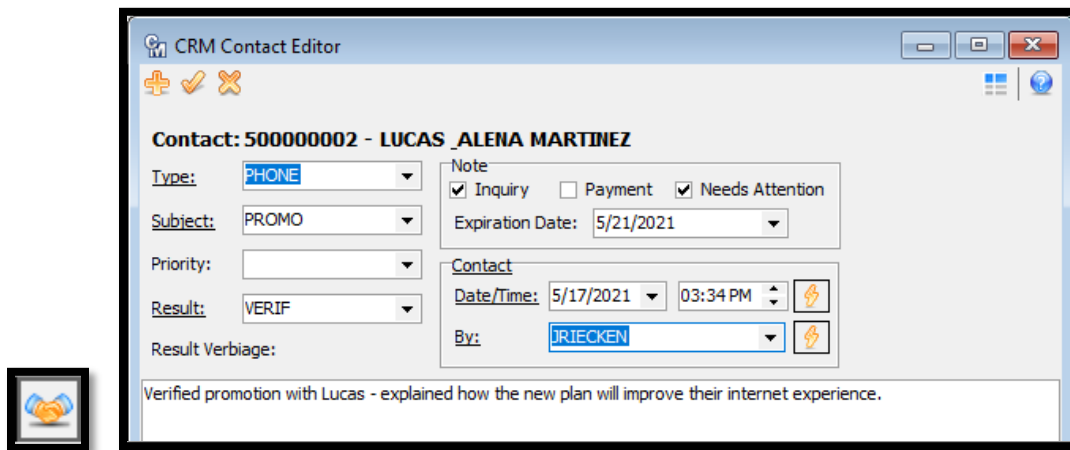


Marketing – A Case Study
Pop-Up Training
6/15/2021-6/17/2021

- Marketing Suite - CRM
 - CRM Maintenance
 - Using CRM



- Inquiry, Payment, Needs Attention, Expiration Date
- CRM Automatic Behaviors
- CRM Reporting
 - Account Contacts Report
- Marketing Suite – Case Study: Managed Wifi
 - Creative Services Resources
 - Newspaper ad
 - Social media ad
 - Insert
 - On-bill ad
 - HTML e-mail
 - Suggestive Marketing
 - CPNI Prompt
 - Message – with Attachment
 - Criteria

Suggestive Marketing Criteria Wizard

General Information

Criteria Code: MWIFI Description: Managed WiFi Inactive

Message Code: MWIFI Document:

(Message Code required for Viewing from Inquiry.)

Criteria Level

Company Billing Zip Code Main Report Area Report Area Service Area

Look in These Tiers

Account Customer Network

Bus/Res

No Filter Business Residence

Type:

Email Address Options

No Filter No Email Address Email Address

Type:

Payment Options

No Filter With ACH Without ACH With Auto Credit Card Without Auto Credit Card

Other Filters

Network Types Plant Service Inclusions Service Exclusions

- Employee Editor – Automatically Suggestive Market

Employee Editor

ID: JRIECKEN

First Name: Julie Middle Name:

Last Name: Riecken Full Name: Julie Riecken

Net Login: JRiecken

Automatically Suggestive Market

Automatically Open Account Overview

Designation:

USAC Rep ID:

Inactive

- Using Suggestive Marketing

CPNI | Activity | Vacation | Marketing

CPNI Approved

Last Marketed: 06/09/2021

Status	Code	Description	Promo	Promo Status
	MVP	Join the team by signing up for our MVP		
Accept	MWIFI	Mountain Valley Communications no		

- CRM Automatic Behaviors

CRM Contact window for contact 500000071 - MARY ABBOTT. The window includes checkboxes for Deleted, Include Notices, Include CPNI, Include NSF, Include ACH, and Include Notifications. Below is a table of automatic behaviors.

