

Case Study: Sales, Distribution & Marketing

To win and retain customers in today's competitive business world, you must establish and maintain a seamless buying process. Marketing, sales, and distribution must be in sync to satisfy the customer requirement and provide products and services when the client is ready to buy, with the appropriate product to meet their needs. [Dcode's BI for Sales & Marketing solutions](#) can satisfy the needs of every organization, no matter how large or small, with affordable, practical, simple solutions.

Insurance Cross-Sell & Up-Sell Analysis

We will see how our BI software can be a valuable tool in your analytic arsenal to evaluate cross-sell and up-sell campaigns. In this demonstration we will look at current customer insurance policies that have been queried from our CRM database. Our goal is to find possible cross-sell and up-sell opportunities, organize that information, and share it with others.

- Improved campaign efficiency through integration with statistics server and visualizations that dynamically incorporate calculations by data engine to quickly update views based on an ad hoc path of data exploration.
- Authors can configure and distribute these capabilities to others by creating dashboards, which are published to the web and provide immediate data access presented within these configured, interactive visualizations.
- Allows for real time monitoring of customer service scores to improve customer satisfaction and growth. It allows you to quickly identify highly profitable customers for inspection, resulting in more business and a stronger relationship with those customers.

Examine Premiums, Liabilities & FICO Scores

Liability and Premium Review

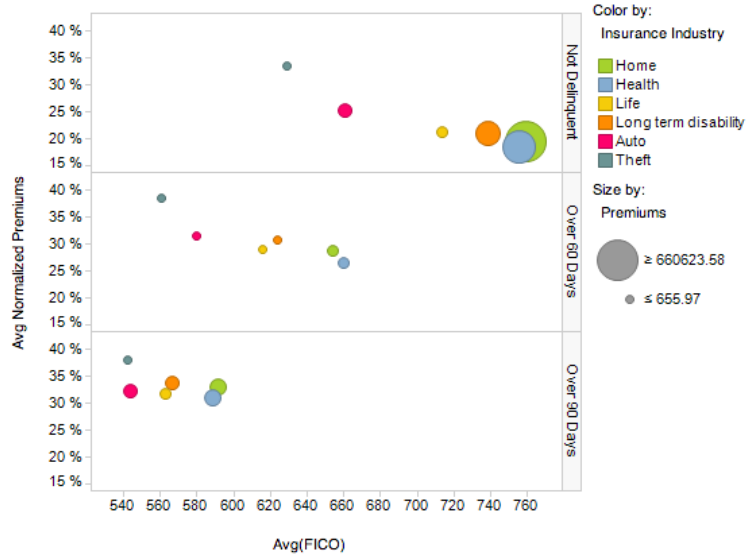
	Delinquent Stat...	Total Premiums	Total Liability	Avg FI...	Liability by FICO	Avg Premium by FICO	Customer Count by FI...	Customer Co...	Average Premium	Average Liability
	Not Delinquent	\$1 B	\$20 B	759				101 k	6.54 %	\$200 k
	Over 60 Days	\$71 M	\$727 M	654				4 k	9.76 %	\$200 k
	Over 90 Days	\$302 M	\$3 B	592				14 k	11.11 %	\$200 k
Health	Not Delinquent	\$5 M	\$73 M	755				73 k	6.59 %	\$1 k
	Over 60 Days	\$168 k	\$2 M	660				2 k	9.50 %	\$995
	Over 90 Days	\$1 M	\$11 M	589				11 k	11.08 %	\$994
Life	Not Delinquent	\$19 M	\$241 M	713				8 k	8.01 %	\$30 k
	Over 60 Days	\$1 M	\$10 M	616				324	10.92 %	\$30 k
	Over 90 Days	\$9 M	\$80 M	563				3 k	11.82 %	\$30 k
Long term disability	Not Delinquent	\$3 M	\$45 M	738				45 k	7.13 %	\$999
	Over 60 Days	\$90 k	\$844 k	624				861	10.59 %	\$981
	Over 90 Days	\$914 k	\$8 M	566				8 k	11.51 %	\$997
Auto	Not Delinquent	\$28 M	\$290 M	661				12 k	9.52 %	\$25 k
	Over 60 Days	\$3 M	\$23 M	580				918	11.66 %	\$25 k
	Over 90 Days	\$20 M	\$170 M	544				7 k	12.08 %	\$25 k
Theft	Not Delinquent	\$177 k	\$2 M	629				849	10.45 %	\$2 k
	Over 60 Days	\$13 k	\$104 k	561				53	12.38 %	\$2 k
	Over 90 Days	\$128 k	\$1 M	542				542	11.84 %	\$2 k

Delinquent Status

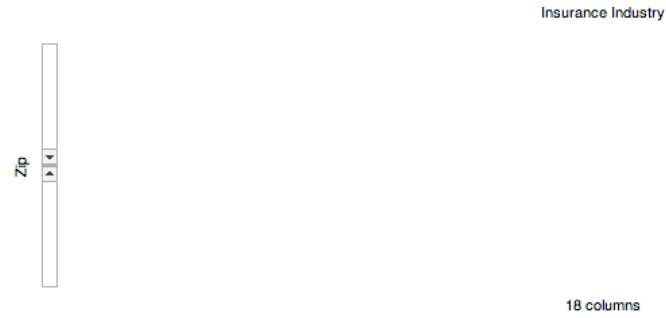
Insurance Industry

Cross-Sell & Up-Sell

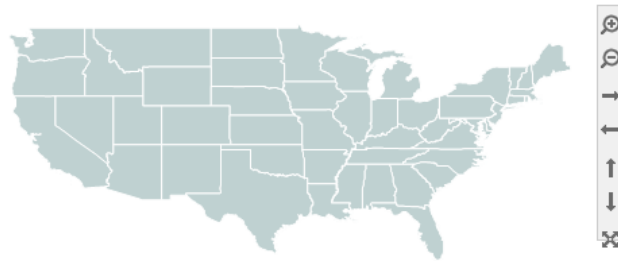
How FICO and Premium are spread by Industry and Delinquency



[Detail] Cross Sell Demographic Clustering



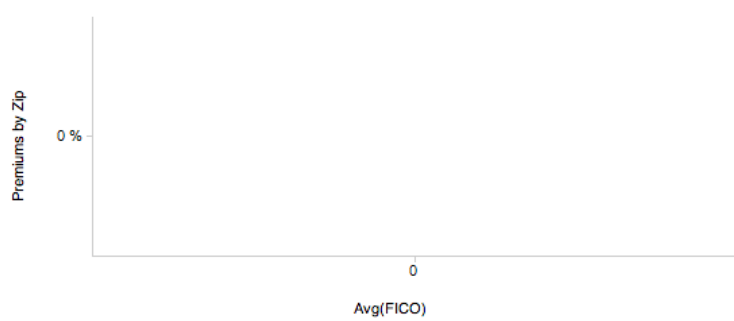
[Detail] Markets by location



[Detail] Customer Count by Type



[Detail] Comparison by Premium and FICO by Zip



Sales Call List

Customer ID	Area Name	State	Zip