

**Featuring  
Operator  
Case Studies:**

**Corinna Cortes, Ph.D., AT&T  
Labs Research**

**Paul Glover,  
Revenue Assurance  
Specialist,  
Bell Atlantic**

**Sharif Elhilali, Associate  
Director, Marketing  
Information Systems,  
Bell Canada**

**Mark Chilton,  
HRIS Manager,  
BellSouth**

**Stephen O'Brien, Senior  
Consultant, Database  
Marketing, British Telecom  
(UK)**

**Steve Butler,  
Manager,  
Database Analysis, GTE  
Mobilnet**

**Alessandra Chiuderi,  
Business Analyst, Omnitel  
Pronto Italia**

**Keith Korte,  
Director of Network  
Engineering,  
Pacific Bell Wireless**

**Jovan Barac, Executive  
Director, Database Marketing,  
US WEST**

**Also Includes  
Presentations from:**

**Peter Eck  
Director  
Communications Industry  
Marketing  
NCR Corporation**

**Ismail Parsa  
Senior Director of Quantitative  
Analysis  
Epsilon**

**Sanjoy Goel  
Managing Director, CRM  
Telcordia**

**Erik Thomsen  
Chairman  
OLAP Council**

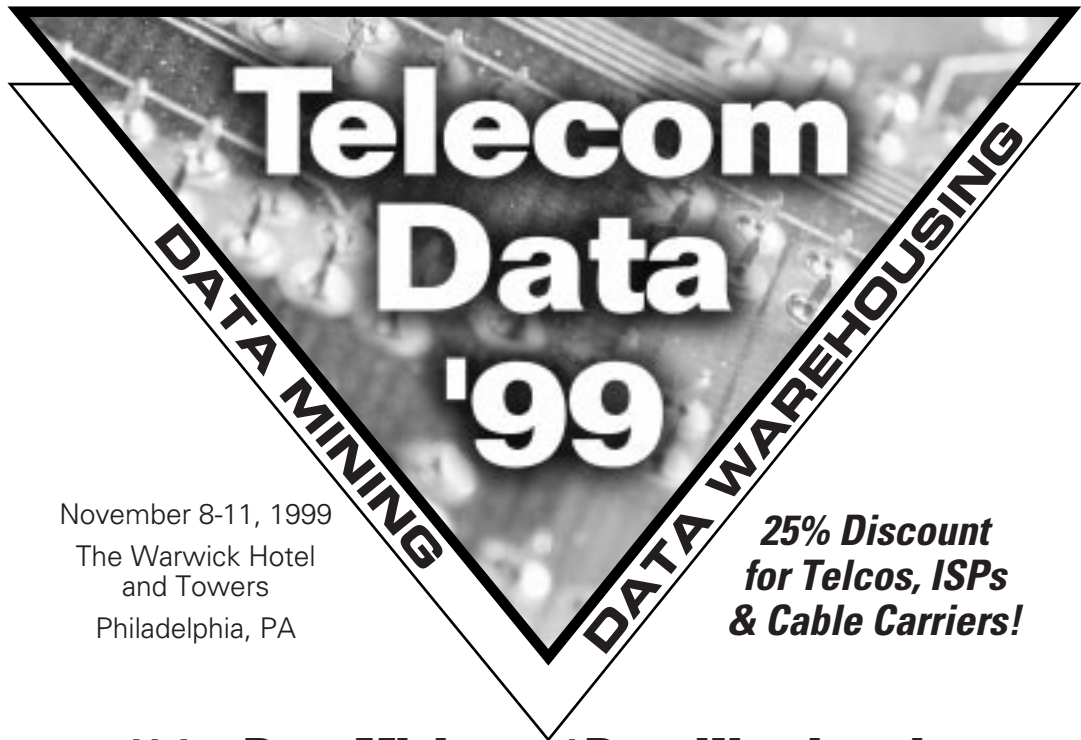
**Evan Levy  
President  
Baseline Consulting**