Type	Priority	Subject	Payment Note	Inquiry Note	Note Expire Date	Result	Contact By	Result Verbiage	Contact Date	Entered By	Entered Date	Changed By	Changed
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		SOLD	JRiecken	Suggestive Marketing accepted with the following criteria offered: MVP	6/9/2021 10:08:01 AM	JRiecken	6/9/2021 10:08:01 AM	JRiecken	6/9/2021
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		OFFER	JRiecken	Suggestive Marketing completed with the following criteria offered: MWIFI	6/9/2021 10:08:01 AM	JRiecken	6/9/2021 10:08:01 AM	JRiecken	6/9/2021
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		SOLD	JRiecken	Suggestive Marketing accepted with the following criteria offered: MWIFI	6/9/2021 10:08:01 AM	JRiecken	6/9/2021 10:08:01 AM	JRiecken	6/9/2021
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		OFFER	JRiecken	Suggestive Marketing completed with the following criteria offered: MVP	6/9/2021 10:08:00 AM	JRiecken	6/9/2021 10:08:00 AM	JRiecken	6/9/2021

- Promotions Setup (Campaign Manager)

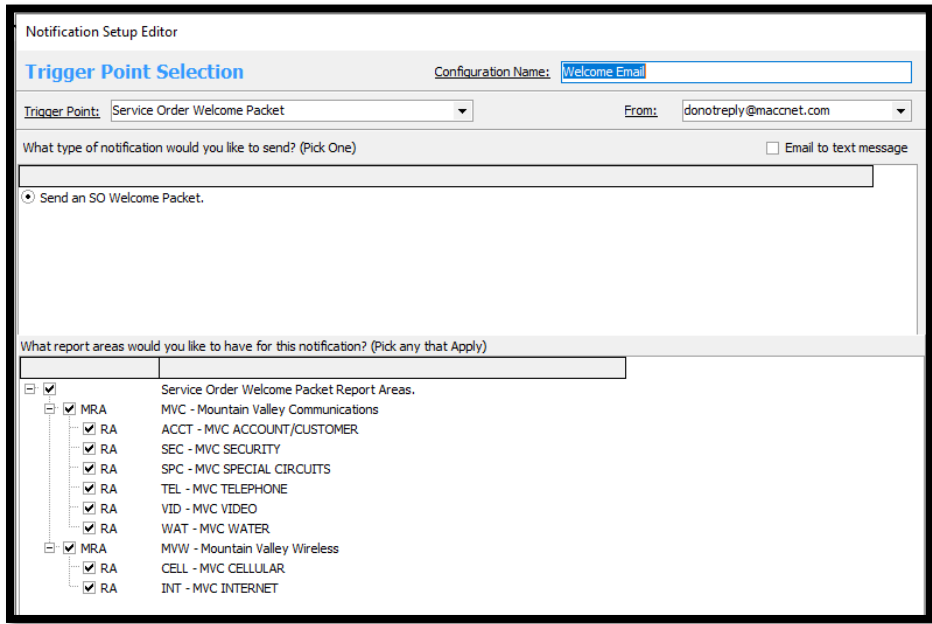
Promotion Campaign Manager window for Promo Code: MWIFI. Description: Managed Wifi Promotion. The window includes a sidebar with Promotion, Accounts, Actions, Service Orders, and Sales Leads. The main area contains fields for Promotion Code, Description, Start Date, End Date, Suggestive Marketing Criteria, Goals (Monthly Revenue, Accounts), and Costs and Gains (Installation, Monthly Gain).

- Promotions Actions

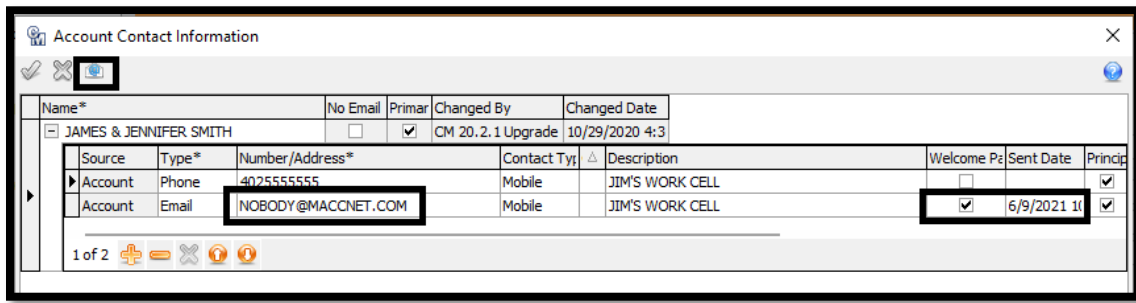
Promotion Actions window showing a table of promotion actions.

