Infrastructure Assessment

Prepared for

Client

Version 1.0

Date

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CHANGE CONTROL LOG

Change ID	Description	Date	Owner
1.0	Initial draft	Date	Ari Buchwald
1.1	Revised with client comments	Date	Ari Buchwald

INTRODUCTION

EXECUTIVE SUMMARY

As part of continuing efforts to improve its customer contact strategy and marketing processes, Client (Client) is implementing a Campaign Marketing System (Software Vendor's Software A & B products) for managing a connected series of marketing operations designed to:

- Provide Client with leading edge loyalty, CRM and multi-channel database marketing capabilities that leverage centralized Client data at all touch points
    - Develop competitive advantage through the use and interaction of leading edge marketing systems
- Streamline creation, management and delivery of marketing messages such as service offers, special events, etc.
- Automate communication strategies to Client segments by using more sophisticated targeted strategies
- Drive revenue based on offers that are relevant, timely and delivered via the right channel at the right time

Client engaged Vendor to aid in implementation and process redesign. The first step in Vendor's implementation methodology is to conduct an Infrastructure Assessment (IA). The IA includes development of a future state process diagram for campaign list generation, analysis of the technical systems and data, and discussion of various functional areas to configure the application to meet Client business requirements (i.e. suppressions, selections, strategic segments, campaign metadata, offer metadata, etc.).

In addition to the technical infrastructure, the marketing business processes across marketing departments will be confirmed to identify areas requiring adaptation within the existing Client marketing campaign management process. A preliminary review of these processes was completed during the Total Cost of Ownership (TCO) phase of the Project and elements of that discovery are used in this document. As Client Franchises are added to the implementation, this process review will be refined to include items that are specific to each of the Franchises' marketing efforts.

The IA meetings focused on the current marketing systems and processes at Client with the objective of documenting a phased solution that applies Client requirements within the Tool Software A system. Future state was initially developed in the TCO phase and is represented accordingly in this document.

Consistent with our philosophy that the implementation of enterprise marketing automation solutions will affect people, processes and technology, all three areas were discussed and are captured in this document.

Key findings from the discussions are summarized below:

- Client current marketing model is decentralized, with Franchises having control over campaign type, offers, and final filtering/selection criteria. Corporate teams provide tools and support to the Franchises, such as master segmentation, campaign de-duplication, opt-out suppression and overall data and database maintenance.

- Throughout the upcoming implementation phases, as many of Client marketing process steps as possible will be migrated to Tool Software A and Software B; including capturing campaign and offer metadata, the application of suppressions and generating file audits. Steps that exist in other systems will remain, but automated links and triggers will be built to streamline the overall handoff process.

    - Franchises will maintain responsibility for campaign execution, mail vendor management as well as reporting and analysis with the exception of corporate email initiatives.

- As part of the TCO study performed under a prior statement of work, Vendor has already completed the initial review and recommended hardware necessary to support system implementation and projected growth over the next three to four (3 – 4) years.

    - The existing Enterprise Data Warehouse (EDW) is housed in Data Warehousing Tool; the Web server and Tool software will reside on a new server purchased based on Vendor provided hardware specifications.

- As part of the TCO study, Vendor has already created the framework of roles and responsibilities to support the future state design. Client has dedicated adequate human resources to the success of this implementation project from subject matter experts, pilot users, to project management as well as defined future hiring needs to support tool usage based on those initial recommendations. Roles and Responsibilities are reiterated from the TCO phase in this document instead of a separate document as may be interpreted from the project plan.

- Franchise marketing teams have varied goals, skill sets and levels of marketing sophistication. Some challenges the implementation team will face include piloting, training and eventual rollout – potentially phasing out some of the current systems used for marketing today. With respect to users, one risk is adoption of the new tool versus continuing to execute programs in the current process model.

- Many of the requirements have been collected in the IA and the preceding TCO engagement. Client and Vendor will continue to scope out development through the next phases of the project.

- In light of different options available for auditing within Tool Software A, Vendor will need to work with Client Corporate Marketing and Franchises to agree upon and standardize auditing procedures.

- The Vendor team wishes to thank all persons who took the time to meet with us.

DOCUMENT OVERVIEW

The purpose of this document is to create a common understanding of the marketing process, the technical environment, and the core functional requirements at Client. This information will provide the framework for a successful implementation of Software Vendor's Software A & B tools. In addition, it will help lay the groundwork for the project teams' next steps and provide additional context for the overall project.

Background

Client purchased Software A & B to add additional functionality to current marketing processes and provide the potential for streamlined user interfaces. Tool Software A provides a specifically designed platform for contact list generation. Software B will provide Franchises with the ability to have a more flexible, yet still consistent and controlled ability to execute marketing programs.

Goals in supplementing the current environment include:

- Provide a unified interface for all marketing enabling technologies in the future state, e.g. provide a united front-end to Reporting Tool as the interface for the Standardized Campaigns with Software A & B
- Emulate and standardize functionality available via current Ad Hoc Tool and ANALYTIC TOOL data manipulation process at the Franchise level with Software A & B

Tool Software A will enable corporate and Franchise marketers to profile data attributes on the fly, pull counts quickly, and store business rules for list selections, segments, and standard exclusion and suppression logic in a centralized repository. Marketers can access common rules through a shared library, thus preventing duplicated effort for campaign development. Tool Software A will also increase the sharing of marketing standards and best practices.

Tool Software B will be used as a shell for Tool Software A Flowcharts, and will create a user friendly interface that can be used to control flowcharts, alter business rules and filter data.

Project Objectives

Client and Vendor have defined the Tool implementation project as three phases comprised of multiple projects.

- **Phase 3.1 - the Extract Value Phase**: Corporate contact rules are applied to select campaigns for better targeting and contact management
- **Phase 3.2 - the Process Improvement Phase:** Franchises select target audience for campaigns using a single interface to customize their contact rules
- **Phase 3.3 - the Full Implementation Phase:** Unified interface used by all Franchises for all direct marketing processes

Tasks for the overall project are defined by the following objectives set off by phase:

- Phased adoption of Tool by up to sixteen (16) Field Marketing Departments representing approximately 40 Franchises.
- Establish a Campaign Management Team ("CMT") to expertly manage the Tool Software A & Software B Applications.
- Develop Master File Management Processes and Campaign business rules using Software A to execute two hundred (200) marketing campaigns per month by the end of Phase 3.1.
- Complete technical development of the Campaign Management application to include the Software B Application to enable process improvements in Phase 3.2.
- Upgrade the Tool software to the current release.
- Shift all trigger marketing campaigns to the new Campaign Management application and implement new corporate marketing campaigns.
- Work with Client staff to develop business rules to support existing marketing campaigns. No more than seventy (70) business rules are expected in Phase 3.1.

- Review EDW fields, tables and views to ensure data sets are available to support marketing campaign development and business rules. Make recommendations as necessary.
- Develop methodology to validate the accuracy of the marketing campaigns and business rules.
- Standardize workflow processes to assure efficient development of the marketing campaigns and business rules. Establish a tracking system or utilize existing Client tracking applications.

Project Scope

Phase 1a Extract Value

While the overall project is established in the three phases mentioned above, phase 1 has been broken into two sub-segments. The first engagement with Vendor Corporation, 1A has been scoped and specified as below. Phase 1A is scheduled to be completed the first week of December, with scoping of phase 1B to commence in mid-October.

- Define Roles and Responsibilities
    - Document and communicate roles and responsibilities to all stakeholders
- Conduct Data Gap Analysis
    - Review marketing campaign data elements
    - Review current EDW model
    - Perform Data Gap Analysis
    - Make recommendations
- Develop and Implement Software A software taxonomy
    - Apply methods to standardize flowchart design, marketing campaign codes and cell codes
    - Apply methods to validate process counts
    - Develop folder structure for templates, macros, catalogs, marketing campaign offers, segments, etc.
- Implement Audits from TCO Campaign Track
    - Update marketing campaigns and business rules as necessary
    - Validate and document changes
- Audit marketing campaign metadata requirements
    - Create user-defined fields for offers and marketing campaigns
    - Determine where marketing campaign metadata is to reside and review reporting usage

SUMMARY OF PROJECT OPPORTUNITIES AND RISKS

Risks and Expectations

We have identified a few risk areas that can impact the success of the Software Vendor Software A project:

1) Project Scope. The three phase implementation plan is defined to deliver tools and training in the pilot campaigns. As the campaigns are designed, issues may arise around the data, application bugs, or other unforeseen problems. The project team will track and resolve these issues. Whenever possible, the team will propose a solution but may request for additional research or work effort to resolve the issue. Increases in work effort outside the scope of the project can negatively impact the project completion timelines and budget.

2) Commitment from pilot users. The three phase implementation plan requires a significant amount of time from corporate and Franchise pilot users. Vendor realizes the pilot users have other job responsibilities and will do our best to utilize their time wisely. Lack of time with the pilot users may cause a delay in the completion of the implementation.

3) Enterprise Data Warehouse. All successful tool implementations depend heavily on a sound underlying data and data processing infrastructure. Changes to the EDW, or required alterations to support Tool products could delay or prevent the successful launch of the Tool system.

As part of the ongoing Data Gap Analysis, salient issues may be identified and brought to the attention of the Client Implementation Team.

4) Training end users. Adoption of Software Vendor's Tool Software B tool will require that end users receive training. Vendor Corporation recommends that training not only cover the user interface, but also incorporate a review of the underlying structure and systems in order to create a better understanding of the overall campaign environment and the downstream systems it touches. Failure to create regular and systematic training can foster an environment where users cannot identify issues, or will simply refuse to use the new system.

