



---

# Versium Predict User Guide

# Table of Contents

---

<b>WHAT IS VERSIUM PREDICT?</b> .....	5
GLOBAL DATA COVERAGE .....	5
<b>GET STARTED</b> .....	6
SETUP .....	6
WHAT CAN YOU DO IN PREDICT? .....	6
FIND YOUR WAY AROUND.....	6
To open Versium Predict in Dynamics 365 .....	6
Find Predict Insights in the CRM .....	7
Use Predict Wizards.....	8
Find Predictive Models, Insights, and Lists .....	8
<b>PERSONALIZE YOUR CUSTOMER INTERACTIONS WITH PREDICT INSIGHTS</b> .....	10
WHERE TO FIND PREDICT INSIGHTS.....	10
To find Predict Insights in the CRM .....	10
To find Predict Insights in Predict .....	10
WHAT KIND OF INSIGHTS ARE THERE? .....	11
Social Insights Card.....	11
Business News Insights Card.....	11
Standard Business Scores .....	11
Financial Strength Score.....	11
Social Presence Score .....	12
Standard Personal Scores .....	12
Green Score .....	12
New Tech Adopter Score.....	12
DIY Score.....	12
Donor Score .....	12
Wealth Score .....	12
Travel Score .....	13
SEE PREDICT INSIGHTS IN A RECORD IN THE CRM .....	13
To see the Predict Heads-Up view .....	13
To see Predict Insights cards in the CRM.....	13
See More Details for Predict Insights .....	14
To see more details.....	14
Add Predict Insights to a Single Record in the CRM .....	14
To add Insights to a record from the Heads-Up View .....	15
To add data to a record from Versium Predict Insights.....	15
Report Incorrect Predict Insights .....	15
To report Insights are for the wrong person or company .....	15
To report an Insights card is incorrect .....	15
SEARCH FOR PREDICT INSIGHTS ON BUSINESSES AND PEOPLE .....	16
To search for Predict Insights.....	16
To create a new or update an existing record in the CRM from Predict Insights .....	16
ADD PREDICT INSIGHTS TO A LIST .....	17
To add Predict Insights to a list .....	17

Add Predict Insights for a list to your CRM .....	18
<i>To add Predict Insights in a list to your CRM.....</i>	18
What you can do with list Insights.....	19
<i>To review your list insights.....</i>	19
<i>To download Predict Insights for a list as CSV .....</i>	19
<b>SET AND MANAGE ALERTS FOR BUSINESS NEWS .....</b>	<b>20</b>
<i>To set, manage, or delete alerts for a business in Versium Predict .....</i>	20
<i>To see alerts.....</i>	20
<i>To manage all alerts .....</i>	20
<b>CREATE CONNECTIONS .....</b>	<b>21</b>
CONNECTION TYPES .....	21
People You Know.....	Error! Bookmark not defined.
Work History .....	Error! Bookmark not defined.
Education .....	Error! Bookmark not defined.
ADD CONNECTIONS .....	22
<i>To import People You Know.....</i>	22
<i>To add business people, businesses, or schools from Search or the CRM .....</i>	22
<i>To change or delete connections from your profile.....</i>	22
SEE HOW YOU'RE CONNECTED .....	23
<i>To see How You're Connected in Predict .....</i>	23
<i>To see How You're Connected in the CRM.....</i>	23
<b>VALIDATE LEAD INFORMATION — VALIDATE LISTS.....</b>	<b>24</b>
VALIDATE LISTS .....	24
<i>To validate a List of Leads .....</i>	24
WHAT YOU CAN DO WITH VALIDATED LISTS .....	25
<i>To use validation grades.....</i>	25
<i>To interpret Validated List Results.....</i>	25
<i>To interpret a Validated List CSV.....</i>	26
<b>PREDICT CUSTOMER BEHAVIOR —BUILD MODELS .....</b>	<b>27</b>
HOW A PREDICTIVE MODEL WORKS.....	27
GET READY TO BUILD A MODEL .....	27
Choose Marketing Lists .....	28
<i>Tips on Selecting Marketing Lists for the Best Models .....</i>	28
List Requirements.....	29
BUILD A PREDICTIVE MODEL .....	30
<i>To build a predictive model.....</i>	30
WHAT YOU CAN DO WITH A PREDICTIVE MODEL .....	30
<i>To review a Predictive Model .....</i>	30
<i>To target leads with a Predictive Model — Go to <a href="#">Target Leads Likely to Convert — Score Leads</a> .....</i>	30
<i>To source leads with a Predictive Model — Go to <a href="#">Source New, High-value Leads — Create Lists</a> .....</i>	30
<b>TARGET LEADS LIKELY TO CONVERT — SCORE LEADS .....</b>	<b>31</b>
SCORE LEADS .....	31
<i>To score leads.....</i>	31
<i>To find your Scored List.....</i>	31
WHAT YOU CAN DO WITH SCORED LEADS .....	32

To fine-tune a Scored Leads list.....	32
To download scored leads as a CSV.....	32
To create a new marketing list from Scored Leads — Go to <a href="#">Create a New List from Scored Leads</a> .....	32
To see Predict scores in the CRM — Go to <a href="#">See the Versium Predict Scores for a Lead</a> .....	32
<b>SOURCE NEW, HIGH-VALUE LEADS — CREATE LISTS .....</b>	<b>33</b>
BUILD A NEW LIST .....	33
To build a Predictive List .....	33
WHAT YOU CAN DO WITH BUILT LISTS .....	34
To review your built lists .....	34
To add a built list to your CRM .....	34
To download a built list as a CSV .....	34
<b>TROUBLESHOOTING .....</b>	<b>35</b>

# What is Versium Predict?

---

Versium Predict enhances your existing marketing process with insights and predictive analytics that allow you to personalize and more precisely target your campaigns. See [Get Started](#) for all the details.



For FAQs, support, troubleshooting, and additional help, please visit [predict-help.versium.com](https://predict-help.versium.com).

## Global Data Coverage

Versium LifeData® covers consumers and businesses worldwide; however, we must comply with the legal limitations for each country to offer this data commercially. Versium currently has data available for over a hundred countries and are unlocking more as we ensure we comply with the legal limitations for each country. For the most recent list, see “[Global Coverage](#).”

# Get Started

---

To get started, first let's walk through what you can do in Predict, and then give you a start at finding your way around.

## Setup

For information on setting up Versium Predict, see [Set Up and Install Versium Predict](#).

## What can you do in Predict?

With Versium Predict, you can:

- Personalize your campaigns with Predict Insights — [Add Insights](#), [Search](#), and [Insights Cards](#) in the CRM
- Validate the contact data you have in a list — [Validate Lists](#)
- Model and predict customer behavior for future campaigns — [Build Models](#)
- Target leads more likely to convert — [Score Leads](#)
- Source new, high-value leads — [Create Lists](#)
- See your model and list results — [Dashboard](#).

Find these features on the main Predict menu:



## Find your way around

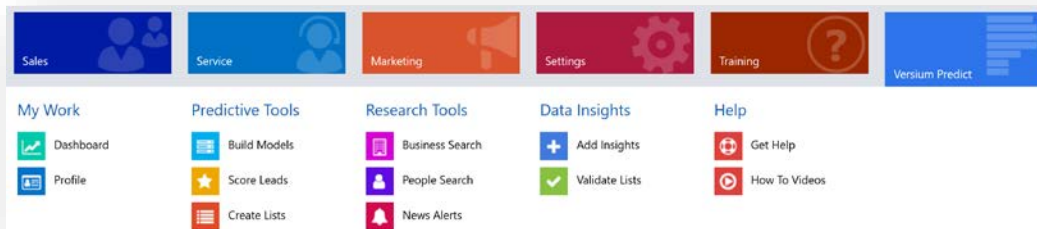
You can get to Versium Predict in the CRM, both by opening it directly from the Tools menu, and from a record in the CRM that has Versium data associated with it.