	Code	Description	Type	Changed By	Changed Date
▶	BB	Billboard	General	JRiecken	6/9/2021 10:26:21 AM
	Call	Calls to customers	Mass Contact	JRiecken	6/9/2021 10:26:10 AM
	Door	Door Hanger	General	LLemon	10/22/2020 2:54:00 PM
	Email	Emails generated from Mass Contact	Mass Contact	CM 13.2 Update	12/10/2013 5:28:19 PM
	InqOffAcpt	Offered Accepted from Inquiry	Account	CM 13.2 Update	12/10/2013 5:28:19 PM
	InqOffDed	Offered Declined from Inquiry	Account	CM 13.2 Update	12/10/2013 5:28:19 PM
	InqOffMade	Offered from Inquiry	Account	CM 13.2 Update	12/10/2013 5:28:19 PM
	MailLabels	Labels generated from Mass Contact	Mass Contact	CM 13.2 Update	12/10/2013 5:28:19 PM
	News	Newspaper Ad	General	JRiecken	6/9/2021 10:24:02 AM
	Post	Postcards	Mass Contact	JRiecken	6/9/2021 10:23:36 AM

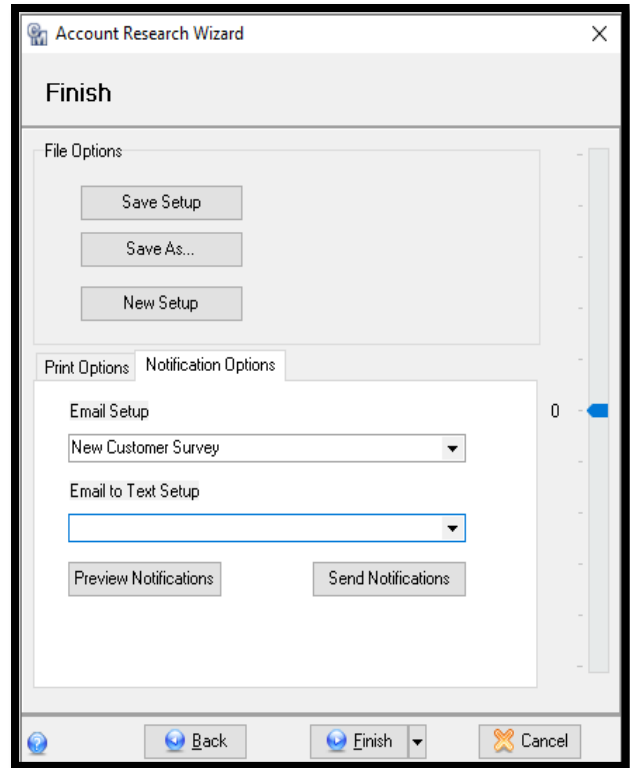
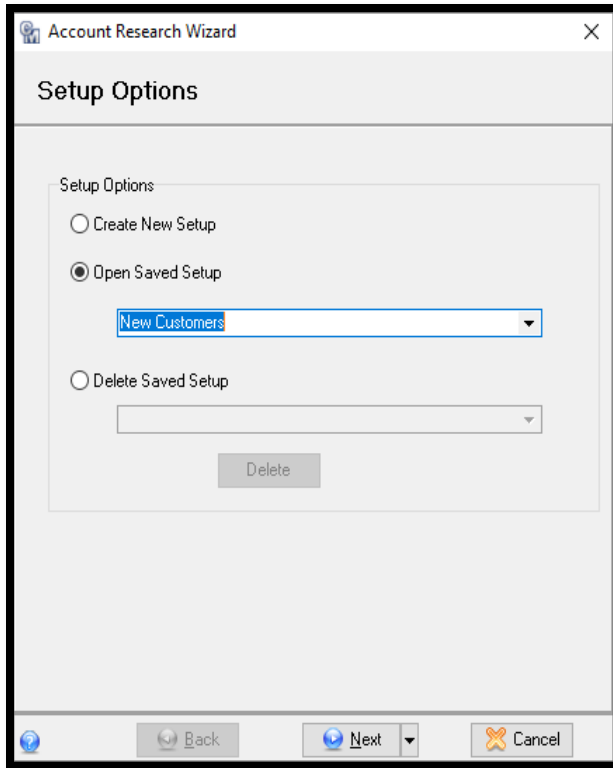
- Automated Behaviors – Promotions, CRM Rows, Service Orders
- Marketing Suite - Case Study & Review: Faster Internet
 - Creative Services Resources
 - Postcards
- Messenger Suite – Case Study: Auto-Pilot
 - Creative Services Resources
 - Auto-Pilot HTML Email Welcome Email
 - Welcome Email Attachment
 - Survey to new Account Holders
 - Survey upon Trouble Cleared
 - Trouble Ticket Mass Outage
 - Welcome Email Notification Setup