- Failure to establish clear accountability for benefits is a precursor to low user adoption and project disappointment
- Training should not be a one time exercise but an iterative process that occurs at anticipated intervals
- Trainers should not only be fully competent in the use of the application but should also be able to effectively communicate best practices that are consistent with the best interests of the organization and users

Client Marketing Process and System Strengths

Technical Software A User Community
Software A requires a certain understanding of logic, data, and data manipulation to really work well with the application. Client current Software A users and Franchise Marketers are all are generally familiar with the data and with working with data. This group should have no problem learning to use Software A to generate marketing programs.

Strong and Integrated Technical Support
The Corporate Marketing group has strong sponsor and executive level support for the implementation of Software A and the technical needs of the group. This may reduce risks associated with accessing IT and other required non-marketing resources.

Strong Marketing Program Documentation
Current campaign management tools are well documented at Client. Each marketing system has comprehensive documentation and training surrounding its usage. This information serves as a strong base for process review, redesign, and QC.

A Database Designed for Marketing
The Client marketing database is designed for marketing and segmentation type queries. The database includes a number of aggregate tables and aggregated data views defined for the marketing purposes. Addition of other tables, aggregates and sources will only serve to strengthen the integrity and functionality of the existing data repository for marketing purposes.

Client Marketing Process and System Challenges

Technical User Community Tool Adoption
Though a technical or quasi-technical user has the greatest success with Tool Campaign, they can also be resistant to it. Change resistant Franchise personnel may not appreciate Tool Campaign's functionality or the fact that what Tool is doing is not easily visible. Plus, there will be changes to current processes that in the short term may not always be perceived as easier to execute than via existing systems. Overall, as Software A is adopted it should increase campaign management productivity and broaden usability.

Too Many Exceptions to Rules
For many marketing objectives there are standards that Corporate seeks to define and maintain. Franchises though use existing systems to develop their own business rules. Capturing all these rules and implementing in Tool may prove to be challenging, more so if Franchise marketers are not encouraged to adopt the new system. This could cause problems with determining a standard set of business rules for the suppression of contacts based on master contact strategies.

In order to engender success, the team should strive to apply strong discipline around documenting Client suppression and contact management rules. These rules could be difficult to enforce and manage when there are many Franchise level exceptions.

Project Benefits

The implementation of Software A will provide process improvements by:

- Allowing implementation of flexible business rules and contact strategies
- Creating more refined targeting by using cross mapped data from EDW in a controlled fashion
    - Cost savings by streamlining usage
    - Better targeting, selection of higher potential customers
- Providing greater consistency and embedded best practices for managing both corporate and Franchise marketing needs
- Streamlining campaign setup to reduce time spent by Franchises to prepare new campaigns
    - Replace Franchise offer system user interface with feeds of data sent directly from Software A & B
- Providing a unified interface for all marketing enabling technologies in the future state
    - Enabling system integration of currently separate processes and tools such as Reporting Tool and ad hoc work currently performed in ANALYTIC TOOL or Ad Hoc Tool
    - Providing functionality to eventually replace Reporting Tool as the interface for the Standardized Campaigns
    - Providing functionality to eventually replace current Ad Hoc Tool and ANALYTIC TOOL data manipulation processes (currently held at the Franchise level) with Software A & B
- Hardware infrastructure to support more users and improve performance
- Instituting campaign taxonomy to allow quick discovery of campaigns, templates, catalogs, and macros for consistent reuse
- Centralizing knowledge in a well-trained campaign staff to effectively execute direct marketing campaigns

Sources of Information

Meetings with Client corporate marketing and IT staff were the main source of information for the Infrastructure Assessment document. Sources referred to during the course of meetings included Client Planning deck, Offers System documentation, Offer Post Analysis documentation and TCO documentation.

Documents

- Total Cost of Ownership Analysis and related supporting documentation for Software Vendor Implementation
- Background on PowerPoint presentation
- 28 Steps to creating an Offer
- Offer Post Analysis
- Standardized Campaigns
- Standard Campaign Procedures Information

TECHNICAL INFRASTRUCTURE

Technical Overview

Current and Future State: The Enterprise Data Warehouse (EDW), housed in Data Warehousing Tool, contains current and lapsed Clients and very few if any prospects.

The source systems for the EDW are the Client ODS systems and various production systems. Systems that feed or are fed by data held in the EDW include:

- **(PDB)** acts as real time juncture between local Management Systems and the EDW
- **(EMS)** supports management of on PR events
- **(LMS)** holds reservations and stay information. Two system types are in production, and each Franchise has its own system for Regulatory compliance
- **(CMS)** holds all Service A, ratings and comp data. Each Franchise has own system for Regulatory compliance
- **(SDS)** manages Service Tool %, Reimbursement and Service B
- **(EP)** manages participation and tracking of drawings and other types of local promotions

While these systems share data, the Software A installation will not materially affect any of these systems or their supporting data and processes.

Current State: The majority of direct marketing occurs de-centrally at the Franchise level within the framework as provided by corporate. Oversight is provided through monthly direct marketing reviews and analytical insight. Tools used include:

- Reporting Tool (Marketing Workbench)
- Ad Hoc Tool/ANALYTIC TOOL at the Franchise level
- Offer Management System

Additional systems not shown:

- Tool Campaign/Software B (Pilot phase)
- Email tool/vendor
- OCRM (Operation CRM – deliver offers to customers)
- PCS (Service Contact System - use to contact customers)

Figure 1. Environment Current State

Future State: The Software A installation will seek to emulate the functionality of Reporting Tool, Ad Hoc Tool and ANALYTIC TOOL in the current environment.

Figure 2. Environment Future State

Source Systems

Data Source - Enterprise Data Warehouse (EDW)

Current State: The Client Corporate Data Warehouse on Data Warehousing Tool supports corporate reporting and analysis requirements. It is used and will continue to be used as a data source for list pulls.

Proprietary SQL is run to score and segment Clients into marketing segments, referred to as Standardized campaigns. Views of data stored in the EDW are used in these processes. The View Database used by Tool is vCRM, also used for TCRM Trigger campaigns and owned and managed externally to the Campaign group

Future State: The Client Corporate Data Warehouse on Data Warehousing Tool supports corporate reporting and analysis requirements. It is used and will continue to be used as a data source for list pulls.

The vCRM Database will be replicated and named vMARKETING. This new view will be managed by ITI&AS and Marketing and will be updated accordingly to more closely resemble the vEDW View. It is noted that gaps exist between current View documentation and the actual View. The IT group will assume the task of updating and providing data schemas and dictionaries for vCRM.

It should be noted that Software A could be used to connect natively to the Data Warehouse to execute the proprietary SQL designed to score and segment Clients into marketing segments should such functionality be found to be valuable for the future.

Channels

Client plans marketing efforts primarily for Direct Mail and Email channels. Inbound phone and Web responses do occur as Clients make reservations in response to marketing efforts. Little outbound telemarketing occurs – mainly in the form of clientelling via triggers from systems other than the CMS.

System Architecture

Current State: Campaign System Architecture

The following illustration details at a high level the current system touch points that are used in marketing today.

Figure 3. Campaign Architecture Current State

Future State: Proposed Software A Architecture

The proposed Client design is to house the campaign web and Tool server on the same hardware. The recommended hardware specifications for this server are rather large, including 12 fast CPUs, a large amount of memory and HDD space. Client has acquired two scalable servers for the marketing environment to add to the existing server.

Figure 4. Campaign Architecture Future State

Recommendation made during the TCO phase is to place the campaign web and campaign server on one server:

- Operating System - XX
- Database for Tool Metadata - XX
- Web App Server - XX
- Back-up / Recovery - Enterprise standard
- Operating System - XX

Server

- XX CPU, XX GB Memory , XX TB usable Disk space - running the Software A app

Develop / Test Environment:

- XX CPU, XX GB Memory, XX GB usable Disk space
- This server will be running all components including web sphere, Software A & B and XX

OPERATIONAL SPECIFICATIONS

The following section details the Client marketing environment current state and recommendations for future state, including people, process and technology.

Relationship Marketing Group
Primary Subject Matter Experts for this project are:

– Business Sponsor
– IT Business Solutions Manager
– Client Marketing Subject Matter Expert
– Client Marketing Subject Matter Expert and Program Manager

Current State: Client current marketing model is decentralized, with Franchises having control over campaign type, offers, and final filtering/selection criteria. Corporate teams provide services to the Franchises, such as master segmentation, campaign de-duplication, opt-out suppression and overall data and database maintenance.

Corporate Marketing (Customer Contact Management (MARKETING), Multi Channel Marketing (MCM)) is responsible for Strategy, Branding and providing core capabilities & enterprise tools that enable Franchise marketing efforts. Corporate marketing consults with Franchises to maximize usage of enterprise marketing tools and analytics. The following illustration details current staffing; with reference to other marketing teams within Client corporate Relationship Marketing group.

Figure 5. Marketing Team Current State

Recommended State: Optimal staffing **r**ecommendations were made during the TCO for suggested future state staffing, roles and responsibilities assuming full tool utilization. Following illustrates the proposed Tool support team:

Figure 6. Marketing Team Campaign Support Recommendation

- Campaign Manager
  - Leads the Team
  - Peer to Marketing & IT
  - Accountable for full CM process
- Marketing Manager
  - Works with Campaign Manager to defines campaign requirements
  - Approves campaigns for deployment to production
  - Tracks results
- Tech Lead
  - Works with Campaign Developer to optimize campaigns
  - Works with IT to understand database
  - Provides support for advanced topics, i.e.: flowchart design, SQL
  - Tech Lead gains more knowledge on contact strategies/offer management & overall marketing processes
- Campaign Developer
  - Creates campaign sessions
  - Developers gain deep expertise on CM techniques and basic SQL to build campaigns
  - Executes campaigns
- IT Support
  - Work together with Tech Lead to ensure the environment is optimized for performance & info on the data is surfaced

Future State: No changes are planned to the existing decentralized Client marketing model. Following illustration details current planned changes in staffing as provided during IA meeting discovery. Additions to staff have been planned according to Vendor Corporation recommendations, current staffing levels and Client marketing budget allocations for staffing. Note positions shaded yellow are scheduled to be filled in 2005/2006.