Versium Predict uses step-by-step wizards to make it easy to accomplish your predictive analytics goals, and the dashboard gives you quick access to all your results.

### *To open Versium Predict in Dynamics 365*

There are several ways to access Versium Predict. In Dynamics 365, sign in to a CRM organization that has Versium Predict installed, and then:

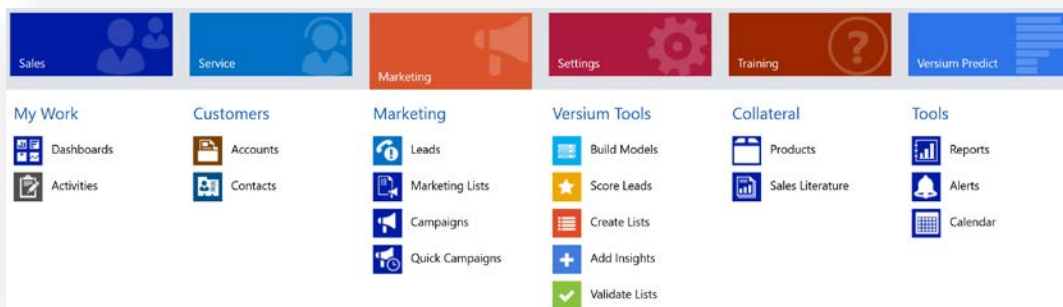
- Click the **Versium Predict** tab, and under **My Work**, click **Dashboard**.



- From the **Sales** tab, click an option under **Versium Research**.



- From the **Marketing** tab, click an option under **Versium Tools**.



## Find Predict Insights in the CRM

You have several ways to see Predict Insights in matching account, contact, and lead records in the CRM. For more information, see [See Predict Insights in the CRM](#).

## Use Predict Wizards

Versium Predict makes it easy to get things done with wizards that walk you through the process of building predictive models, scoring lists with a model, and more. Everything is accessible from the top menu, shown below.

Select what you want to do, or select one of the search options to search our LifeData® database.

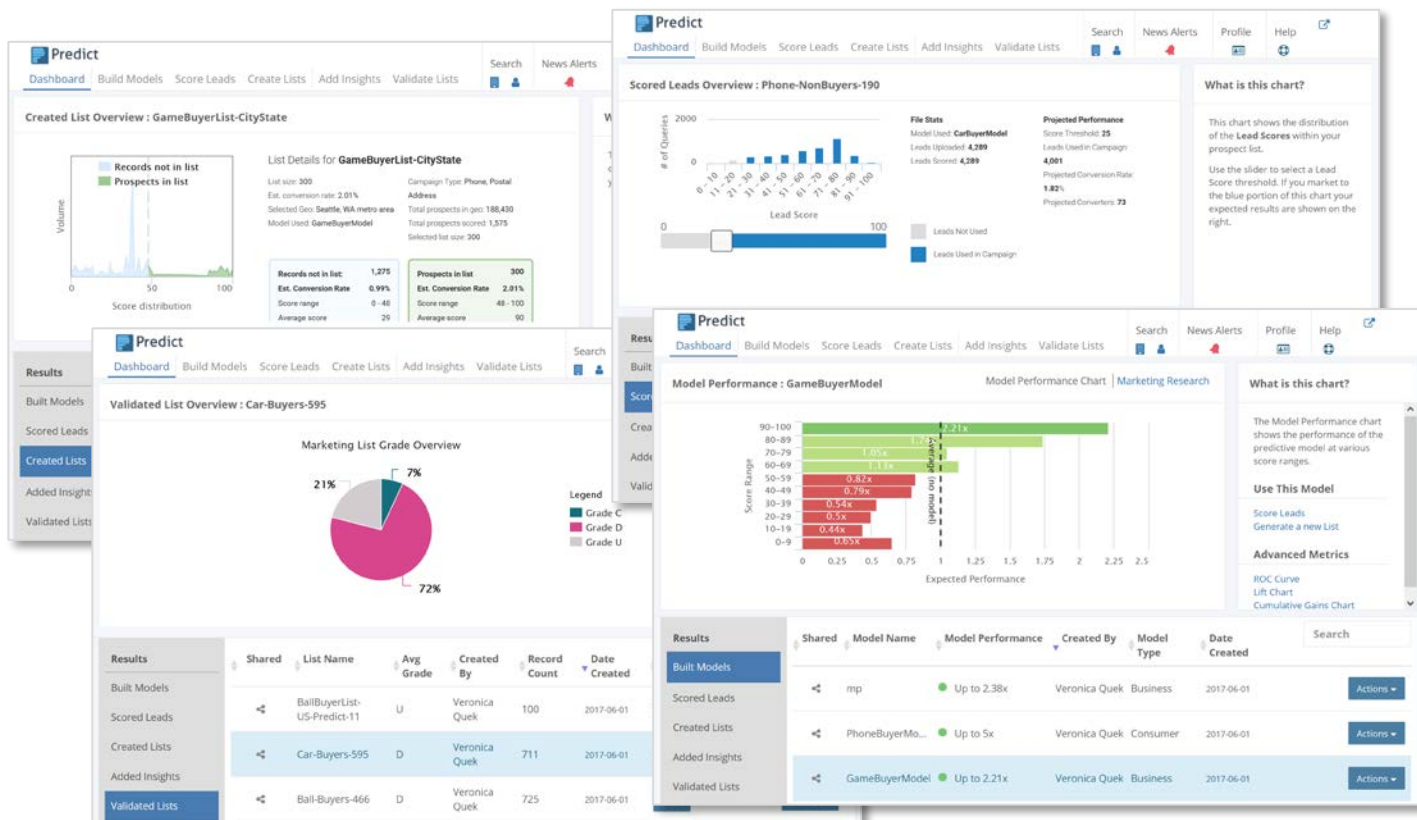
Any prerequisites for the wizards are on the first page, so you know before you start. Here they are:

- **To build a model**, you need to create two marketing lists from records in the CRM. See the wizard or Build a Predictive Model here in the user guide for more details. To learn how to build a marketing list, see [How to build a marketing list in Microsoft Dynamics 365](#).
- **To score leads or build a list**, you must build a model first.

## Find Predictive Models, Insights, and Lists

Check the status or view any of the models or lists you have created from the Versium Predict Dashboards. The Dashboard gives you quick access to everything you do in Predict: your Build Models, Scored Leads, Created Lists, Added Insights, and Validated Lists.

In Versium Predict, open the **Dashboard**. Under **Results** in the bottom left, select what you'd like to view. (For example, for models, select **Predictive Models**).





On the dashboard, you can:

- **Open a Model or List** — Select the row to open an overview of a model or list.
- **See status** — Review the status of results that are still generating.
- **See Results, or Download a CSV** — For models or lists that are complete, select **Actions** on the right to open, download, or delete. Deleting a list here does not remove it from the CRM.
- **Filter Results by Created By or Model Type** — Or sort by any column to find the model or list you want.
- **Search** — Type in the Search box to search for a model or list.
- **Share** — Select the Share icon to share the results with your organization.

# Personalize your Customer Interactions with Predict Insights

Enhance your marketing lists with additional information from the Versium LifeData® warehouse, such as email addresses, phone numbers, financial information, social network information, and demographic data.

Get insights to:

- Start a new campaign with confidence
- Fill in missing or outdated contact/lead information
- Discover information about your customers to help you connect and make the sale

## Add Insights to your Marketing Lists




## Where to find Predict Insights

You can find and add Predict Insights from a record in your CRM and in Predict.

### *To find Predict Insights in the CRM*

When Predict scores or grades a record in your CRM, or has insights for that business or person, that information is added to the records in your CRM. For more information see [See Predict Insights in the CRM](#). The Heads-Up view and Insights cards are available in standard views, or you can [Set Up Custom Views in Dynamics 365](#).

