Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

3.1.2.1 Select Customers and Manage Programs

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Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 3.1.2.1 Select Customers and Manage Programs

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3.1.2.1 Select Customers and Manage Programs

This section provides a description of the “Select Customers and Manage Programs” business process, including:

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- Business Process Diagrams
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    - Select Customers and Manage Programs Process Model - Page 2
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Brief Description

Business Process: 3.1.2.1 CC&B v2.5 Select Customers and Manage Programs

Process Type: Process

Parent Process: 3.1.2 CC&B v2.5 Manage Marketing Programs

Sibling Processes: n/a

This process takes place when Utility organization markets various programs and services designed to encourage selected customers to enroll in various sales and marketing initiatives and measures success of efforts. Examples of typical programs include Enrollment to conservation program, sign up for special contract options, setting up marketing surveys.

Process starts when Sales and Marketing Representative selects one or more initiatives that designed for specific market and group of customers and activates selected programs. Programs usually target:

- Groups of customers selected automatically based on criteria defined by business.
- Groups of customers identified either manually or by third party application (e.g. reporting application).
- One or more individual Customers/Accounts selected by business user.

CC&B generates Leads for each selected Account. Usually Lead consists of number of events. Some of the Events trigger communication to customer, such as a letter or an email that are sent to a customer.

The system considers a Lead as successful if goal program has is achieved and CC&B has the indicator (appropriate data/information is stored) that reflects this achievement. For example, if a rebate claim is filed for a customer with an active lead linked to conservation program initiative the lead will be considered as successful.

In most of the situations system automatically completes Events and Leads, however Leads and Events could be edited and completed manually by Sales and Marketing Representative or Authorized User as well.

Application allows collecting statistics for initiative, for groups and/or individual Sales and Marketing Representatives and provides a tool to measure success of efforts.

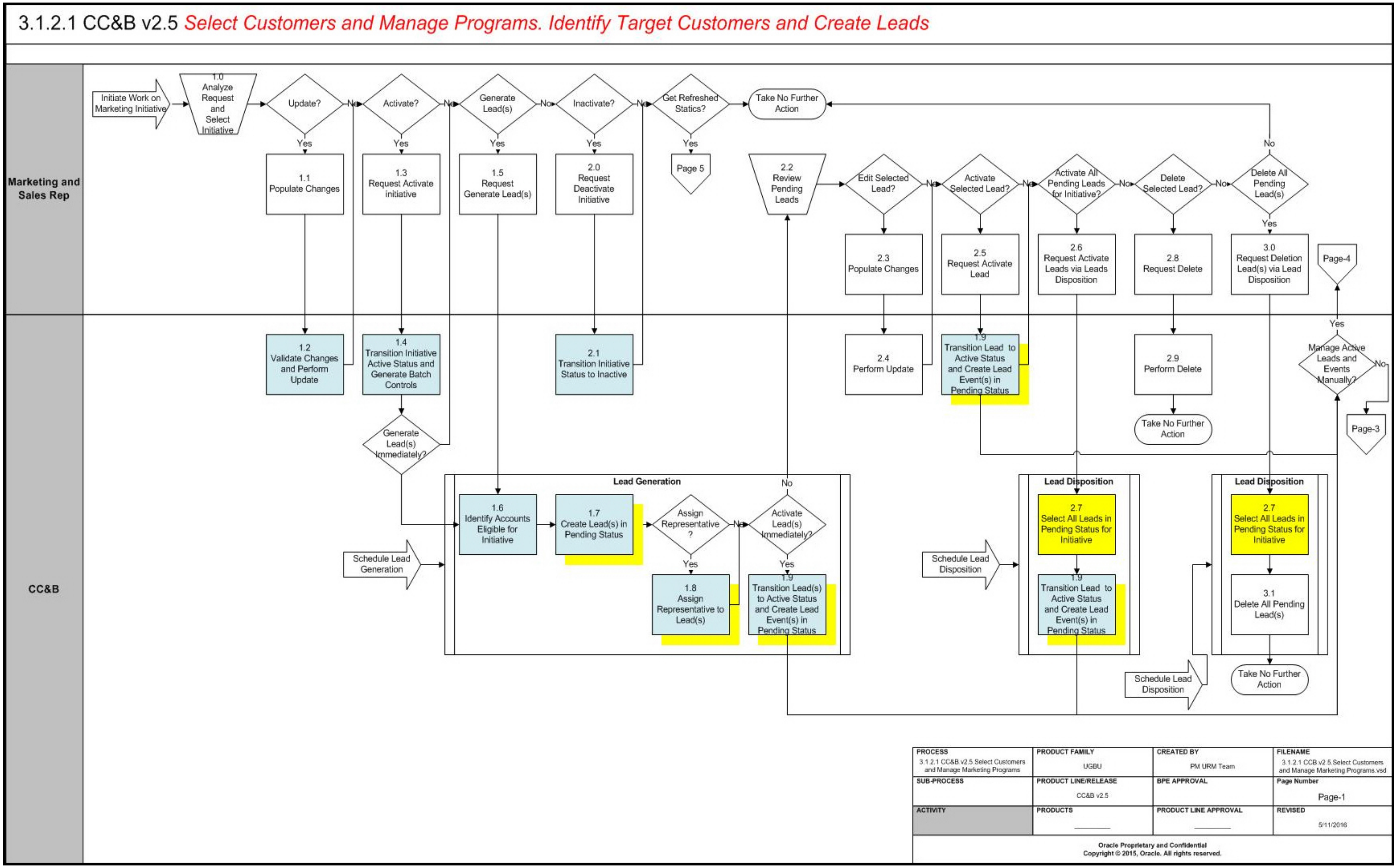
Actors/Roles

The Select Customers and Manage Programs business process involves the following actors and roles:

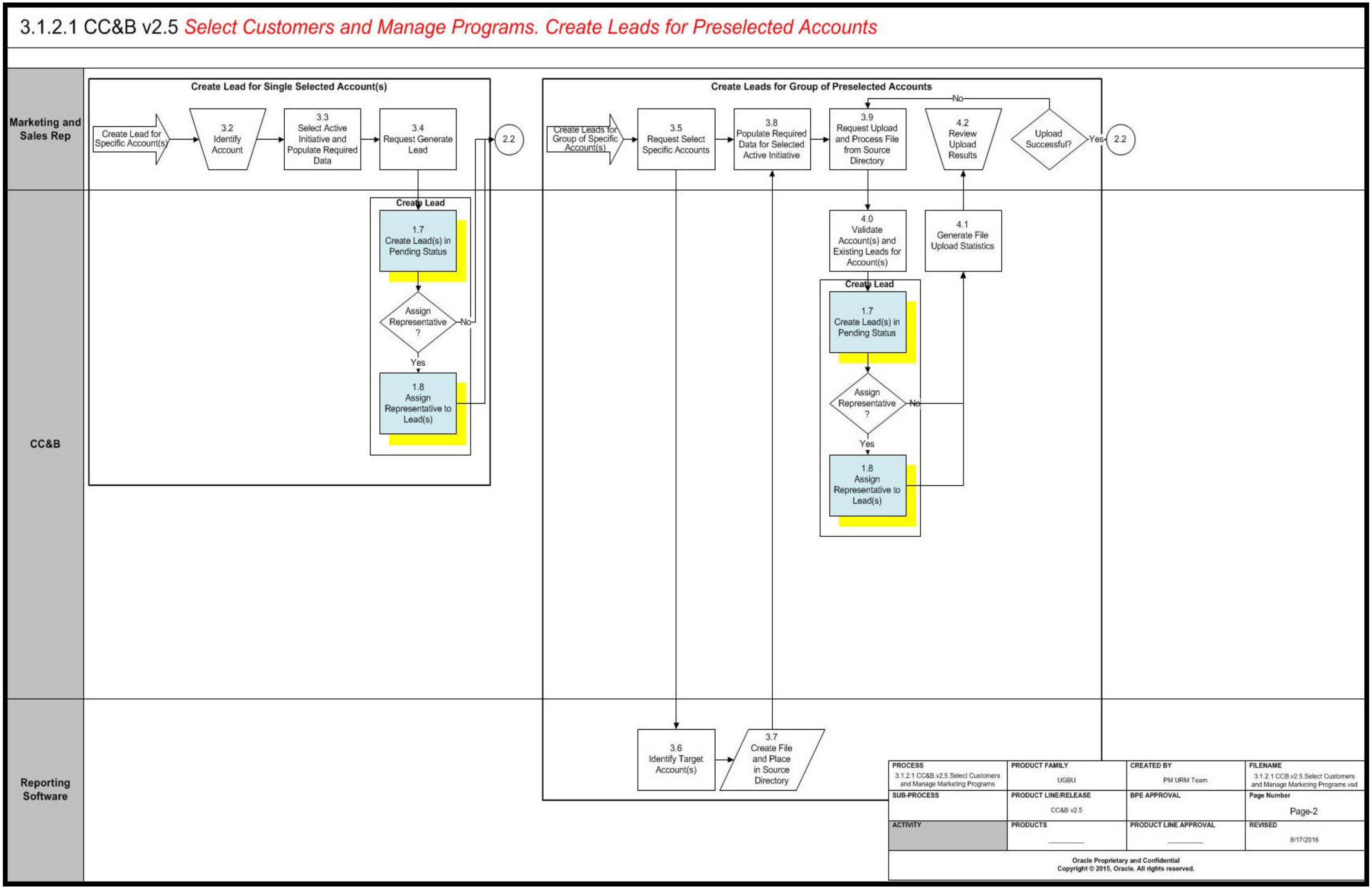
- **CC&B**: The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR CC&B:** CSR or Authorized User of the Customer Care and Billing application.

Business Process Diagrams

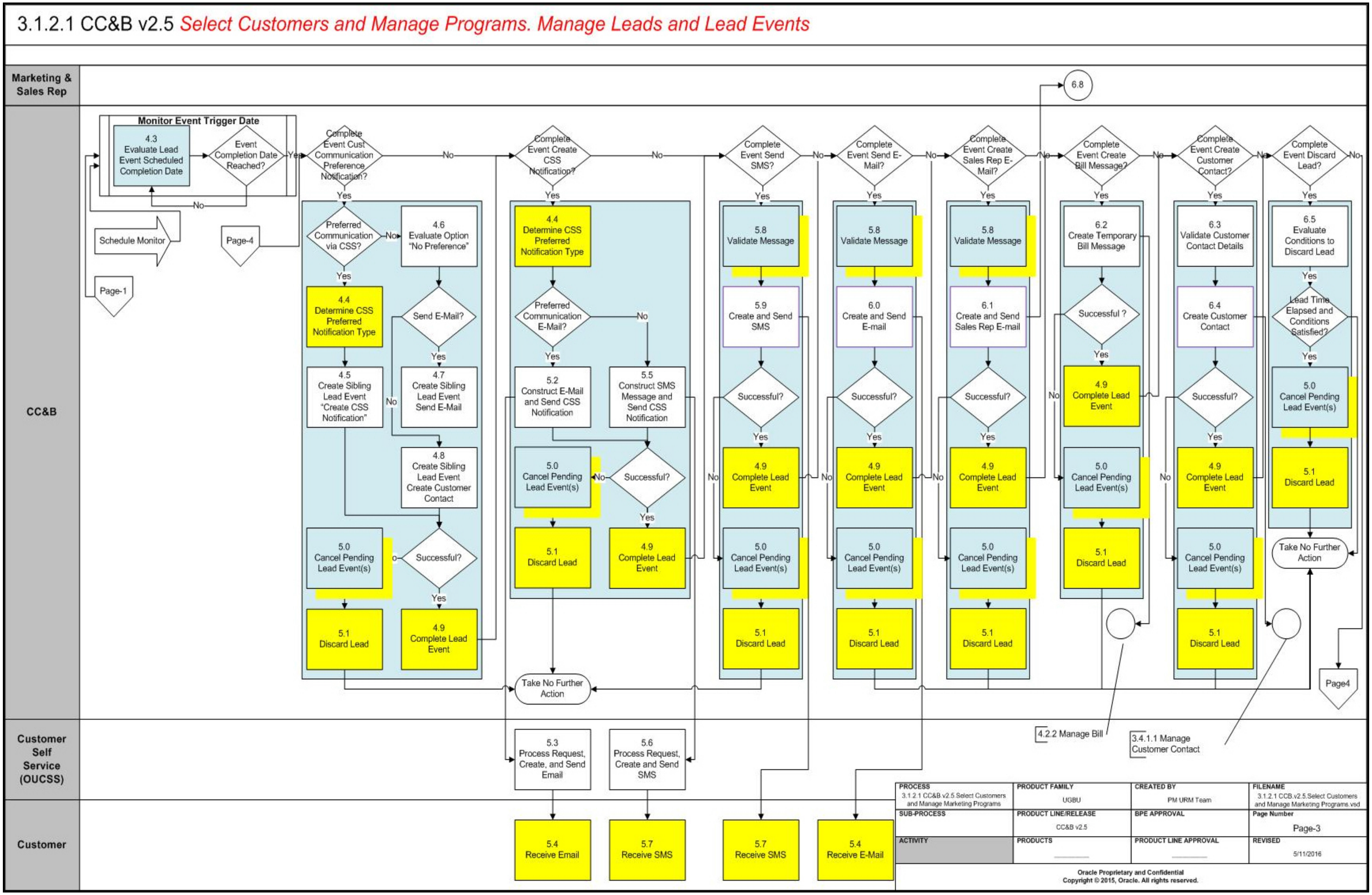
Select Customers and Manage Programs Process Model - Page 1