**Bob Walters  
Vice President  
for Data Warehousing  
Informix Software**

**Dorian Pyle  
President  
Xychron Corporation**

**Carolyn Calzavara  
Senior Director Business  
Intelligence/Data Mining  
Marketing  
SPSS, Inc.**

**...and many more!**



November 8-11, 1999  
The Warwick Hotel  
and Towers  
Philadelphia, PA

**25% Discount  
for Telcos, ISPs  
& Cable Carriers!**

**Using Data Mining and Data Warehousing  
to Increase Revenue for Wireline & Wireless  
Operators, ISPs and Cable Carriers**

**How the Latest Innovations in Data Mining Can Help You  
Retain Customers, Attract New Business and Keep  
a Step Ahead of Your Competitors**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Enhance customer service</li> <li>• Optimize pricing plans</li> <li>• Improve billing systems</li> <li>• Cross-sell advanced services</li> </ul> | <ul style="list-style-type: none"> <li>• Increase revenue per user</li> <li>• Reduce fraud</li> <li>• Improve customer relationships throughout your organization</li> </ul> |
|---|--|

**Two Information-Packed Tracks Reveal the Newest  
Technology and Cutting-Edge Marketing Applications:**

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Marketing and Customer Relations Track</li> </ul> | <ul style="list-style-type: none"> <li>• Advanced Methods Track</li> </ul> |
|--|--|

**Specialized In-Depth Workshops:**

**Introductory Briefing:  
Data Warehousing  
Fundamentals**

**Master Class:  
Enterprise-Wide Customer  
Relationship Management**

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# AGENDA-AT-A-GLANCE

**Monday, November 8, 1999**

## **Introductory Briefing: Data Warehousing Fundamentals**

*PART ONE:* Building a Data Warehouse: Preparing and Cleaning Data for Maximum Benefit and Ease of Use

*PART TWO:* Data Mining Tools and Methods: Get Up To Speed on Sophisticated Data Mining Techniques

**Tuesday, November 9, 1999**

*SESSION 1:* How Does Data Mining Impact the Business of Telecommunications?

*SESSION 2:* Understanding Customers: Analyzing User Information to Determine "High-Value" Customers

*SESSION 3:* Data and Voice, Wireless and Wireline: Data Mining in a Converging Communications Industry

**Wednesday, November 10, 1999**

*SESSION 6:* Data Mining as a Tool for Controlling Fraud

*SESSION 7:* How Data Mining Improves Business & Network Efficiency

### **Marketing and**

#### **Customer Relations Track:**

*SESSION 4:* Leveraging Existing Information for Enhanced Customer Service

**OR**

#### **Advanced Methods Track:**

*SESSION 5:* Making Room to Grow: Preparing for Expanding Information Resources

**Thursday, November 11, 1999**

### **Master Class:**

#### **Enterprise-Wide Customer Relationship Management**

**Where Are We Headed in Customer Relationship Management? Building the Framework for Successful Enterprise-Wide CRM**

This intensive, hands-on workshop will show you the steps needed to incorporate successful CRM throughout your enterprise. Identify and track market segments to respond more accurately to your customer's needs, and disseminate customer and segment information across all of your customer contact points.

### **Marketing and**

#### **Customer Relations Track:**

*SESSION 8:* Customer Value and Retention: Key Data Mining Activities

**OR**

#### **Advanced Methods Track:**

*SESSION 9:* Emerging Challenges and Opportunities in Data Mining

# BRAND NEW FOR 1999! A FOUR DAY ONE-STOP SHOP

## **Offering Customized Information to Meet the Needs of Both Advanced Technical Specialists and Customer-Oriented Database Marketer**

- **An Intensive Briefing on How to Set Up and Mine your Data Warehouse for Maximum Value.**  
Internationally-known experts will explain how to clean data to maintain the accuracy and reliability of your warehouse, providing you with the fundamentals you need in order to understand data mining tools and when to use them.
- **Web-Based Data Mining for Telecoms and Communications Carriers.**  
Mining data from the Internet and from your corporate Intranet to respond more accurately to your customers and take advantage of the dominant market potential of the web.
- **The Converged Data Warehouse.**  
Meeting data mining challenges for ISPs, wireless and wireline carriers in a converging marketplace. Don't lose opportunities for cross-selling and adding value.
- **Two Tracks Delivering a Customized Conference Experience.**  
Choose from a Marketing/Customer Relations track or an Advanced Methods track. Attend with your team to take advantage of both tracks.
- **A Post-Conference Master Class on Enterprise-Wide Customer Relationship Management.**  
Respond more accurately to your customer needs, and disseminate customer and segment information throughout your enterprise.