### *To find Predict Insights in Predict*

- Add Predict Insights to a list of accounts, contacts, or leads by selecting **Add Insights**. See [Add Predict Insights to a List](#)
- Search for Predict Insights by selecting Business or Person Search. See [Search for Predict Insights on Businesses and People](#)
- Click Open Predict  on any insight cards in the CRM to open detailed insights for that record in Predict.

## What Kind of Insights are there?


Predict Insights are organized onto Insights cards for each kind of insight. What cards you see varies for businesses vs. consumers, and by what Insights are available for that record in the Versium database. Here are the Insights cards you might see:

### Business Insights

- Business Contact Information
- Firmographics
- Business Financial
- Social
- Business News
- Standard Business Scores
- [How You're Connected](#)

### Consumer Insights

- Personal Contact Information
- Current Employer
- Consumer Demographics
- Interests and Activities
- Household Financial
- Social
- Standard Personal Scores

On some Insights cards, you can select Open Predict  to see more details. The Insights cards that aren't self-explanatory are described below

## Social Insights Card

The Social insights card shows trending social information for the selected business or consumer. If Predict finds more than one match for the social feed, you can choose which feed to use.

**Note**—Your feed choice is saved for you, not for your organization.

To select a different feed, open the record in Predict, and on the Social tab, select **Incorrect Feed**.

## Business News Insights Card

The Business News insights card shows trending news for the selected business. You can also [Set and Manage Alerts for Business News](#). If Predict finds more than one match for the news feed, you can choose which feed to use.

**Note**—Your feed choice is saved for you, not for your organization.

To select a different feed, open the record in Predict, and on the News tab, select **Incorrect Feed**.

## Standard Business Scores

Standard business scores give you a quick view into business financial strength and social presence. The business scores are:

### *Financial Strength Score*

Find financially strong businesses to inform your decisions on whether to engage in financial transactions with them. Financial Strength Score ranges from 0 (weak or risky financials) to 100

(strong financials), and is computed by factoring in several key financial signals, such as earnings over time and bankruptcy.

### *Social Presence Score*

Track the social sentiment and marketing via social media for a business. The Social Presence Score ranges from 0 (low presence and engagement) to 100 (high presence), and is computed by incorporating the presence of social handles for businesses, as well as how many followers or engagement the business has.

## Standard Personal Scores

Standard personal scores give you a quick view into a person's interests and tendencies. The personal scores are:

### *Green Score*

Find consumers who are most likely to be interested in environmentally-conscious goods or services. Green Score ranges from 0 (least likely) to 100 (most likely), and is computed by examining a consumer's recent activity in environmentally-conscious actions and causes, such as donating to an environmental cause or owning a hybrid or electric automobile.

### *New Tech Adopter Score*

Find consumers most likely to be interested in high tech goods and services. New Tech Adopter Score ranges from 0 (least likely) to 100 (most likely), and is computed by assessing a consumer's interest in high tech products and services.

### *DIY Score*

Find consumers most likely to be interested in do-it-yourself products or services. DIY Score ranges from 0 (least likely) to 100 (most likely), and is computed by assessing a consumer's interest in categories and activities such as hobbies, crafts and home improvement.

### *Donor Score*

Find consumers most likely to donate to causes. Use in combination with other scores (like Green Score) to find most likely donors with particular interests. Donor Score ranges from 0 (least likely) to 100 (most likely), and is computed by assessing a consumer's actions, such as donating to a political or social cause, and the consumer's financial and income-related data.

### *Wealth Score*

Find consumers most likely to have the disposable income to buy your products and services. Wealth Score ranges from 0 (least likely) to 100 (most likely), and is computed by assessing a consumer's financial data, such as estimated household income and net worth, as well as home address and other attributes that correlate to financial wealth.

## Travel Score

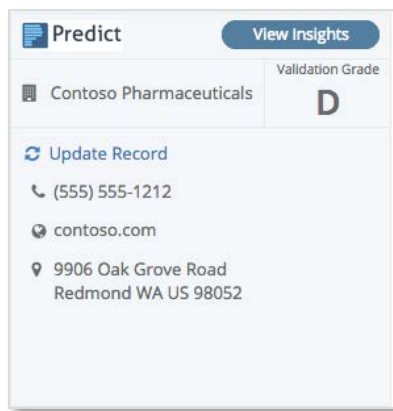
Find consumers most likely to be interested in travel related products and services. The Travel Score ranges from 0 (least likely) to 100 (most likely), and is computed by assessing a consumer's interest in travel, the presence of upscale credit cards, as well as many other attributes that correlate to an interest in travel.

## See Predict Insights in a record in the CRM

You can see and add new insights about an Account, Contact, or Lead directly in a record in the CRM on the Predict Heads-Up view, and on Versium Predict Insights cards.

### To see the Predict Heads-Up view

1. Open a record in the CRM.
2. In most views, you'll see the Predict Heads-Up view on the top right of the record.



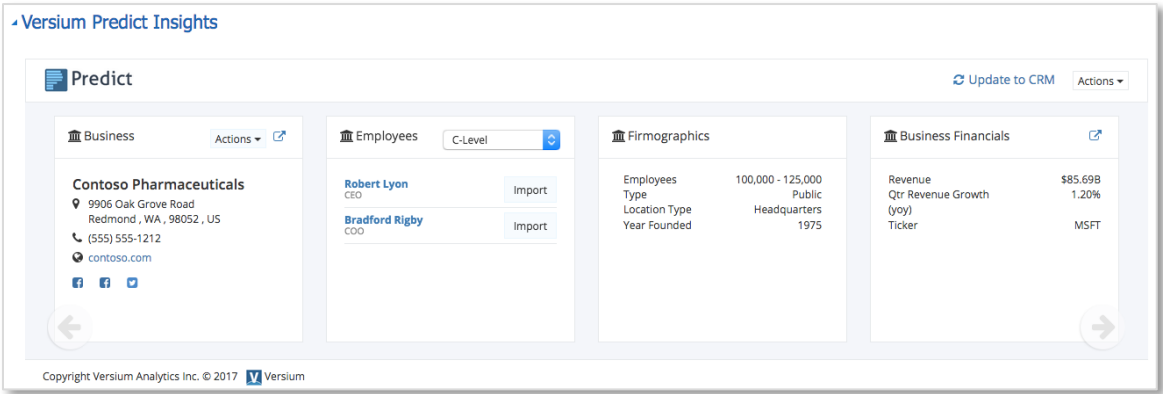
In the Heads-Up view, you can:

- See the read-time validation grade for the record. The validation grade is automatically recalculated whenever you update and save the record.
- Review what data is different or missing in the record
- Click **Update Record** to update the record with Predict data.
- Click **View Insights** to jump down to the Versium Predict Insights cards for the record

### To see Predict Insights cards in the CRM

1. Open a record.
2. Scroll down, or in the Heads-Up view, click **View Insights** to jump down to the Versium Predict Insights for the record. Versium Predict Insights shows any insights that Predict has for that record.
3. If there are multiple possibilities for a record, choose the best match from the search results.
4. To add the insights on the Versium Predict Insights cards to the CRM, select **Update to CRM**.

Predict shows Insights cards for various categories of insights found for that record. To add any of these insights to the record, see [Add Predict Insights to a Single Record in the CRM](#). To see more details, select the **Open Predict**  link.

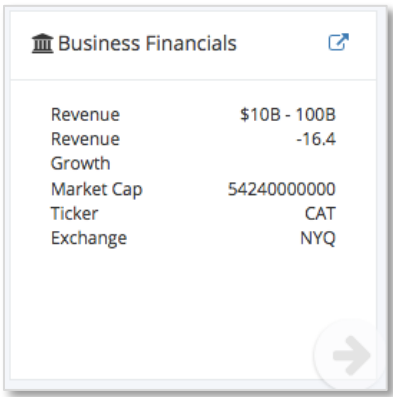


## See More Details for Predict Insights

Some Predict Insights cards have more details available.

