C2M.v2.7.CCB

3.1.2.1 Select Customers and Manage Programs

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ORACLE

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Brief Description

Business Process: **3.1.2.1 C2M.CCB.Select Customers and Manage Marketing Programs**
Process Type: **Process**
Parent Process: **3.1.2 C2M.CCB.Manage Marketing Programs**
Sibling Processes:

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 Customer/Account(s) selected by business user

C2M(CCB) 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 is achieved and C2M(CCB) 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.

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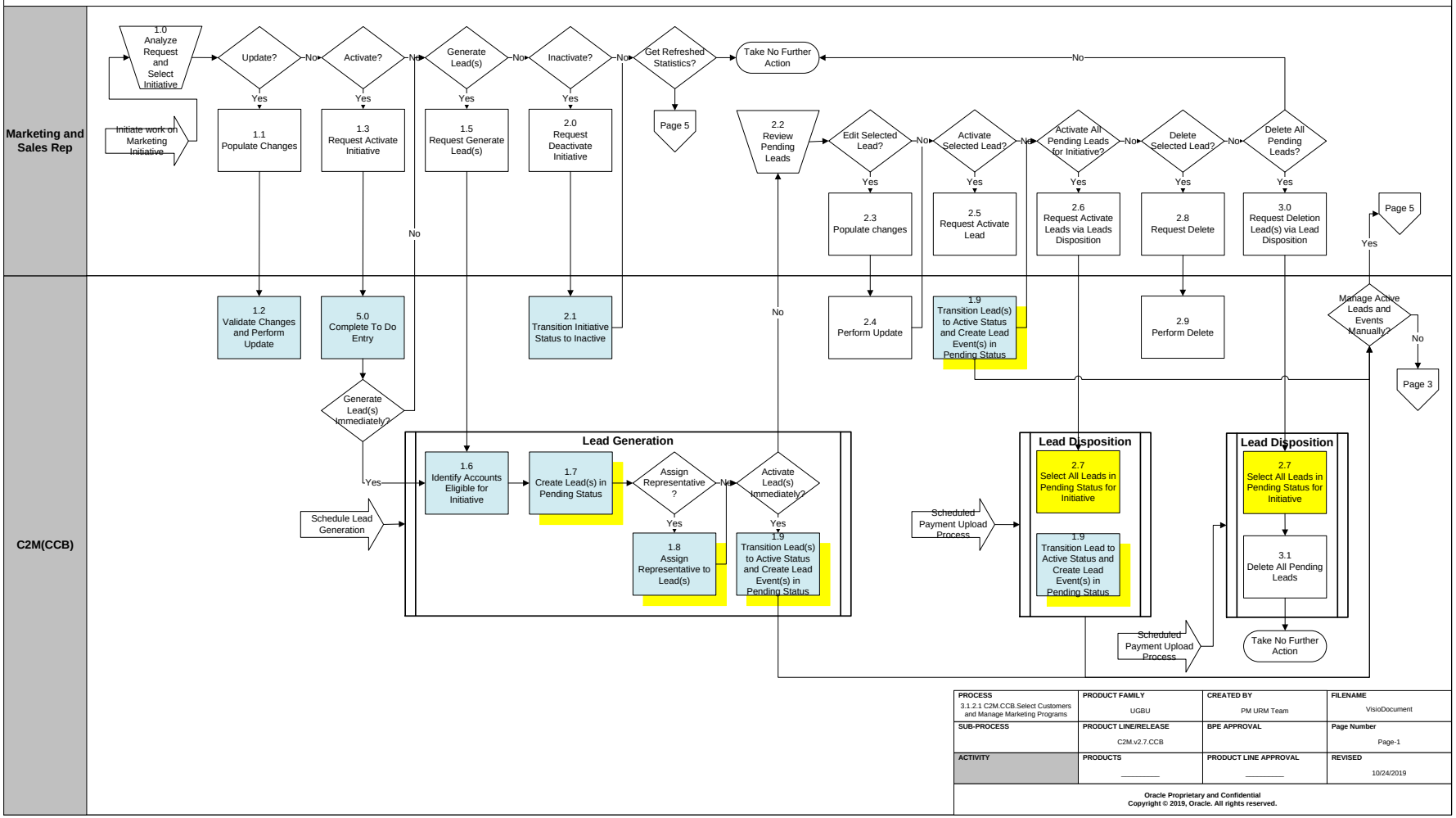
Business Process Model Page 1