Figure 7. Marketing Team Future State

Director, Customer Contact Management

- **Competencies**
    - Experience developing and managing marketing strategies, measurements, budgets and resources
    - Significant exposure to multi-channel marketing tools particularly campaign management
    - Strong communication and negotiation skills working with the Marketing Managers/Franchises as customers of the process, in addition to IT Management who provide support to this process
    - Knowledge of the marketing process & the internal and external parties involved and/or impacted by the campaign management process
    - Understanding of the integration points, including timing/frequency, between marketing applications and marketing channels
    - Experience with direct mail and multichannel campaigns required including segmentation and database marketing tools and approaches

- **Work Activities**
    - Oversees efforts to coordinate marketing initiatives across channels
        - Work closely with the internet marketing team on online marketing, specifically ensuring linkages with efforts in other channels
    - Supports improved customer level contact management, including: **i**mplementing the tools that can achieve these goals and determining future development priorities to support the overall vision
    - Works closely with the VP of Channel Management to drive all key projects and activities that will deliver multi-channel and customer contact vision and capabilities
    - Software Bs with manager and developers in developing business rules to support customer contact management.
    - Leads development of internal department metrics, e.g., channel cost, revenue, and success metrics for pilot projects
    - Develops strategy and timelines for campaigns that involve multiple channels, including tests
    - Drives campaign management tool development and act as core business user on key multi-channel projects
    - Leads performance metric development and reporting in all channels.
    - Works closely with internet marketing team on online marketing initiatives ensuring integration in execution and measurement
    - Communicate project success internally and externally where needed

Manager MARKETING Programs

- **Competencies**
    - Understands the marketing objectives including the business objectives, timing, expected financial results
    - Management skills and responsibility for Campaign Developers/Technical Systems Analysts
    - Authority and accountability to sign-off on campaigns that are run in the production environment
    - Project management and project deployment skills
    - Strong communication and negotiation skills working with the Marketing Managers/Franchises as customers of the process, in addition to IT Management who provide support to this process
    - Knowledge of the complete marketing process & the internal and external parties involved and/or impacted by the campaign management process
    - Understanding of the integration points, including timing/frequency, between Software A & other supporting applications
    - Ability to work with the Marketing Managers & recommend strategic database marketing tactics on a campaign by campaign basis

- Understand how to effectively use the core functions of Software A (e.g., Select, Merge, Segment, Sample, Snapshot, Contact)

- **Work Activities**
  - Serve as the liaison between the Marketing Managers and IT to secure resources, communicate status, mediate issues, etc.
  - Perform resource management across the Campaign Developers and Technical Leads for workload balancing and performance optimization resolution
  - Manage the Campaign calendar of events and drive overall MARKETING workload. Drive annual/quarterly planning sessions to understand campaign strategies to be deployed.
  - Measure progress against goals for tool utilization.
  - Oversee and coordinate the collection and distribution of best practices and standards for the campaign team, including such items as:
    - Business processes
    - Naming standards and conventions for all the key Software A objects
    - Session templates, stored queries, derived fields
    - Directory structures, table catalogs
    - Report definition, strategic segment definition, offer management
    - Identify commonalities in the marketing initiatives (at a high-level) that can be leveraged across campaigns
  - Define the quality control process surrounding the use of Tool and roll-out of campaigns, in-line with corporate requirements.
  - Manage the campaign design methodology that is used by the campaign team for new campaigns
  - Regularly review the overall process and identify areas of opportunity to tune and enhance the process through the use of advanced campaign functions, process reengineering or performance optimization techniques
  - Define and communicate the deployment plans for Tool (e.g., continued roll-out to users and Franchises over the upcoming 12- 18 months.
  - Facilitate the on-going and advanced training needs of the campaign team to ensure they have access to the latest features/functions/enhancements of Tool
  - Quality check rules, selections, flow charts etc. created by campaign developers, and create campaigns on an as needed basis
  - Provide expertise on efficient queries and database structures, defining future IT requirements

Marketing Power User

- **Competencies**
  - Understands the marketing objectives including the business objectives, timing, expected financial results
  - Management skills and responsibility for Campaign Developers
  - Authority and accountability to sign-off on campaigns that are run in the production environment
  - Strong communication and negotiation skills working with the Marketing Managers/Franchises as customers of the process, in addition to IT Management who provide support to this process
  - Knowledge of the complete marketing process & the internal and external parties involved and/or impacted by the campaign management process
  - Ability to work with the Marketing Managers & recommend strategic database marketing tactics on a campaign by campaign basis
  - Understand how to effectively use the core functions of Software A e.g., Select, Merge, Segment, Sample, Snapshot, Contact)
  -

- **Work Activities**
  - Support the collection and distribution of best practices and standards for the campaign team, including such items as:
    - Business processes
    - Naming standards and conventions for all the key Software A objects
    - Session templates, stored queries, derived fields

        - Directory structures, table catalogs
        - Report definition, strategic segment definition, offer management
        - Identify commonalities in the marketing initiatives (at a high-level) that can be leveraged across campaigns
    - Help establish the campaign design methodology that is used by the campaign team for new campaigns
    - Define and communicate the deployment plans for Tool (e.g., continued roll-out to users and Franchises over the upcoming 12- 18 months.
    - Quality check rules, selections, flow charts etc. created by campaign developers, and create campaigns on an as needed basis

Campaign Developer

- **Competencies**
    - Fully understands the campaign marketing process
        - functional paradigm (e.g., campaign planning, campaign design, testing, execution, offer management, promotion history, contact management, response tracking and reporting)
    - Understand how to effectively use the core functions of Software A(e.g., Select, Merge, Segment, Sample, Snapshot, Contact)
    - Acumen on Strategic Database Marketing; easily picks up new technology; analytical problem solver; creative thinker; detail oriented; basic knowledge of SQL; basic knowledge of data structures
    - Able to effectively communicate with the Franchise Marketing Managers to understand their requirements and translate those objectives into the Tool application
    - Understand the dependencies between the campaign efforts and other marketing initiatives (e.g., full contact strategies, cross-channel and cross-business launch plans)
    - Offer insight and recommendations to the Marketing Managers on how to maximize the campaign's objectives through the use of application functionality

- **Work Activities**
    - Work with the Tool application on a day-to-day basis to support CM activities including:
        - Create target selections & suppressions
        - Performing merges, segmentation, setting up samples, tests groups, control groups
        - Setting up table catalogs, core table mappings, output contents
        - Creating the campaigns to run on automated schedules
        - Defining simple & moderately complex queries for tracking
    - Work closely with the Marketing Managers to:
        - Document and finalize campaign requirements for setup in Tool
        - Serve as a 'partner' to provide expertise and insight into best practices related to the campaign management process for the Marketing Managers (e.g., use of sampling, QA procedures, standard suppressions)
    - Support Franchise Marketing Manager requests for quick counts and campaign status information
    - Utilize standard naming conventions and structures as defined by the Campaign Manager, to ensure consistency and usability within the application
    - Identify and recommend additional best practices/standards based on experience using the application on a day-to-day basis
    - Ensure that QC procedures are incorporated into the campaign design as specified by the Campaign Manager
    - Work with the Technical Leads to ensure the campaign is optimized for performance
    - Short term during system development - manages file preparation and movement (Audit reporting, FTP)

Marketing Technical Systems Analyst

- **Competencies**
    - Knowledge and expertise using SQL and writing simple to complex SQL queries/programs
    - Knowledge of selected operating system scripting (e.g., shell script)
    - Knowledge of the campaign marketing platform and environment (e.g., Unix, DB2, Windows)
    - Expertise in all of the marketing data supporting Tool, relational database structures and query techniques
    - Familiarity of the marketing and campaign management processes

- Sophisticated knowledge of the more advanced features within the Software A application (e.g., audience level switching, creating complex queries using the query builder/raw SQL, triggers, complex templates, stored derived fields)
- Provide coaching and knowledge transfer to the Campaign Developers on some of the more sophisticated Tool features/functions (e.g., Audience, Schedule, Triggers, Snapshot)
- Provide coaching to the Campaign Developers on the data, table structures and database schema in support of their campaign development activities
- Support definition of table mappings and field usage
- Monitor derived field usage for potential db additions/modifications and work with designated DBA to complete the change
- Provide the first line of support for performance optimization with the end-users

- **Work Activities**
  - Setup and manage the testing environment for testing upgrades and new releases of Tool
  - Work with the Campaign Developers to establish testing timeframes and campaign regression tests
  - Interface with Software Vendor regarding software upgrade requirements and release notes
  - Work with the Campaign Developer(s) to identify which upgrades should be applied and when based on functionality to be supported
  - Maintain the campaign environment overall (e.g., clean-up of directories, old sessions, etc)
  - Serve as a liaison to the IT Support Resource specifically for:
    - Coordinating the upgrade or patches applied to the testing environment
    - Completing more complex hardware or network optimization
    - Developing technical components to support integration requirements where appropriate
    - Understanding the timing and communicating to the Campaign Developers information related to database activity that could affect campaign development

Franchise Marketing Groups

Franchises are responsible for executing local marketing activities using enterprise tools. Franchises work closely with Corporate Marketing resources to define, execute, test and measure marketing efforts.

Franchise marketers utilize Standardized campaign files are used as input to additional tools to manipulate Standardized campaign data:

- Reporting Tool (Marketing Workbench)
- Ad Hoc Tool
- Analytic Tool
- Offer Management System

Current and Future State: Recommendations were made during the TCO for no specific changes to established staffing, roles and responsibilities. Rather, phased training, rollout and change management tools should be utilized for encouraging adoption of Tool Software B over existing systems.