*To see more details*

- On a card with an Open Predict  link, select it to see more details for the selected card.



**Tip:** The details pages have all the information Versium Predict has for a business or consumer. Browse through the tabs and pages to see all the information.

## Add Predict Insights to a Single Record in the CRM

There are two places you can add Predict Insights from a record in the CRM. You can add Insights on contact data from the Heads-Up view, or from Versium Predict Insights.

### *To add Insights to a record from the Heads-Up View*

1. Open a record in your CRM. In most views, you'll see the Predict Heads-Up view on the top right of the record.
2. Review the highlighted data, which indicates contact data that is different or missing in the CRM record.
3. Click **Update Record**.
4. On the **Update Record** page, check **Check All**, or check the boxes for the data you want to update.
5. Click **Update**.

### *To add data to a record from Versium Predict Insights*

1. On the Predict Heads-Up view, click **View Insights**, or scroll down to Versium Predict Insights.
2. In the upper right, click **Update to CRM**.
3. On the **Update Record** page, check **Check All**, or check the boxes for the data that you want to update in the CRM.
4. Click **Update**.

## Report Incorrect Predict Insights

Although our matching algorithms make this unlikely, if you do find inaccurate insights, there are two ways to report incorrect insights:

### *To report Insights are for the wrong person or company*

If the Insights on a record are for the wrong person or company, you can remove the association with the CRM record:

1. Open Accounts, Contacts or Leads in the CRM and open a single record that contains Predict Insights.
2. Once the record loads, scroll down until you see the Predict Insights Cards section.
3. Select **Actions**, and then select one of the following:

**Revert to Original Data**—Removes the insights and shows you a list of possible matches.

**Looking for someone else**—Allows you to choose from the other matches for the record.

### *To report an Insights card is incorrect*

If insights are for the right person or company, but the information on one of the Insights cards is incorrect, you can flag the card:

1. Open a single record in the CRM that contains Predict Insights.
2. Once the record loads, scroll down until you see the Predict Insights Cards section.
3. On the Predict Insights card with the incorrect information, choose **Actions**, and then choose **Flag as Incorrect**.

# Search for Predict Insights on Businesses and People



Predict Search allows you to search the Versium LifeData® warehouse for enhanced data insights on specific people or businesses. As you add new records to the CRM, use Predict Search to ensure you have the most complete data for your accounts, contacts, and leads. When Predict finds a match, you can view the insights, and quickly add them directly to the CRM.

You can search businesses or people, and for the people search, you can choose to search people at businesses, or consumers.



- Tap into over 1 trillion data attributes from LifeData®
- Includes B2B and B2C data from over 100 countries
- Add to your records for instant access

## *To search for Predict Insights*

1. In Versium Predict, go to **Search**; or, from the Sales tab, go to Versium Research.
2. Select **Business Search**  or **People Search** .
3. If you're in **People Search**, choose whether to search Consumers or Business people.
4. Type in the information you have for the business or person, and select **Search**.
5. Predict shows the possible matches.
6. To see more information for each result, select **View Profile**. You can also add or update the data in the CRM.

## *To create a new or update an existing record in the CRM from Predict Insights*

1. Search for Businesses or People as described above.
2. Find the match you want to create in the CRM, and select **Add to CRM**. **Note:** The Add to CRM will be for an **Account**, **Business data**, or **Consumer data**.
3. Double-check that the information on the left is what you want.
4. **To create a new record**, select **Create a new account, contact, lead** (what is available depends on the type of information returned).  
**To update an existing record**, under **Update or Create**, select the matching record in the CRM.
5. Select **Continue**.
6. Select the data to include. You can check **Check All**, or check just the data you want.
7. Select **Import**.



## Add Predict Insights to a List

To get Predict Insights for a list, you'll need a marketing list with the fields for the type of insights you want to add:

Desired Insights	Required CRM Fields
Business	Business name, and optionally, Contact name and email, plus <b>at least one</b> of the following: <ul style="list-style-type: none"><li>• Phone Number</li><li>• Postal Address</li><li>• Cell Phone</li><li>• Postal Code</li></ul>
Consumer	Person's name, and <b>at least one</b> of the following: <ul style="list-style-type: none"><li>• Postal Address</li><li>• Phone Number</li><li>• Email Address</li><li>• Postal Code</li></ul>

### To add Predict Insights to a list

- In Versium Predict, select **Add Insights** and follow the wizard.

When you've finished the Add Insights wizard, Versium Predict:

- Matches leads on your list with leads in the Versium LifeData® warehouse
- Finds insights to add to or update the information for entries in your marketing list.

When it's done finding insights, Versium Predict opens **Data Insights** on the Dashboard so you can review the new information. Depending on the size and complexity of your list, it can take some time to finish. When complete, you can:

- Add the insights back into the marketing list in the CRM.
- Review the insights found on the Dashboard.
- Download the enhanced CRM records as a CSV file.

## Add Predict Insights for a list to your CRM

Once it finishes finding insights, Predict can add them to your marketing lists in the CRM. For each type of insight found (for example, email address or phone number), you can choose how to add the data to the CRM.

### *To add Predict Insights in a list to your CRM*

1. Go to the Dashboard and under **Results**, select **Data Insights**.
2. Find the row for your new insights.
3. In the **In CRM** column, select **Add**.

**Tip**—If the **In CRM** column shows **Pending**, your insights are already being added, and still processing, so come back later. If the **In CRM** column shows **Yes**, then you've already added insights to this list. If it shows **No**, it's a shared list and you can't add insights to it.

4. Choose how to add each insight field:
  - **Do not add:** Do nothing with this field.
  - **Only add to empty fields:** Add this field to the marketing list ONLY if the existing field in the CRM is empty.
  - **Overwrite existing CRM fields:** Overwrite existing fields with insights data.

**Caution!** Overwriting existing data in the CRM is permanent and cannot be undone.

5. When you are finished selecting how to add each insight, select **Next Step**.
6. Predict then shows you about 10 sample records showing how your selected insights will be added. Compare the added insights records with the original records, and verify that the changes give you the result that you want. If they're correct, select **Add to CRM**.
7. If you have chosen to overwrite data, you'll be asked to confirm the overwrite.

Predict starts adding the requested insights to your marketing list in the CRM. On the Dashboard, check the **In CRM** column for status:

- **Pending**—Predict Insights are still being added.
- **Yes**—All Predict Insights have been added.

## What you can do with list Insights

You can review your list insights results, add them to the CRM records, or download them as a CSV.

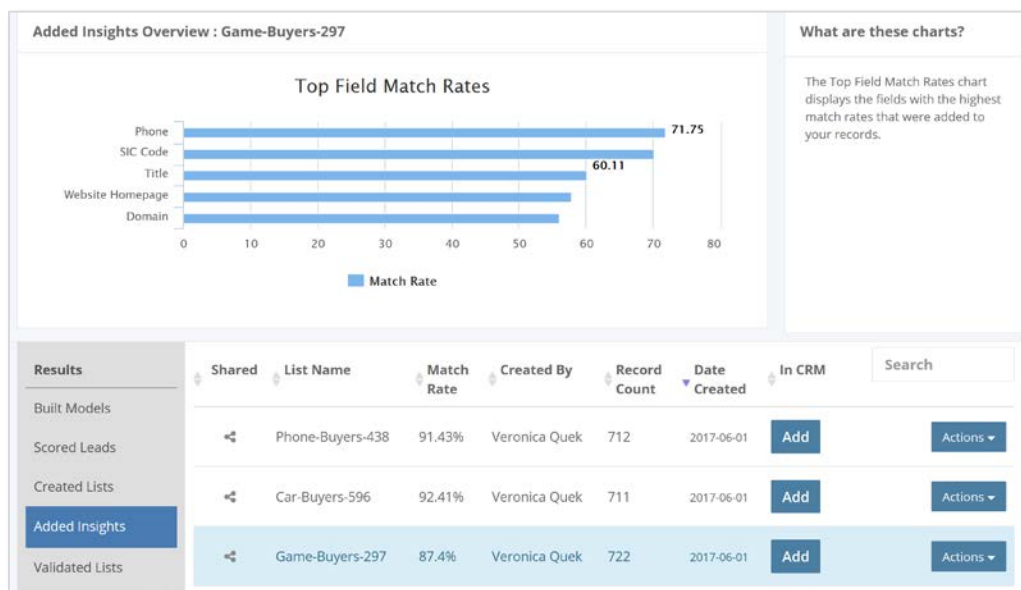
### To review your list insights

1. Go to the Dashboard and under **Results**, select **Data Insights**.
2. Select a row to see match rates for records in your marketing list.