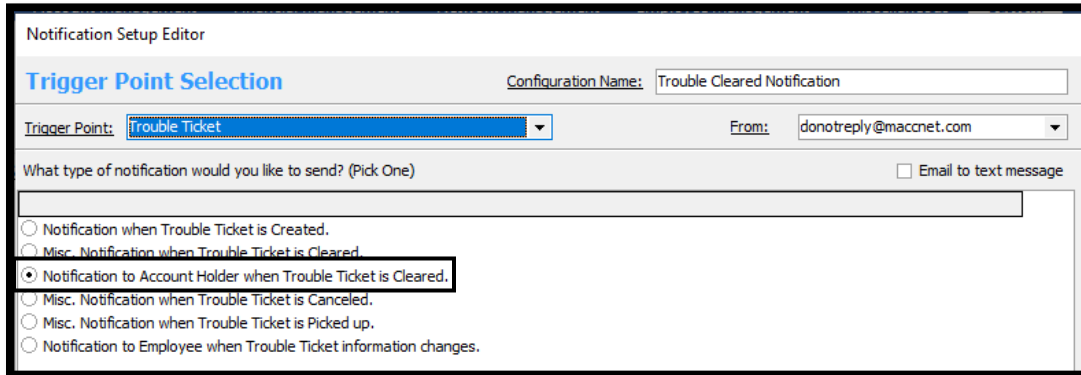
- Sending the Welcome Email – (automated or by selection)



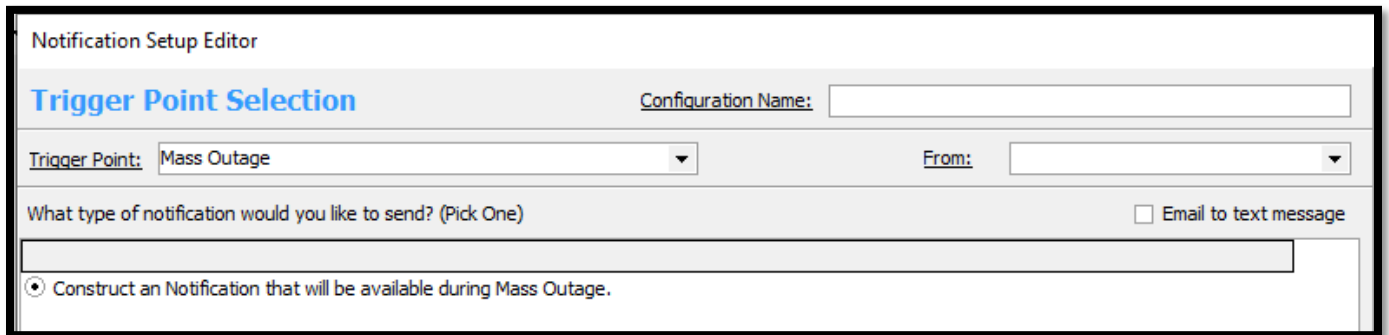
- Marketing Suite – Account Research Report - Email with Survey to all new account holders