Software A may be made available to Franchises based on need, level of user sophistication and training.

Marketing Universe

The active Client universe is comprised of Clients across all Client Franchises that have been active at any Franchise in the last 24 months.

Monthly Standardized Campaigns are selected, (comprised of series or Hotfiles of segments) and are generated from the EDW using Client proprietary SQL code as managed by the Planning & Analysis team. This process initiates the monthly Franchise Marketing cycle. Not all Clients are assigned to segments as the data warehouse contains active, lapsed and deeply lapsed Client information which does not fall into a specific targeted marketing segment.

Marketing Segments

Segments (Series)

Client divides their Clients into various recipient groups using analysis based on proprietary measures and traditional observed types of interaction (service types, services, Potential, etc.).
Segments are groups of Clients defined by parameters set in Analysis and clustered during monthly processing. For marketing purposes, segments are often rolled into series, i.e. segments 101, 102, 103 = series 100. Segments also translate approximately to Cells in Tool terminology. Note: Client DMIDs are not mutually exclusive among segments. De-duplication occurs based on business rules prior to mailing.
Most segments become an offer. A few segments will share an offer.

Series Designations

Series 400, 500, 600 and 800 have been retired prior to this assessment process.

- 100
- 200
- 300
- 700

Standardized Campaigns

Standardized campaigns are defined as the combination of specific messaging and Client segments. Similar to a monthly segmentation data snapshot, Client provides both targeting and messaging in this process. Franchises are able to select Clients from the Standardized campaigns and define specific offers designed to stimulate specific service or stay behaviors.

One standard Standardized Campaign Query generates multiple files (can be up to approximately 100 lists) which include campaigns (i.e. both Welcome and Bounceback).
Each segment is broken into lists (sub-segments) by Actual Daily Worth (ADW) ranges as set by the Franchise.

Frequency Market

- Welcome/Bounceback (100)
    - New business and existing business - Clients who visited recently (product offers)
- Reactivation (300, 700, 1000, 1100)
    - Clients who have not visited recently or declining in frequency (product offers)
- Service (900)
    - Targeting Clients in order to provide an offer in hand at all times (service offers)
- Supplemental (1200 or 1300 in shared feeder markets)
    - Targeting Clients in order to provide an offer in hand at all times (product offers)
- Special Events (1200)
    - Supports specific events such as Service events (invitation offers)

Destination Market

- Welcome/Bounceback (200)
    - New and existing Clients who visited recently (Service & product offers)
- Reactivation (300, 700, 1000, 1100)
    - Clients who have not visited recently or declining in frequency (Service & product offers)
- Service Supplemental (900 or 1400 in sister Franchises)
    - Targeting Clients in order to provide an offer in hand at all times (service offers)
- Special Events (1200 or 1300 in sister Franchises)
    - Supports specific events such as Service events (invitation offers)

Audience Level

Client uses ID/DMID as the primary identifier. In most all instances, this is the primary level of identification for mailings. Campaigns are selected based on individual ID, taking into account other linkages. Depending on downstream processes, some Franchises may elect to perform an address level merge to reduce mailings to one family/address.

While most identification occurs at the individual Client level, there are two other database or Franchise levels of linking that can occur. Linkages can only be created on request and are created at the Franchise level in the CMS system. Linkage data is forwarded to the PDB and EDW. Note these linkages are not for use in campaigns at this time.

Linked Accounts – Accounts that are linked in the PDB database on Client request by a common ID cross reference that is Franchise specific.
Shared Accounts – In Nevada, (Regulatory driven linkage) Clients can request a shared account. In this case, one account is defined as positive point balance, the other will always disService B as the same balance but negative

References are created on the PDB and held in a table named Client_Assoc_Accounts

All Clients are considered for and mailed based on household point value. It is noted that accounts can be merged, but only at the Corporate level. All history is combined and accounts can not be separated at a later date due to the loss of detailed information in the combination process. A 2006 initiative is in place to unwind the existing process and push the functionality to the EDW.

Suppressions

Business rules are defined to manage compliance with specific opt-out sources stored at the database level. Opt-outs are processed prior to opening the campaign window for the month. The channels are email and direct mail

Suppressions

1. DM opt-out (global opt out)
2. Email opt-out
3. Phone opt-out (very limited application for the purposes of this implementation)
4. Industry Restriction (DM flag)
5. Depending on the program, other suppressions or filters may be performed

Marketing Process

Pre-Campaign Processing

EDW Refresh

Current and Future State: Client IT team manages the hygiene and segmentation process of data refresh that opens the monthly campaign window. While hygiene and other database processes will remain within the purview of Client IT, the segmentation process could potentially be triggered by Software Aas a scheduled process. Campaign could be used to initiate execution of SQL code that:

- Applies suppressions
- Applies business rules
- Generates aggregated data
- Scores database
- Creates segments
- Opens Campaign Window

Campaign Processing

Current State: Franchise Campaign Process

Current Franchise Campaign Process steps are listed below. For interaction of steps and systems, please see the following current state illustration (Figure 8).

Files that are manipulated contain DMID, the primary identifier across systems. Files created by Franchises are coded with matrix information embedded into the file name and provided back to the Offers System with an offer matrix which is then combined with the disparate solicitation files to create a full mail file containing name, address and loyalty based information used in personalization.

Step 1 (Franchise)
- Review previous analysis
- Determine Objective
- Create Proforma

Step 2 (Franchise)
- Create Offer
- Run Standardized Campaign/Ad Hoc Query
- Filter Hotfiles, De-dup series based on prioritization, etc
- Create Offer Matrix
- Segment into Regular, Test, Control, Worth buckets, etc

Step 3 (Franchise)
- Associate Clients (lists) with Offer to create Recipient Groups
- Offers sends list to appropriate vendor

Step 4 (Client)
- Respond/non response

Step 5 (Franchise)
- Analyze P&L, Behavior Change, Consolidated Summary, Test and Control

Current State: Franchise Campaign Process Flow

Figure 8. Franchise Campaign Process Current State

Future State: Franchise Campaign Process

EDW Refresh Cycle occurs as normal to apply standard suppressions and create segmentation (EDW) These processes will continue without alteration by the Tool Implementation. Campaign window is opened on completion of refresh processes.

Franchise selects Standardized campaigns (Tool Software B/Campaign) Franchise utilizes Tool Software B to select a predefined Campaign flowchart built to emulate the appropriate Standardized campaign and applies filtering and manipulations formerly done in Ad Hoc Tool. Franchise Marketers enter criteria into user friendly prompts which seamlessly transfer data to the appropriate Software A flowchart. This flowchart selects Clients from the vCRM view containing the current segmentation. De-duping, series prioritization, and specific filtering criteria are entered through the Software B interface.

Franchise enters Business Rule setting variables (Tool Software B) Franchise utilizes Tool Software B to enter criteria into a second flowchart, which suppresses customers from the dataset created in the Standardized campaign selection above. Suppressions are based on tunable parameters that are exposed to the Franchise via Software B. Note: in initial pilot phases, Franchises will provide criteria and campaigns will be run in Software A by designated power users.

Franchise runs campaign, receives counts (Tool Software B) Franchise re-runs campaign until desired counts are reached.

Decision point: Audit counts (Manual step/Tool Software B) Software B presents campaign selection totals. Normal validation process occurs to approve campaign. Note: in initial phases, marketers will receive counts from Software A power users designated to run campaigns.

Generate Final Output (Tool Software B) Franchise instructs Software B to generate the final list. Software B executes a trigger (stored predefined process) to forward Recipient List of Client DMIDs to the Offers System.

Assign files to recipient groups (Offers System) External process to be defined and implemented by Vendor will integrate Tool output files with Offers System to assign Recipient Groups to the correct offer.

Format mail file (Offers) Offers System will continue to perform the process of formatting data and triggering delivery of a mailfile to the appropriate vendor.

Reporting (Offers, Post Offer Analysis) Offers System will continue to provide all file specific reporting save count approval steps handled within Tool. Post offer campaign analysis will continue to be maintained separate to Tool and Offers System.

New Campaigns Note: For a campaign that has not yet been built, Franchise will work with Corporate Marketing to document specifications, develop the Software A Flowchart and test prior to creation of Software B interface and rollout to production.

Future State: Franchise Campaign Process Flow

On completion of the three Tool installation phases, Franchise Campaign Process will be altered slightly. For interaction of steps and systems, please see the following future state illustration.

Figure 8. Franchise Campaign Process Future State

Current State: Corporate Campaign Process

Currently corporate trigger campaigns are executed via Data Warehousing Tool's campaign tool, TCRM. These campaigns are initiated via schedulers and manually loaded to the Offers System.

Three campaigns are currently run as scheduled TCRM initiatives:

- Expiration
- E-Statement
- Tiered Upgrade

Future State: Corporate Campaign Process

EDW Refresh Cycle occurs as normal to apply standard suppressions and create segmentation (EDW) These processes will continue without alteration by the Tool Implementation. Campaign window is opened on completion of refresh processes.

Corporate Marketers select trigger campaigns (Tool Campaign) Marketer utilizes Tool Scheduler to run campaign in a 'lights out' mode. Flowchart is established with appropriate criteria and scheduler is set to launch the flowchart.

Scheduler runs campaign, generates Final Output (Tool Software B) Scheduler instructs Software B to generate the final list and forwards mail files to the Offers System and a master mailing file to SmartDM (EM vendor)

Assign files to recipient groups (Offers System) External process to be defined to integrate Tool output files with Offers System assigns Recipient Groups to the correct Offer.