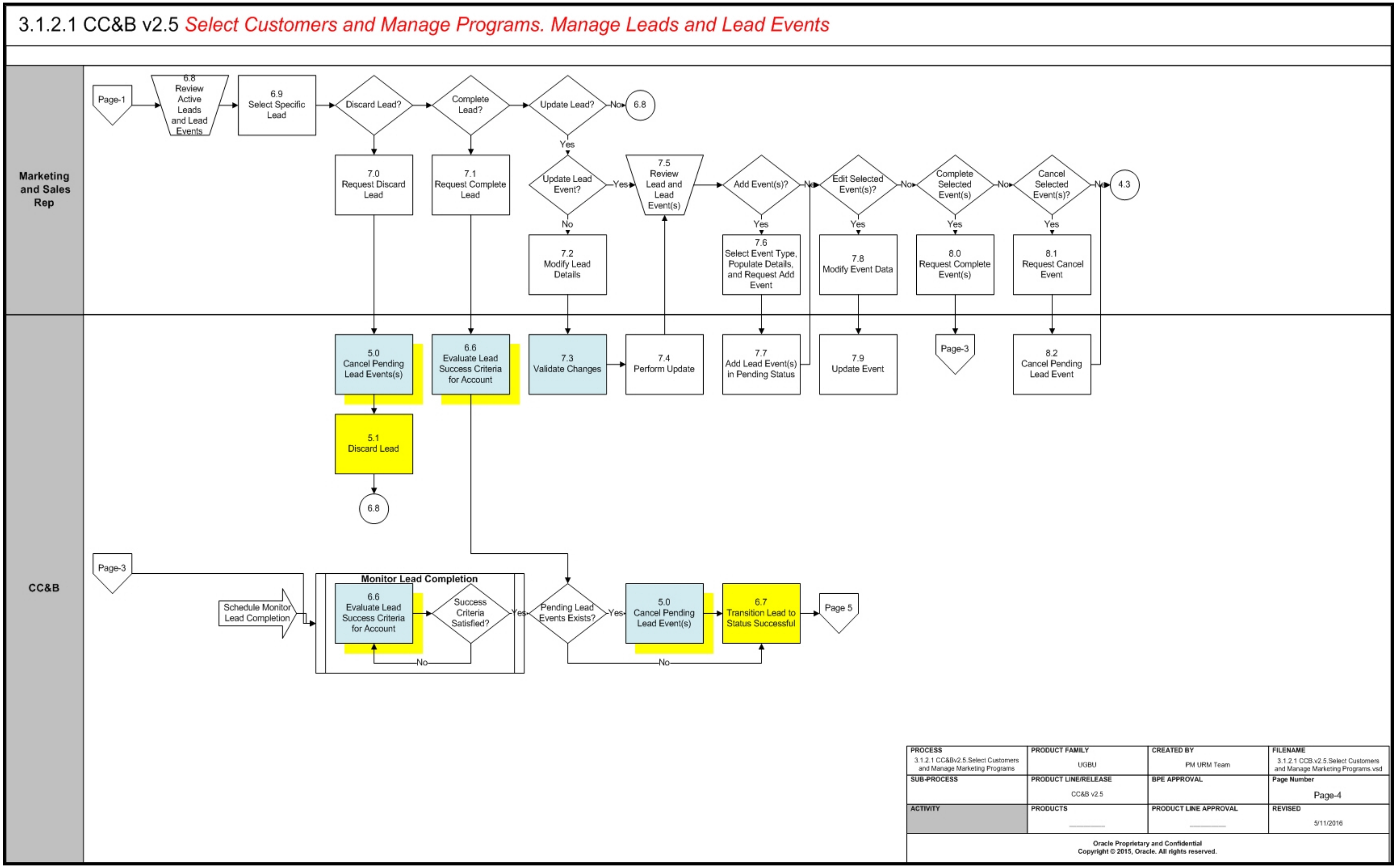
Select Customers and Manage Programs Process Model - Page 2