In the **In CRM** column, you can see the status of the Data Insights:

- **Add**—Select to add found Predict Insights to your marketing list in CRM.
- **Pending**—Predict is in the process of adding Predict Insights.
- **Yes**—All Predict Insights have been added.
- **No**—Predict Insights have not been added to the CRM. You cannot add insights to lists that are shared with you.

When you open a Data Insights list in Versium Predict, you get the top field match rates for the added insights.



### To download Predict Insights for a list as CSV

You can download your new data insights as a CSV file.

1. From the list you want on the Data Insights Dashboard, select **Actions**, and then select **Download CSV**.
2. Save the CSV file. In the CSV, your original data is listed first, followed by 2 empty columns, and then columns with the insights added by Versium Predict.


External link: [Dynamics 365 Help: Import Leads, Contacts, or other data](#)

# Set and Manage Alerts for Business News

---

You can set alerts to be notified about current news for public businesses. There are several ways to set an alert, and you can specify which categories of news you want alerts for. The News tab and News alerts are only available for public businesses.

## *To set, manage, or delete alerts for a business in Versium Predict*

1. In Versium Predict, [Search for a Business](#), and on a public business, select the business name to open it.  
Or, on a record in the CRM, go to **Versium Predict Insights** and from an insights card, select Open Predict .
2. Open the **News** tab.
3. **To set news alert**—Select **Add News Alerts**, check the alert categories you want, and select **Add**.  
**To change your news alerts**—Select **Manage News Alerts**, check or clear alert categories, and select **Update**.  
**To delete news alerts**—Click the Alert bell in the upper right. See **To manage all alerts** below.

## *To see alerts*

The Alert bell changes from an outline  to filled-in and ringing  when you have new alerts.

1. Click the bell to open Predict Business News Alerts. Predict shows a selection of the news for your alerts.

**Note**—Businesses that have new alerts are indicated with a number showing how many news stories are new since you last visited Business News Alerts.

2. To see the alerts for just one business, under Businesses, click the business.

## *To manage all alerts*

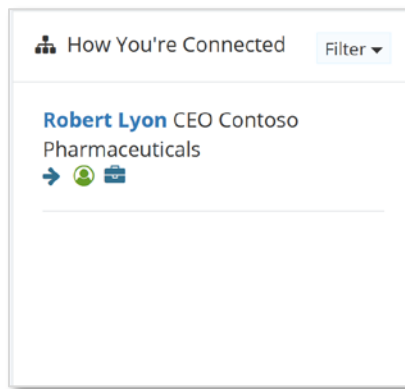
1. Select the Alert bell in Versium Predict.
2. On the **Alerts** page, in the **Businesses** list, click the Settings icon to show the Edit (pencil) and Delete (trashcan) icon for each business.
3. **To change the alert categories** for a business—Select Edit  
**To delete all alerts for a business**—Select Delete. Predict removes the company from the Alerts Businesses list.

# Create Connections

---

Create connections to business people you know, your work history, and your education to find how you're connected to your customers. Here's how it works:

1. You add connections to People You Know, your Work History, and your Education.
2. When you open an Account, Contact, or Lead record in the CRM, or search for a person or business, Predict checks the record data for matches based on the connections you've added.
3. If Predict finds a match, it adds a **How You're Connected** card to the Insights for the record in the CRM or Predict Profile.



## Connection Types

You can enter the following types of information:

### People You Know

You add people you know by searching for them using Business Person search, or by importing a contact file.

**Example**—You import your LinkedIn contacts into Predict Connections. When you open an Account you've been working with in the CRM, you see that one of the people you're connected to on LinkedIn works at that company.

### Work History

You enter your work history by searching for businesses and then adding them to your work history.

**Example**—You add your work history at a business. When you search for a business person in Predict and open their details, you find out they also used to work at that company.

## Education


You enter your education by doing a business search for your school and then adding them to your education.

**Example**—You add the university where you got your degree. When you open a Contact in the CRM, you see that the person attended the same university as you.


## Add Connections

You add connections to business people you know, where you've worked, and where you went to school. The more connections you add, the more likely it is that Predict will find matches that allow you to connect more personally with a business or person in the CRM.


### *To import People You Know*

1. Export your contacts from [Outlook](#), or [LinkedIn](#), or have your Google sign-in information ready.  
**Note**—In LinkedIn, accept the defaults to get an archive of your data.
2. In Predict, go to **Profile** , and open **People You Know**.
3. Select **Import**, and select what contacts to import.
4. Select the file that contains your exported contacts, and click **Import**, or sign in to Google and import contacts.  
**For LinkedIn:** Select the Connections.csv file from your data archive.

### *To add business people, businesses, or schools from Search or the CRM*

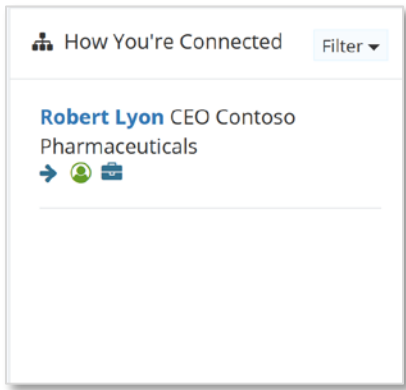
1. Search for the business person or business (including schools) in Predict.  
Or, from a record in the CRM, in the Heads-Up view, select **View Insights**, and then select Open Predict  from one of the insights cards.
2. On the Overview page for the person or business, select **Add Connection**.
3. Select the connection type, enter the details on how you're connected, and then select **Add**.  
**Note**—Connections do not apply to Consumer people.

### *To change or delete connections from your profile*

1. In Predict, go to **Profile** , and open the type of connection you want to change.
2. Find the card for the connection you want to edit or delete, and select the ellipses (...). In **People You Know**, you can filter which connections are shown by selecting one of the icons at the top.
3. Change the details you'd like, and then select **Update**.  
To delete, select **Delete**.

## See How You're Connected

Once you've entered information on your profile, you'll start seeing **How You're Connected** Insights cards when you search for people or businesses you're connected to.



### *To see How You're Connected in Predict*

1. Search for the business person or business in Predict.
2. Open the record you want.
3. On the Overview page for the business person or business, look for the **How You're Connected** card.


### *To see How You're Connected in the CRM*

1. Open a record in the CRM.
2. In the Heads-Up view, select **View Insights**, or scroll down.
3. In Versium Predict Insights, look for the **How You're Connected** card.

# Validate Lead Information — Validate Lists

When you validate a list, you're checking whether the information you have for a list of records in the CRM matches the data in the Versium LifeData database. With a grade for the list, you've got a measure of how good the data is.

Grade	Matched	What I can do
A	All	Start a campaign with confidence
B	Most	Add Insights or filter the list for grade A & B records
C	Half	
D	Some	Add Insights to improve the contact data
U	None or unknown	



## Validate Lists

Check the data in a list to get a quick view into the quality of the contact data for Accounts, Contacts and Leads.

### To validate a List of Leads

- In Versium Predict, select **Validate Lists** and follow the wizard.

**Tip:** If you want the scores added to the CRM records, on the last step of the wizard, check **Add Validation Grades to the CRM**. This option only adds the grades, it does not update any data in the list.