Reporting (Offers, Post Offer Analysis) Offers System will continue to provide all file specific reporting. Post offer campaign analysis will continue to be maintained separate to Tool and Offers System.

It is recommended that Client and Vendor investigate and specify standards for utilization of native reports available in Tool for:

- QC of campaign process and results
- Audits of tool and environment usage
- Single step and multiple step Email and Web behaviors stimulated by marketing efforts

Auditing

Future State: Tool cells can be audited through the generation of an audit file and the review of that file. The audit file could be generated using an Software A interim extract process, called Snapshot to produce an interim file before final output. This Snapshot process can send all the cell records to files or just a sample of records without writing out to any history tables. In addition, Tool has several built in Audit reports that can be viewed or exported.

In light of the different options for auditing, Vendor will need to work with Corporate Marketing and Franchises to agree upon and standardize auditing procedures.

In addition, in further development phases, the audit snapshots could generate output to an audit table that will allow for profile reporting and use a web application for viewing.

Contact History

Current State: The EDW contact history is used and maintained via the existing Offers System for direct mail campaigns.

Future State: The Software Vendor contact and response history are both not used, and the existing EDW contact and response history processes will remain in operation without change.

Response History

Current and Future State: For response tracking, the existing Client reporting infrastructure will continue to be used. The existing reporting is based on linking efforts to responses captured via toll free phone numbers or scanned barcodes on coupons.

FUNCTIONAL SPECIFICATIONS

Tool Environment

Security

Tool security will be handled through Unix permissions on the campaign file data. Unix user IDs will be assigned for each Software Vendor user, and appropriate file security will be enforced at the region and Franchise level.

Initially, the same shared login and password will be used in each data source. Tool Security Manager (ASM) submits the database login and password without the user having to enter it.

Users

ASM will be used to manage user accounts

- **Corporate Marketing:** The primary system users are the corporate marketing staff listed in the future state section on page 16 of this document and will be designated as administrators within the ASM and Campaign tools.
- **Client Corporate IT Team:** will be set up as administrators to manage upgrade, connectivity and technical issues.
- **Franchise Marketing:** Depending on user sophistication and knowledge of the underlying data, user located at Client ~40 Franchises will be provided with either Campaign or Software B user access.

Data sources

The primary data source as detailed resides in the EDW, specifically in the View named vCRM.

- **EDW:** the Client Corporate data warehouse will continue to be used as described. Ownership of the vCRM view will be transferred to the campaign group.

- **Flat Files:** The ability to add in additional flat files exists in Tool but is not currently utilized by the Franchises or Corporate Marketing. It is recommended that in the next phases, a specific procedure be written to define and regulate future usage of data not currently stored in the EDW.

- **E-Channel Data:** Several underlying projects are planned or in process to share in batch mode data from the corporate Email vendor. Currently, functionality is built into the EDW to store email and Web response data from the Email vendor, but regular batching and processing of data has not occurred. Historical data also has not been created or loaded to these tables. Additional work will be required to define, process and store tracking of multiple step responses.

Software A Set-up

User Directories

The following section specifies the initial directory structure and taxonomy for Tool created objects like campaigns, sessions, templates, derived fields, etc.

Taxonomy

As discussed through implementation and discovery, a best practice in campaign management is the standardization of naming conventions for files and storage areas. Many different coding mechanisms can be implemented in developing a naming convention and the following taxonomy has been discussed and agreed upon as standard for Client.

Proposed Client Structure

Campaigns

Campaign is a marketing event in its entirety with associated summary data; a campaign may encompass more than one flowchart and related elements. A Campaign in Tool captures campaign metadata which can be output within its flowcharts. Following is the proposed structure for organization of Campaigns. Note that Production is the live universe, Test,, Development and Working Files are temporary structures to aid in the flow of work from inception. Proper hygiene and archiving must be in place to maintain these areas.

Production
- ↳ (Region)
  - ↳ (Franchise)
    - ↳ (Campaign Type)
- ↳ Corporate Campaigns
  - ↳ (Type)
- ↳ Test
  - ↳ (Username)

Development
- ↳ ((Region)
  - ↳ (Franchise)
    - ↳ (Campaign Type)
- ↳ Corporate Campaigns
  - ↳ (Type)

Working Files
- ↳ (Username)

- Production - Holds all data associated with active Campaigns
- Development – Separate environment (5% sample universe) used to develop Campaigns
- Test – Campaigns moved from Development but not tested against full Universe and approved for Production
- Working Files – User scratch pad space, designed to be utilized for temporary storage of objects not attributed to a specific campaign across Test, Development and Production folders

Folder Name	Examples
Region	Region
Franchise	Franchise
Campaign Type	Special_Event Service

Folder Name	Examples
Working Files	**Working_Files**
UserName	John_Doe
Corporate Campaigns	**Corporate_Campaigns**
Campaign Type	Type

Sessions

Sessions categorize flowcharts that are not for campaign purposes, but are used for data manipulation or analysis. Sessions do not have campaign metadata associated to them. Following is the proposed structure for organization of Sessions.

Production

- ↳ (Region)
  - ↳ (Franchise)
    - ↳ (Campaign Type)
- ↳ Corporate Campaigns
  - ↳ (Type)
- ↳ Test
  - ↳ (Username)

Development

- ↳ ((Region)
  - ↳ (Franchise)
    - ↳ (Campaign Type)
- ↳ Corporate Campaigns
  - ↳ (Type)

Working Files

- ↳ (Username)

- Production - Holds all data associated with active Sessions
- Development – Separate environment (5% sample universe) used to develop Sessions
- Test – Sessions moved from Development but not tested against full Universe and approved for Production
- Working Files – User scratch pad space, designed to be utilized for temporary storage of objects not attributed to a specific session across Test, Development and Production folders

Folder Name	Examples
Region	Region
Franchise	Franchise
Campaign Type	Special_Event Service
Working Files	**Working_Files**
UserName	John_Doe
Corporate Sessions	**Corporate_Campaigns**
Session Type	Type

Templates

Templates capture the business logic in a Select process for reapplication in various flowcharts. Templates are typically stored in libraries organized around specific Template functions. The key to making these libraries usable are the naming conventions applied to Templates – as well as to the folder systems that store the Templates.

For ease of use and retrieval, Templates should be organized into folder and sub-folder groupings. When designing these folders, the following guidelines should be followed:

- Folders should group triggers meaningfully and logically. Ease of retrieval should be the primary goal
- Folder names should adequately represent the contents of the folder
  - For example, Templates related to suppression logic might be stored in a folder called 'Suppression'
- Sub-folders should be used to aid in organization
  - For example, under a folder labeled 'Suppression', sub-folders may be labeled 'Email' and 'Direct Mail'
- Spaces are not allowed in folder names. Underscores will be used as word separators
- Notes should be provided for each folder. This provides more information to help users choose the right folders for Template storage

Agreement was made to name Template folders by the Template type. Following is the proposed structure for organization of Templates. Other folders may be created over time pending the need for additional storage based on Client definitions of Template Storage

Production

- Rules
- Test_Control_Splits
- Criterion_Filters
- Standardized_Campaign_Classification
- Input_File_Handling
- Output_File_Creation
- Working_Files
  - (Username)
- **(…)**
- Test
  - Rules
  - Test_Control_Splits
  - Criterion_Filters
  - Standardized_Campaign_Classification
  - Input_File_Handling
  - Output_File_Creation
  - Working_Files
    - (Username)
  - **(…)**

Development

- Rules
- Test_Control_Splits
- Criterion_Filters
- Standardized_Campaign_Classification
- Input_File_Handling
- Output_File_Creation
- Working_Files
  - (Username)
- **(…)**

- Production - Holds all data associated with active Templates
- Development – Separate environment (5% sample universe) used to develop Templates
- Test – Templates moved from Development but not tested against full Universe and approved for Production
- Working Files – User scratch pad space, designed to be utilized for temporary storage of objects not attributed to a specific Template
- Rules – Specific business rules to manage functions such as Day of Week, Like Offers, etc.

- Test_Control_Splits – Functions developed to manage selection of groups within a campaign for testing purposes
- Criterion_Filters – Individual predefined processes to prioritize Clients for suppression
- Standardized_Campaign_Classification – Functions to determine naming conventions prior upload to Offers System
- Input_File_Handling – Functions to format and prepare input files for use in campaign flowcharts
- Output_File_Creation – Functions to format output files for downstream processes and vendors

Folder Name	Examples
Distinct Rules	Day_Of_Week Like_Offers
Test/Control Splits	Adjustable_Test_Control Stratified_Sample
Criterion Filters	Active_Accounts Expiring_Accounts Valid_Franchise
Standardized Campaign Labeling	100_Series_Label 200_Series_Label
Output Processing	Output_for_Offers Output_for_DM Output_for_Split
Working Files	**Working_Files**
UserName	John_Doe

Custom Macros, Table Catalogs, Trigger Scripts, Derived Fields, etc.

For ease of use and retrieval, other objects should be organized into folder and sub-folder groupings. No common definitional hierarchies exist across all functions listed in this section. Groupings will be determined as required through the development process. When designing these folders, the following guidelines should be followed:

- Folders should group items meaningfully and logically. Ease of retrieval should be the primary goal
- Folder names should adequately represent the contents of the folder
    - For example, objects related to suppression logic might be stored in a folder called 'Suppression'
- Sub-folders should be used to aid in organization
    - For example, under a folder labeled 'Suppression', sub-folders may be labeled 'Email' and 'Direct Mail'
- Spaces are not allowed in folder names. Underscores will be used as word separators
- Notes should be provided for each folder. This provides more information to help users choose the right folders for storage

Production
- ↳ Working Files
    - ↳ (Username)
- ↳ **(…)**
- ↳ Test
    - ↳ Working Files
        - ↳ (Username)
    - ↳ **(…)**

Development
- ↳ Working Files
    - ↳ (Username)
- ↳ **(…)**

- Production - Holds all data associated with active Objects

- Development – Separate environment (5% sample universe) used to develop Objects
- Test – Objects moved from Development but not tested against full Universe and approved for Production
- Working Files – User scratch pad space, designed to be utilized for temporary storage of objects not attributed to a specific campaign across Test, Development and Production folders

Folder Name	Examples
Working Files	**Working_Files**
UserName	John_Doe

Input/Output Files
Data that is used as inputs and outputs from Campaigns will be stored in folder hierarchies mirroring that of Campaigns. The purpose is to replicate structure that will allow simple navigation and access to input source and file outputs.