- Trouble Cleared Notification - Email with Survey to customers when trouble ticket is cleared



- Trouble Ticket Mass Outage - HTML e-mail (could also be used for planned outages)



- Billing Suite – Case Study: Ebill and Paperless Billing Adoption

- Creative Services Resources

- Custom billing envelope
- On-bill ad
- Bill insert
- Online form

- Importance of knowing how to turn off the paperless medium – automatically and manually

- Preferences – Ebill Enrollment Bill Medium

The screenshot shows a window titled "eBill Enrollment Bill Medium" with a table of enrollment records. An "eBill Enrollment Bill Medium Editor" dialog box is open over the table, allowing for manual changes to the bill medium settings.

Enrollment Type	Current Bill Medium	New Bill Medium	Changed By	Change Date
Enroll	eBill	eBill	JRiecken	6/9/2021 11:46:31 AM
Enroll	eBill & Email	Paper & eBill	Alter28_V19-1-2_eBill	6/21/2019 11:15:13 PM
Enroll	Email	Paper & eBill	Alter28_V19-1-2_eBill	6/21/2019 11:15:13 PM
Enroll	Paper	Pap		13 PM
Enroll	Paper & eBill	Pap		13 PM
Enroll	Paper & Email	Pap		13 PM
Enroll	Paper, eBill, Email	Pap		13 PM
De-enroll	eBill	Pap		13 PM
De-enroll	eBill & Email	Pap		13 PM
De-enroll	Email	Pap		13 PM
De-enroll	Paper	Pap		13 PM
De-enroll	Paper & eBill	Pap		13 PM
De-enroll	Paper & Email	Paper	Alter28_V19-1-2_eBill	6/21/2019 11:15:13 PM
De-enroll	Paper, eBill, Email	Paper	Alter28_V19-1-2_eBill	6/21/2019 11:15:13 PM

14 Rows Active

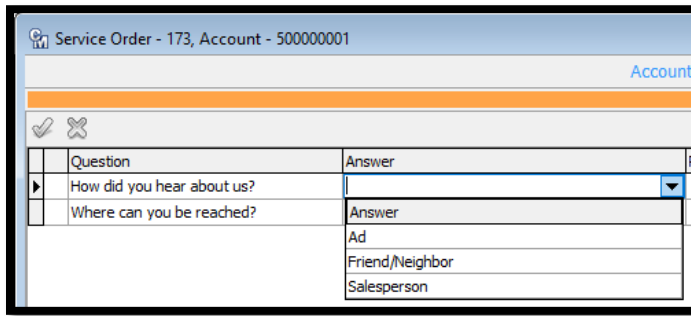
- Service Order Bill Medium

The screenshot shows a form for "Service Order Bill Medium" with the following fields:

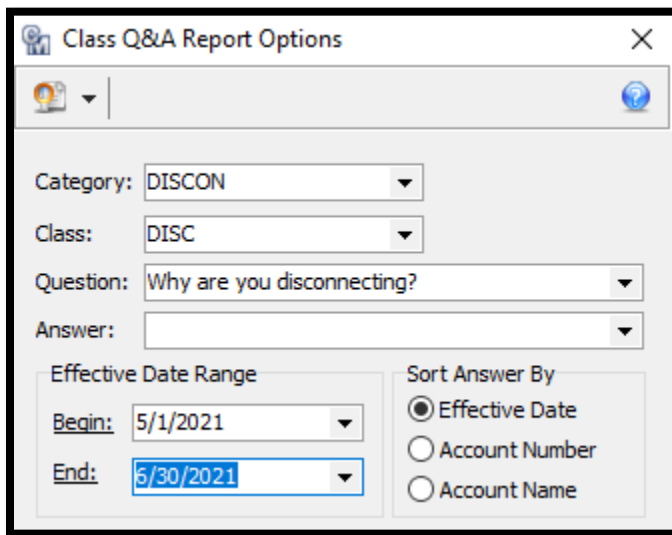
- Bill Medium:** Paper (selected)
- Bill Format:** Paper (selected), eBill (highlighted)
- Bill Language:** Paper & eBill, Paper & Email, Paper, eBill, Email
- Agent:** eBill & Email, Email
- Discount