When it's done checking contact data, Versium Predict opens **Validated Lists** on the Dashboard so you can review the results. Depending on the size and complexity of your list, it can take some time to finish. On the dashboard, you can:

- Review the average grade for records on the list.
- Select the list to see average match rates and grade distribution.
- Review grades and data that don't match by downloading the CSV.
- Add Insights to improve the quality of the data in your list



# What you can do with Validated Lists

Validating a marketing list gives you an idea of the quality of the contact data in a marketing list. You can use validation grades to make decisions about who to source lists from, filter records by grade, or add insights to improve the quality of data for records in the list.

## *To use validation grades*

Use validation grades to inform how you use the graded records.

- **If your list gets a high grade**, you can start your campaigns with confidence.
- **If your list gets a low grade overall**, you can [Add Insights](#) to the list, or sort the list to pull out only A and B grade records.
- **If a business or consumer record gets a low grade**, you can [Search for Predict Insights on Businesses and People](#)

## *To interpret Validated List Results*

We compare the name you provide and each piece of contact data in your marketing list with Versium LifeData®, and score the record by how closely it matches. Possible grades are A to D, plus U for Unknown:

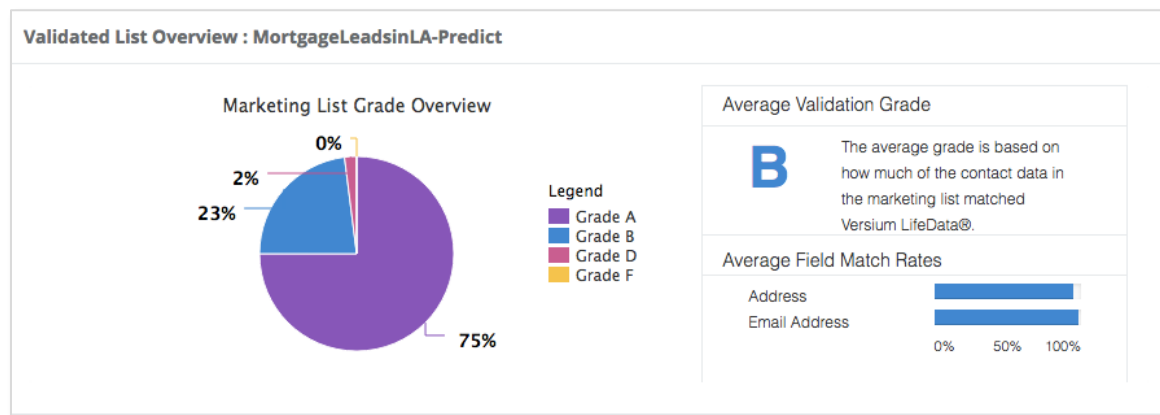
A - All

B - Most

C - Half

D - Some

U - Unknown - Person or Business name not found



Validation compares each part of the contact data separately, to see if it's found associated with the first and last name in the Versium LifeData® warehouse. For example, if you choose to validate phone, email, and address, then Validate List does the following:

1. For each record, finds the input record's first and last name in the database
2. Checks if the contact data follows the expected formatting for that data type. For example, the email address follows the pattern: name@domain.com.
3. Checks if the input record phone number appears in our database associated with that name.
4. Repeats that check for the email address, and then for the parts of the postal address.
5. Records the parts of the contact data that match and don't match, and any formats that don't match.
6. Grades the record based on how much of the data matches.
7. Averages the scores of all records to calculate an average grade for the list.

### *To interpret a Validated List CSV*

When you download a Validated List as a CSV, look for the columns that Predict added to the right of your input data. The Validation columns start with Validation Score and Validation Grade. Then, for each piece of contact information, you'll see one of the following:

- **YES = Match** — The business or consumer name was associated with that contact data (for example, address, email, or phone) in our database. This is recorded as YES in the CSV.
- **NOT FOUND = No Match** — That business or consumer name was not associated with that contact data in our database. This is recorded as NOT FOUND in the CSV.
- **VALID/INVALID** — The contact data (email and phone numbers) matches the expected format. Valid means they follow the format (for example, name@domain.ext). Invalid means they don't (for example, an email address without an @ symbol). Validation is separate from matching. An email can be in a valid format, but also be NOT FOUND. Validation is recorded as VALID or INVALID in the CSV.

# Predict Customer Behavior —Build Models

Analyze customer lists from previous campaigns to create a model of the business or consumer characteristics that correlate with desired behaviors.

With a predictive model, you can:

- Use customer behavior from a past campaign to predict behavior in the next campaign
- Customize models and predictions for your business and your sales goals
- Increase conversion rates and lower acquisition costs

A predictive model provides insight into whether a business or consumer is more or less likely to behave in a particular way under particular conditions. For example, you might build a Predictive Model to help you predict whether contacts on one of your marketing lists are likely to respond to an email offer, or purchase a specific type of product or service.

## Building a Predictive Model



## How a Predictive Model works

Starting with two marketing lists you create in the CRM: one with and one without a desired behavior (such as conversion, engagement, or select-through). Versium Predict analyzes the lists you provide and builds a Predictive Model for the behavior you’re interested in.

When the model is complete, you can then use it to score a marketing list for how likely each lead is to behave in the desired way (a Scored List), and to generate new lists of potential customers who score highly likely for that behavior (a Predictive List).

For example, you might use the Predictive Model you created for “blog email click-through” to score a new marketing list for an upcoming email marketing plan. You can then target your plan to the leads on the list that are most likely to click through.

External Link: [How to build a marketing list in Dynamics 365](#)

## Get Ready to Build a Model

The key to generating an effective predictive model is in your marketing lists. A marketing list is a list of leads in your CRM that you can think of as a training set for the model. For your model to function the way you want, your training set needs to be for the behavior and leads that you want to model.

## Choose Marketing Lists

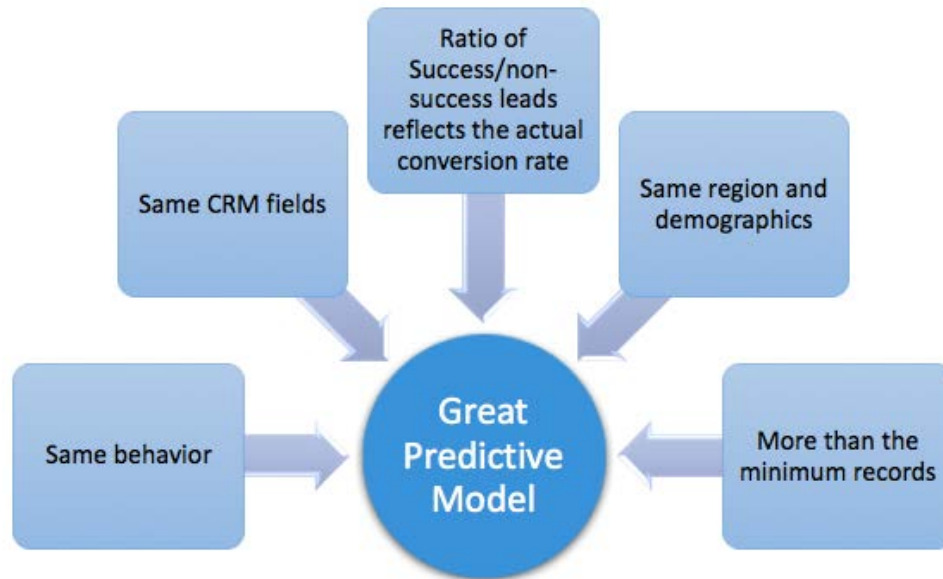
To create a Predictive Model, you need to decide if you want to create a business or consumer model, and then create or choose two marketing lists:

- **Success List:** Businesses or consumers who have displayed the behavior that you're building the model for, and who are in the same country. For example, consumers who have bought a subscription or clicked through on an ad in Germany.
- **Non-Success List:** Businesses or consumers who **do not** display that same behavior, and are in the same country.