# INTRODUCTORY BRIEFING

## MONDAY, NOVEMBER 9, 1999

# Data Warehousing Fundamentals

This briefing is designed for marketing and operations specialists who may use data warehouse tools already, but who want to review the basics. These intensive presentations are focused on the needs of communication operators: wireless and wireline carriers, as well as ISPs, cable and other operators.

8:00 *Registration and Coffee*

8:50 **Chairman's Welcome**

**Erik Thomsen**, *Principal, Dimensional Systems, Chairman, OLAP Council*

## Part One: Building a Data Warehouse

9:00 **What is a Data Warehouse?**

- Creating and maintaining a customer-centered data warehouse
- The building blocks of a warehouse
- Key challenges for telecom warehouses: coping with massive amounts of data, updating information, and allowing many different users access to information

**Travis Richardson**, *Vice President, Marketing, Carleton Corporation*

9:45 **Data Retrieval and Integration for a Telecom Data Warehouse**

- Understanding data collection: beyond the notion of a "black box"
- Improving the process of collecting data
- Cleaning your data to maintain quality and integrity

**Dorian Pyle**, *President, Xychron Corp.*  
*author of "Data Preparation for Data Mining"*

10:30 *Refreshment Break and Exhibition Viewing*

11:00 **Data Quality: The Foundation for Successful Data Warehousing and Data Mining**

- The six building blocks of customer data quality
- Where data quality fits into the process of your data warehouse or data mining efforts
- How data quality helps you discover your most important business asset – your customers
- How a single customer view results in a more effective data warehouse
- Improving business practices and increasing profitability with customer data quality

**Kevin Murtha**, *Senior Vice President, FirstLogic, Inc.*

## Part Two: Data Mining Tools and Methods

11:45 **What is Data Mining and Who Needs It?**

- What is data mining and how is it different from other approaches to databases?
- Statistics vs. data mining
- Core data mining technologies and how they are used
- Data mining tools: understanding symbolic classification and neural networks

**Carolyn Calzavara**, *Senior Director, Business Intelligence/Data Mining Marketing, SPSS, Inc.*

12:30 *Luncheon and Exhibition Viewing*

2:00 **OLAP (On-Line Analytical Processing) and Data Mining**

- The importance of OLAP for posing questions about your data
- What types of queries are most suitable for OLAP and how is it different from data mining?
- How (and when) to use OLAP as part of a data mining process

**Erik Thomsen**, *Principal, Dimensional Systems, Chairman, OLAP Council*

2:45 **Data Marts**

- How are data marts different from data warehouses?
- What are the key advantages and pitfalls of data marts for carriers?
- Linking multiple data marts within large organizations

**Matthew Doering**, *Vice President Product Development, QueryObject Systems*

3:30 *Refreshment Break and Exhibition Viewing*

4:00 **Visualizing Data to Expand Your Data Mining Capabilities**

- How two and three-dimensional visualization tools reveal hidden patterns in data
- Ease of use: user-friendly modes of data retrieval and display
- Building visual models into your information toolkit

**William Wright**, *Chief Designer, Application Solutions, Visible Decisions*

4:45 *End of Introductory Briefing*

# MAIN CONFERENCE

## TUESDAY, NOVEMBER 9, 1999

8:00 *Conference Registration and Coffee*

### **SESSION 1: The Business Case for Data Mining Solutions in Telecoms**

8:50 **Chairman's Welcome**

*Peter Eck, Director, Communications Industry Marketing,  
NCR Corporation*

9:00 **KEYNOTE PRESENTATION:**

#### **Implementing a Framework for Customer Relationship Management**

- Strategies for Customer Analysis and Customer Interaction
- Effective use of a data warehouse and data mining environments
- Key Factors in Campaign Management
- Leveraging Technology at Customer Touchpoints