3.1.2.1 C2M.v2.7.CCB *Select Customers and Manage Marketing Programs. Identity Target Customers and Create Leads*



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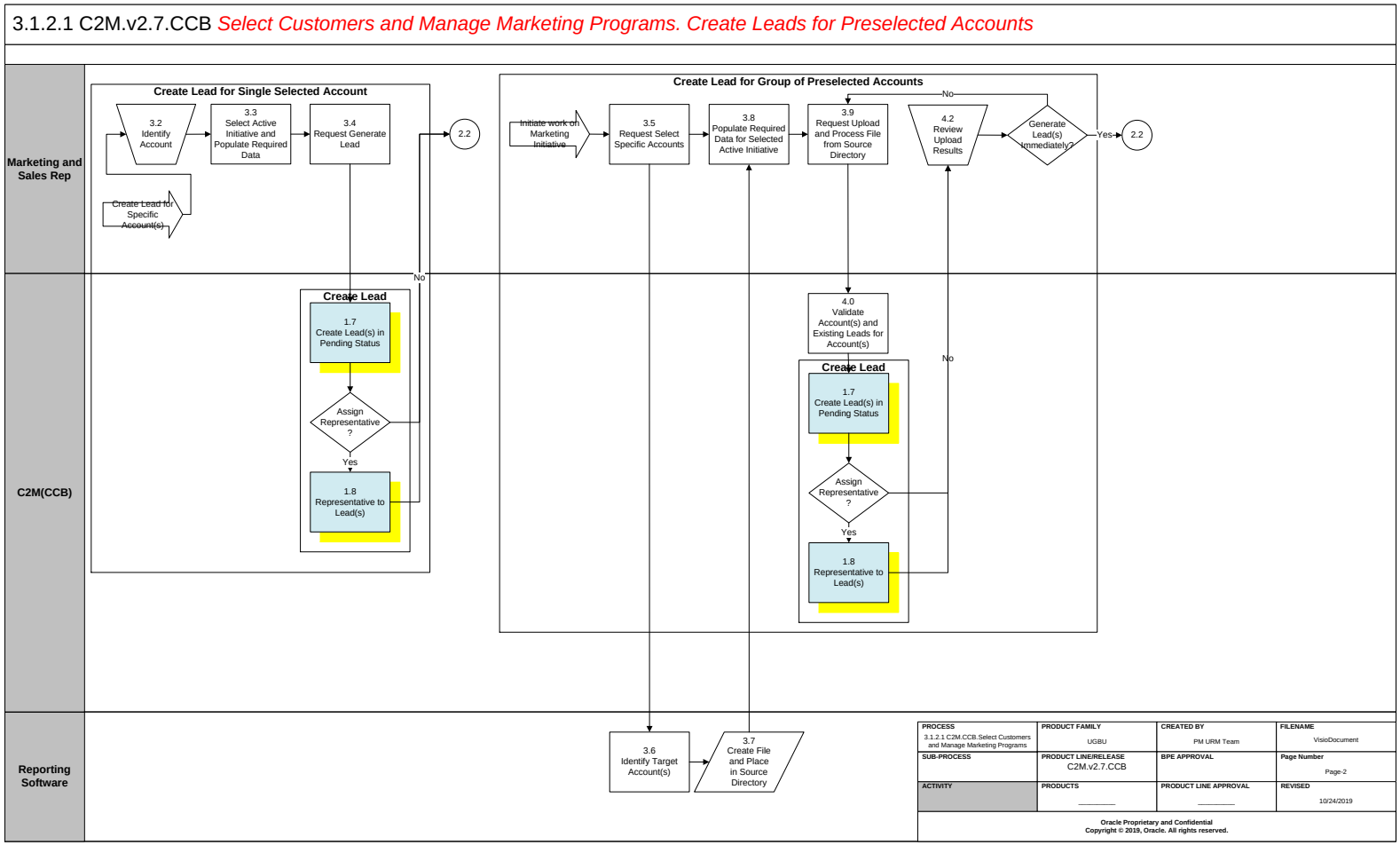

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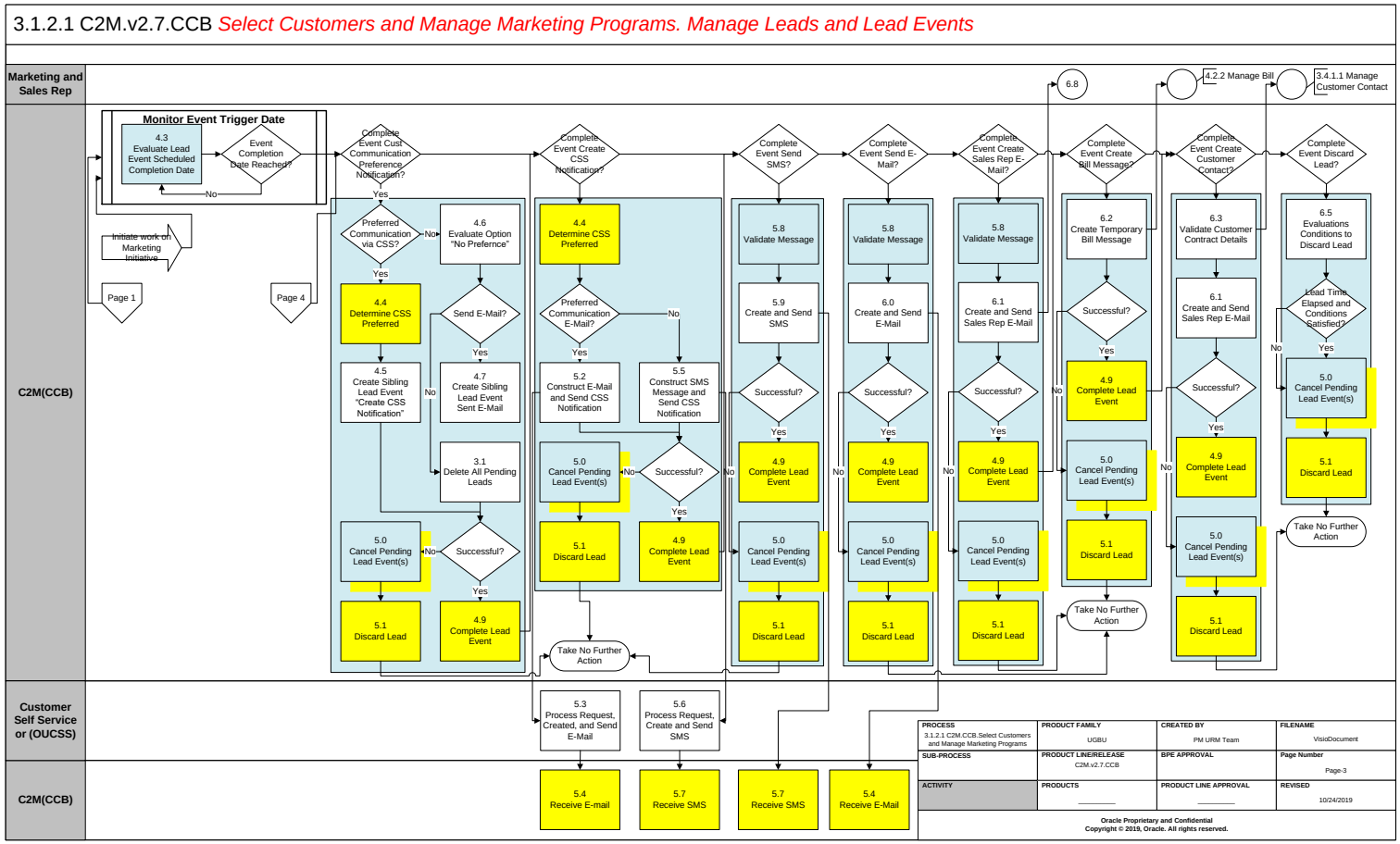