### *Tips on Selecting Marketing Lists for the Best Models*

Your Predictive Model will be the most effective if you make sure both lists:

- **Are for the behavior you want to model, and are for the same behavior:** Are of leads who either had or didn't have the same behavior (for example, leads who did (your Success list) or didn't (your Non-success list) subscribe to your service.
- **Have the same required CRM fields for each record:** The more of these attributes you include, the better your predictive model will be.
- **Represent your conversion rate:** The conversion rate represented in your training set should reflect the conversion rate you had for the combined lists. You'll likely have fewer records in your success list than your non-success list.
- **Have the same basic criteria:** Have the same criteria for both lists. Your model won't be as effective if your success list contains only leads from NY and your non-success list has leads from LA.
- **Have more than the minimum number of records:** See the minimum for the type of model you're building in the table below. The more records you can provide, the better your model will be (up to our maximum of 5000).
- **Are in the same country:** Lists used to build models must contain leads from a single country. And, regional differences mean a model built with customers in one country won't work to predict customers in a different country.



See **List Requirements** for the required CRM fields and recommended number of records for each type of model and list.

## List Requirements

Make sure the lists you choose or create meet the requirements for the minimum number of records and required fields. Both lists can include any of the CRM customer types: Accounts, Contacts, or Leads.

Model Type	Success List Minimum	Non-success List Minimum	List Max	Required CRM Fields
Business	500	1000	5000	Business name, plus one of: Zip code, postal address, email address, or phone
Business + Contact	500	1000	5000	Business name, and Contact name, plus one of: Zip code, postal address, email address, or phone
Consumer	1000	3000	5000	Name, Phone number, Email Address and Zip Code

The more of these attributes you include, the better your predictive model will be. Now that you've got a great set of lists, you're ready to build your model!

# Build a Predictive Model

Once you have your Success and Non-Success lists, you are ready to build your Predictive Model.

## To build a predictive model

1. In Versium Predict, select **Build Models**.
2. Select **Build a Model** and follow the wizard.

**Tip:** A great way to name your model is using the behavior you're targeting, the region, if any, and maybe the type. For example, Shoe Sales-San Diego Consumers.

Versium Predict starts building your model. Depending on the size of your lists and how many fields you've included, it can take some time. Check the Predictive Models Dashboard to see the status.

Here's a brief overview of what Predict does as it builds your model:

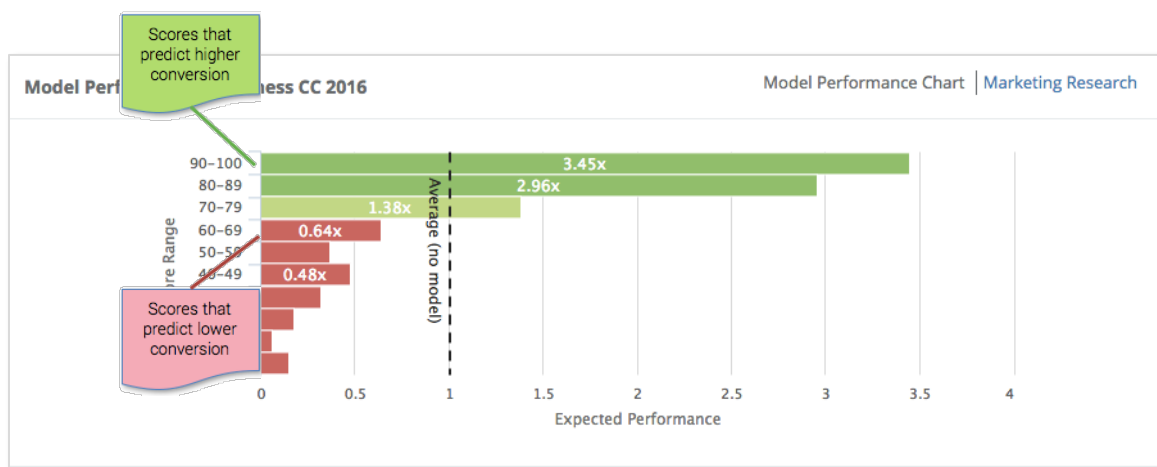
- Appends Versium LifeData® — thousands of additional attributes for each record
- Uses machine-learning algorithms that assess predictive signals
- Develop your model, and then test to ensure it is properly tuned.

# What you can do with a Predictive Model

Having a predictive model for a behavior gives you the ability to target and source leads that are predicted to score highly for that behavior

## To review a Predictive Model

1. Go to the Dashboard and select **Predictive Models**.
2. Select the row for the predictive model. The Model Performance chart shows you how the behavior scores are predicted to improve conversion rates.



To target leads with a Predictive Model — Go to [Target Leads Likely to Convert — Score Leads](#)

To source leads with a Predictive Model — Go to [Source New, High-value Leads — Create Lists](#)

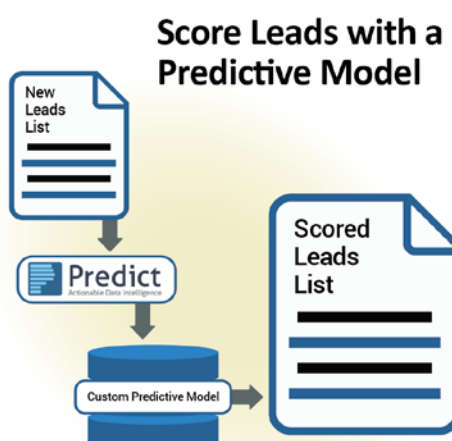
# Target Leads Likely to Convert — Score Leads

Using a Predictive Model for a behavior, you can analyze a list of Accounts, Contacts, or leads, and score records on the list by how likely they are to have the desired behavior.

By scoring leads, you can:

- Target leads most likely to convert
- Allocate marketing spend more strategically

You provide a list of Accounts, Contacts, or Leads, and select a Predictive Model for the behavior you want. Versium Predict scores each lead for that behavior and adds those scores to each record in your list. On the Dashboard, under Scored Lists, you can then see the predicted performance for the list and how adjusting the score you're targeting affects the predicted conversion rates.



## Score leads

To score a list of leads, you'll need:

- A Predictive Model for the behavior, customer type (business or consumer), and country you'd like to score for.
- A marketing list in the CRM to score.

### *To score leads*

1. In Versium Predict, select **Score Leads**.
2. Select **Begin Scoring Leads** and follow the wizard.

When you've finished the wizard, Versium Predict starts scoring the leads on your marketing list, and adding scores to the CRM. When it's done scoring, you'll get an email with a link to the scores. Depending on the size of your list and how many fields you've included, it can take some time to score the list.

### *To find your Scored List*

- Go to the Dashboard and select **Scored Leads**.