*Peter Eck, Director Communications Industry Marketing,  
NCR Corporation*

### **SESSION 2: Understanding Customers: Analyzing User Information to Determine "High- Value" Customers**

9:30 **Using Data Mining and Call Detail to Maximize Customer  
Value and ROI**

- Using calling activity information to sharpen and individualize your pricing propositions
- Fine-grained predictive analysis: getting a real handle on which customers will do what
- Understanding calling patterns in changing and competitive markets
- The essential role of detailed analysis in customer relationship management and all its facets
- Specific examples in customer retention, upselling and cross-selling
- Dealing with change: employing data analysis for product repositioning

*Ian Broadhead, Principal Consultant, White Cross Systems*

10:00 **Increasing Customer Value by Integrating  
Data Mining and Campaign Management Software**

- High-potential customers in a database containing hundreds of items for millions of customers
- Targeting the best prospects: fitting data mining results into the execution of marketing campaigns that enhance the profitability of customer relationships
- Improving campaign results by utilizing the tight, seamless integration of data mining and campaign management software.

*Jovan Barac, Executive Director, Database Marketing,  
US WEST*

*Susan E. North, Director of Solutions Marketing,  
Exchange Applications*

10:45 *Refreshments and Exhibition Viewing*

**SESSION 3:**

### **Data and Voice, Wireless and Wireline: Data Mining in a Converging Communications Industry**

11:15 **The Converged Data Warehouse**

- Understanding the customers of ISPs, wireless carriers and wireline carriers
- Using customer information in cross-selling multiple services
- With voice and data converging, what kind of customer information is being collected, and how can it be integrated in a multiple-carrier business?

*Bret Calder, Senior Product Marketing Manager,  
DataMirror Corporation*

11:45 **Enterprise-Wide Cross-Sell Optimization:  
Learning from Data Mining in the Financial Services**

- Why are data mining practices in the financial services industry especially relevant to telecoms?
- Many clients consider campaigns as one-off events, however, developing the campaign calendar over an extended period allows you to optimize cross-sell opportunities and develop a longitudinal contact strategy
- Matching products to customers while focusing on profitability: learning from experience with consumer promotion strategies

*Gregory Lampshire, Customer Relationship Management  
Consultant, PricewaterhouseCoopers*

12:15 **Facing Questions of Confidentiality  
and Privacy in Data Mining**

- Dealing with privacy issues when designing data mining procedures
- What are the limitations on Internet-based research and customer profiling?
- Designing data mines to comply with existing and pending legislation affecting communications carriers

*Sanjay Goel, Managing Director, Customer Relationship  
Management, Telcordia*

12:45 *Luncheon and Exhibition Viewing*

**OPERATOR  
INFORMATION**

**OPERATOR  
INFORMATION**

**OPERATOR  
PRESENTATION**

# TWO CONCURRENT TRACKS

## CHOOSE ONE (TUESDAY, NOVEMBER 9, 1999)

### Marketing and Customer Relations Track

1:55 Chairman's Welcome

#### SESSION 4:

### Leveraging Existing Information for Enhanced Customer Service

2:00 Using Lifetime Value (LTV) for Customer Relationship Management

- Estimating LTV for customers using classical statistics and data mining (neural network) techniques
- Segmenting customers based on their tenure characteristics, and understanding behavior patterns
- Using segmentation to develop targeted promotions and retention campaigns

D. R. Mani, *Principal Member of Technical Staff, GTE Laboratories, Inc.*

2:30 Identifying & Understanding Customer Profiles for Marketing

- Outlining the approach to successful profiling of customers
- The role of the data mart and data mining within customer profiling

Stephen O'Brien, *Senior Consultant, Database Marketing, British Telecom (UK)*

**OPERATOR  
PRESENTATION**

3:00 Assessing Customer Value

- Assessing the impact of value-added services on ARPU
- Can sophisticated data mining techniques lead to "customer intimacy"?
- Lifetime value modeling and other means of understanding customer value

Steve Butler, *Manager, Database Analysis, GTE Mobilnet*  
*Plus previous speakers D. R. Mani and Stephen O'Brien*

**OPERATOR  
PANEL**

3:30 Refreshments and Exhibition Viewing

4:00 Clicks to Customers: E-Business Intelligence to Improve Internet-Based Marketing

- Web server information • Web traffic information from distributed web environments
- How to link this information to other corporate data; for analysis in dollars rather than just hits
- Web traffic info for one-to-one marketing • Integrating web traffic data with e-business systems