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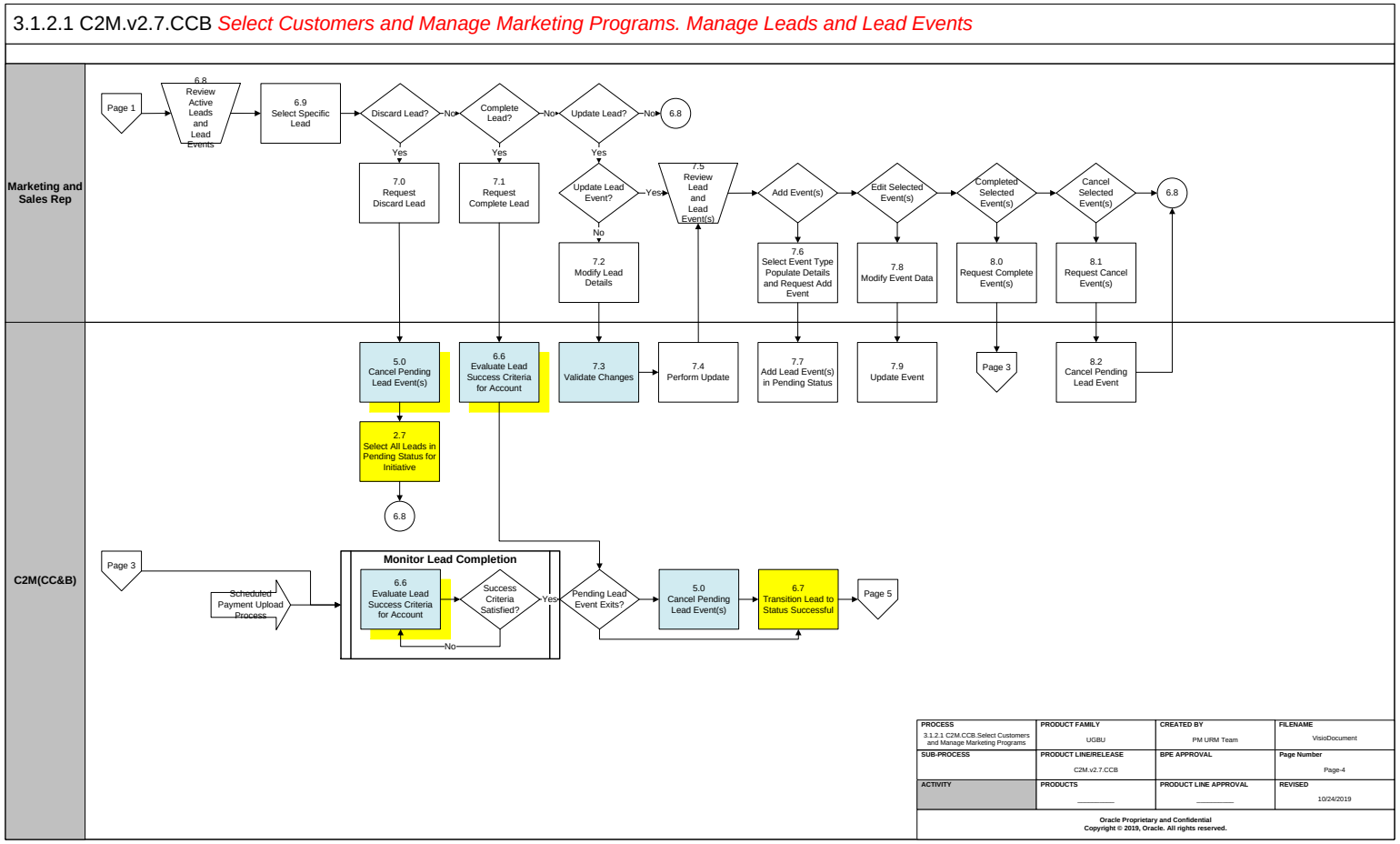