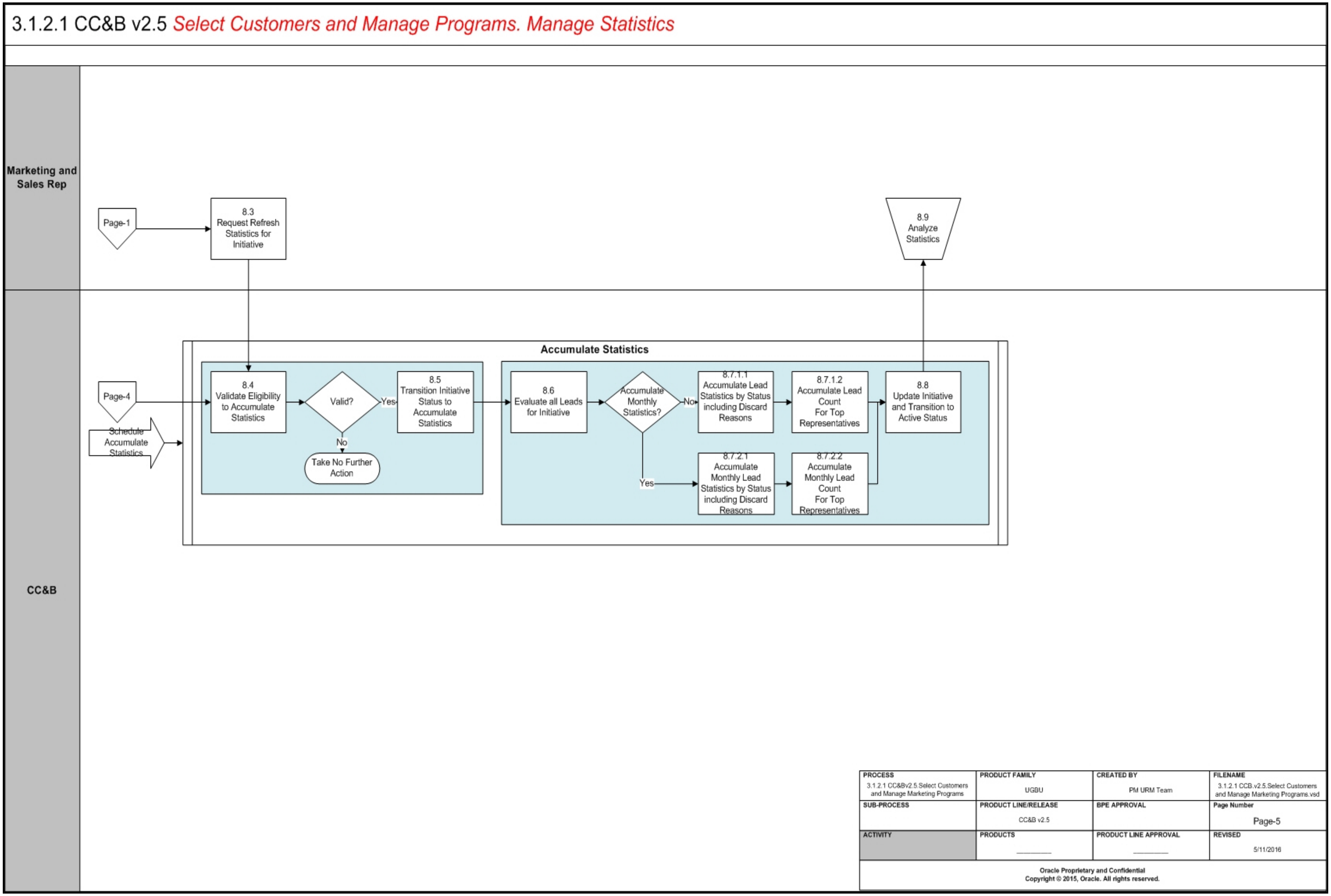
Select Customers and Manage Programs Process Model - Page 3



Select Customers and Manage Programs Process Model - Page 4



Select Customers and Manage Programs Process Model - Page 5



Select Customers and Manage Programs Detailed Process Model Description

This section provides a detailed description of the "Select Customers and Manage Programs" business process, including:

- 1.0 Analyze Request and Select Initiative
- 1.1 Populate Changes for an Initiative Update
- 1.2 Validate Changes and Perform Update
- 1.3 Request to Activate Initiative
- 1.4 Transition Initiative Active Status and Generate Batch Controls
- 1.5 Request Generate Leads
- 1.6 Identify Accounts Eligible for Initiative
- 1.7 Create Leads in Pending Status
- 1.8 Assign Representative to Leads
- 1.9 Transition Leads to Active Status and Create Lead Events in Pending Status
- 2.0 Request Deactivate Initiative
- 2.1 Transition Initiative Status to Inactive
- 2.2 Review Pending Leads
- 2.3 Populate Changes
- 2.4 Perform Update Lead
- 2.5 Request Activate Lead
- 2.6 Request Activate Leads via Lead Disposition
- 2.7 Select All Leads in Pending Status for Initiative
- 2.8 Request Delete Lead
- 2.9 Perform Delete Lead
- 3.0 Request Deletion Leads via Lead Disposition
- 3.1 Delete All Pending Leads
- 3.2 Identify Account
- 3.3 Select Active Initiative and Populate Required Data
- 3.4 Request Generate Lead
- 3.5 Request Select Specific Accounts
- 3.6 Identify Target Accounts
- 3.7 Create File and Place in Source Directory
- 3.8 Populate Required Data for Selected Active Initiative
- 3.9 Request Upload and Process File from Source Directory
- 4.0 Validate Accounts and Existing Leads for Accounts
- 4.1 Generate File Upload Statistics
- 4.2 Review Upload Results
- 4.3 Evaluate Lead Event Scheduled Complete Date
- 4.4 Determine CSS Preferred Notification Type
- 4.5 Create Sibling Lead Event "Create CSS Notification"
- 4.6 Evaluate Option "No Preference"
- 4.7 Create Sibling Lead Event "Send E-Mail"
- 4.8 Create Sibling Lead Event "Create Customer Contact"
- 4.9 Complete Lead Event
- 5.0 Cancel Pending Lead Events
- 5.1 Discard Lead
- 5.2 Construct E-Mail and Send CSS Notification
- 5.3 Process Request, Create and Send E-Mail
- 5.4 Receive Email

