



## C2M v2.9

### 3.1.2 Select Customers and Manage Programs

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## Brief Description

**Business Process:** 3.1.2 C2M.Manage Marketing Programs

**Process Type:** Process

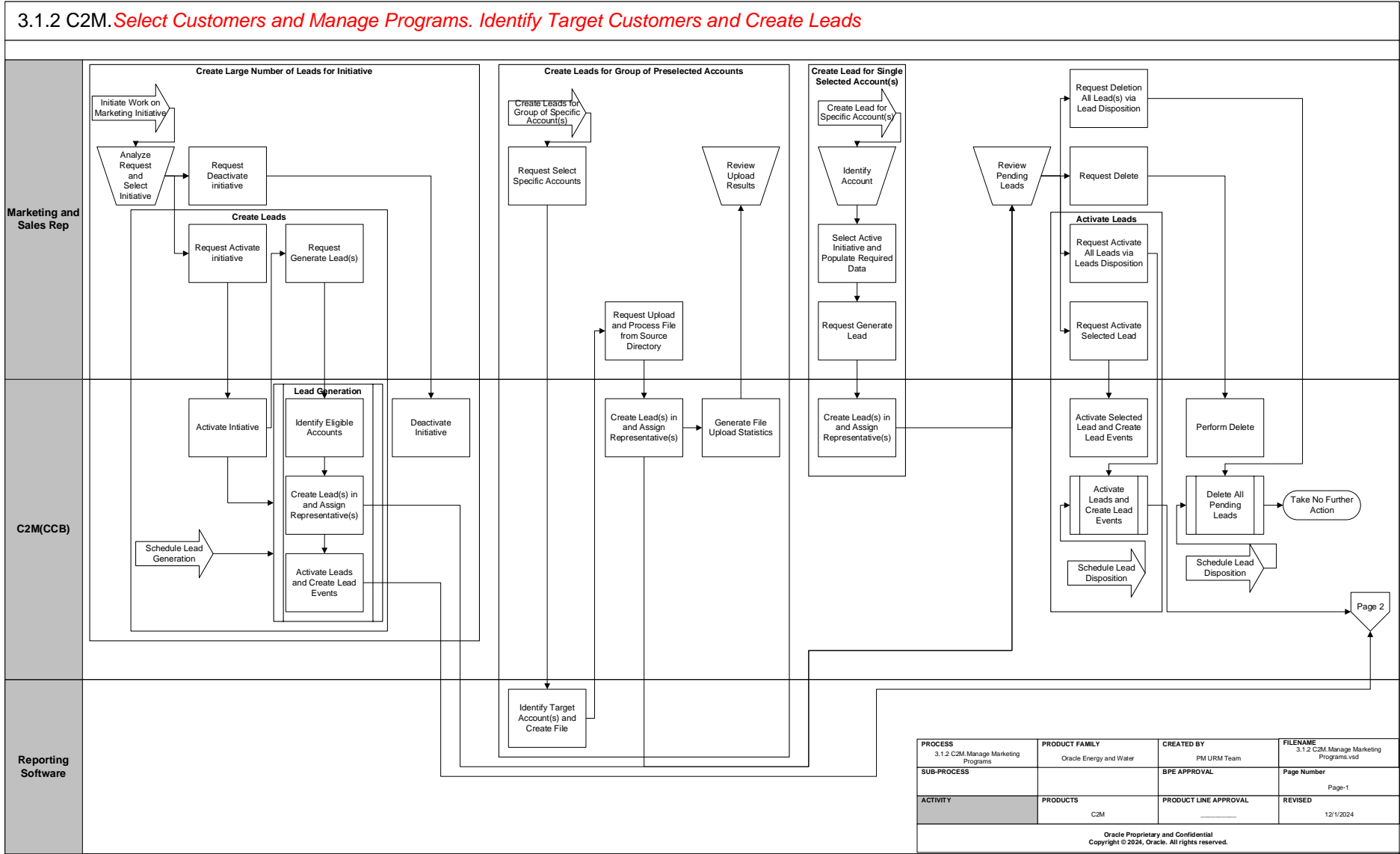
**Parent Process:**

**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 allows target individuals and groups of customers selected by specific criteria. Application initiates various types of customer contacts (e.g. e-mails, text messages, bill messages, letters) and controls how successful communication with customer is. Other words, application checks if any of the data reflecting customer activity in response to marketing efforts has been added and stored. Users have ability to measure success of the marketing initiative, analyze performance and manage sales representatives effectively based on available statistics.

Business Process Model Page 1



**Marketing & Sales Rep**

**Process, Complete Events and Leads**

Page-1 → Review Active Leads and Lead Events → Review Selected Lead and Lead Event(s) → Request Cancel Event → Request Complete Event(s) → Request Add Event → Request Discard Lead → Request Complete Lead → Request Discard Lead

**Accumulate Initiative Statistics**

Review Initiative → Analyze Initiative Statistics → Request Statistics for Initiative → Monitor Initiative Statistics → Accumulate Monthly and Total Statistics → Schedule Accumulate Statistics

**C2M(CCB)**

Schedule Monitor → Monitor Events Trigger Date → Cancel Pending Lead Event(s) and Discard Lead → Evaluate Lead Success Criteria for Account → Add Lead Event(s) in Pending Status → Cancel Pending Lead Event → Complete Event "Customer Communication Preference Notification" → Complete Event "Send SMS" → Complete Event "Send E-Mail" → Complete Event "Create Bill Message" → Complete Event "Send Sales Rep E-Mail" → Complete Event "Customer Contact" → Complete Event "Discard Lead", Cancel Pending Events and Discard Lead → Monitor Lead Completion and Lead Success Criteria → Cancel Pending Lead Event(s) and Complete Lead

**Customer**

Receive SMS → Receive Email

4.2.2 C2M.Manage Bill

3.4.1.1 C2M.Manage Customer Contacts

PROCESS	PRODUCT FAMILY	CREATED BY	FILENAME
3.1.2.1 C2M.Manage Marketing Programs	Oracle Energy and Water	PM URM Team	3.1.2 C2M.Manage Marketing Programs.vsd
SUB-PROCESS	PRODUCT LINE/RELEASE	BPE APPROVAL	Page Number
	C2M v2.9		Page-2
ACTIVITY	PRODUCTS	PRODUCT LINE APPROVAL	REVISED
	C2M		12/1/2024

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Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets

# Document Control

## Change Record

Date	Author	Version	Change Reference
05/14/2014	Galina Polonsky		Reviewed, Approved
09/02/2015	Muhssin Suliman		Update to CCBv2.5
10/21/2015	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated format
09/12/2017	Genti Kondili		Updated for C2M.CCB2.6
09/27/2017	Galina Polonsky		Reviewed, Approved
05/28/2019	Satya Kalavala		Updated format for v2.7
06/26/2024	Kunal Nerkar		Updated for C2M v2.9
07/26/2024	Line Prado		Reviewed
12/19/2024	Galina Polonsky		Reviewed, Approved