Mike McClure, *Vice President of Marketing, Marketwave Corp.*

4:30 Integrating a Campaign Management Tool with the Marketing Data Warehouse

- How to properly define requirements & what to look for during vendor selection
- What are the key differences between data discovery, campaign execution, & campaign tracking?
- Which platform/application combination to employ in order to address each of these areas

Sharif Elhilali, *Associate Director, Marketing Information Systems, Bell Canada*

**OPERATOR  
PRESENTATION**

5:00 Using Predictive Models to Understand Customer Behavior

- Understanding the value of predictive modeling and related methods
- Optimizing the value of customer information from your call center
- Case studies of predictive modeling applied to problems of churn, win-back and upsales

Ashley Blackman, *Director of Market Research Methodology, The Faneuil Group*

**OPERATOR  
CASE STUDIES**

5:30 Close of Marketing and Customer Relations Track, Tuesday, November 9, 1999

### Advanced Methods Track

1:55 Chairman's Welcome

#### SESSION 5:

### Making Room to Grow: Preparing for Expanding Information Resources

2:00 Giga-Mining: Problems of Working with Very Large Sets

The problem of data overload is enormous, as terabyte-sized databases become common. This presentation describes data mining processes that may be applied in telecommunications (for example, for call detail record analysis), as we build ever-larger data sets and expect faster turn-around time in commercial applications.

**OPERATOR  
PRESENTATION**

- Major issues in creating and maintaining information platforms
- Computational techniques and tools to support extraction and discovery of useful knowledge and decision support
- A general methodology for creating profiles to be maintained by the platform
- Tying machine learning and statistical techniques into an information-mining platform to build powerful new business applications

Corinna Cortes, *Ph.D., AT&T Labs-Research*

2:45 Working with Very Large Databases

Corporate data volumes continue to grow while business leaders seek additional value from the information that they already have. Yet, very large databases present unique challenges to the data mining process.

- What are these challenges?
- How can you leverage a data warehouse to overcome them?
- What are the benefits of mining the enterprise data warehouse?

Todd Higginson, *Teradata Marketing Manager, NCR Corporation*

3:30 Refreshments and Exhibition Viewing

4:00 Overcoming Challenges of Very Large Databases

- The problem of data overload
- Terabyte-sized databases
- New tools for decision support

Allen Razdow, *CEO, Torrent Systems, Inc.*

4:45 Opening Up Access to Data by Linking Data Warehouses and Data Marts

- Cross-industry studies of linking data warehouses
- Learning from case studies of data mining in large, complex enterprises
- Applying the lessons to telecommunications

Bob Walters, *Vice President, Data Warehousing, Informix Software, Inc.*

5:30 Close of Advanced Methods Track, Tuesday, November 9, 1999

# MAIN CONFERENCE

## WEDNESDAY, NOVEMBER 10, 1999

8:30 *Coffee*

8:50 **Chairman's Welcome**

**Andrew Braunberg**, *Publisher, Data Mining News*

### **SESSION 6:**

#### **Data Mining as a Tool for Controlling Fraud**

9:00 **Data Mining as the Key Element in a Fraud-Prevention Strategy**

- Different methods for front-end screening
- Differentiating fraud risks from high-value customers
- Using fraud-visualization models in your organization: how do you act on the information?

**Thomas A. Price**, *Product Manager, Billing Systems Department, Lucent Technologies*

9:30 **Case Study in Fraud Prevention**

- Developing a fraud prevention strategy
- Analyzing the main scenarios of fraud
- Improving a fraud detection plan
- Evaluating systems for direct-dial fraud management with open architecture

**Paul Glover**, *Revenue Assurance Specialist, Bell Atlantic*

**OPERATOR PRESENTATION**

### **SESSION 7:**

#### **How Data Mining Improves Business & Network Efficiency**

10:00 **How to Release the Potential Buried in Your Billing Data**

- What types of information can I get from my billing system?
- How can I find the 'information nuggets' in the mountain of billing data?
- How can I use billing, and other systems, to take advantage of these information nuggets?
- What else do I need, besides a billing system?