Following is the proposed structure for organization of input and output files.

Production

- (Region)
  - (Franchise)
    - (Campaign Type)
- Corporate Campaigns
  - (Campaign Type)
- Test
    - (Username)

Development

- (Region)
  - (Franchise)
    - (Campaign Type)
- Corporate Campaigns
  - (Campaign Type)

- Production - Holds all data associated with active Campaigns
- Development – Separate environment (5% sample universe) used to develop Campaigns
- Test – Campaigns moved from Development but not tested against full Universe and approved for Production

Folder Name	Examples
Region	Region
Franchise	Franchise
Campaign Type	Special_Event Service
Corporate Campaigns	**Corporate_Campaigns**
Campaign Type	Campaign Type

***Offer*s**

Depending on the Franchises, offers software in Software A will not be used. Client team will continue to use the existing Offers System. As noted, an opportunity to use the functionality in Tool to query underlying Offers data should be considered in order to utilize data more effectively in selection and adherence to contact cadence rules.

The existing Offers process requires that data within a campaign is broken into multiple (up to nearly 100) small mail files in order to feed the system appropriately. Tool will provide files as defined. Functionality will be developed outside of Tool, which will be launched and controlled from within Tool to replicate the complex process of splitting files as dictated by the downstream systems.

In the interim, one large file will be generated to be sent to the Franchises for suppression and other downstream processing. Franchises will use their existing file creation processes to create mail files.

Data

Audience Levels

Primary Client identifier is DMID. Marketing efforts drive creation of a file that identifies offers by file name and contain only a list of DMIDs. Additional information such as name, address and loyalty information are appended prior to the solicitation file being sent to the fulfillment vendor.

No specific additional taxonomy is required to manage usage of Audience Levels.

Campaign Environment

Metadata

Developing good organizational standards will enable the team to more easily manage and maintain campaigns. Naming conventions and consistent management of associated descriptive data can greatly impact the success or failure of any tool implementation. Since naming conventions are not always enforceable (in the case of free form text fields), best practices dictate that conventions should be determined and agreed upon.

The downstream impact consistency can have will be seen in the ability for the system or other tools to query named fields for reporting, QC, searching, and dynamic reuse of objects.

General Naming Standards

For coded fields, general best practices direct that naming conventions should meet the following guidelines:

- Should be descriptive. Names like 'BobsCampaign1' are not appropriate
- Should not include spaces if field will be used for RDBMS report selection, etc.
- Should be unique – although uniqueness is not always enforced within the tool

For descriptive text fields, general best practices direct that naming conventions should meet the following guidelines:

- Should be as descriptive as possible
- Should summarize the design requirements or the goals for the element (Campaign, Flowchart, Process, etc.)
- Intensive formatting, such as paragraph indentation, etc., should not be used, although underscores can and should be used for name fields
- Should be unique – although uniqueness is not always enforced within the tool

Proposed Client Structure

Campaigns

The following are the proposed Client standard conventions for Software Adescriptive fields at the campaign level. For the immediate implementation, Date will be used in the naming convention in order to differentiate like campaigns. On the implementation of Software B, Date may be removed from the naming convention.

Field	Naming/Coding Convention	Example
Campaign Name	XXXYYZZZ-Object_Name_Escaped_By_Underscores • XXX = 3 ltr Franchise code (i.e. LAS) • YY = object owner's initials (i.e. MS) • ZZZ = campaign type (i.e. HTL)	LASMSPRO-06_2005_Big_Giveaway
Campaign Code	Campaign codes are system generated and will remain as C########	C00000046
Initiative	May be left blank. System default settings are: • Acquisition • Retention • Cross Sell • Up Sell	Retention
Description	Free text field identifying the Campaign	Evebt
Objective	May be left blank. Goal of campaign – metrics of the campaign.	Objective
Channel(s)	Method used for distribution of marketing message	Direct Mail
Effective/ Expiration Dates	Campaign start and end dates. Not used for tracking responses but available for reporting. Default is calendar month except in case of date specific mailings like Special Events, in which the event dates will be used.	10/1/2005, 10/31/2005

Campaign User Defined Fields

Software Aallows for additional user defined fields, which are optional for campaign setup. These fields are also referred to as Campaign Extended Attributes. Below is a list of additional fields and field types that will be created for Client.

Following fields will be used in upcoming phases to drive reporting on campaigns across Franchises, campaign types and time.

Field Name	Field Type	Field Definition	Sample Entries
Region/Pod/Franchise	VarChar	List of all possible Franchise combinations Single Select Drop down list (no default)	123
Campaign Type	VarChar	list with ~ 30 three letter campaign types Single Select Drop down list (no default)	456
Year	Num	Single Select Drop down list (current year is default)	2005 2006 2007
Month	VarChar	Single Select Drop down list (no default)	JAN FEB MAR

Sessions

The following are the proposed Client standard conventions for Software Adescriptive fields at the Session level. For the immediate implementation, Date will be used in the naming convention in order to differentiate like campaigns. On the implementation of Software B, Date may be removed from the naming convention

Field	Naming/Coding Convention	Example
Session Name	XXXYYZZZ-Object_Name_Escaped_By_Underscores • XXX = 3 ltr Franchise code (i.e. LAS) • YY = object owner's initials (i.e. MS) • ZZZ = Session type (i.e. HTL)	LASMSPRO-06_2005_Big_Giveaway
Description	Free text field identifying the Session	Client File Generation Process

Flowcharts

When a new Flowchart is designed in conjunction with a Campaign or Session the user may supply a Flowchart Name and Flowchart Description. Once the Flowchart is saved, the name assigned to the flowchart will serve as a link on the Summary page for the associated Campaign or Session.

Flowchart usage in the Client marketing environment will be defined as one flowchart per campaign. If there is a fundamental change to the flowchart logic then a new campaign will be created. As such, flowchart naming conventions will follow that of Campaigns.

For the immediate implementation, Date will be used in the naming convention in order to differentiate like campaigns. On the implementation of Software B, Date may be removed from the naming convention

Field	Naming/Coding Convention	Example
Flowchart Name	XXXYYZZZ-Object_Name_Escaped_By_Underscores • XXX = 3 ltr Franchise code (i.e. LAS) • YY = object owner's initials (i.e. MS) • ZZZ = campaign type (i.e. HTL)	LASMSPRO-06_2005_event_Giveaway
Description	Free text field identifying flowchart	Client 123

Stored Triggers

Stored Triggers in Tool are stored scripts that can be called anywhere in a Flowchart. Software A has the ability to manage libraries of Stored Triggers that perform different functions. The key to making these libraries usable are the naming conventions applied to Triggers – as well as to the folder systems that store the Triggers.

Note: Stored Triggers differ from Client Triggers (Campaigns) – campaigns that run in a lights out mode on a daily, weekly or monthly basis.

When Stored Triggers are deployed, the Trigger Name is most often chosen from a list. When supplying names to triggers, the following guidelines should be considered:

- Names should be meaningful and describe the intent of the trigger
- Spaces are not allowed in triggers names
- Notes should be provided for each saved item

Process Boxes

Each of the Software A Process Boxes used in a Campaign design should be provided with a unique name. When supplying a Process Name, the following guidelines should be observed:

- Must be unique within a Campaign
- Should be descriptive. This allows users to understand the contents or purpose of the process just by looking at the Flowchart view instead of drilling into individual processes
- Should be brief. Because the output cells resulting from a process retain the name of that process, Process Names that are too long could be hard to work with down stream.

For each Process box, users have the option to supply a Note. The text typed into the Note field is available as a pop-up when users mouse over that process. When a Note is supplied, the following guidelines should be followed:

- Describe the contents and/or objective of the process
- Include the actual selection criteria or SQL code. Because users can mouse over the process and see the full note, it is a common practice to copy and paste selection criteria into the Note fields of Select processes

Segments

Outputs from individual Process Boxes can be built into Tool Segments. These segments are passed to the next Process box for selection and further manipulation or filtering steps as dictated in the flowchart.

To understand the best practices associated with naming Segments created within a Segment process, it is important to first understand how that Segment name will be used down stream in the Campaign. Once a Segment is named, that name + the name of the Segment process then becomes the name of the output cell that results from that process.

For example, if a Segment process named '100Series' produces three Segments named – '101', '102' and '103', that Segment process will produce three output cells – named '101.out', '102.out'and '103.out'. This 'layering' of the process and Segment names should be considered when determining your naming standards.

When naming Segments, the following guidelines should be followed:

- Segment names should be simple and as short as possible. This will make them easier to work with down stream
- To keep names simple and short, spaces should not be used
- Segment names should be meaningful and should describe the contents of the segment

Derived Fields and Stored Derived Fields

Derived Fields in Tool provide functionality that allows users to access manipulated data such as temporary or pass though fields that can be called anywhere in a Flowchart. And eliminate the need to recalculate variables within the flowchart. Stored Derived Fields are saved differently than Derived Fields and are available to other Flowcharts outside of the specific Campaign.

Software A has the ability to manage libraries of Stored Derived Fields. The key to making these libraries usable are the naming conventions – as well as to the folder systems that store the Derived Fields.

