dun & bradstreet

Expressions – Aggregations on the Fly

Summary

*'On the fly' aggregations now include a **Personal Best** function.*

A new **Personal Best** feature of 'on the fly' aggregations is accessed through the Expression window in the same way that existing on the fly aggregations are.

This new functionality allows us to more easily establish the number of times a record has broken their previous record – for the better or worse - on a numeric value, such as their spend on a policy. In this way we can more easily identify customers who are increasing or lessening in value over time and then take appropriate action with our marketing.

A person's transactions are sorted into order and a numeric value is returned for each transactional record, as follows:

> ***-2***   *Current transaction has the lowest value in the sequence so far (worst so far "personal worst")*

> ***-1***   *Current transaction has a lower value in the sequence than the previous record ("worse")*

> ***0***   *Current transaction has the same value in the sequence as the previous record ("unchanged")*
> __NOTE:__ *The first transaction will always have a value of 0*

> ***1***   *Current transaction has a higher value in the sequence than the previous value ("better")*

> ***2***   *Current transaction has the highest value in the sequence so far (best so far "personal best")*

➢ In a new Expression window, click on the ⬚ **Add Aggregation** button and then on the tab that opens up

➢ From the type drop down select **Personal Best**
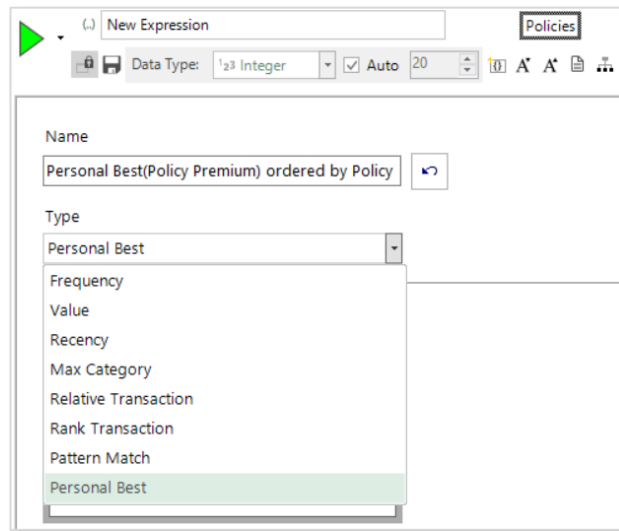
- ➤ Set the table level of the Expression to your transactional table - in this case Policies

- ➤ Define the settings – see screenshot below
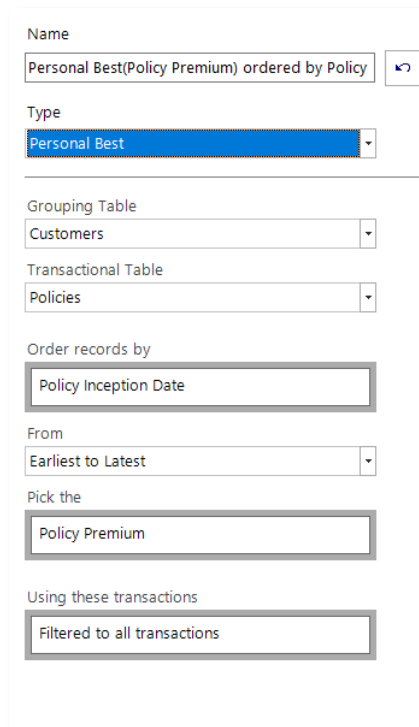
Based on these settings, Market Insight will order policies by Policy Inception Date and examine how the Policy Premium compares across the customer's policies to date, from earliest to latest.

Use a Data Grid to verify the results:

In the above example, we have grouped by Client Reference Number and selected Sort Ascending for Policy Inception Date. From this view we can draw insight. For example, CRN 115692 has made 5 bookings:

- The first of these on 22-05-2010 is identified by a Personal Best value of 0;

- The second, with a higher policy premium is then identified as 2, indicating that it is the best Cost ever for this person as at 16-02-2011;

- The further booking on 30-03-2011, with a value of £56.25, is the same value as the previous transaction and therefore flagged as 0;

- The fourth booking, dated 26-05-2011, has the lowest value of £22.50, then becomes the worst cost ever and is flagged as -2;

- The booking on 10-03-2011 is shown as 1, indicating that it is better than the previous booking, but less than the best ever.