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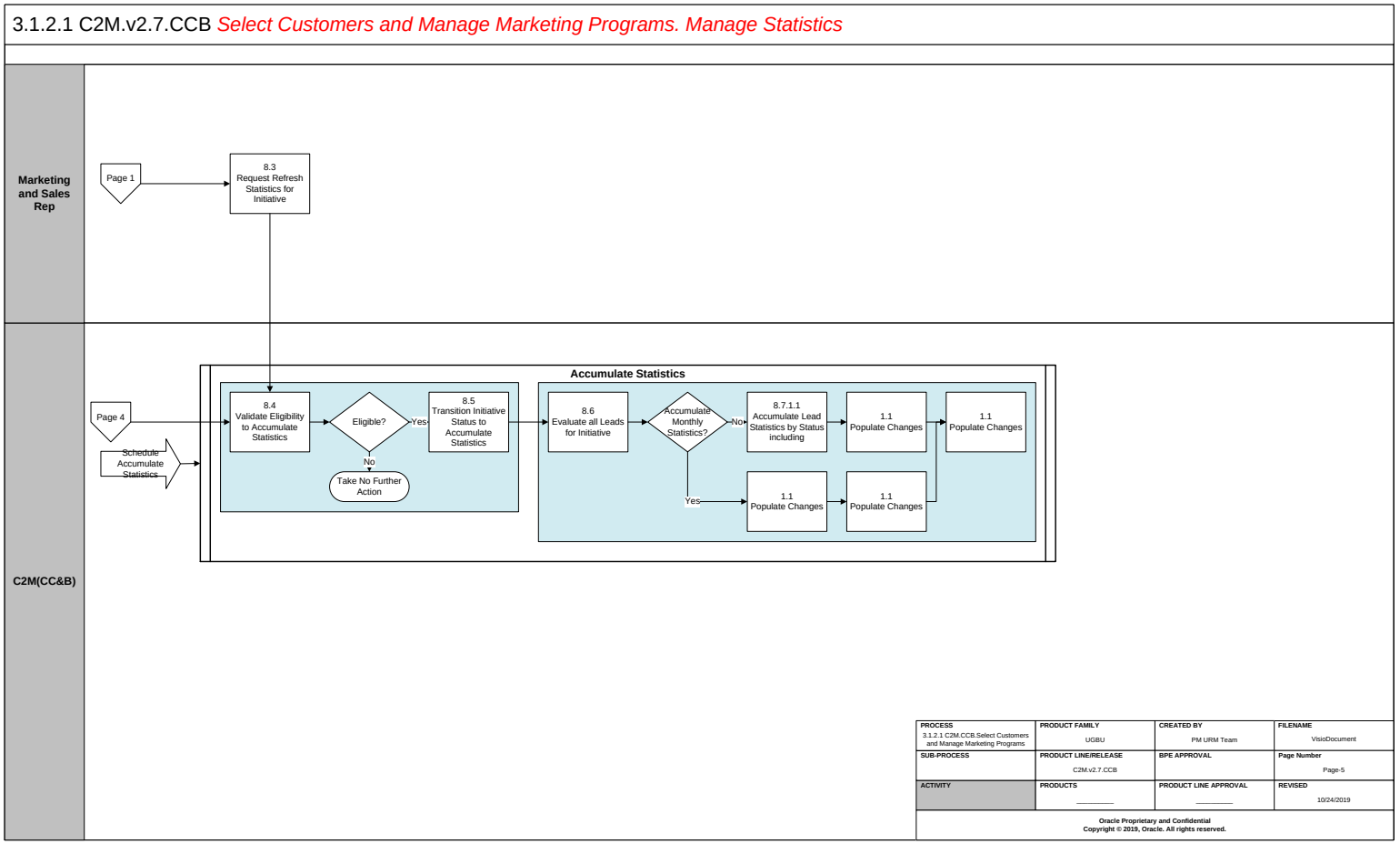

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Detail Business Process Model Description

1.0 Analyze Request and Select Initiative

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

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

Actor/Role: C2M(CCB)
Description:
The system validates any changes made to the Initiative and updates the Initiative record. The system further validates program management initiatives.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-INITVVAL - Initiative Validation C1-VALCOPRRE - Validate Conservation Program C1-VALCNOPRE - Validate Contract Option Initiative C1-VALCPGNRE - Validate Campaign Initiative
Business Object (Y)	**Business Object:**	C1-Initiative C1-InitiativeConservationProg C1-InitiativeContractOption C1-InitiativeService C1-InitiativeLite
Configuration required (Y)	**Entities to Configure:**	Initiative Program Management Configuration (Master Configuration)

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1.3 Request to Activate Initiative

Actor/Role: Marketing and Sales Representative
Description:
The Marketing and Sales Representative requests activate pending or inactive Initiative.

1.4 Transition Initiative Active Status and Generate Batch Controls

Actor/Role: C2M(CCB)
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.

Process Plug-in enabled Y **Available Algorithm(s):**

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

Business Object (Y) **Business Object:**

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

1.5 Request Generate Lead(s)

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

1.6 Identify Accounts Eligible for Initiative. Group: Lead Generation

Actor/Role: C2M(CCB)
Description:
This is the first step that takes place when application executes Lead Generation batch process submitted by user or automatically. C2M(CCB) 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 Initiative.

