

CustomerInsight

Blue Tahiti Customer Insight Functionality Preview

Blue Tahiti's online Customer Insight application is built to provide marketing users with self serve access to their hosted marketing database, typically represented by a **single customer view** (SCV). The single customer view is a process of taking all of a business's CRM, accounts and marketing data, managed by multiple departments, lines of business or geographies, and constructing a cleaned, matched, de-duplicated repository to support all marketing activities. It's all about delivering **maximum return on investment** on an organisations marketing spend. The SCV provides the marketer with the ability to efficiently harness the intelligence held in their operational data in order to create **targeted, cost effective and responsive campaigns** across multiple channels.

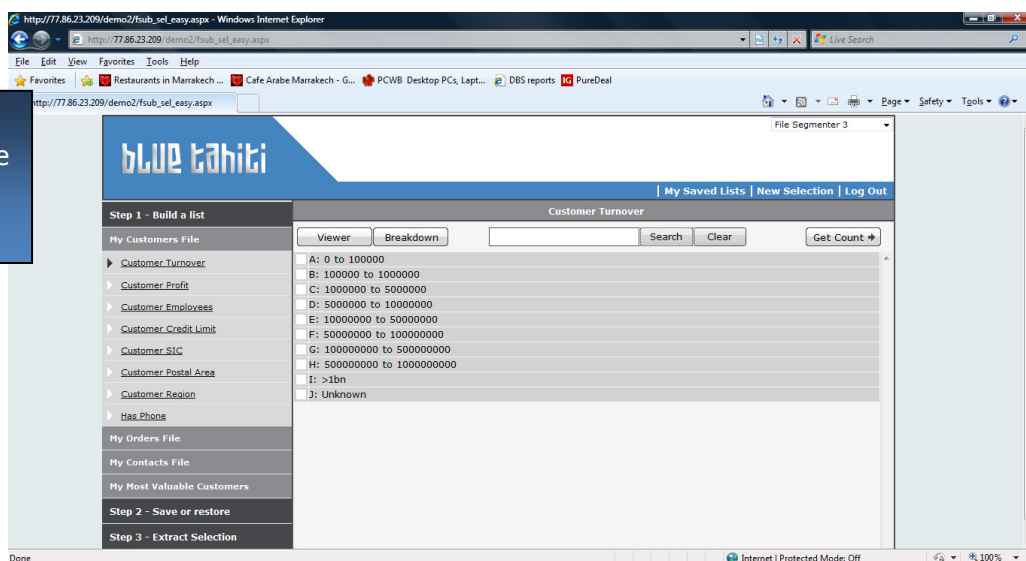
Customer Insight delivers all the functionality needed to allow the marketing user to interrogate their own marketing data (SCV) without the need for referral to the hosting/IT resources. It allows them to easily visualise, analyse, segment, manipulate and export their data for rapid campaign creation, delivering empowerment to the marketer and improving productivity.

Below we preview some of the features that make Customer Insight the ideal solution for providing self serve access to the marketer.

