
Draft

POWER SYSTEM OVERVIEW

Document Information

Name	Description
Project Name:	
Document Name:	PowerOverview1.4.doc (high level overview summary)
Author:	Carol Locus
Date:	

Revision History

Date	Revision	Author	Description of Changes
[REDACTED]	1.0	C. Locus	Initial Draft/Notes
[REDACTED]	1.1	C. Locus	Second draft. Add more workflow details. Reorganized and rewrote based on feedback from Brandon and Richard. Incorporated virtually all data collected from Richard, Brandon, and Chris
[REDACTED]	1.2	C. Locus	Third Draft. Change title (from Power Procedure Overview to Power System Overview; streamline; delete introduction, purpose, project goal, doc phases, doc scope; add flowchart; re-organize document per flowchart; remove database tech steps.
[REDACTED]	1.3	C. Locus	Fourth Draft. Add Brandon's markups; verify and re-order some screen shots.
[REDACTED]	1.4	C. Locus	Fifth Draft. Add glossary; fix formatting; proof

Project Contact List

Place holder

Name	Title	Phone	E-Mail
	AVP, Marketing Solutions Office		
	Sr. Manager Database Marketing		
	VP Marketing Data Integration		
	AVP Campaign Systems		
	AVP Application Development		
	1 st VP Marketing Technology		
	1st VP, Database Marketing		
	1st VP, MTPO		
	Software Technical Spec, Sr.		
Carol Locus	BA, Sr Tech Writer	818-771-0156	

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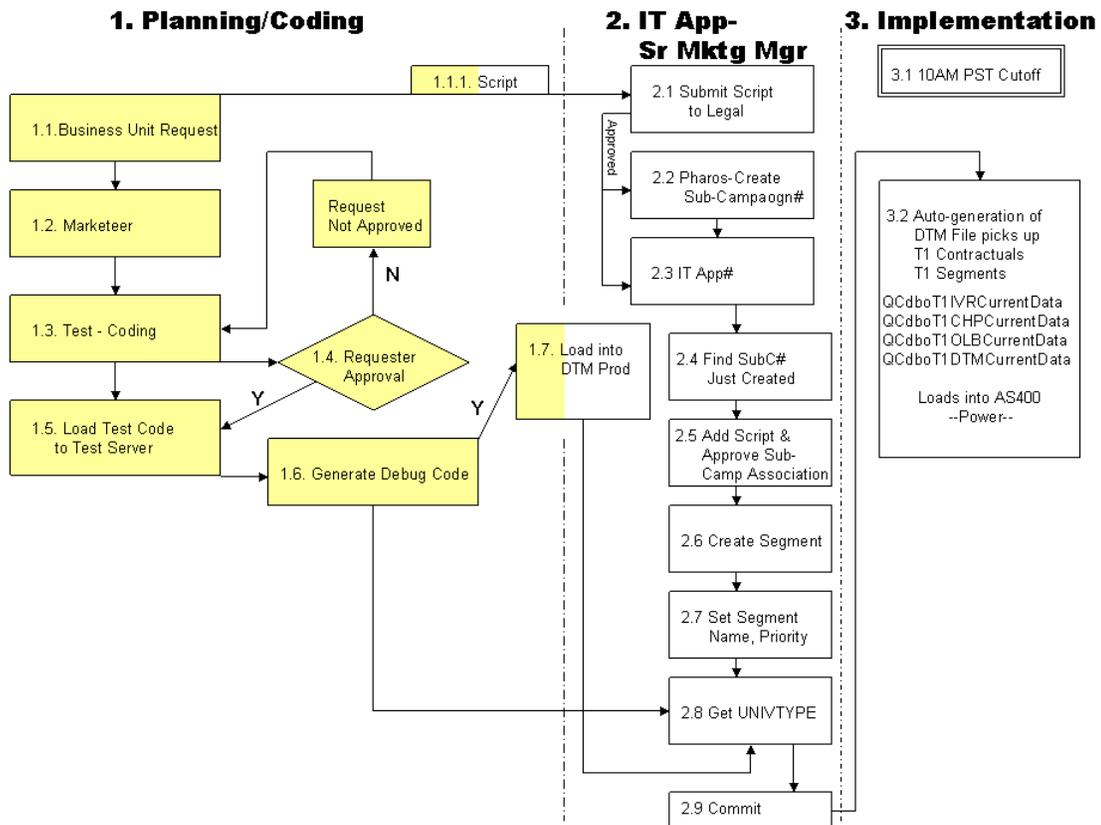
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1. The Power Workflow: Planning/Coding

This section describes the initial planning and coding steps at the very beginning as a campaign is being conceived and designed.