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- 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 Plug-in enabled (Y) **Available Algorithm(s):**

C1-OPENLDALR - Retrieve Open Leads
C1-ICACCUVAL - Is Account Current Criteria Validation
C1-ICCMCHVAL - Communication Channel Criteria Validation
C1-ICCNPGVAL - Conservation Program Criteria Validation
C1-ICCOOPGVA - Contract Option Criteria Validation
C1-ICGEOVVAL - Geographic Value Criteria Validation
C1-ICPRSPVAL - Premise SP Type Criteria Validation
C1-ICRTSCVAL - Rate Schedule Criteria Validation
C1-ICSPTYVAL - SP Type Criteria Validation
C1-ICSVTYVAL - Service Type Criteria Validation
C1-INITVAPCR - Apply Initiative Criteria
C1-INTCRIVAL - Freeform Initiative Criteria Validation

Business Object (Y) **Business Object:**

C1-InitiativeCriteria - Initiative Criteria
C1-InitvAccountAutopay - Is Account on Autopay Criteria
C1-InitvAccountBudget - Is Account on Budget Criteria
C1-InitvAcctCustomerClass - Customer Class Criteria
C1-InitvAverageServiceQty - Average Service Quantity Criteria
C1-InitvCurrentAccount - Is Account Current Criteria
C1-InitvCurrentCommChannelCrit - Communication Channel Criteria
C1-InitvCurrentConsvProgCrit - Conservation Program Criteria
C1-InitvCurrentContractOptCrit - Contract Option Criteria
C1-InitvCurrentRateCrit - Rate Schedule Criteria
C1-InitvCurrentSPTypeCrit - SP Type Criteria
C1-InitvCurrentServiceTypeCrit - Service Type Criteria
C1-InitvDaysLastLead - Number of Days Since Last Lead Criteria
C1-InitvFreeformCrit - Freeform Criteria
C1-InitvGeoValueCrit - Geographic Value Criteria
C1-InitvPremiseCities - Premise Cities Criteria
C1-InitvPremiseSPTypeCrit - Premise SP Type Criteria

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C1-PremFreeformCrit - Freeform Premise Criteria
C1-PremiseInitiativeCriteria - Premise Initiative Criteria

Customizable process (N) **Process Name**

C1-LEADG - Lead Generation batch control

1.7 Create Lead(s) in Pending Status. Group: Lead Generation

Actor/Role: C2M(CCB)
Description:
The system creates Leads in Pending status using the Initiative's 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.

Process Plug-in enabled (Y) **Available Algorithm(s):**

C1-LDACCTINF - Account Lead Customer Information

Business Object (Y) **Business Object:**

C1-Lead - Lead
C1-LeadAccount - Account Lead
C1-AdvancedAnalysisLead - Advanced Analysis System Lead

1.8 Assign Representative to Lead(s) Group: Lead Generation

Actor/Role: C2M(CCB)
Description:
Further in the Lead Generation process, the system will link the created Lead(s) 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.

Process Plug-in enabled (Y) **Available Algorithm(s):**

C1-LDALOCREP Allocate Lead Representative

Business Object (Y) **Business Object:**

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

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Configuration required (Y)	**Entities to Configure:**	Group Sales Representatives, Individual Sales Representatives
		Initiative

1.9 Transition Lead(s) to Active Status and Create Lead Events(s) in Pending Status. Group: Lead Generation

Group: Lead Disposition

A**ctor/Role: C2M(CCB)**
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.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LDCRELDEV - Lead – Create Lead Events
Business Object (Y)	**Business Object:**	C1-LEAD
		C1-LeadAccount
Configuration required (Y)	**Entities to Configure:**	Initiative
		Lead Event Types

2.0 Request Deactivate Initiative

A**ctor/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

A**ctor/Role: C2M(CCB)**
Description:
The system transitions initiative to Inactive status.

C1-Initiative
C1-InitiativeConservationProg
C1-InitiativeContractOption

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Business Object (Y)	Business Object:	C1-InitiativeService

2.2 Review Pending Leads

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

Actor/Role: Marketing and Sales Representative
Description:
Marketing and Sales Representative updates selected pending Lead(s) if required.

2.4 Perform Update Lead

Actor/Role: C2M(CCB)
Description:
The system performs required updates.

Business Object (Y)	Business Object:	C1-LEAD
		C1-LeadAccount

2.5 Request Activate Lead

Actor/Role: Marketing and Sales Representative
Description:
Marketing and Sales Representative requests to activate selected pending Lead(s).

2.6 Request Activate Leads via Lead Disposition

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

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2.7 Select All Leads in Pending Status for Initiative. Group: Lead Disposition

Actor/Role: C2M(CCB)
Description:
This is the first step that takes place when application executes Lead Disposition batch process submitted by user or automatically. C2M(CCB) selects all the pending Leads for the Initiative that should to be either activated or deleted

Business Object (Y)	**Business Object:**	C1-LEAD
		C1-LeadAccount
		C1-Initiative
Configuration required (Y)	**Entities to Configure:**	Initiative
		Lead Event Type
Customizable process (Y)	**Process Name**	C1-LEADD (Lead Disposition batch control)

2.8 Request Delete Lead

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

Actor/Role: C2M(CCB)
Description:
The system deletes selected pending Lead that was erroneously generated.

Business Object (Y)	**Business Object:**	C1-LEAD
		C1-LeadAccount

3.0 Request Deletion Lead(s) via Lead Disposition

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.

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3.1 Delete All Pending Lead(s)

Actor/Role: C2M(CCB)
Description:
The system utilizes the Lead Disposition batch process to delete a group of Leads that were erroneously generated.

Business Object (Y)	**Business Object:**	C1-LEAD
		C1-LeadAccount
		C1-Initiative
Customizable process (N)	**Process Name**	C1-LEADD (Lead Generation batch control)

3.2 Identify Account. 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. Group: Create Lead for Single Selected Account

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

Configuration required (Y)	**Entities to Configure:**	Initiative
		Group Sales Representatives, Individual Sales Representatives

3.4 Request Generate Lead. 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. Lead is created in Pending status.

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3.5 Request Select Specific Accounts. Group: Create Leads for Group of Preselected Accounts

A**ctor/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 Account(s). Group: Create Leads for Group of Preselected Accounts

A**ctor/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. Group: Create Leads for Group of Preselected Accounts

A**ctor/Role: Reporting Software**
Description:
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.