1. Easy to use interface delivered purely via the web browser.

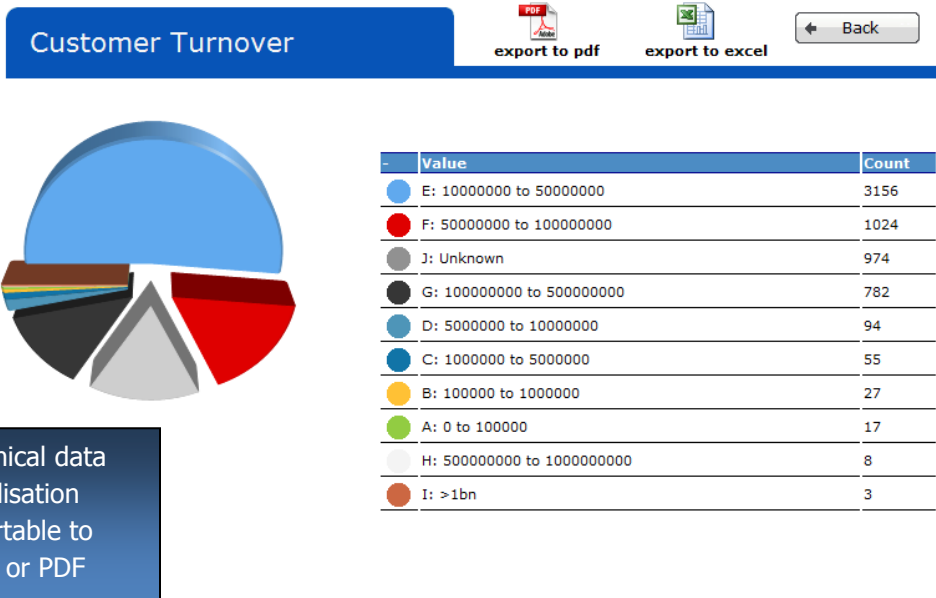
- a. No installed software
- b. Intuitive interface
- c. User group security
- d. High performance

Simple interface provides intuitive access to all functionality



2. Data visualisation and reporting – Data Viewer

- View the breakdown of the database by any available attribute
- Visualize as grid or chart
- Export to Excel or PDF reports



3. Data visualisation and reporting - Cross tabulation

- Cross tabulate up to four dimensions
- Pivot table output
- Export to Excel or PDF reports

Customer Region Customer Employees

Customer Turnover None

[export to ex](#)

Customer Turnover	Customer Employees	England – London & South East	England - South West	England - West Midlands	Wales
A: 0 to 100000	A: 0 to 10	1	0	1	0
B: 100000 to 1000000	A: 0 to 10	4	0	1	0
C: 1000000 to 5000000	A: 0 to 10	9	1	1	0
D: 5000000 to 10000000	A: 0 to 10	2	1	2	0
E: 10000000 to 50000000	A: 0 to 10	77	3	9	3
F: 50000000 to 100000000	A: 0 to 10	32	0	2	0
G: 100000000 to 500000000	A: 0 to 10	24	0	3	
H: 500000000 to 1000000000	A: 0 to 10	1	0	0	

Multi-dimensional cross tabulations, exportable to Excel or PDF

4. Data visualisation and reporting - Profiling

- a. Profile up to 3 dimensions
- b. Compare subset to whole file
- c. Export to PDF or Excel

Customer SIC	Analysis	Base	% Analysis	% Base	Index	Z-Score
-	458	-	10.82	-	-	11.535
74870 - Other business activities	295	358	6.97	5.83	1.195	7.3
65230 - Other financial intermediation (not elsewhere classified)	214	233	5.06	3.79	1.332	5.196
74150 - Holding companies	154	181	3.64	2.95	1.234	3.637
70110 - Development and selling of real estate	121	149	2.86	2.43	1.178	3.637
51900 - Other wholesale	111	179	2.62	2.92	0.899	3.637

Multi-dimensional profiling, exportable to Excel or PDF

5. Quick Search

- a. Filter attribute values easily with keyword filtering

Customer SIC

Viewer Breakdown Search Clear

- [51840 - Wholesale of computers, computer equipment and software](#)
- [72210 - Software publishing](#)
- [72220 - Other software consultancy and supply](#)

6. Fast Counts

- a. Run counts on selections across multiple tables e.g. customer, contact, transactions
- b. Counts shown for customer, contact and transaction levels.
- c. Aggregate order value (if transactions are available).
- d. Get counts in seconds
- e. Summary screen displays current selection items
- f. Remove items by clicking bin

Companies: 3 Contacts: 10 [← Back to Build](#)

Order Value: 3,912 Transactions: 6 [Select Action From List](#)

Customer: Credit SIC

- Customer SIC : 51840 - Wholesale of computers, computer equipment and software
- Customer SIC : 72210 - Software publishing
- Customer SIC : 72220 - Other software consultancy and supply

Customer: Turnover

- Customer Turnover : C: 1000000 to 5000000
- Customer Turnover : D: 5000000 to 10000000

Quickly run counts using all attributes, counting at all levels

7. Save Selections

- Save, edit, restore or delete selections
- Persist selections across data refreshes

Save selections for later editing, export or use in advanced segments

Select a list to restore or delete

My Saved Lists

List Name (select a list to restore from the drop-down menu below)
 Selection A (1/11/2009)

List Description

[Restore list](#) Restore your list and View your selection criteria.