- 5.5 Construct SMS Message and Send CSS Notification
- 5.6 Process Notification, Create and Send SMS
- 5.7 Receive SMS
- 5.8 Validate Message
- 5.9 Create and Send SMS
- 6.0 Create and Send Email
- 6.1 Create and Send Sale Rep E-Mail
- 6.2 Create Temporary Bill Message
- 6.3 Validate Customer Contact Details
- 6.4 Create Customer Contact
- 6.5 Evaluate Conditions to Discard Lead
- 6.6 Evaluate Lead Success Criteria for Account
- 6.7 Transition Lead to Status Successful
- 6.8 Review Active Leads and Lead Events
- 6.9 Select Specific Lead
- 7.0 Request Discard Lead
- 7.1 Request Compete Lead
- 7.2 Modify Lead Details
- 7.3 Validate Changes
- 7.4 Perform Update
- 7.5 Review Active Lead and Lead Events
- 7.6 Select Event Type, Populate Details, and Request Add Event
- 7.7 Add Lead Events in Pending Status
- 7.8 Modify Event Data
- 7.9 Update Event
- 8.0 Request Complete Events
- 8.1 Request Cancel Event
- 8.2 Cancel Pending Lead Event
- 8.3 Request Refresh Statistics
- 8.4 Validate Eligibility to Accumulate Statistics
- 8.5 Transition Initiative Status to Accumulate Statistics
- 8.6 Evaluate All Leads for Initiative
- 8.7.1.1 Accumulate Lead Statistics by Status Including Discard Reasons
- 8.7.1.2 Accumulate Lead Count for Top Representatives
- 8.7.2.1 Accumulate Monthly Lead Statistics by Status Including Discard Reasons
- 8.7.2.2 Accumulate Monthly Lead Count for Top Representatives
- 8.8 Update Initiative and Transition to Active Status
- 8.9 Analyze Statistics

1.0 Analyze Request and Select Initiative

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative selects one of the existing initiatives that satisfies current business requirements and needs.

1.1 Populate Changes for an Initiative Update

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative evaluates existing Initiative and makes necessary changes to the main attributes of an initiative if it requires any adjustment to address business requirements.

1.2 Validate Changes and Perform Update

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The system validates any changes made to the initiative and updates the initiative record. The system further validates program management initiatives.

Entities to Configure

- Initiative Program Management Configuration (Master Configuration)

Business Objects

- C1-Initiative
- C1-InitiativeConservationProg
- C1-InitiativeContractOption
- C1-InitiativeService
- C1-InitiativeLite

Available Algorithms

- C1-INITVVAL (Initiative Validation)
- C1-VALCOPRRE (Validate Conservation Program)
- C1-VALCNOPRE (Validate Contract Option Initiative)
- C1-VALCPGNRE (Validate Campaign Initiative)

1.3 Request to Activate Initiative

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative requests activate pending or inactive the initiative.

1.4 Transition Initiative Active Status and Generate Batch Controls

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: The system transitions the initiative to Active status and attempts to create a lead generation and a lead disposition batch control using the template batch controls.

> **Note**: The template lead generation and a lead disposition batch controls are retrieved from the parent initiative.

Business Objects

- C1-Initiative
- C1-InitiativeConservationProg
- C1-InitiativeContractOption
- C1-InitiativeService
- C1-InitiativeLite
- C1-BatchControl

Available Algorithms

- C1-TRINSTAT (Transition to Accumulate Statistics)
- C1-CRINTVBT (Create Initiative Batch Controls

1.5 Request Generate Leads

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative requests generate predefined large number of Leads for the selected initiative by submitting Lead Generation process.

1.6 Identify Accounts Eligible for Initiative

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Group: Lead Generation

Actor/Role: CC&B

Description: This is the first step that takes place when application executes Lead Generation batch process submitted by user or automatically. CC&B identifies accounts eligible for the initiative by applying initiative eligibility criteria.

> **Note**: Templates for lead generation and a lead disposition batch controls are configured in the initiative.
>
> The initiative's lead generation batch control is constructed by concatenating the initiative code and a number. For example, when an initiative with code SMARTAC is activated, the system creates batch control SMARTAC1 for lead generation and SMARTAC2 for lead disposition.
>
> Each batch control's description is constructed by concatenating the template batch control's description and the initiative's description.

Process Names

- C1-LEADG (Lead Generation batch control)

Business Objects

- C1-InitiativeCriteria
- C1-InitvCurrentCommChannelCrit
- C1-InitvCurrentContractOptCrit
- C1-InitvCurrentRateCrit
- C1-InitvCurrentServiceTypeCrit
- C1-InitvCurrentSPTypeCrit
- C1-InitvFreeformCrit
- C1-InitvCritBundlingAddBO
- C1-InitvCritPhysicalBO

Available Algorithms

- C1-INITVAPCR - Apply Initiative Criteria
- C1-ICCHKAPAY (Check if account is on autopay)
- C1-ICCHKBUDG (Check if account is on budget)
- C1-ICDYLSTLD (Calculate days since last lead)
- C1-ICGETCC (Retrieve customer class)
- CI_AVGKWH (Retrieve average daily kWh usage)
- C1-ICGETCOCH (Retrieve all successful communication channels)
- C1-ICGETCOPR (Retrieve all conservation programs)
- C1-ICGETCOPT (Retrieve all contract options)
- C1-ICGETCITY (Retrieve cities)
- C1-GETACTVRT (Retrieve all active rates)
- C1-ICGETSPTY (Retrieve all SP types)
- C1-ICGETSVTY (Retrieve all service types)

1.7 Create Leads in Pending Status

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Group: Lead Generation

Actor/Role: CC&B

Description: The system creates Leads in Pending status using the initiative eligibility criteria. Application also provides information about return customers By generating the Lead in Pending state the system allows the user to verify the targeted customer before actively marketing the Initiative.

Business Objects

- C1-Lead
- C1-LeadAccount

Available Algorithms

- C1-LDACCTINF - Return Customer Information

1.8 Assign Representative to Leads

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Group: Lead Generation

Actor/Role: CC&B

Description: Further in the Lead Generation process, the system will link the created Leads to their respective Sales Representative. A sales representative is responsible for marketing or selling products and services to end customers. Two types of representatives are supported, namely groups and individuals.

Entities to Configure

- C1-LEADG

Business Objects

- C1-Lead
- C1-LeadAccount
- C1-SalesRepresentative
- C1-SalesRepIndividual
- C1-SalesRepGroup

Available Algorithms

- C1-LDALOCREP Allocate Lead Representative

1.9 Transition Leads to Active Status and Create Lead Events in Pending Status

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Group:

- Lead Generation
- Lead Disposition

Actor/Role: CC&B

Description: The Lead is activated and the Initiative is actively marketed to customers. When a lead is transitioned to the Active state, Lead Events are created to encourage the customer to participate in the Initiative.

