



## Portrait Dialogue™

Get customer-centric. Get into the dialogue.

# Engage every customer in an enduring 1:1 dialogue across channels and interactions.

## Executive summary

“Blast” marketing strategies of the past are no longer sufficient to engage today’s customers and foster loyalty. Typical campaign response rates have plummeted while customer opt-out rates have ascended, limiting your ability to converse with even your most valuable customers. The new customer is omni-channel and expects relevance. This is why “campaign management” and marketing automation systems inevitably fall short.

To the rescue, the new customer interaction hub with automated dialogue strategies that can engage today’s omni-channel customer across online, offline, mobile, social and listening channels for a dramatic impact to satisfaction, retention and profitability.

## Business challenge

In the face of growing competition, finite resources, and more demanding customers, leading organisations are striving to increase profitability by better aligning their core propositions and operations around their customers. They are challenged to increase cross-sell effectiveness, reduce attrition rates and reduce customer ad-fatigue. However, to solve these issues, businesses often find they must first overcome:

- Disjointed or inefficient manual processes
- Limited customer communication “governance”
- Lack of a true “single customer view”
- Difficulty learning individual customer preferences
- Low visibility into critical customer KPIs and metrics

## Solution

Pitney Bowes Software Portrait Dialogue™ solution enables you to make informed decisions, converse with customers in mutually beneficial dialogue and treat each customer like they’re the only one.

A unique customer interaction solution, Portrait Dialogue converts disparate customer interactions into connected two-way, cross-channel dialogues. A unified marketing dashboard makes it easy to plan, execute, monitor and tune all customer engagements—online, social media, direct mail, mobile and call center. Now you can engage customers as individuals at the right time...with the right message...based on data and insight.

“The benefits that we have achieved in the past 12 months are on many different levels. Portrait Dialogue has enabled us to gather additional customer intelligence on 25% of our customer base and structure automated dialogues throughout the customer life-cycle.”

Ernst Fredrik Nygaard  
CRM Manager  
Chess Communications

## Portrait Dialogue enables you to:

- Convert campaigns into two-way dialogue
- Connect the customer experience across all customer touch points
- Embed insight and understanding into every interaction
- Optimise the customer lifecycle to maximise customer value

# Choreograph your customer lifecycle best practice for:

- Acquisition and onboarding
- Cross-sell and upsell
- Loyalty and referrals
- Retention and renewals
- Customer winback

## Making the move from campaigns to dialogues

Campaigns focus on action and reaction. They are direct, product-oriented, one-way, and typically channel specific and time bound. The alternative to campaigns, dialogues, take place over time rather than just at a point in time.

Dialogues focus on strengthening conversations over time to create the greatest value for the customer and the business. They recognise that providing additional customer benefits (a bundled discount, VIP special offers, etc.) can result in a longer, stronger customer relationship that provides higher ROI and a better customer experience over the course of an extended customer lifecycle.

Effective dialogues are not about getting interactions right once at a particular point in time, they're about getting them right continuously by connecting them across time to nurture ongoing relationships. A dialogue that begins in an e-mail can segue to a conversation that happens in a store, on a mobile device, even across things like kiosks and self-service IVRs. Businesses need to develop an institutional memory of each customer in order to be able to maintain a fluid, ongoing conversation across channels.

## Portrait Dialogue™ will enable your organisation to:

- Reduce customer opt-out
- Improve customer retention
- Achieve enhanced cross-sell success
- Optimise upon customer lifetime value
- Gain efficiency and collaboration across your marketing team
- Optimise offer management to maximise return on investment

“The deployment of Portrait was one of the easiest and quickest I have ever seen. Significant productivity gains were apparent from day one.”