The Power Workflow Overview Diagram:



1.1. Business Unit Request

The business unit sends a request to the Sr. Marketing Manager (Brandon) or to 1st VP, Database Marketing (Gary). The request includes marketing criteria and a proposed script. Brandon consults with Gary in regards to formulating a Marketeer as well as getting any additional input regarding the script.

1.1.1. Script is Sent to Sr. Marketing Manager

The business unit sends the script to the Sr. Marketing Manager (if it was not already sent with the initial request). Sr. Marketing Manager may ask the 1st V.P. Database Marketing, for input or suggestions to improve the script.

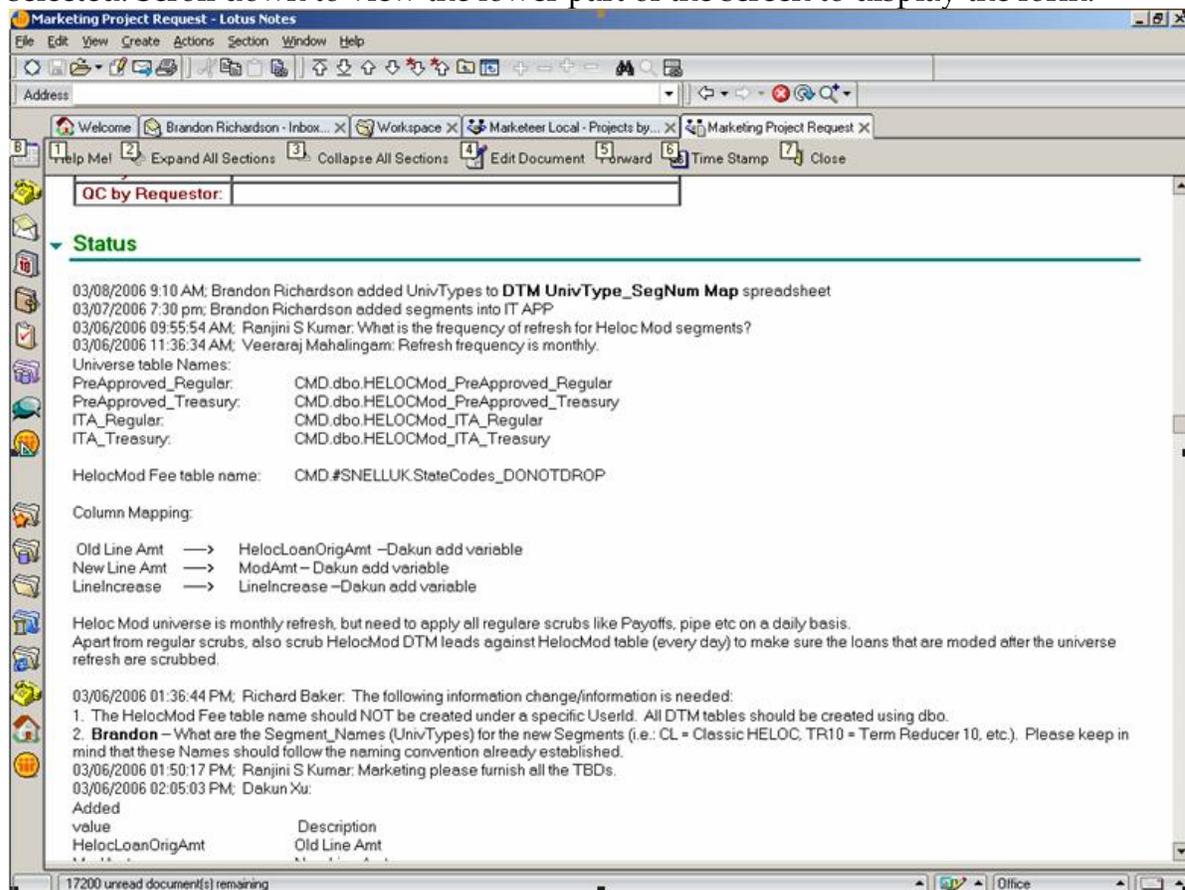
1.2. Marketeer

The request, once discussed and confirmed, is input into Marketeer. Marketeer is a Lotus Notes database which serves as a project tracking and notification tool. The Sr. Marketing Manager sends the Marketeer to the AVP Campaign Systems, functioning as the Sr. Programmer, (Richard).

The request includes criteria and any variables that may need to be used in the script. If a segment calls for a variable not already setup in the IT App, the 1st +VP Marketing Technologies (Steven ██████████) is also copied.

MARKETEER JOB REQUEST

When Marketeer is launched, this screen opens with the Marketeer Local Tab selected. Scroll down to view the lower part of the screen to display the form.



MARKETING IT FILE REQUEST FORM

View the lower part of the screen to see the Marketing IT File Request Form, where a request is input into Marketeer: The Marketing IT File Request, when submitted, results in a Marketeer Report.

Marketing Project Request - Lotus Notes

File Edit View Create Actions Section Window Help

Address: []

Welcome Brandon Richardson - Today's... Re: C051 segment X Hi & a few q's X Hi & a few q's X Workspace X Marketeer Local... Marketing Projec...

1 Help Me! 2 Expand All Sections 3 Collapse All Sections 4 Forward 5 Save 6 Approve 7 Time Stamp 8 Submit for Legal Review 9 Close

Project Number: 1038449

Project Title: DTM Segment Additions 4-28-06

Project type: Campaign

Division: CMD

Advertiser: Affiliate Non-affiliate

Lead Source: Port Non-port

Channel:

- Direct Mail Radio Portfolio
- Outbound TV Employee
- Email Collateral Promotions
- Print Ad Merchandising Events
- Outdoor Internet Monthly Statement

Load External List: Yes No

For CFC India: No Yes

Status: Draft Open More Info

Evaluation Complete Cancelled

Priority: Low Moderate Medium High Urgent

Description: We need to add corresponding 1st lien segments for the Heloc Mods

Date Needed: [16] *On Going:* No Yes ASAP

Estimated Contact Date Range: **Start Date:** [16] **End Date:** [16]

Other info - specify: []

Date created: 04/28/2006 03:15 PM

Requested by: Brandon Richardson/Marketing/CF/CCI, Gary Griffin/Marketing/CF/CCI, david loenzen

Auto Notify: Yes No

Requesting Department: Portfolio Marketing

Programmer's Manager: Lexmi Epur/IT/CF/CCI

This is the protected text area of the form.

Subform Edit History not loaded Office

1.3. Test Coding Begins

The Sr. Programmer (Richard) codes and runs some tests to verify his code.

1.4. Requester Reviews and Approves Code

Sr. Programmer sends his code to be reviewed by the Sr. Marketing Manager and the 1st VP Database Marketing. (If the code is not approved, the programmer makes necessary changes and seeks approval once more.)

1.5. Load Test Code to Test Server

Test code is loaded into DTM Dev test tables in debug mode.

1.6. Generate Debug Code

Once code is debugged and approved, Debug Code is generated.

The debug code is held until IT App is ready for segment implementation.