> **Note**: The number and type of events are defined on the initiative's event template.
>
> Event trigger date is calculated for each lead event by adding the number of days defined on the initiative's event template to the lead creation date.

Entities to Configure

- Initiative, Lead Event Types

Business Objects

- C1-LEAD
- C1-LeadAccount

Available Algorithms

- C1-LDCRELDEV - Lead - Create Lead Events

2.0 Request Deactivate Initiative

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative deactivates the Initiative either temporarily or permanently depends on business requirements.

2.1 Transition Initiative Status to Inactive

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: The system transitions initiative to Inactive status.

Business Objects

- C1-Initiative
- C1-InitiativeConservationProg
- C1-InitiativeContractOption
- C1-InitiativeService

2.2 Review Pending Leads

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative reviews pending leads created for the targeted customers before actively market the Initiative.

2.3 Populate Changes

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative updates selected pending Leads if required.

2.4 Perform Update Lead

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: The system performs required updates.

Business Objects

- C1-LEAD
- C1-LeadAccount

2.5 Request Activate Lead

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative requests to activate selected pending Leads.

2.6 Request Activate Leads via Lead Disposition

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: To activate automatically large number of Pending Leads for an Initiative, the Marketing and Sales Representative submits Lead Disposition process.

2.7 Select All Leads in Pending Status for Initiative

Reference: Select Customers and Manage Programs Process Model - Page 1 on page 3 for the associated business process diagram.

Group: Lead Disposition

Actor/Role: CC&B

Description: This is the first step that takes place when application executes Lead Disposition batch process submitted by user or automatically. CC&B selects all the pending Leads for the Initiative that should to be either activated or deleted.

Process Names

- C1-LEADD (Lead Disposition Batch Control)

Entities to Configure

- Initiative
- Lead Event Type

Business Objects

- C1-LEAD
- C1-LeadAccount
- C1-Initiative

2.8 Request Delete Lead

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Upon review of the system generated pending Leads, Marketing and Sales Representative requests to delete a specific Lead.

2.9 Perform Delete Lead

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: The system deletes selected pending Lead that was erroneously generated.

Business Objects

- C1-LEAD
- C1-LeadAccount

3.0 Request Deletion Leads via Lead Disposition

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Upon review of pending Leads, a Marketing and Sales Representative requests to delete a group of Leads that were erroneously generated.

3.1 Delete All Pending Leads

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: The system utilizes the Lead Disposition batch process to delete a group of Leads that were erroneously generated.

Process Names

- C1-LEADD (Lead Disposition Batch Control)

Business Objects

- C1-LEAD
- C1-LeadAccount
- C1-Initiative

3.2 Identify Account

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Lead for Single Selected Account

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative determines if any of the specific accounts that should be part of one of the currently active programs.

3.3 Select Active Initiative and Populate Required Data

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Lead for Single Selected Account

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative identifies an active initiative that represents the program to which the customer should participate and populates required details.

Entities to Configure

- Initiative: Group Sales Representatives
- Individual Sales Representatives

3.4 Request Generate Lead

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Lead for Single Selected Account

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative requests generate Lead for a targeted account.

3.5 Request Select Specific Accounts

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Marketing and Sales Representative

Description: Sometimes business process requires identify and add a number of specific target accounts to existing active Initiative. The Marketing and Sales Representative initiates Account selection process.

Accounts could be selected manually or automatically using reporting software.

> **Note**: This process is used to generate leads for small number of accounts.

3.6 Identify Target Accounts

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Reporting Software

Description: Third party Reporting Software (or any other software) generates a list of selected accounts eligible for specific program represented by active Initiative.

3.7 Create File and Place in Source Directory

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Reporting Software

Description: The application creates one or more CSV files containing selected accounts and places them in specified directory.

> **Note**: This process is recommended for processing limited number of pre-selected accounts. It allows forcefully create Leads for any initiative and bypasses the Initiative's eligibility criteria.
>
> CSV file containing pre-selected accounts could be created manually by Marketing and Sales Representative as an exception.

3.8 Populate Required Data for Selected Active Initiative

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative populates all the required data.

3.9 Request Upload and Process File from Source Directory

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative selects the specific file containing list of accounts and requests to upload it.

4.0 Validate Accounts and Existing Leads for Accounts

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: CC&B

Description: Upon CSV file upload, CC&B validates the accounts from the list and existing leads these accounts.

> **Note**: BPA script C1-InitvLdUp (Initiative - Lead Upload) is used for loading accounts via CSV file.

4.1 Generate File Upload Statistics

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: CC&B

Description: The system generates statistics on whether the account was successfully or unsuccessfully uploaded and processed. A summary provides details of the action taken for each account (i.e. how many leads were successfully created, how many leads encountered error and how many accounts were skipped.

4.2 Review Upload Results

Reference: Select Customers and Manage Programs Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Create Leads for Group of Preselected Accounts

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative reviews file upload results.

4.3 Evaluate Lead Event Scheduled Complete Date

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Group: Monitor Event Trigger Date

Actor/Role: CC&B

Description: An initiative usually defines a structured marketing effort for the events or actions that take place during the life of a lead to encourage a customer to participate in a program. These Lead events have scheduled triggers dates for processing. CC&B monitors lead events completion dates and triggers event processing when event completion date is reached.

Process Names

- C1-LDEVT

Entities to Configure

- Lead Event Type

Business Objects

- C1-LeadEvent

Available Algorithms

- C1-LETRNCMP - Transition Event On/After Trigger Date

4.4 Determine CSS Preferred Notification Type

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The system executes this step only if CC&B is integrated with Oracle Utility Customer Self-Service (OUCSS) application. CC&B retrieves configured customer's preferred communication channel.

Entities to Configure

- CC&B Self Service Master Configuration
- Notification Service Task
- Lead Event Type

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification
- C1-LECNTFCSS - Create CSS Notification

4.5 Create Sibling Lead Event “Create CSS Notification”

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The system will create a CSS Notification Sibling Lead Event.

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification

4.6 Evaluate Option "No Preference"

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If customer didn't specify any preferences to communicate via customer self-service application CC&B automatically evaluates other options to contact customer. Usually these options are determined based on business requirements and available customer information (e.g. e-mail address stored in CC&B).