Note: 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. Group: Create Leads for Group of Preselected Accounts

A**ctor/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. Group: Create Leads for Group of Preselected Accounts

A**ctor/Role: Marketing and Sales Representative**
Description:
Marketing and Sales Representative selects the specific file containing list of accounts and requests to upload it.

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4.0 Validate Account(s) and Existing Leads for Account(s). Group: Create Leads for Group of Preselected Accounts

A**ctor/Role: C2M(CCB)**
Description:
Upon CSV file upload, C2M(CCB) 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. Group: Create Leads for Group of Preselected Accounts

A**ctor/Role: C2M(CCB)**
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. Group: Create Leads for Group of Preselected Accounts

A**ctor/Role: Marketing and Sales Representative**
Description:
The Marketing and Sales Representative reviews file upload results.

4.3 Evaluate Lead Event Scheduled Complete Date Group: Monitor Event Trigger Date

A**ctor/Role: C2M(CCB)**
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. C2M(CCB) monitors lead event(s) completion dates and triggers event processing when event completion date is reached

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LETRNCMP - Transition Event On/After Trigger Date
Business Object (Y)	**Business Object:**	C1-LeadEvent
Configuration required (Y)	**Entities to Configure:**	Lead Event Type
Customizable process (N)	**Process Name**	C1-LDEVT - Lead Event Periodic Monitor Process

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4.4 Determine CSS Preferred Notification Type

A**ctor/Role: C2M(CCB)**
Description:
The system executes this step only if C2M(CCB) is integrated with Oracle Utility Customer Self-Service (OUCSS) application. C2M(CCB) retrieves configured customer's preferred communication channel

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LECMRKPF – Customer Communication Preference Notification
		C1-LECNTFCSS – Create CSS Notification

Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeUseCustomerPref

Configuration required (Y)	**Entities to Configure:**	CC&B Self-Service Integration - Master Configuration
		Notification Service Task
		Lead Event Type

4.5 Create Sibling Lead Event "Create CSS Notification"

A**ctor/Role: C2M(CCB)**
Description:
The system will create a CSS Notification Sibling Lead Event.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LECMRKPF – Customer Communication Preference Notification

Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeUseCustomerPref

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4.6 Evaluate Option "No Preference"

A**ctor/Role: C2M(CCB)**
Description:
If customer didn't specify any preferences to communicate via customer self-service application C2M(CCB) 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 C2M(CCB)).

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event C1-LECMRKPF - Customer Communication Preference Notification
Business Object (Y)	**Business Object:**	C1-LeadEvent C1-LeadEventType C1-LeadEvtTypeUseCustomerPref
Configuration required (Y)	**Entities to Configure:**	Lead Event Type

4.7 Create Sibling Lead Event "Send E-Mail"

A**ctor/Role: C2M(CCB)**
Description:
If customer's e-mail address is available in C2M(CCB), C2M(CCB) creates sibling lead event "Send E-mal"

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event C1-LECMRKPF – Customer Communication Preference Notification
Business Object (Y)	**Business Object:**	C1-LeadEvent C1-LeadEventType C1-LeadEvtTypeUseCustomerPref
Configuration required (Y)	**Entities to Configure:**	Lead Event Type Message Category, Message Number

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4.8 Create Sibling Lead Event "Create Customer Contact"

Actor/Role: C2M(CCB)
Description:
If system determines customer didn't provide self-service notification preferences and e-mail is also not available C2M(CCB) creates sibling lead event "Create Customer Contact" to initiate communication to the customer.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event C1-LECMRKPF – Customer Communication Preference Notification
Business Object (Y)	**Business Object:**	C1-LeadEventType C1-LeadEvtTypeUseCustomerPref
Configuration required (Y)	**Entities to Configure:**	Lead Event Type

4.9 Complete Lead Event

Actor/Role: C2M(CCB)
Description:
Upon the successful completion of a Lead event, the system transitions lead event to complete status

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event C1-LECMRKPF – Customer Communication Preference Notification
Business Object (Y)	**Business Object:**	C1-LeadEvent C1-LeadEventType C1-LeadEvtTypeUseCustomerPref

5.0 Cancel Pending Lead Event(s)

Actor/Role: C2M(CCB)
Description:
If currently processing event couldn't be completed successfully and communication with customer couldn't be initiated, C2M(CCB) transitions lead event to cancel status. It also cancels rest of the pending events(if any).

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LDCANCEL

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Business Object (Y)	**Business Object:**	C1-Lead

5.1 Discard Lead

A**ctor/Role: C2M(CCB)**
Description:
When a Lead Event is not successful and the pending lead events have been canceled, C2M(CCB) transitions Lead to discard state.

Business Object (Y)	**Business Object:**	C1-Lead

5.2 Construct E-Mail and Send CSS Notification

A**ctor/Role: C2M(CCB)**
Description:
If customer indicated e-mail as preferred communication channel, C2M(CCB) constructs email and initiates sending process to customer using OUCSS application

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LECNTFCSS – Create CSS Notification
Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeUseCustomerPref

Configuration required (Y)	**Entities to Configure:**	C2M(CCB) Self Service Master Configuration
		Notification Service Task
		Lead Event Type

5.3 Process Request, Create and Send E-Mail

A**ctor/Role: OUCSS**
Description:
OUCSS creates and send the email to the customer.

5.4 Receive Email

A**ctor/Role: Customer**
Description:

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The customer receives the email.