**Stuart Easton**, *Sales & Marketing Manager, Kenan Systems Corporation*

10:30 *Refreshments and Exhibition Viewing*

11:00 **Data Mining and Operator Networks: Data Mining Tools for Predicting and Analyzing Network Problems – Operator Presentation**

- Applying data mining to networks: analyzing usage, service, capacity, and traffic
- New techniques that revolutionize network management
- Predicting system problems through data mining techniques
- Case study: applying the technologies

**Keith Korte**, *Director of Network Engineering, Pacific Bell Wireless*

**Kevin Cavanaugh**, *Director of Product Research, Software Systems, ADC Telecommunications*

**OPERATOR PRESENTATION**

11:45 **Extracting, Organizing and Presenting Key Human Resource Measurements in a Regional Bell Operating Company**

- Transforming complicated data into meaningful information
- Providing decision-makers with powerful results using simple methods for extraction and presentation

**Mark Chilton**, *Human Resources IS Project Manager, BellSouth*

**OPERATOR PRESENTATION**

12:15 *Luncheon and Exhibition Viewing*

# TWO CONCURRENT TRACKS

## CHOOSE ONE (WEDNESDAY, NOVEMBER 10, 1999)

### Marketing and Customer Relations Track

1:25 Chairman's Welcome

Gene M. Ferruzza, *Senior Vice President,*  
KnowledgeBase Marketing

#### SESSION 8:

### Customer Value and Retention: Key Data Mining Activities

1:30 Data Mining in the Real World:  
Case Studies in Telecommunications

OPERATOR  
CASE STUDIES

- Learning from data mining pilot projects for telecommunications companies
- Examining the business drivers for data mining, the data mining algorithms applied, and which technologies solve which types of business problems
- Applying results of the case studies: what are the business benefits for each particular organization?
- A checklist for evaluating your own data mining readiness

Evan Levy, *President, Baseline Consulting Group*

2:00 Cross-Selling Optimization: The Latest in Marketing Science for  
Telecoms

- The cross-selling opportunity of value-added services from convergence
- Integrating multiple data sets with diverse data
- Why you must use price point testing for optimal profit

Rebecca House Dewan, *Executive Vice President, Trajecta*

2:30 Customer Loyalty and Retention

- How technology and techniques enable one-to-one marketing
- Exposing the lie of one-to-one
- The importance of fine grain detail, and the challenges presented by it
- Examples of new of customer relationships created with on-line billing

Charles Nicholls, *General Manager, Analytical Applications,*  
Business Objects

3:00 Refreshments and Exhibition Viewing

3:30 Improving Customer Relations through Data Mining

- How does data mining improve relations with customers?
- Using data mining tools to extract detailed information and understand customer behavior
- The use of data mining results for customer relationship improvement

OPERATOR  
PRESENTATION

Alessandra Chiuderi, *Business Analyst, Omnitel Pronto Italia*

4:15 Tackling Churn in Fast-Moving Mobile Communications Markets

- Why churn modeling resists traditional market segmentation approaches
- Constructing empirically-based churn detection, description and prediction measures
- How this approach can be fed into the development of profit-making marketing and sales programs
- Bottom-line results: business returns and technical approaches to look for in order to tackle churn effectively
- Implications for data preparation and analytical tool selection to ensure a tight connection between empirical behavior and appropriate sales responses

Barry Deville, *Vice President, Services, Angoss Software Corporation*

5:00 Close of Marketing and Customer Relations Track, Wednesday,  
November 10, 1999

### Advanced Methods Track

1:25 Chairman's Welcome

Erle Davis, *Senior Consultant, The Artemis Group, LLC*

#### SESSION 9:

### Emerging Challenges and Opportunities in Data Mining

1:30 Advanced Data Mining Methods: Research Results  
from CSELT (Telecommunications  
Research Center)

OPERATOR  
INFORMATION

- An overview of CSELT's research in two project
- Development of a very fast characterization algorithm for large datasets
- Insertion of a pre-existing clustering algorithm into a loop in which the user may impose constraints on the formation of the clusters
- Both projects have had good results in field trials, and have been applied to problems of fraud detection, market segmentation, and other problems in telecoms

Prof. Lorenza Saitta, *Dept. of Sciences and Advanced Technologies,*  
University of Piemonte Orientale, Alessandria, Italy

2:15 Evaluating and Integrating Divergent Data  
Mining Technology

OPERATOR  
CASE STUDY

Successfully implementing data mining technology in your organization may not necessarily equate to finding the most predictive response models or acquiring the software with the latest and greatest algorithms. Using examples from telecommunications, this talk will address areas of particular importance when selecting and deploying data mining technology.