- Service Order Suite – Case Study: Tracking Reasons for New Installs and Disconnects

- Service Order Questions & Answers



- Class Q&A Report



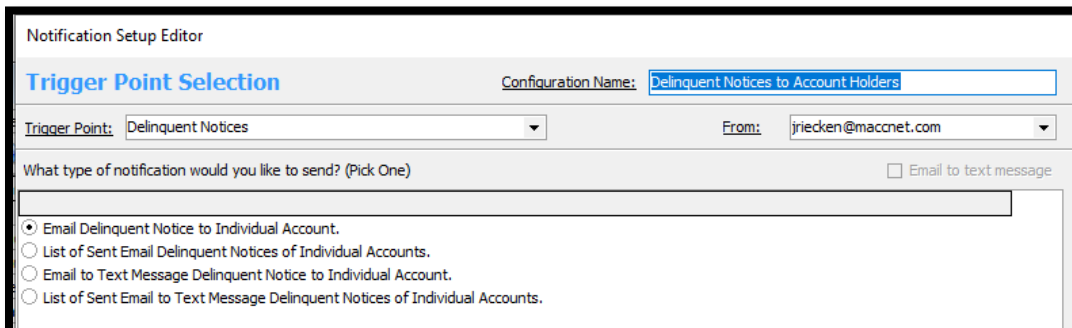
- Follow-Up Campaign

- Delinquency Suite – Case Study: AutoPilot Delinquent Notices

- Creative Services Resources

- HTML email

- Messenger Suite – Notification Setup



- Delinquency Suite – Email or Email to Text Notifications

Delinquent Notices

List Option: New List Past List

Setup:

Both Business Residence

Report Area:

Bill Cycle:

Bill Date:

Filter by CRM

List Name:

Recalculate Op...
 Recalculate B...
 Induc...

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Account Name	Acct Number	Adj Curr...	Adj Past ...	Forgi...	Class	Status	CM Equipment	AM Inventory	Penalty	Broke...	Current
BRUCE & KARLA ANDERSON	500000014	\$161.41	\$0.00	<input type="checkbox"/>	B		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$8.63	<input type="checkbox"/>	\$16
ARLINGTON LAW OFFICES	500000006	\$13.82	\$0.00	<input type="checkbox"/>	B		<input type="checkbox"/>	<input type="checkbox"/>	\$0.74	<input type="checkbox"/>	\$3
LUCAS & ALENA MARTINEZ	500000002	\$27.91	(\$5.85)	<input type="checkbox"/>	B		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$1.50	<input type="checkbox"/>	\$3
JOSHUA & KIM MORREL	500000013	\$393.66	\$126.23	<input type="checkbox"/>	B	DNP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$20.76	<input type="checkbox"/>	\$39
MOUNTAIN ENTERPRISES	500000010	\$544.84	(\$75.00)	<input type="checkbox"/>	B		<input type="checkbox"/>	<input type="checkbox"/>	\$29.15	<input type="checkbox"/>	\$54
MOUNTAIN INSURANCE AGENC	500000058	\$250.87	\$0.00	<input type="checkbox"/>	B		<input type="checkbox"/>	<input type="checkbox"/>	\$13.42	<input type="checkbox"/>	\$25
PAULA PARAISO	500000028	\$147.83	\$0.00	<input type="checkbox"/>	B		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$7.91	<input type="checkbox"/>	\$14
JAMES & JENNIFER SMITH	500000001	\$253.39	\$0.00	<input type="checkbox"/>	B		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$13.56	<input type="checkbox"/>	\$25
STEVEN THOMAS	500000003	\$359.68	\$0.00	<input type="checkbox"/>	B	DIS	<input type="checkbox"/>	<input type="checkbox"/>	\$19.24	<input type="checkbox"/>	\$35
BOB WILLIAMS	500000018	\$228.73	\$76.79	<input type="checkbox"/>	B		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$12.24	<input type="checkbox"/>	\$22