When supplying names to Derived Fields, the following guidelines should be considered:

- Names should be meaningful and describe the content of the field
- Spaces are not allowed in Derived Field names
- Notes should be provided for each saved item

Output Files

In the Software A Mail List, Call List and Snapshot processes, output files are created for the purpose of exporting data from Tool Campaign. These files should be named and stored appropriately so that they can be easily retrieved.

When naming an Output File, naming conventions should meet the following guidelines:

- Should be descriptive. Often, the output file name references the name or code of the associated Campaign
- Will include a date. If the Campaign is to be executed multiple times and/or will produce different files on different dates, a date may be an important part of the file name
- Output files should be saved in a directory on the Software Aserver that allows multiple users to easily retrieve their files

Campaign Extended Attributes

The additional Software A extended attributes are listed below.

Franchise: Referential listing of all Franchises for which campaign is produced
Campaign Type: Listing of marketing campaign type
Campaign Code: CampaignCode, 8 characters, Format = Cnnnnnnnn (e.g. C20040001)
Offer Extended Attributes: For the first phases, offers in Software A will not be used. Client team will continue to use the Offers System
Offer Code: First half of identifier for unique offer record. Offer Code1, 64 characters, Format = OCnnnnna (e.g. OC00001A)
Offer Version Code: Second half of identifier for unique offer record. VersionCode, 64 characters, Format = Vnnn (e.g. V001)
Tracking Code: Code given at moment of associating an offer version to a cell in a list process. TrackingCode, 64 characters, Format = TCaannnnnn (eg. TCAA000001)
Cells: Cells in Software Ado not capture much information. The agreement here is that the cell code will be used for the actual cell code and the cell name will be the descriptor. Cell name can be manipulated by changing the previous process name and output cell designation.
Cell Code: Cell Code is the id of the cell generated upon list output. CellCode, 50 characters, Format = Tnnn (eg. T001)
Products: There will be no initial mapping to a products table.
Selects and Segments
This section describes standard business logic used for suppressions, selections, and to identify strategic segments.
Templates capture the business logic in a Select process for reapplication in various flowcharts.
Strategic Segments saves a set of keys at a designated audience level that identifies a group of households or accounts. There are no plans currently to develop Strategic Segments.
Contact History is used and maintained via the existing Offers System. No integration or usage of internal Tool functionality is planned.
Response History tracking will continue to be tracked and reported outside of the Tool tool. No integration or usage of internal Tool functionality is planned.

SUMMARY RECOMMENDATIONS

While Client, Software Vendor and Vendor A have closely partnered to scope out a detailed three phase implementation, pilot and rollout process, Vendor Corporation has the following additional observations and callouts that could further benefit Client in delivering success through implementation and rollout to full production.

Adopt a Release Mentality

In software development organizations, a standard project management practice is in place to create releases or versions. All functionality is developed, tested and batched together with documentation detailing changes, features and benefits. Small changes are handled as dot releases, while more robust upgrades are handled as major releases.

This process can successfully be adopted in the IT and user environment to not only control software and functionality updates, but also to create additional awareness of procedures defined within the marketing environment that standardizes Client tool usage. This too, can add to awareness, compliance and ongoing success of the overall marketing environment.

Marketing to Marketers

Franchise marketing teams have varied goals, skill sets and levels of marketing sophistication. Some challenges the implementation team will face include piloting, training and eventual rollout. With respect to users, one risk is adoption of the new tool versus continuing to execute programs in the current process model.

It is recommended that Client develop a full launch plan that includes awareness generating activities that will not only initiate training and usage, but will also include opportunities to leverage Client rich entertainment history to make the process creative, fun and entertaining.

This plan should be modular, to be easily replicable for pilot Franchises, or full rollout to the organization.

Develop a strong User Community

Software Vendor Corporation offers many opportunities to interact with their user community through online forums, regional meetings and annual conventions.

Client future state will have many dozens of users interacting with the Tool tool suite. With that being said, Client has the opportunity to develop a rich repository of user experiences and support through developing its own tools to share information.

It is suggested that Client develop a longer term plan to leverage and disseminate information from Software Vendor sources, as well as start creating the opportunity for Client employees to develop their own network. Tools that can be used are email forums, a knowledge share portal on the company intranet and periodic training and sharing conferences that bring Franchise and Corporate marketers together to share and learn. It is imperative for such initiatives to succeed, subject matter experts should be selected and potentially incented to maintain and share out information via the various channels and tools developed for this process.

Continue to build a standardized, yet flexible Marketing Platform

In light of the flexibility that Tool tools offer; and the varied goals and processes currently managed by Franchises, Client should continue to strive to create an environment that allows marketers to focus on marketing results rather than managing marketing processes.

The shape of integration efforts should include; extension of leveraging functionality available within the larger Tool suite, developing more sophisticated underlying infrastructure as well as periodic review of end reporting and analysis for the creation of channel and business specific dashboards.

From an infrastructure standpoint, several underlying projects are planned or in process to share in batch mode data from the corporate Email vendor. It is also suggested that specific procedures be written to define and regulate future usage of data not currently stored in the EDW, such as flat files generated from ad hoc processes such as surveys, signup or customer comments.

Identify additional opportunities for auditing, analysis and measurement

It is recommended that Client and Vendor Corporation investigate and specify standards for utilization of native reports available in Tool and other tools for:

- QC of campaign process and results
- Audits of tool and environment usage
- Single step and multiple step Email and Web behaviors stimulated by marketing efforts
- Development of additional benchmarks for campaigns, usage and channels

APPENDIX I - PROJECT PLAN STEPS AND MILESTONES

Extract Value - Phase I

Infrastructure Assessment
Kick-off
Define Goals & Objectives
Define Roles and Responsibilities
Confirm current CM processes
Confirm Technical & Data Environment
Upgrade Software Vendor to latest version
Software Vendor Taxonomy
Define campaign metadata
Audit / update current campaigns
Infrastructure Assessment Document

Installation (Production Environment)
Complete Pre-install check list for new Servers
Install & configure Web Application Server
Install & configure Software B to Web App Server
Install & configure Software A Server
Migrate Existing Flowcharts
Build Table Catalogs
Post-Install Documentation
Formal Software Vendor Training
Advanced User Training by Consultant
Campaign Business Rule Development Support
Campaign Development Support

Technical Development
Develop / Refine BFF Process; apply to each Franchise
Data Discovery - DB recommendations
Develop scripts to maintain technical environment (temp table, file system)
Standardized Campaign (Reporting Tool) Extract Planning
Standardized Campaign Extract Design / Development
Standardized Campaign Extract Testing and Validation / Document
Define Requirement for Software B Interface for Standardized Campaign Selects
Develop Software B Interface for Standardized Campaign Selects
Gather business requirements for Tool to replace Franchise Access processing
Document Software B Process, create training materials
Set-up Software A permission (per Franchise) for file manipulation
Prepare templates for Access replacement processes
Document Tool best practices for Franchises, develop training materials

Process Improvement - Phase II
Advanced User Training
Business Rule Development Support
Campaign Development Support

Technical Development
Pilot the new Tool Software B / Campaign processes
Rollout the new Tool Software B / Campaign processes
Offer System Integration (OSI) Business Requirements
Offer System Integration Design & Development
Document OSI Process, Create user Training Documents
Offer System Integration Pilot / UAT
Offer System Integration (phased roll-out)

Full Integration - Phase III
Advanced User Training
Campaign Development Support
Business Rule Development Support
Database Recommendations

APPENDIX II - GLOSSARY

Software A Terminology

In the language of Tool Campaign, certain terms have specific meanings some of which may be different from the way they are used at Client.

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- **Campaign** is a marketing event in its entirety with associated summary data; a campaign may encompass more than one flowchart and related elements. A Campaign in Tool captures campaign metadata which can be output within its flowcharts.
- **Campaign Code** is the tracking code that identifies a specific campaign in Tool Campaign. The campaign code must be unique across campaigns.
- **Cell** is a group of Clients that is treated as a unit. Almost every process in Software A accepts cells as inputs and generates a cell or cells as output. Cells can also be output in the final list with Cell Codes and Cell Name.
- **Contact** is a record in the contact history table which indicates that output was generated with an offer to a customer.
- **Flowchart** is a single instance of a process flow within Tool Campaign. The Flowchart is where the actual data query and manipulation work is performed. Flowcharts are associated with Sessions or Campaigns depending on the purpose of the flowchart.
- **Select** is the process that allows Marketers to choose specific records (or all records) from any table, at any point in campaign development. Once records are selected, they flow through the subsequent processes within the campaign session.
- **Segment** is the process of dividing records (Clients) into groups for marketing purposes. Groups can be defined using business rules (logic) or by querying the value in a field when the field content is known to be mutually exclusive (such as gender). Resulting segments can be mutually exclusive. There are two types of Segment processes in Tool Campaign, one to create Strategic Segments and one to create cells dynamically within a flowchart.
- **Sessions** categorize flowcharts that are not for campaign purposes, but are used for data manipulation or analysis. Sessions do not have campaign metadata associated to them.
- **Strategic Segments** are pre-created cells that can be used across all flowcharts. These segments usually capture portfolios of customers based on value or business relationship. Strategic segments can also be used to eliminate complex or performance intensive query logic from having to be rerun multiple times.
- **Tracking Code** is an identifier for the application of an offer to a specific cell within a campaign and flowchart. It corresponds to the offer instance.
- **Offer** is the product, channel, and incentive presented to a group of customers through the Software A list process. Offer and Offer Version are synonymous in Software Awith each cell always tracking to an Offer Version. Offer Version is the lowest level of tracking within Tool Campaign. Offers will not be used by Client in favor of the existing Offers System.
- **Snapshot** allows Marketers to create a file or insert records into a database table at any point in the session. Files may be used to pass data to other systems, for auditing purposes, or for use in other flowcharts.
- **Trigger** is an Software A element that can be used within a List Process or Schedule Process to call an external executable. Triggers in Software A are used to initiate file transfers or to send emails.