- Evaluating your current and future data mining needs when selecting software
- Does one size fit all? Appreciating the special features of data mining packages
- Working with more than one data-mining technique to achieve objectives and maximize success
- Addressing project resource requirements: acquiring the right mix of data, tools and people

Erle Davis, *Senior Consultant, The Artemis Group, LLC*

3:00 Refreshment Break and Exhibition Viewing

3:30 One ClickAnalytic: Data Mining Strategies for the Web

This talk provides an overview of web technologies as they relate to 1-on-1 targeted marketing on the web, and will shed light on the analytic technologies embedded in them. The presentation covers data capture strategies and explains how existing data mining technologies can complement these emerging approaches. The speaker will also review the tools offering packaged solutions in the web space.

- Ad targeting
- Analyzing click-stream data
- User profiling
- Evaluating data mining tools for web-based database marketing

Ismail Parsa, *Senior Director of Quantitative Analysis, Epsilon*

4:15 Customer Profiling for Telecoms: Using Advanced Modeling  
Techniques for High-Dimensional Data

- Challenges of high-dimensional data: including "efficiency vs. comprehensibility" tradeoffs; visualization difficulties; and difficulties of projected correlation (looking at data "with one eye closed")
- Contrasting OLAP 'hypercube' paradigms and spatial 'hypercube' paradigms: enhancing analytical capabilities
- Manual and automated techniques for building models of high dimensional data: building predictive models using adaptive algorithms such as neural networks
- These techniques impact customer profiling and can provide a substantial return on investment – for example in customer acquisition or retention, fraud detection, or virtually any area where sufficient historical data exist.

Monte Hancock, *Chief Scientist, Computer Science Innovations (CSI)*

5:00 Close of Advanced Methods Track, Wednesday, November 10, 1999

# MASTER CLASS

## THURSDAY, NOVEMBER 11, 1999

# Enterprise-Wide Customer Relationship Management

### Where Are We Headed in Customer Relationship Management? Building the Framework for Successful Enterprise-Wide CRM.

*Seminar Leader: Gene M. Ferruzza, Senior Vice President, KnowledgeBase Marketing*

This intensive, hands-on workshop will show you the steps needed to incorporate successful CRM throughout your enterprise. Aimed specifically at the needs of the converging telecoms marketplace, the material draws from the instructor's extensive experience in strategic database marketing, development and application of data marts, and predictive modeling.

#### ***This Master Class Will Show You How to:***

- Identify and track market segments to respond more accurately to your customer needs
- Incorporate database marketing into enterprise-wide customer relationship management
- Disseminate customer and segment information across all of the customer touch points
- Analyze your needs for data warehouse and data mart systems and their interface
- Structure your web site in order to personalize the content presented to a prospect or customer

#### ***Overview:***

##### **The Value of Enterprise-Wide CRM**

Currently the strategic uses of data for customer relationship management are focused on direct communication with customers. The primary reason for this is that customer information has been leveraged first in the marketing department.

##### **Beyond the Marketing Department**

The customer interacts with many other aspects of a company reaching beyond the marketing department. In the future, strategic customer relationship programs will be implemented across the corporate enterprise.

##### **Database Marketing and E-CRM**

Customer relationship management, as performed in sophisticated database marketing, will affect all departments of a corporation. This implies that a "high risk, high value" customer identified through data-mining processes, will also be recognized as "high risk, high value" in the Customer Service Department, the Finance Department, Sales, and any other department or group that contain

one or more customer touch points.

##### **Disseminating Customer Information**

The issues to achieve a true enterprise-wide customer information strategy go beyond just systems integration. The ability to attach a decision to a customer in an automated fashion, disseminate that decision across all of the customer touch points, segment the customer effectively based on the decision, and act in a refined manner when in contact with that customer, is critical to the success in leveraging information. All departments must understand the corporate customer information strategy and know what it means to them when in contact with a customer.