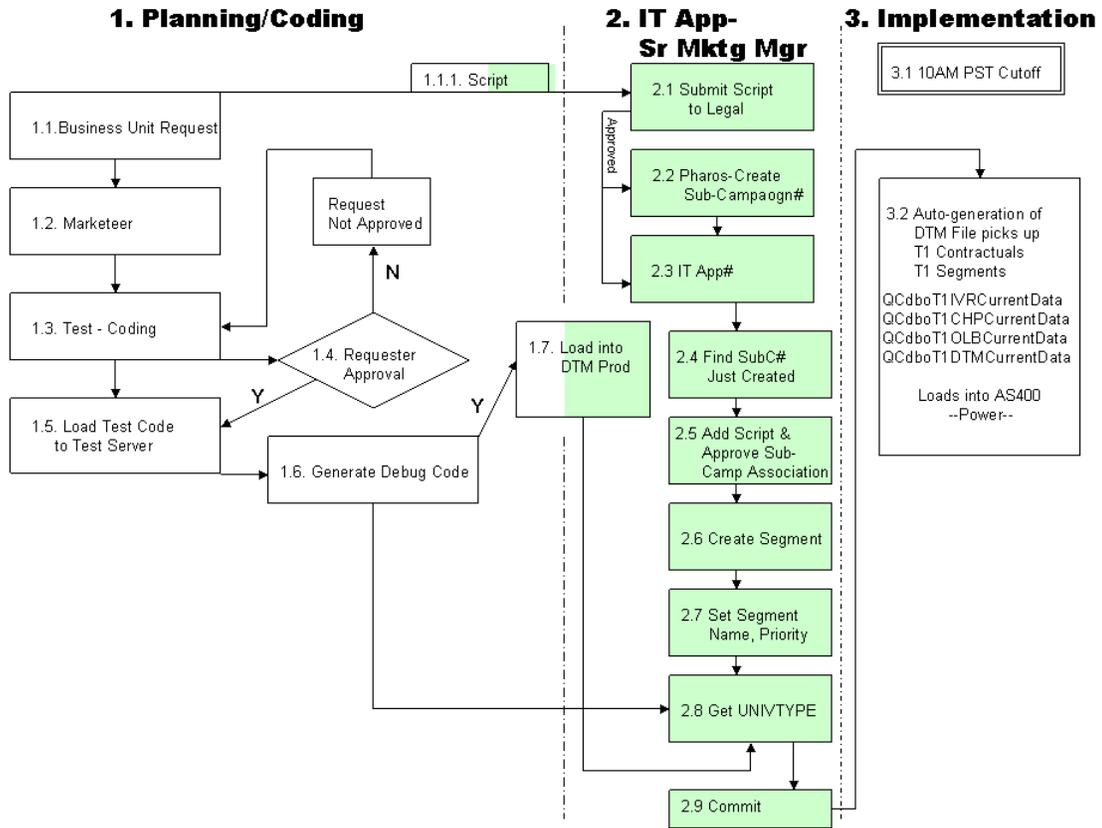
1.7. Load into DTM Production for Implementation

Code is held until IT App is ready for segment implementation and until the Univtype is assigned.

2. IT App

This section describes the steps of how the segment is composed with the workflow steps being done in the IT App.