Entities to Configure

- Lead Event Type

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification

4.7 Create Sibling Lead Event "Send E-Mail"

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If customer's e-mail address is available in CC&B, CC&B creates sibling lead event "Send E-mail".

Entities to Configure

- Lead Event Type
- Message Category, Message Number

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification

4.8 Create Sibling Lead Event "Create Customer Contact"

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If system determines customer didn't provide self-service notification preferences and e-mail is also not available CC&B creates sibling lead event "Create Customer Contact" to initiate communication to the customer.

Entities to Configure

- Lead Event Type

Business Objects

- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification

4.9 Complete Lead Event

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: Upon the successful completion of a Lead event, the system transitions lead event to complete status.

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECMRKPF - Customer Communication Preference Notification

5.0 Cancel Pending Lead Events

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If currently processing event couldn't be completed successfully and communication with customer couldn't be initiated, CC&B transitions lead event to cancel status. It also cancels rest of the pending events (if any).

Business Objects

- C1-Lead

Available Algorithms

- C1-LDCANCEL

5.1 Discard Lead

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: When a Lead Event is not successful and the pending lead events have been canceled, CC&B transitions Lead to discard state.

Entities to Configure

- C1-Lead

5.2 Construct E-Mail and Send CSS Notification

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If customer indicated e-mail as preferred communication channel, CC&B constructs email and initiates sending process to customer using OUCSS application.

Entities to Configure

- CC&B Self Service Master Configuration
- Notification Service Task
- Lead Event Type

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECNTFCSS - Create CSS Notification

5.3 Process Request, Create and Send E-Mail

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS creates and send the email to the customer.

5.4 Receive Email

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: Customer

Description: The customer receives the email.

5.5 Construct SMS Message and Send CSS Notification

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If customer indicated SMS as preferred communication channel, CC&B constructs message and initiates sending process to customer using OUCSS application.

Entities to Configure

- CC&B Self Service Master Configuration
- Notification Service Task
- Lead Event Type

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeUseCustomerPref

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECNTFCSS - Create CSS Notification

5.6 Process Notification, Create and Send SMS

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: Customer

Description: OUCSS creates and sends the SMS (text) message to the customer.

5.7 Receive SMS

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram associated with this activity.

Actor/Role: Customer

Description: The customer receives the SMS (text) message.

5.8 Validate Message

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The system validates the details and information required to construct SMS or e-mail.

Business Objects

- C1-LeadEventType
- C1-LeadEvtTypeCreSMSAbtInitv

Available Algorithms

- C1-LDEVTYMVA(Create Email or SMS Message Validation)

5.9 Create and Send SMS

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: If customer provided phone number that allows sending SMS, the system creates and sends the SMS to the customer.

> **Note**: Service Script C1-SmsSend (Send SMS Message) is used to send message.

Entities to Configure

- Installation Options
- C1-LeadEventType

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeCreSMSAbtInitv

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LETCRESMS - Create Lead SMS

6.0 Create and Send Email

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: If customer provided e-mail address, the system creates and sends the e-mail to the customer.

> **Note**: The script C1-EmailSvc (Send Email) is responsible for sending once the email has been created.

Entities to Configure

- Outbound Message Type
- C1-LeadEventType
- External System
- Message Sender

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeCreEmailAbtInitv

Available Algorithms

- C1-LECOMP Complete Lead Event
- C1-LECINCUSE Create Lead Email

6.1 Create and Send Sale Rep E-Mail

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B constructs and sends e-mail to Sales Representative.

> **Note**: The script C1-EmailSvc (Send Email) is responsible for sending once the email has been created.

Entities to Configure

- Outbound Message Type
- C1-LeadEventType
- External System
- Message Sender

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeCreEmailAbtLead

Available Algorithms

- C1-LECOMP - Complete Lead Event
- C1-LECINREPE - Create Sales Representative Email

6.2 Create Temporary Bill Message

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The system gathers account information and creates a temporary bill message for leads' account. A notification lead event and lead log entry is added to track the creation of the bill message.

Entities to Configure

- C1-LeadEventType

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeCreBillInsAbtIni

Available Algorithms

- C1-LECOMP - Complete Lead Event
- C1-LECCREBI - Create Lead Bill Message

6.3 Validate Customer Contact Details

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The system validates Customer Contact Details.

Entities to Configure

- Customer Contact Type
- Customer Contact Class

Business Objects

- C1-LeadEvtTypeCreCCAbtInitv

Available Algorithms

- C1-LDEVTYCCV -Create Customer Contact Event Type Validation

6.4 Create Customer Contact

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: A customer contact is created for the main person linked to the leads' account.

Entities to Configure

- C1-LeadEventType

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeCreCCAbtInitv

Available Algorithms

- C1-LECOMP - Complete Lead Event
- C1-LETCRECC -Create Lead Customer Contact

6.5 Evaluate Conditions to Discard Lead

Reference: Select Customers and Manage Programs Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: It's a common business practice to discard leads after the lead has been active for number of days. This period is configured and controlled by business. This functionality is enabled by adding Discard Lead event to the lead.

The application determines if time elapsed between current date and lead's status/update time.

Entities to Configure

- C1-LeadEventType

Business Objects

- C1-LeadEvent
- C1-LeadEventType
- C1-LeadEvtTypeDiscardLead

Available Algorithms

- C1-LECOMP - Complete Lead Event
- C1-LECDISCLD - Discard Lead

6.6 Evaluate Lead Success Criteria for Account

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Group: Monitor Lead Completion

Actor/Role: CC&B

Description: The system checks if a lead has been successful by evaluating Lead Success Criteria for initiative. CC&B attempts to determine if any changes occur in the application in response to the lead related activity. For example, if the initiative's leads encourage a customer to file a rebate claim, this algorithm will look for a rebate claim for the lead's account linked to the initiative's conservation program.