5.5 Construct SMS Message and Send CSS Notification

Actor/Role: C2M(CCB)
Description:
If customer indicated SMS as preferred communication channel, C2M(CCB) constructs message and initiates sending process to customer using OUCSS application

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LECNTFCSS - Create CSS Notification
Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeUseCustomerPref
Configuration required (Y)	**Entities to Configure:**	C2M(CCB) Self Service Master Configuration
		Notification Service Task
		Lead Event Type

5.6 Process Notification, Create and Send SMS

Actor/Role: Customer
Description:
OUCSS creates and sends the SMS (text) message to the customer.

5.7 Receive SMS

Actor/Role: Customer
Description:
The customer receives the SMS (text) message.

5.8 Validate Message

Actor/Role: C2M(CCB)

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

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LDEVTYMVA - Create Email or SMS Message Validation
Business Object (Y)	**Business Object:**	C1-LeadEventType
		C1-LeadEvtTypeCreSMSAbtInitv

5.9 Create and Send SMS

A**ctor/Role: C2M(CCB)**
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.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LETCRESMS - Create Lead SMS
Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeCreSMSAbtInitv
Configuration required (Y)	**Entities to Configure:**	Installation Options
		C1-LeadEventType

6.0 Create and Send Email

A**ctor/Role: C2M(CCB)**
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

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP Complete Lead Event
		C1-LECINCUSE Create Lead Email
Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeCreEmailAbtInitv
		Outbound Message Type

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Configuration required (Y)	**Entities to Configure:**
	C1-LeadEventType
	External System
	Message Sender
	Feature Configuration

6.1 Create and Send Sale Rep E-Mail

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) 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

Process Plug-in enabled (Y)	**Available Algorithm(s):**
	C1-LECOMP - Complete Lead Event
	C1-LECINREPE - Create Sales Representative Email

Business Object (Y)	**Business Object:**
	C1-LeadEvent
	C1-LeadEventType
	C1-LeadEvtTypeCreEmailAbtLead

Configuration required (Y)	**Entities to Configure:**
	Outbound Message Type,
	External System
	Message Sender
	C1-LeadEventType
	Feature Configuration

6.2 Create Temporary Bill Message

A**ctor/Role: C2M(CCB)**
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.

Process Plug-in enabled (Y)	**Available Algorithm(s):**
	C1-LECOMP - Complete Lead Event
	C1-LECCREBI - Create Lead Bill Message

Business Object (Y)	**Business Object:**
	C1-LeadEvent
	C1-LeadEventType
	C1-LeadEvtTypeCreBillInsAbtIni

Configuration required (Y)	**Entities to Configure:**
	C1-LeadEventType

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6.3 Validate Customer Contact Details

Actor/Role: C2M(CCB)
Description:
The system validates Customer Contact Details.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LDEVTYCCV -Create Customer Contact Event Type Validation
Business Object (Y)	**Business Object:**	C1-LeadEvtTypeCreCCAbtInitv
Configuration required (Y)	**Entities to Configure:**	Customer Contact Type Customer Contact Class

6.4 Create Customer Contact

Actor/Role: C2M(CCB)
Description:
A customer contact is created for the main person linked to the leads' account.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP - Complete Lead Event C1-LETCRECC -Create Lead Customer Contact
Business Object (Y)	**Business Object:**	C1-LeadEvent C1-LeadEventType C1-LeadEvtTypeCreCCAbtInitv
Configuration required (Y)	**Entities to Configure:**	C1-LeadEventType

6.5 Evaluate Conditions to Discard Lead

Actor/Role: C2M(CCB)
Description:

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

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LECOMP - Complete Lead Event
		C1-LECDISCLD – Discard Lead
Business Object (Y)	**Business Object:**	C1-LeadEvent
		C1-LeadEventType
		C1-LeadEvtTypeDiscardLead
Configuration required (Y)	**Entities to Configure:**	C1-LeadEventType

6.6 Evaluate Lead Success Criteria for Account Group Monitor Lead Completion

A**ctor/Role: C2M(CCB)**
Description:
The system checks if a lead has been successful by evaluating Lead Success Criteria for initiative. CCB 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 Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LDCHKSCS - Determine lead success
		C1-CHKCOMPRC - Rebate Claim Lead Success
		C1-CHKSACOPT - SA Contract Option Lead Success
		C1-CHKCOMPOR - Order Lead Success
Business Object (Y)	**Business Object:**	C1-Lead (Lead)
		C1-Initiative
		C1-InitiativeConservationProg
		C1-InitiativeContractOption
		C1-InitiativeService
		C1-InitiativeLite
		C1-BatchControl
Customizable process (Y)	**Process Name**	C1-LDTR - Lead Periodic Monitor Process

6.7 Transition Lead to Status Successful

A**ctor/Role: C2M(CCB)**

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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

A**ctor/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. Here the Marketing and Sales Representative has the option to:

6.9 Select Specific Lead

A**ctor/Role: Marketing and Sales Representative**
Description:
The Marketing and Sales Representative selects a specific event to process manually.

7.0 Request Discard Lead

A**ctor/Role: Marketing and Sales Representative**
Description:
If required the Marketing and Sales Representative requests to discard selected lead for an initiative.

7.1Request Compete Lead

A**ctor/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

A**ctor/Role: C2M(CCB)**
Description:
The Marketing and Sales Representative makes changes in the selected Lead record. Such changes could include adding Notes and attachment documents, if needed.

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

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7.3 Validate Changes

A**ctor/Role: C2M(CCB)**
Description:
The system validates eligibility of sales representative assignment to the lead.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-LEADPOST - Lead Post Processing
Business Object (Y)	**Business Object:**	C1-Lead
Configuration required (Y)	**Entities to Configure:**	Group Sales Representatives, Individual Sales Representatives

7.4 Perform Update

A**ctor/Role: C2M(CCB)**
Description:
The system performs required updates.