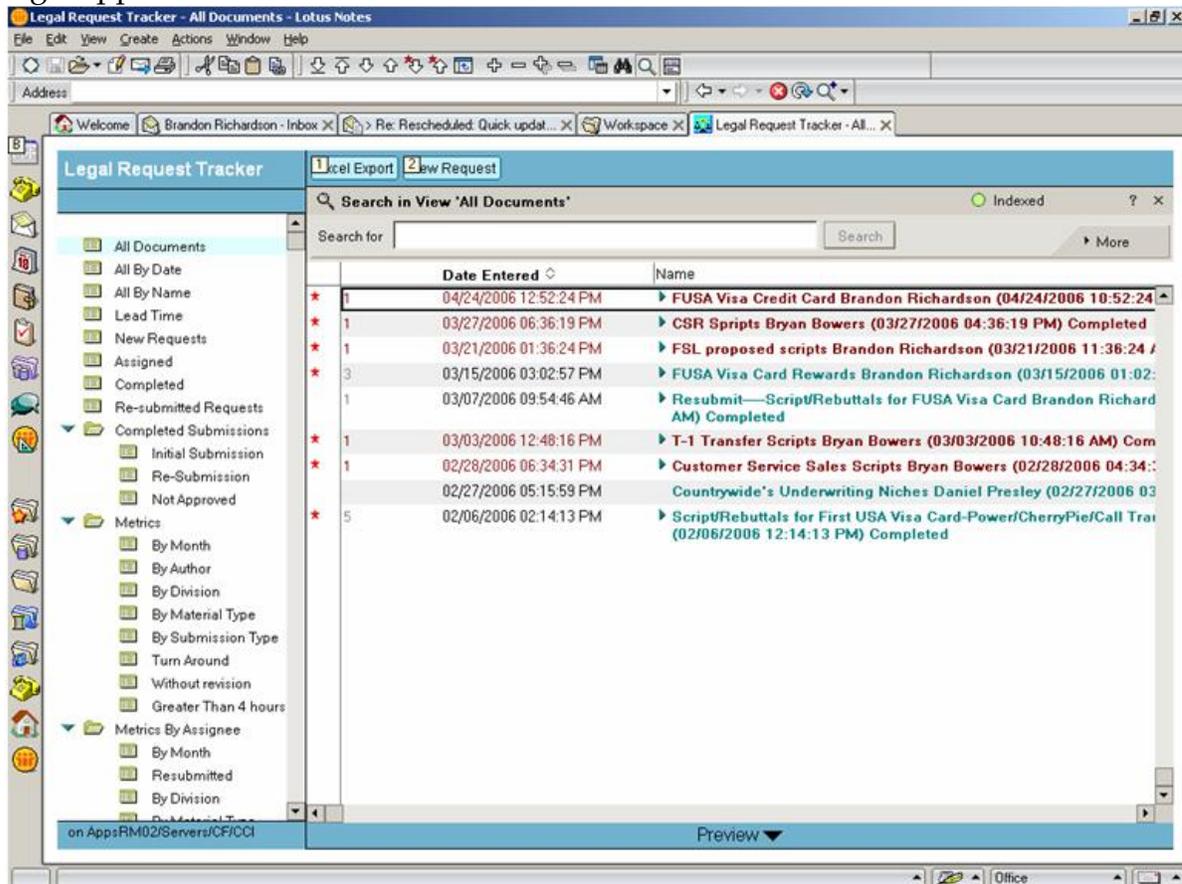
The Power Workflow Overview Diagram:



2.1. Submit Script to Legal

LEGAL REQUEST TRACKER

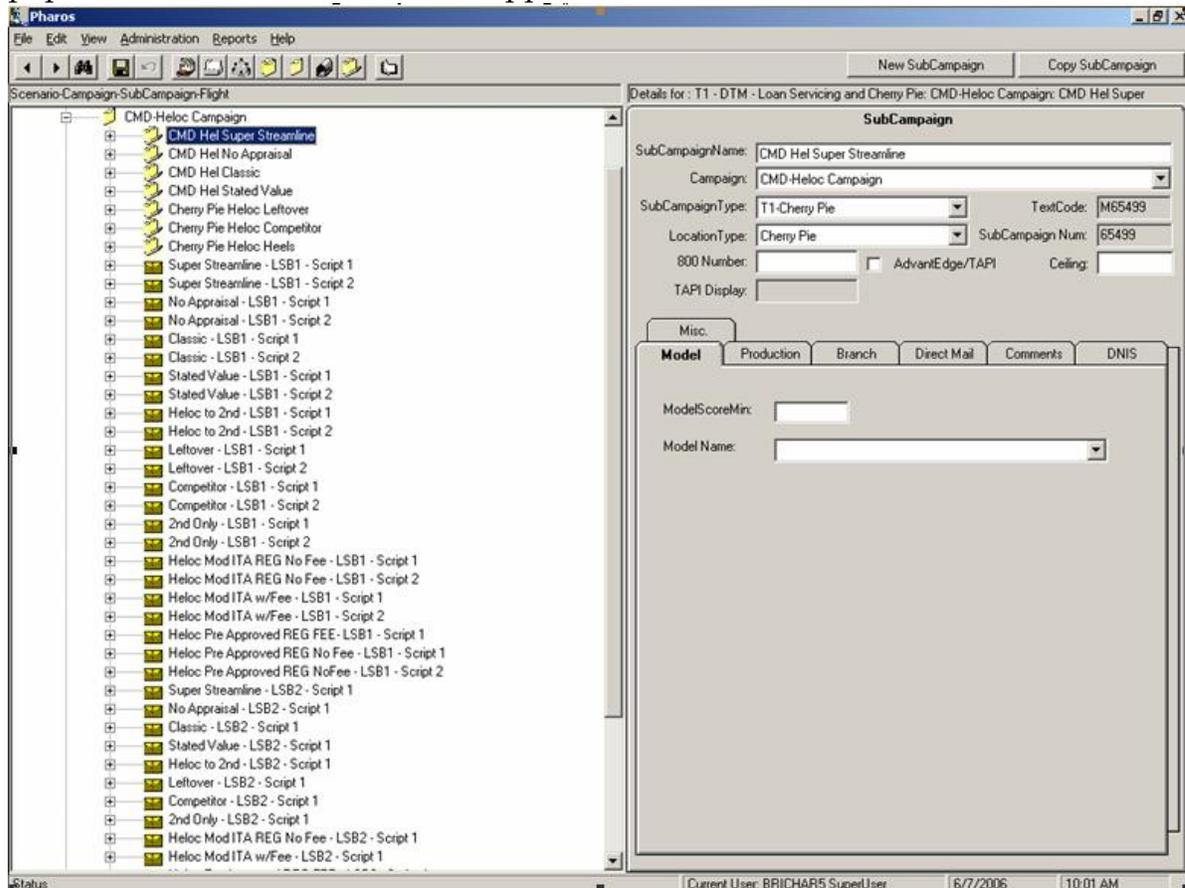
Brandon submits the script (the offer) to the Legal Request Tracker database for legal approval.



2.2. Pharos: Create Sub-Campaign Number

