

## Increasing Revenue and Loyalty Through Personalized Offers

Capturing Business Requirements Phase I of AT&T's Marketing Offer Support Tool

### The Client

AT&T Inc. (NYSE:T) is a premier communications holding company. Its subsidiaries and affiliates, AT&T operating companies, are the providers of AT&T services in the United States and around the world. Among their offerings are world-wide IP-based business communications services, 3G network and worldwide wireless coverage, and high speed Internet access and voice services.

### The Situation

AT&T saw tremendous opportunity to increase revenue and build customer loyalty by presenting customers with targeted offers and messages. In the current environment, neither the tools nor the strategy existed to present customers with such offers. AT&T enlisted outside help to begin development of a sophisticated marketing rules engine that would power the presentation of personalized offers and messages to the call center agent's desktop, web & IVR.

### The Solution

As a personalization technology expert for iXL/Scient, I was brought on to help eAssist Global Solutions with gathering business requirements across the AT&T organization for the development of a robust, real-time rules engine. This tool would personalize offers to customers and prospects who contacted AT&T through inbound non-targeted unsolicited channels, including Web, Email and call centers.

### The Result

The final product was an in-depth document that detailed business, data and offer delivery requirements for the new tool. In addition, four different data model approaches for targeting and prioritization of offers were developed. AT&T constituents were delighted with the document. They used it to further socialize the proposed tool within the organization and to begin development of supporting technical requirements. At the time this document was presented, AT&T was undecided as to whether they would build the tool in-house or utilize an off-the-shelf application.

**Marketing Offer Support Tool Business Requirements**  
 Prepared for

1.2	Business Need (Marketing & Channel)	1
1.3	Business Benefits	1
1.3.1	Customer Experience	1
1.3.2	User Experience	1
1.4	Project Scope	1
2.	DOCUMENT DETAIL S	4
2.1.	Document Revisions	4
2.2.	Document Purpose	4
2.3.	Contacts	4
2.4.	Document Acceptance	5
3.	BUSINESS RISK S	6
3.1.	Issues	6
4.	HIGH LEVEL OVERVIEW OF NEW PROCESS	7
5.	BUSINESS REQUIREMENTS	9
5.1.	Marketing Offer Support Tool	9
5.1.1.	Offer Development	9
5.1.2.	Analytics for Campaign Planning	14
5.1.3.	Offer Execution	18
5.1.4.	Offer Targeting and Prioritization	21
5.1.5.	Administrative	27
5.1.6.	Reporting & Tracking	28
5.1.7.	Offer & Message Delivery	28