7.5 Review Active Lead and Lead Event(s)

A**ctor/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

A**ctor/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

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7.7 Add Lead Event(s) in Pending Status

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) adds Lead Event in pending status to the Lead.

Business Object (Y)	**Business Object:**	C1-Lead
Configuration required (Y)	**Entities to Configure:**	Lead Event Type

7.8 Modify Event Data

A**ctor/Role: Marketing and Sales Representative**
Description:
The Marketing and Sales Representative updates Lead Event if required after review.

7.9 Update Event

A**ctor/Role: C2M(CCB)**
Description:
The system performs required updates.
Note: BPA Script C1-LdEvtMain (Lead Event – Maintenance) is invoked when modifying lead events

Business Object (Y)	**Business Object:**	C1-Lead
Configuration required (Y)	**Entities to Configure:**	Lead Event Type

8.0 Request Complete Event(s)

A**ctor/Role: Marketing and Sales Representative**
Description:
Upon review, the Marketing and Sales Representative requests manually complete a Lead Event.

8.1 Request Cancel Event

A**ctor/Role: Marketing and Sales Representative**
Description:
Upon review, the Marketing and Sales Representative requests to cancel a Lead Event if required.

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8.2 Cancel Pending Lead Event

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) transitions Lead Event to Canceled status

Business Object (Y)	**Business Object**	C1-Lead

8.3 Request Refresh Statistics

A**ctor/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)

8.6 Validate Eligibility to Accumulate Statistics: Group Accumulate Statistics

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) validates ability to accumulate statistics for initiative.
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 Plug-in enabled (Y)	**Available Algorithm(s):**	C1-TRINSTAT – Transition to Accumulate Statistics
Business Object (Y)	**Business Object:**	C1-Initiative
Customizable process (N)	**Process Name**	C1-INITR - Initiative Periodic Monitor Process

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8.5 Transition Initiative Status to Accumulate Statistics: Group Accumulate Statistics

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) transitions Initiative to Accumulate Statistics Status based on User request or Initiative is eligible for periodic statistics accumulation.

Business Object (Y)	**Business Object:**	C1-Initiative

8.6 Evaluate all Leads for Initiative: Group Accumulate Statistics

A**ctor/Role: C2M(CCB)**
Description:
C2M(CCB) retrieves all the leads in all statuses linked to initiative

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative

8.7.1.1 Accumulate Lead Statistics by Status Including Discard Reasons: Group Accumulate Statistics

A**ctor/Role: C2M(CCB)**
Description:
The system calculates number of Leads in each status (i.e, Pending, Active, Success and Discard.) as of the Initiative's Statistics Date/Time. For the Discard state, information is sorted by valid reason codes.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative
Configuration required (Y)	**Entities to Configure:**	Program Management Configuration - Master Configuration

8.7.1.2 Accumulate Lead Count for Top Representatives: Group Accumulate Statistics

A**ctor/Role: C2M(CCB)**
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.

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Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative
Configuration required (Y)	**Entities to Configure:**	Program Management Configuration – Master Configuration

8.7.2.1 Accumulate Monthly Lead Statistics by Status Including Discard Reasons: Group Accumulate Statistics

Actor/Role: C2M(CCB)
Description:
If there is a requirement to represent monthly statistics, C2M(CCB) 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

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative
Configuration required (Y)	**Entities to Configure:**	Program Management Configuration – Master Configuration

8.7.2.2 Accumulate Monthly Lead Count for Top Representatives: Group Accumulate Statistics

Actor/Role: C2M(CCB)
Description:
C2M(CCB) 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.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative

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Configuration required (Y)	**Entities to Configure:**	Program Management Configuration – Master Configuration

8.8 Update Initiative and Transition to Active Status: Group Accumulate Statistics

Actor/Role: C2M(CCB)
Description:
Upon the completion of the Accumulate Statistics process, C2M(CCB) transitions initiative status to Active.

Process Plug-in enabled (Y)	**Available Algorithm(s):**	C1-ACCSTAT - Accumulate Lead Statistics
Business Object (Y)	**Business Object:**	C1-Initiative

8.9 Analyze Statistics

Actor/Role: Marketing and Sales Representative
Description:
Marketing and Sales Representative reviews and analyzes initiative statistics

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Test Documentation related to the Current Process

ID	Document Name	Test Type

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Document Control

Change Record

Date	Author	Version	Change Reference
02/26/2014	Monica Munnings	V1.0	Initial Document
03/11/2014	Monica Munnings		Updates after review
03/29/2014	Monica Munnings		Updates after review
04/29/2014	Monica Munnings		Updates after review
05/03/2014	Cristina Mabandos		Updates in configuration section
05/14/2014	Galina Polonsky		Reviewed, Approved
09/02/2015	Muhssin Suliman		Update to CCBv2.5
11/14/2015	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated word and visio to v2.6
10/04/2017	Genti Kondili		Updated Visio, algorithms, task descriptions, diagrams, screenshots for C2M
10/24/2017	Galina Polonsky		Reviewed, Approved
05/28/2019	Satya Kalavala		Updated format for v2.7

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Attachments

Initiative Query

Lead Events Query.docx

Initiative

Initiative.docx

Lead Query

Lead Query.docx

Lead

Lead.docx

Add Lead (Single)

Add Lead.docx

Lead Upload – CSV File (Group)

Lead Upload File.docx

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Lead Event Query

Lead Event Query.docx

Lead Event

Lead Event.docx

Sales Representative

Sales Representative.docx

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