PHAROS: CREATE SUB-CAMPAIGN NUMBER

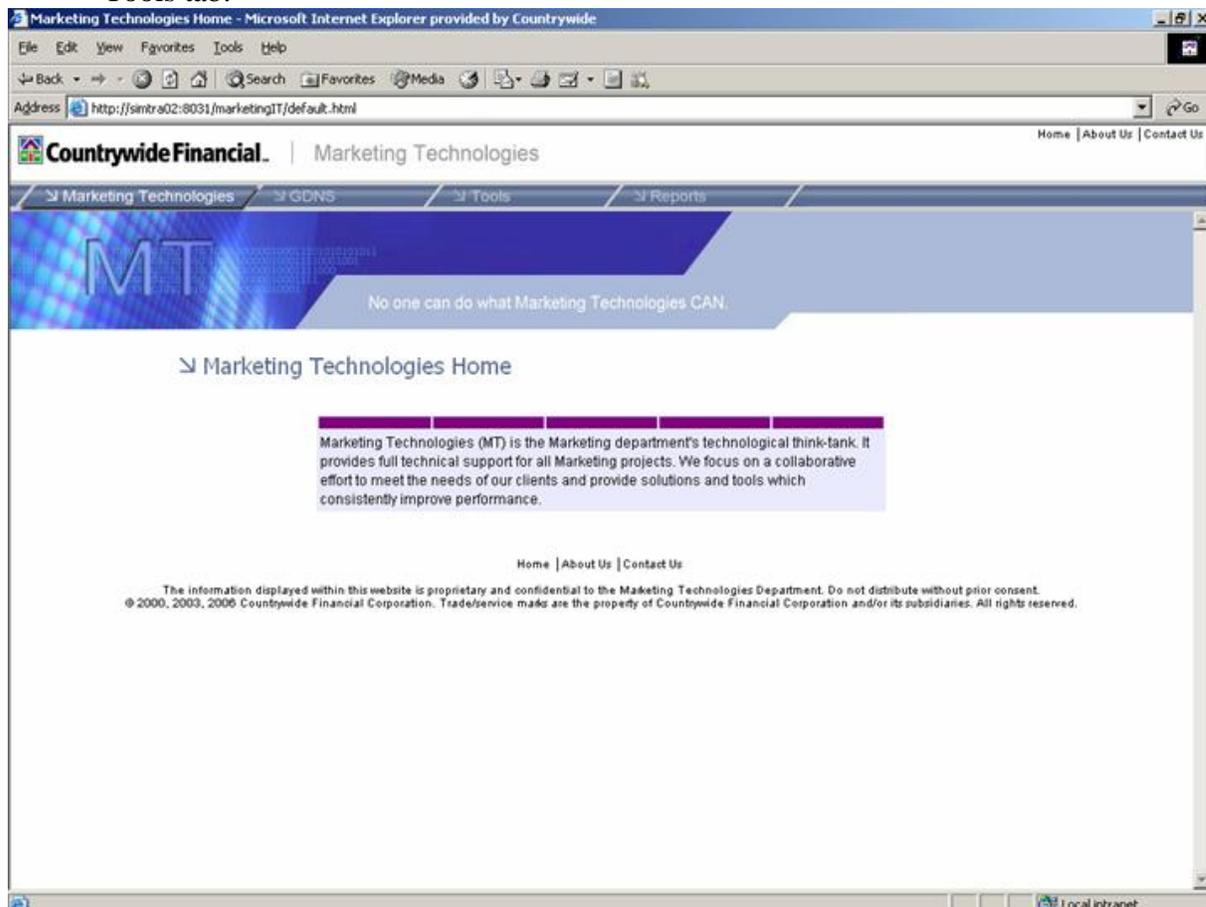
As coding is begun, Brandon creates a sub-campaign number in Pharos. Pharos populates the number into the IT App.