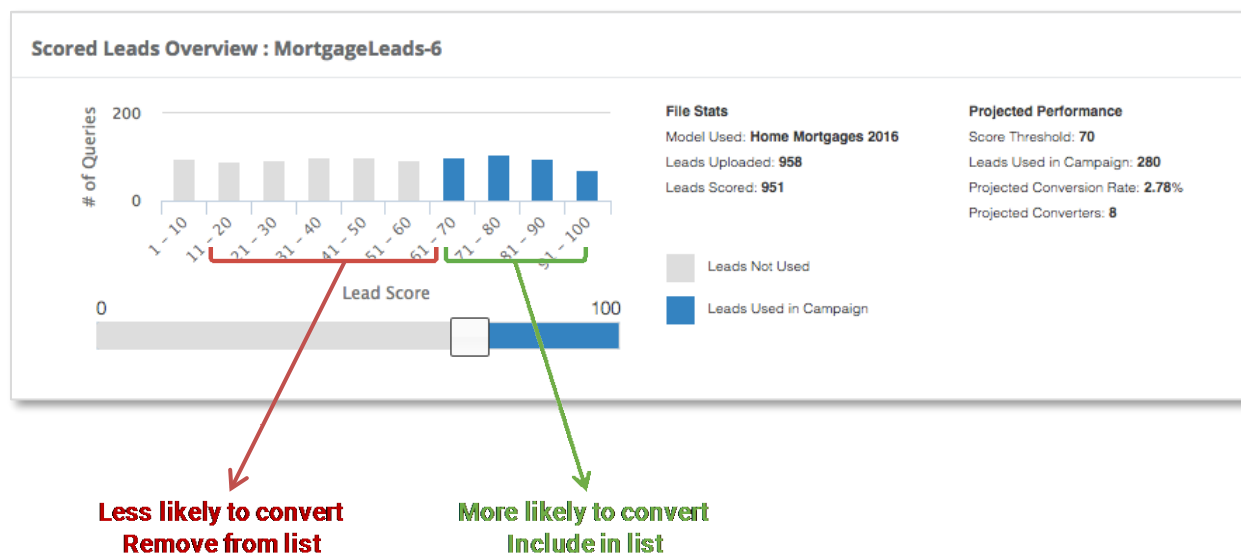
# What you can do with Scored Leads

When you open a Scored Leads list, you'll see a summary of how the leads scored against your Predictive Model.

## *To fine-tune a Scored Leads list*

The scored leads overview allows you to explore which lead score to use to more precisely target your marketing campaigns.

1. On the Scored Leads Overview, slide the Score Threshold to see the number of leads and conversion rate expected for that score.
2. Fine-tune which minimum lead score gives you the best cost/benefit ratio.
3. Search for leads above that score threshold and [build a list](#) using only those leads most likely to convert.
4. Market to only leads above your chosen minimum lead score.



As an example, you might limit your campaign to leads with scores above a chosen threshold, say 70. Marketing only to these leads maximizes your conversion rate, and reduces costs by removing the leads that are least likely to respond favorably.

## *To download scored leads as a CSV*

You can download your Scored Leads as a CSV file.

1. From the list you want on the Scored Leads Dashboard, select **Actions**, and then select **Download CSV**.
2. Save the CSV file.

*To create a new marketing list from Scored Leads – Go to [Create a New List from Scored Leads](#)*

*To see Predict scores in the CRM – Go to [See the Versium Predict Scores for a Lead](#)*



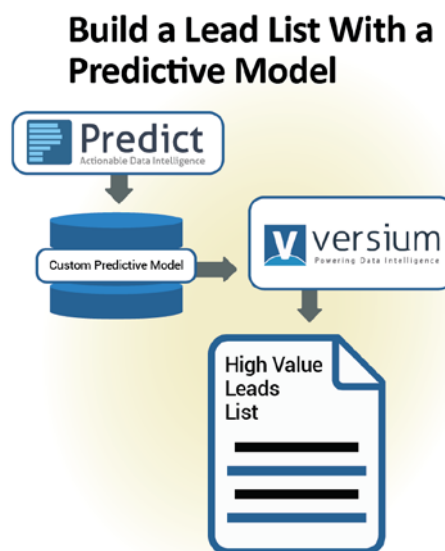
# Source New, High-value Leads — Create Lists

Using a Predictive Model for a behavior and the expanded data in the Versium LifeData® warehouse, you can generate a list of leads that score highly likely to have the desired behavior.

By sourcing lists in Predict, you get:

- New, high-value leads
- Unlimited sourcing, provided at no cost as part of your CRM subscription
- Higher conversion rates than purchased lists because these leads are based on your model

You select whether you want a business or consumer list and select the Predictive Model for the behavior you want. Versium Predict then searches the Versium LifeData® warehouse for leads that score highly for that behavior, and generates a new Predictive List for you.



## Build a New List

To generate a Predictive List, you'll need:

- A Predictive Model for the behavior and country for which you'd like to generate a list.
- Choose whether you'd like a business or consumer list.

### *To build a Predictive List*

1. In Versium Predict, select **Create Lists**.
2. Select **Build a New List** and follow the wizard.
3. At the end of the wizard, check **Add to CRM** to save your new list into a new marketing list in your CRM.

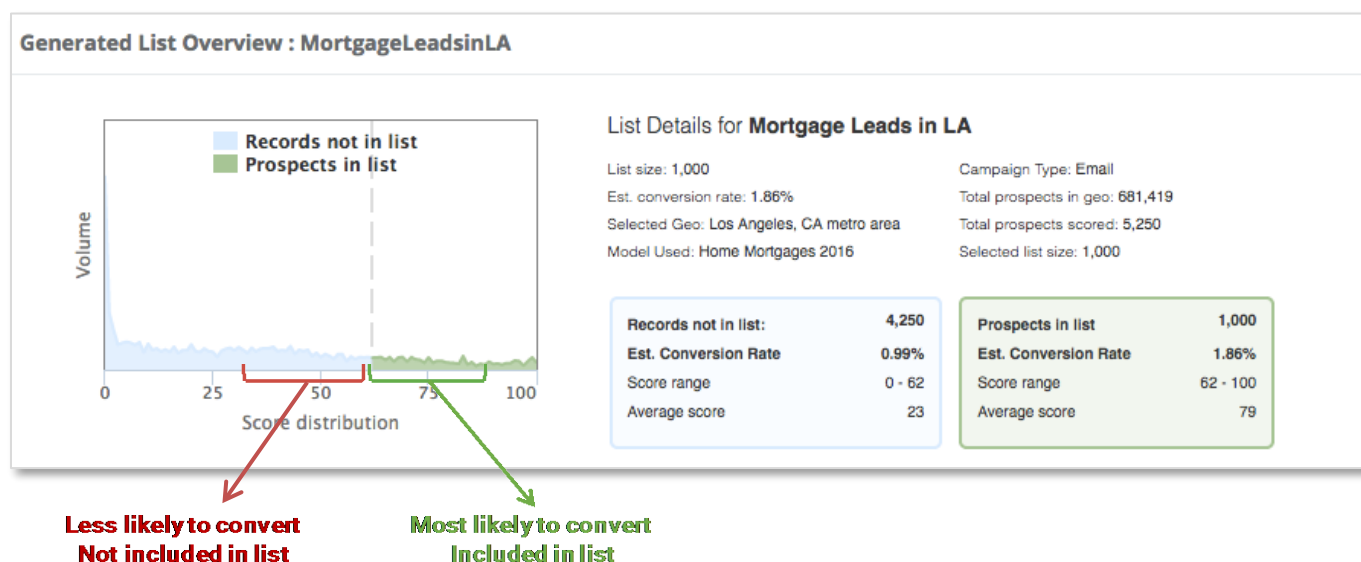
Versium Predict starts building your Predictive List from leads in the Versium LifeData® warehouse that score highly for the behaviors you want. Depending on the size of your list and other list attributes, it can take some time to build the list.

# What you can do with Built Lists

You can review the details of the list that was built, add the list to your CRM, or download the list as a CSV file.

## To review your built lists

1. Go to the Dashboard and select **Built Lists**.
2. Select a list to open the Generated List Overview to see statistics on the difference in predicted performance for all scored leads compared to the leads Predict included in your list.



## To add a built list to your CRM

1. Add your new list to your CRM in two ways:
  - At the end of the wizard, check **Add to CRM** to save your new list into a new marketing list in your CRM.OR
  - From the list you want on the Built Lists Dashboard, under **In CRM**, select **Add**.
2. Once you've added the list to your CRM, go to your CRM and search for the list name.

## To download a built list as a CSV

You can download your new list as a CSV file.

1. From the list you want on the Built Lists Dashboard, select **Actions**, and then select **Download CSV**.
2. Save the CSV file.

# Troubleshooting

---

If you're having an issue with Versium Predict, please check out the [Troubleshooting](#) section in our online help.

If you can't find an answer to your issue, please contact [Versium Support](#) at [msft-support@versium.com](mailto:msft-support@versium.com).