Client Campaign Terminology
Client terms for reference against Software A definitions:

- **Campaign** is a set of projects organized within the same campaign folder in Tool.
- **Cell (metadata)** is tracked at the Offer Version in Tool Campaign. Though both Vendor A and Client have the similar definitions of a cell, Client will not initially be using cells as intended by Software Vendor. Metadata or extended attributes are collected at the offer version level in Tool. A Cell Code is still available though along with the Tool Cell Name used as a descriptor.
- **Contact** is the offer instance in Tool Campaign. It is the association of a cell to a specific offer.
- **Offers** at Client identify which offers a customer can receive. These will be defined as segments in Tool Campaign.
- **Project** represents a Campaign in Tool. A Client project could span multiple list or cells.
- **Trigger** is an event driven campaign that looks for households or accounts that exhibit certain behavior and sends an offer to them.
- **Standardized Campaigns** are defined as segmentations
- **Hotfiles** are monthly segmentation output derived from the EDW and used as input for Franchise level marketing efforts
- **Segment** is a recipient group targeted via segmentation and analysis
- **Series** is a rollup of Segments, i.e. 101,102, 103 = 100 series
- **Recipient Groups** are Clients targeted for specific offers
- **Marketing Work Bench (MWB)** Reporting Tool based tool that manages selection from Hotfiles based on predefined parameter challenges
- **Potential** is defined as Theorical estimate and is equated to revenue based on average hold
- **Worth, Average Daily Worth (ADW)** is defined as a snapshot in time of Potential
- **Share Of Service Budget (SOGB)** is share of wallet allocated to Service B
- **Offers System** interfaces with other Client operational systems
- **Comps** complimentary offer that is redeemed via the Entertainment Management System or the Lodging Management System
- **Coupons** are specific coupons bar-coded and scanned back into the Offers System

APPENDIX III - ROLES AND RESPONSIBILITIES

As provided during TCO phase

Campaign Manager

- **Competencies**
    - Understands the marketing objectives including the business objectives, timing, expected financial results
    - Management skills and responsibility for the Campaign Developers and Technical Leads
    - Authority and accountability to sign-off on campaigns that are run in the production environment
    - Project management and project deployment skills
    - Strong communication and negotiation skills working with the Marketing Managers/Franchises as customers of the process, in addition to IT Management who provide support to this process
    - Knowledge of the complete marketing process & the internal and external parties involved and/or impacted by the campaign management process
    - Understanding of the integration points, including timing/frequency, between Software A& other supporting applications
    - Ability to work with the Marketing Managers & recommend strategic database marketing tactics on a campaign by campaign basis

- **Work Activities**
    - Serve as the liaison between the marketing managers and IT to secure resources, communicate status, mediate issues, etc
    - Manage the Campaign calendar of events. Participate in the annual/quarterly planning sessions to understand campaign strategies to be deployed
    - Involved in the complete campaign life-cycle from ideation through to results analysis
    - Oversee and coordinate the collection and distribution of best practices and standards for the campaign team, including such items as:
        - Business processes
        - Naming standards and conventions for all the key Software A objects
        - Session templates, stored queries, derived fields
        - Directory structures, table catalogs
        - Report definition, strategic segment definition, offer management
    - Identify commonalities in the marketing initiatives (at a high-level) that can be leveraged across campaigns
    - Perform resource management across the Campaign Developers and Technical Leads for workload balancing and performance optimization resolution
    - Define the quality control process surrounding the use of Tool and roll-out of campaigns, in-line with corporate requirements.
    - Manage the campaign design methodology that is used by the campaign team for new campaigns
    - Regularly review the overall process and identify areas of opportunity to tune and enhance the process through the use of advanced campaign functions, process reengineering or performance optimization techniques
    - Measure progress against goals
    - Define and communicate the deployment plans for Tool (e.g., continued roll-out to users and Franchises over the upcoming 12- 18 months.
    - Communicate project success internally and externally where needed
    - Facilitate the on-going and advanced training needs of the campaign team to ensure they have access to the latest features/functions/enhancements of Tool

Marketing Managers

- **Competencies**
  - Owns the Campaign P&L
  - Responsible for campaign planning & financial ROI
  - Manages the contact strategies and its components for their Franchise
  - Defines the customer segments that are to be targeted.

- **Work Activities**
  - Works closely with the Campaign Developers to define campaign requirements:
    - Campaign Objectives
    - Targets/Customer Profiles/Estimated Counts
    - Suppressions and Exclusions to be Applied
    - Promo Frequency, Waves of the Promotion, Channels to be Utilized, Cross-Channel Interactions
    - Offers, Creatives, Treatments to be Applied
    - Estimated Financial Expectations and ROI Objectives
  - Reviews the initial designs and counts resulting from the Campaign Developers work with Tool, and provides recommendations to enhance the design
  - Ensures campaign best practices (control groups, samples, offer tests) are applied to the development process
  - Identifies offer types and utilizes the Offer Management System to facilitate response tracking
  - Monitors results, & communicates campaign effectiveness

Campaign Developers

- **Competencies**
  - Fully understands the campaign marketing process
    - functional paradigm (e.g., campaign planning, campaign design, testing, execution, offer management, promotion history, contact management, response tracking and reporting)
  - Understand how to effectively use the core functions of Software A (e.g., Select, Merge, Segment, Sample, Snapshot, Contact)
  - Acumen on Strategic Database Marketing; easily picks up new technology; analytical problem solver; creative thinker; detail oriented; basic knowledge of SQL; basic knowledge of data structures
  - Able to effectively communicate with the Franchise Marketing Managers to understand their requirements and translate those objectives into the Tool application
  - Understand the dependencies between the campaign efforts and other marketing initiatives (e.g., full contact strategies, cross-channel and cross-business launch plans)
  - Offer insight and recommendations to the Marketing Managers on how to maximize the campaign's objectives through the use of application functionality

- **Work Activities**
  - Work with the Tool application on a day-to-day basis to support CM activities including:
    - Create target selections & suppressions
    - Performing merges, segmentation, setting up samples, tests groups, control groups
    - Setting up table catalogs, core table mappings, output contents
    - Creating the campaigns to run on automated schedules
    - Defining simple & moderately complex queries for tracking
  - Work closely with the Marketing Managers to:
    - Document and finalize campaign requirements for setup in Tool
    - Serve as a 'partner' to provide expertise and insight into best practices related to the campaign management process for the Marketing Managers (e.g., use of sampling, QA procedures, standard suppressions)
  - Support Franchise Marketing Manager requests for quick counts and campaign status information
  - Utilize standard naming conventions and structures as defined by the Campaign Manager, to ensure consistency and usability within the application

- o Identify and recommend additional best practices/standards based on experience using the application on a day-to-day basis
- o Ensure that QC procedures are incorporated into the campaign design as specified by the Campaign Manager
- o Work with the Technical Leads to ensure the campaign is optimized for performance

Technical Lead

- **Competencies**
  - o Knowledge and expertise using SQL and writing simple to complex SQL queries/programs
  - o Knowledge of selected operating system scripting (e.g., shell script)
  - o Knowledge of the campaign marketing platform and environment (e.g., Unix, DB2, Windows)
  - o Expertise in all of the marketing data supporting Tool, relational database structures and query techniques
  - o Familiarity of the marketing and campaign management processes.
  - o Sophisticated knowledge of the more advanced features within the Software A application (e.g., audience level switching, creating complex queries using the query builder/raw SQL, triggers, complex templates, stored derived fields)
  - o Provide coaching and knowledge transfer to the Campaign Developers on some of the more sophisticated Tool features/functions (e.g., Audience, Schedule, Triggers, Snapshot)
  - o Provide coaching to the Campaign Developers on the data, table structures and database schema in support of their campaign development activities
  - o Support definition of table mappings and field usage
  - o Monitor derived field usage for potential db additions/modifications and work with designated DBA to complete the change
  - o Provide the first line of support for performance optimization with the end-users

- **Work Activities**
  - o Setup and manage the testing environment for testing upgrades and new releases of Tool
  - o Work with the Campaign Developers to establish testing timeframes and campaign regression tests
  - o Interface with Software Vendor regarding software upgrade requirements and release notes
  - o Work with the Campaign Developer(s) to identify which upgrades should be applied and when based on functionality to be supported
  - o Maintain the campaign environment overall (e.g., clean-up of directories, old sessions, etc)
  - o Serve as a liaison to the IT Support Resource specifically for:
    - Coordinating the upgrade or patches applied to the testing environment
    - Completing more complex hardware or network optimization
    - Developing technical components to support integration requirements where appropriate
    - Understanding the timing and communicating to the Campaign Developers information related to database activity that could affect campaign development

IT Support

- **Work Activities**
  - Manage Tool security setup & perform ongoing maintenance of the security ids in-line with corporate standards
  - Perform Tool application upgrades based on a request from the Technical Lead on the Campaign Team
  - Support the Technical Lead as needed in the coding of Tool triggers for both inbound and outbound requirements
  - Ensure the application environment has the appropriate capacity to support the volumes and users of Tool
  - Communicate to the Technical Lead or Campaign Manager the status of changes/outages on the environment that would impact Software A(e.g., database loads, database updates, platform migrations)
  - Coordinate and ensure the successful transfer of contact and offer information to fulfillment houses Monitor performance of the application environment, and provide expertise in the areas of tuning, optimization, and allocation of system resources
  - Conduct backup, recovery, and system maintenance procedures as defined in the standard corporate IT operational guides