Klaus B. Johansen  
Project Manager CRM  
3Denmark (Hi3G Denmark)

## Engage with customers

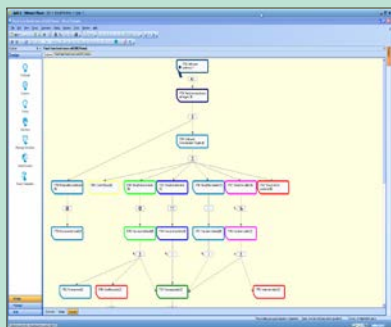
- **Online:** Email, customer web, PURL
- **Social:** Twitter and Facebook
- **Mobile:** SMS, MMS, WAP
- **Offline:** Direct mail, telemarketing
- **Listening:** Integrated online surveys, preference management, feedback management



Craft and orchestrate your customer lifecycle best practice process via an intuitive marketer-oriented interface.



Monitor campaign performance in real-time using intuitive interface designed for marketers.



Build a multi-phase customer dialogue to integrate online, offline, social, mobile and listening for a true cross-channel strategy.

### Achieve customer-centricity

Go beyond managing campaigns and establish strategies that engage each customer individually.

- Understand each customer with closed-loop preference management
- Trigger marketing actions based upon customer-specific events
- Automate customer lifecycle best-practice
- Enforce customer governance across departments and campaigns
- Infuse predictive customer level insight into every action
- Improve customer data

### Boost marketing effectiveness

Getting customer-centric does not have to mean sacrificing revenue. In fact, it's quite the opposite. Now, your organisation can:

- Analytically optimise offer and channel allocation for optimal ROI
- Automate marketing activities at the optimum moment within the customer lifecycle including retention, cross-sell and more
- Stay on top of marketing results with real-time views
- Understand the impact of offers across channels and segments

### Increase your marketing efficiency

Most organisations don't have an unlimited headcount, time or marketing budget. Portrait Dialogue™ can help make the most out of the valuable resources you have today by empowering your team to:

- Unify planning and increase collaboration
- Boost marketing agility, getting campaigns and offers to market in a fraction of the time
- Improve reusability of marketing assets
- Empower marketers to design offers and dialogues
- Centralise marketing management and administration
- Reduce reliance upon IT for metrics and reporting

*“We needed the ability to deliver automated, multi-channel communications with personalised and relevant messages, in order to be front-of-mind with our members. With Portrait’s solution for intelligent customer dialogue, pre-defined and customised follow up is automated to provide meaningful communication to individual members—this will enable us to process their requirements more quickly and accurately.”*

**Torben Schack**  
**CMO**  
**Aeldre Sagen**



Engage your customers like they're the only one.

### Empower customers to tell you what they actually care about

This is the age of the empowered customer, with consumers demanding more control of their experience and consuming messages on their own terms. Your organisation can rise to the occasion giving your customers a new voice to specify their preferred:

- **Channel(s)** – Specify permissions across email, direct mail, mobile, Twitter, Facebook, and more.
- **Frequency** – Understand how much is “too much” before they opt-out.
- **Focus** – learn which topics they care about and which they don't.

### Harness the power of omni-channel automation

Engage customers “like they're the only one” by leveraging multi-step, multi-phase dialogues which span across channels and interactions.

- **Reach** – Connect with customers where and when they want to be engaged for optimal results
- **React** – Track responses and activities while monitoring real-time customer-initiated triggers
- **Route** – Conditionally follow up on customer leads and events based upon urgency and customer lifetime value (CLV)
- **Respond** – Tune the omni-channel offer mix to optimise performance

### Tap into rich customer-level insight

Using the optional Portrait Customer Analytics modules, your organisation can predict the change your offers and treatments can have on your customers' behaviour—before the marketing is initiated. This will allow you to slash unnecessary marketing spend while dramatically boosting relevance, revenue and retention.

Portrait is the industry's most seamlessly integrated analytic and operational solution of its kind, allowing your organisation to rapidly realise benefits including:

- 30-300% improvement in incremental revenue
- 20-60% reduction in campaign cost

*“Portrait offers us a powerful and easy-to-use outbound campaign management tool that provides a robust marketing platform for individual customer dialogues.”*

**Alan Crawley**  
Founding Director  
Optima Value Group

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Every connection is a new opportunity™



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