




---

## Highlights

- Deliver more relevant offers and minimize contact fatigue
  - More customer-centric experiences; increase profitability
  - Lower costs by eliminating wasted and counterproductive communications—while achieving the same results
  - Improve outcome from existing campaigns
  - Builds on the power of IBM Unica Campaign
- 

# IBM Unica Optimize

*Optimize results by balancing marketing goals, contact preferences and business constraints*

As the complexity of marketing increases—more customer touch points, finer audience segmentation, more product lines or business units—the number of occasions and motivations for you to contact your customers grows dramatically.

How can you ensure customers receive the most relevant and profitable offers while satisfying the needs of individual business areas and minimizing customer contact fatigue?

With IBM® Unica® Optimize, you can determine the optimal contact strategy over time for each customer or prospect. Unica Optimize looks across scheduled communications and balances marketing goals with corporate objectives and constraints to ensure the optimal message is delivered at the optimal time.

Unica Optimize, a companion product to IBM Unica Campaign, offers a rich set of contact optimization capabilities:

- **Sophisticated contact optimization algorithm:** mathematically determines the best communications for each customer based on the customer's interaction history, offer details, channel preferences, time frame, business constraints and rules, and marketing objectives
- **Configurable capacity constraints:** limits that can impact contact strategy, such as the size of the marketing budget, the allowable number of contacts per customer per period, how many offers of each type are available, the number of telemarketing calls that can be made per period, or how many direct mail pieces can be sent, and so on
- **Customer preferences:** recorded preferences for each customer, such as preferred channel to receive communications, maximum number of contacts each customer wishes to receive each month, and primary product or service interests



- **Business rules:** determine based on business considerations, such as limits on what offers can be combined, allowable sequences and timing of offers (“if A, then not B within 30 days”), minimum credit scores for certain offers, exclusions of specific customers, offer-specific opt-outs, and so on
- **Business goals:** what gets maximized as part of the optimization process; virtually any marketing goal can be specified, such as maximizing customer value, revenue, profit, or probability of response
- **Flexible scoring options:** can use simple ratings and ranks, not just scores from predictive models, to execute the optimization process, making it usable by marketing organizations that have not yet adopted predictive analytics
- **Reports and analysis:** automated pre- and post-optimization reporting to allow scenario and sensitivity analyses to fine tune parameters; determine the optimal contact strategy over time for each customer or prospect

#### More customer-centric experiences, higher profitability

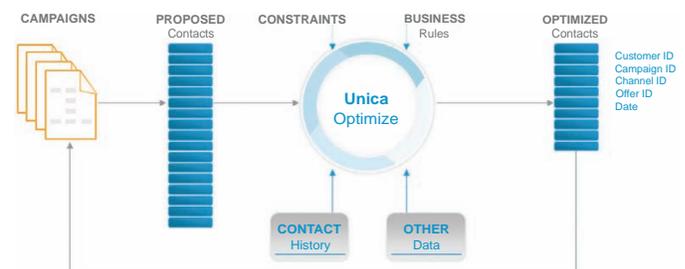
Unica Optimize’s market-leading contact optimization capabilities help enable organizations:

- **Become more customer-centric and less product-centric:** find the best communication for each customer, not the best customer for each marketing campaign
- **Improve results from existing campaigns:** better results come from better choices about which customers should be included in which campaigns, and which individual offers and message each customer should receive
- **Decrease customer fatigue and improve customer relationships:** limiting how many messages each customer receives and ensuring each customer gets the optimal message to advance the relationship means fewer opt-outs and tune-outs
- **Lower costs:** the optimization process eliminates wasted and counterproductive communications, while achieving the same results

#### How Unica Optimize contact optimization works

Unica Optimize’s contact optimization process works as follows:

1. You create campaigns and indicate the proposed contacts you wish to include in each campaign.
2. Constraints, preferences, and business rules that may impact the contact strategy of any given campaign—such as the marketing budget, and limits on what offers can be combined together—are centrally defined.
3. Each optimization process is given a specific business goal or objective, such as maximizing profit or response.
4. Unica Optimize’s patented algorithm factors in the constraints and goals, and also makes use of scores, contact history, and other data to determine the optimal message or offer for each contact.
5. An optimized contact list is outputted for each campaign and made ready for final execution of the campaigns.



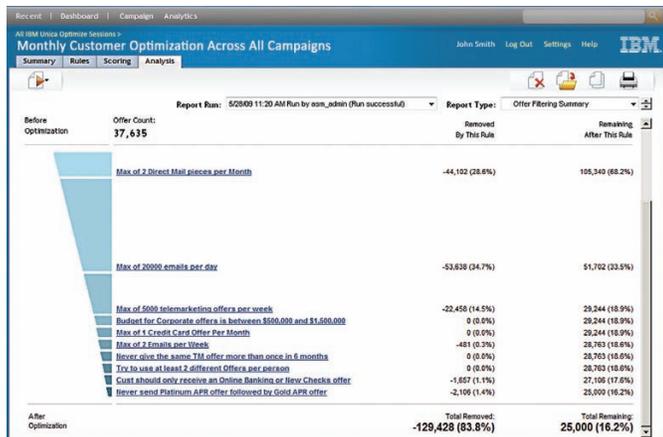
Unica Optimize’s contact optimization process improves the customer experience.

*“The IBM Unica enterprise marketing management solution has positively impacted our marketing efforts in that we have been able to integrate offer optimization with overall campaign management.”*

—Leading Financial Services Provider

**Builds on the power of IBM Unica Campaign**

Unica Optimize is a companion product to Unica Campaign. Unica Optimize requires Unica Campaign, and leverages and complements Unica Campaign’s core campaign management capabilities by helping to determine the optimal interaction strategy for each individual customer over time and across all marketing initiatives.



Unica Optimize provides complete control over—and visibility into—the optimization process, including contact drop-out analyses.

**About IBM Unica solutions**

IBM Unica products are innovative marketing solutions that turn your passion for marketing into business success. Our comprehensive approach to interactive marketing enables organizations worldwide to understand their customers and use that understanding to engage buyers in highly relevant, interactive dialogues across digital, social, and traditional marketing channels.

Recognized as a leading integrator of enterprise systems for multiple industries, we help organizations with a wide variety of projects, analyzing real-time information and returning measurable value to stakeholders. In addition, we provide worldwide support for a variety of industry-partner content, services and applications.

**For more information**

To learn more about Unica Optimize, please contact your IBM marketing representative or IBM Business Partner, or visit the following website: [ibm.com/software/info/unica](http://ibm.com/software/info/unica).

**Smarter Commerce: An integrated approach**

IBM Unica products are part of the IBM Smarter Commerce initiative. Smarter Commerce is a unique approach that increases the value companies generate for their customers, partners and shareholders in a rapidly changing digital world. To learn more about Smarter Commerce, visit: [ibm.com/smarterplanet/commerce](http://ibm.com/smarterplanet/commerce).



---

© Copyright IBM Corporation 2011

IBM Corporation  
Software Group  
Route 100  
Somers, NY 10589 USA

Produced in the United States of America  
July 2011  
All Rights Reserved

IBM, the IBM logo, ibm.com and Unica are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with a trademark symbol (® or ™), these symbols indicate U.S. registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the web at "Copyright and trademark information" at [ibm.com/legal/copytrade.shtml](http://ibm.com/legal/copytrade.shtml)

Other company, product and service names may be trademarks or service marks of others.



Please Recycle

---