[Restore list](#) Restore your list and proceed to Place an Order.

[Delete list](#) Delete your list from My Saved Lists.

8. Export

- Select fields for export from all levels
- Specify number of records to export.
- Export selections to Excel, CSV or PDF
- Preview data for export
- Sort data export by any attribute e.g. turnover

Specify the data that you want in your file

Please select the fields you wish to export

Customer Info	
	fieldname
<input type="checkbox"/>	AM_UNIQUEID
<input checked="" type="checkbox"/>	AM_CIE_NAME
<input checked="" type="checkbox"/>	AM_ADDRESS1
<input checked="" type="checkbox"/>	AM_ADDRESS2
<input type="checkbox"/>	AM_ADDRESS3
<input type="checkbox"/>	AM_POSTCODE
<input type="checkbox"/>	AM_SWITCHBOARD
<input type="checkbox"/>	AM_PHONE
<input type="checkbox"/>	AM_FAX

Contact Info	
	fieldname
<input type="checkbox"/>	AUTOID
<input checked="" type="checkbox"/>	AM_POSITION
<input checked="" type="checkbox"/>	AM_FIRSTNAME

Select fields to export from all levels of the database

Review the data to export and specify quantity

Specify volume to export & sort order (optional)

CUSTOMER_AM_CIE_NAME	CUSTOMER_AM_ADDRESS1	CUSTOMER_AM_ADDRESS2	CUSTOMER_AM_ADDRESS3
2 Sisters Premier Division Ltd.	Dial Lane	Off Richmond Street	
A & J Gummers Ltd.	Unit H	Redfern Park Way	
A.A. Clark Ltd.	72-74 Arthur Road		
Acheson Industries (Europe) Ltd.	Sun Life House	85 Queens Road	
Adm Promotions UK Ltd.	Unit 4 Hanborough Business Pk	Lodge Road	
Alco Finance Ltd.	5th Floor	40 Queen Street	
Allenbuild Ltd. West Midlands	1 High Street		
Alliance Medical Holdings Ltd.	Home Farm Drive	Upton	
Allied Surveyors Plc	36 Brunswick Road		

Sort Output By: Volume to export

Preview, sort and specify volumes for export to Excel, CSV or PDF formats.

9. Advanced Segments

- Use AND/OR/NOT logical merging of selections to build complex campaigns.
- Save advanced segments for edit, reload
- Export advanced segments to Excel, CSV or PDF

Segments Builder

Enter brief description of current selection (max. 30 characters)

High Val Low Recency Add to Segments

Current Count
241

Select	Item Code	Item Name	Volume	Remove	Save	Excel
<input checked="" type="checkbox"/>	D1	Low to Med Turnover	4356		Save	Excel
<input checked="" type="checkbox"/>	D2	High Val Low Recency	241		Save	Excel

Reload Segments
Merge Segments
Clear All
← Back

Create segments from selections then merge them for advanced campaign building.

Segments Merger

Enter a brief description of the new segment (max. 50 characters)

My Set Campaign Add to Segments

Current Count
4176

Bracket	Logic	Code	Name	Count
(D1	Low to Med Turnover	4356
	NOT	D2	High Val Low Recency	241
)				

And
Or
Not
← Back

Use AND, OR, NOT operators to create new segments for complex campaign building

10. Seamless Integration with other modules

- a. Advanced Profiling
- b. Data Append
- c. Acquisition Manager
- d. Data Dedupe
- e. Prospect Creator
- f. More Like This