Process Names

- C1-LDTR - Lead Periodic Monitor Process

Business Objects

- C1-Lead (Lead)
- C1-Initiative
- C1-InitiativeConservationProg
- C1-InitiativeContractOption
- C1-InitiativeService
- C1-InitiativeLite
- C1-BatchControl

Available Algorithms

- C1-LDCHKSCS - Determine lead success
- C1-CHKCOMPRC - Rebate Claim Lead Success
- C1-CHKSACOPT - SA Contract Option Lead Success
- C1-CHKCOMPOR - Order Lead Success

6.7 Transition Lead to Status Successful

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: Application transitions Lead to status Successful.

For Manual Process: BPA script C1-TranLead Transition Lead to Success is available and responsible for transitioning lead to 'Successful' status.

6.8 Review Active Leads and Lead Events

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: In an attempt to manage his assigned Leads, the Marketing and Sales Representative reviews his active Leads and Lead Events.

6.9 Select Specific Lead

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative selects a specific event to process manually.

7.0 Request Discard Lead

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: If required the Marketing and Sales Representative requests to discard selected lead for an initiative.

7.1 Request Compete Lead

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative requests to complete the lead if success criteria determined for initiative has been met.

7.2 Modify Lead Details

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The Marketing and Sales Representative makes changes in the selected Lead record

> **Note**: BPA Script (C1-LeadMain) Lead Maintenance is responsible for any modification on lead details.

7.3 Validate Changes

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The system validates eligibility of sales representative assignment to the lead.

Entities to Configure

- Group Sales Representatives, Individual Sales Representatives

Business Objects

- C1-Lead

Available Algorithms

- C1-LEADPOST - Lead Post Processing

7.4 Perform Update

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The system performs required updates.

7.5 Review Active Lead and Lead Events

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: In an attempt to manage assigned Leads, the Marketing and Sales Representative reviews Leads and Lead Events.

7.6 Select Event Type, Populate Details, and Request Add Event

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative determines that a new Lead Event must be added to the selected Lead. The representative selects required Lead Event Type, populate the details and request the new Lead Event be added to the existing Lead.

> **Note**: BPA Script C1-LdEvtAdd(Lead Event - Add) is available for adding lead events.

7.7 Add Lead Events in Pending Status

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B adds Lead Event in pending status to the Lead.

Entities to Configure

- Lead Event Type

Business Objects

- C1-Lead

7.8 Modify Event Data

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: The Marketing and Sales Representative updates Lead Event if required after review.

7.9 Update Event

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The system performs required updates.

> **Note**: BPA Script C1-LdEvtMain (Lead Event - Maintenance) is invoked when modifying lead events.

Entities to Configure

- Lead Event Type

Business Objects

- C1-Lead

8.0 Request Complete Events

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Upon review, the Marketing and Sales Representative requests manually complete a Lead Event.

8.1 Request Cancel Event

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Upon review, the Marketing and Sales Representative requests to cancel a Lead Event if required.

8.2 Cancel Pending Lead Event

Reference: Select Customers and Manage Programs Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B transitions Lead Event to Canceled status.

Business Objects

- C1-Lead

8.3 Request Refresh Statistics

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative requests to refresh statistics for the initiative if business requires monitoring the statistics associated with the initiatives (e.g. the number of Pending, Active, or Completed Leads).

8.4 Validate Eligibility to Accumulate Statistics

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: CC&B validates ability to accumulate statistics for initiatives. This step could be executed automatically (by background initiative periodic monitor process) or manually.

Automated Process: System checks if enough time elapsed since last time statistics were accumulated for the initiative based on configured statistics frequency.

Manual Process: Application allows users request accumulated statistics for the initiative any time based on current business needs.

Process Names

- C1-INITR - Initiative Periodic Monitor Process

Business Objects

- C1-Initiative

Available Algorithms

- C1-TRINSTAT - Transition to Accumulate Statistics

8.5 Transition Initiative Status to Accumulate Statistics

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: CC&B transitions the initiative to Accumulate Statistics status based on User request or if the initiative is eligible for periodic statistics accumulation.

Business Objects

- C1-Initiative

8.6 Evaluate All Leads for Initiative

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: CC&B retrieves all the leads in all statuses linked to the initiative.

Business Objects

- C1-Initiative

Available Algorithms

- C1-ACCSTAT - Accumulate Statistics status

8.7.1.1 Accumulate Lead Statistics by Status Including Discard Reasons

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: The system calculates number of Leads in each status (i.e, Pending, Active, Success and Discard.) as of the Statistics Date/Time on the initiative. For the Discard state, information is sorted by valid reason codes.

Entities to Configure

- Program Management Configuration

Business Objects

- C1-Initiative

Available Algorithms

- C1-ACCSTAT(Accumulate Statistics status algo)

8.7.1.2 Accumulate Lead Count for Top Representatives

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: Application accumulates statistics for the top individual Sales Representatives for the initiative (i.e sales representatives with the largest number of active leads assigned to them as of the Statistics Date/Time).

> **Note**: Application displays data for the top 5 sales representatives that are represented by unique color.

8.7.2.1 Accumulate Monthly Lead Statistics by Status Including Discard Reasons

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: If there is a requirement to represent monthly statistics, CC&B calculates the number of open, completed and discarded leads each month. Open leads are calculated as the sum of pending and active leads. Application also accumulates statistics for the top 4 discard reasons each month. Statistics for all other discard reasons are accumulated in a catch-all “other” bucket.

This step is performed if enough time has elapsed to accumulate monthly statistics.

Entities to Configure

- Program Management Configuration

Business Objects

- C1-Initiative

Available Algorithms

- C1-ACCSTAT(Accumulate Statistics status algo)

8.7.2.2 Accumulate Monthly Lead Count for Top Representatives

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: CC&B accumulates monthly statistics the top individual representatives for the initiative in context, i.e. representatives with the largest number of active leads assigned to them as of the process date.

8.8 Update Initiative and Transition to Active Status

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Group: Accumulate Statistics

Actor/Role: CC&B

Description: Upon the completion of the Accumulate Statistics process, CC&B transitions the initiative status to Active.

Business Objects

- C1-Initiative

Available Algorithms

- C1-ACCSTAT(Accumulate Statistics status algo)

8.9 Analyze Statistics

Reference: Select Customers and Manage Programs Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: Marketing and Sales Representative

Description: Marketing and Sales Representative reviews and analyzes the initiative statistics.

Related Training

The following User Productivity Kit modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data