##### **Improving Operational Data Warehouse Systems**

Fundamentally, we have made a tremendous amount of progress in leveraging information through database marketing in most industries. The architecture for information dissemination throughout the corporation currently may not be sufficient to effectively support enterprise-wide customer relationship management. This may be true even for current data warehouse and data mart topologies. We will discuss the logical interface and placement of operational/data warehouse/data mart systems, and the applications that are dependent on joint access.

##### **Web-Based CRM**

One of the most promising customer communication channels for relationship management is the corporate web site. The web site effectively enables true one-to-one capabilities in an environment conducive for continuous, real-time decision processing. A customer or prospect's behavior during a session should in fact drive the content presented to that prospect or customer. The logic and topology of using information to and from the web site will be discussed.

#### MASTER CLASS TIMETABLE

8:30 <b>Master Class Registration and Coffee</b>	9:00 <b>Master Class Begins</b>	10:30-10:45 <b>Refreshment Break</b>	12:00 <b>Lunch Break</b> (lunch on your own)	1:15 <b>Master Class Continues</b>	3:30 <b>Close of Master Class</b>
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#### ***Your Seminar Leader:***

**Gene M. Ferruzza, Senior Vice President, KnowledgeBase Marketing, Chapel Hill, NC**

For 16 years, Gene has provided integrated business solutions for clients in telecommunications, electric utilities, financial services, catalogue, manufacturing, and retail. He is an internationally recognized expert in strategic database marketing planning and implementation, development and application of data marts, predictive modeling, and the design of decision processing strategies for customer retention, growth and acquisition programs. He has also developed and marketed his own customer database management and marketing software, and is currently working on new internet related opportunities and implementation of customer relationship management strategies across the corporate enterprise.



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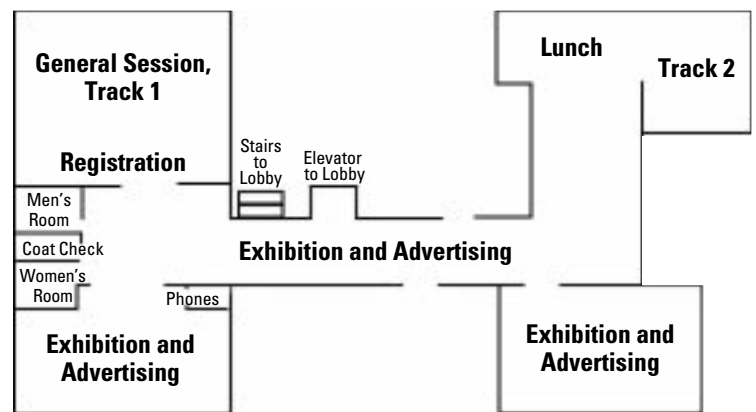
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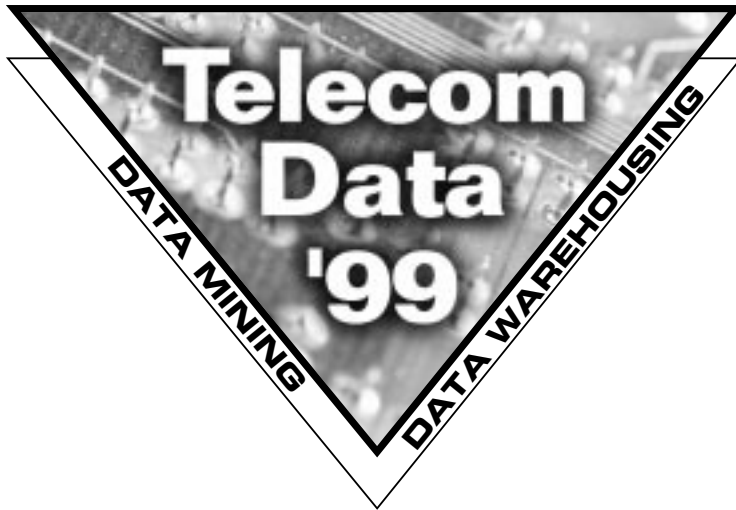


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**Venue: The Warwick Hotel and Towers**  
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