2.3. Open IT App

LAUNCHING IT APP

1. Go to the IT App (<http://simtra02:8031/marketingIT/default.html>) and click on the Tools tab.



The Menu options are expanded. In the Cherry Pie menu, click the Numbers option to display approved segments and sub-campaigns in list form.

This screen displays the segments and sub-campaigns that are currently in production.

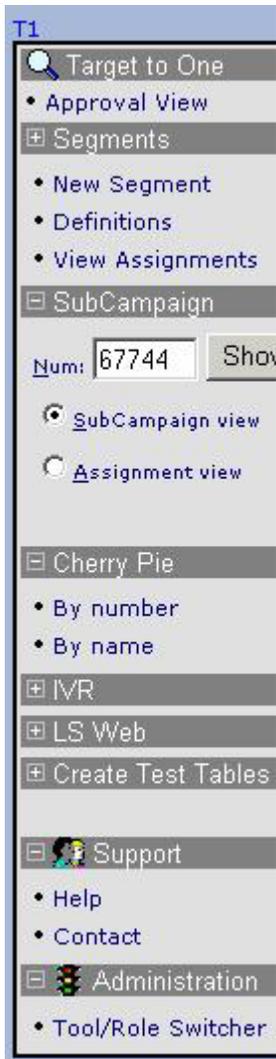
The screenshot shows a web application interface for "Marketing Technologies" within "Countrywide Financial". The interface is displayed in a Microsoft Internet Explorer browser window. The main content area is titled "Status" and displays a table of "Approved Segments and the Approved Sub-Campaigns assigned to them (listed in Priority and Sequence Order)".

The table has the following columns: Num, Name, Cherry Pie, IVR, LSB1, LSB2, and On-line Banner. The data rows are as follows:

Num	Name	Cherry Pie	IVR	LSB1	LSB2	On-line Banner
-1	Default Messages	10582 T1-FSL Ref Gen Eligible		65176 Default - LSB1 - Script 1		
190	FSL Refi Subprime Modelled List	67744 FSL Ref Subprime Models				
239	CMD Refi ARM Pre Adjustor	70173 CMD Ref ARMPreAdjustor				
240	CMD Refi ARM Post Adjustor	70174 CMD Ref ARMPostAdjustor				
105	CMD Purchase Handraiser	67747 CMD Pur Handraiser		65106 Purchase Handraiser - LSB1 - Script 1		68861 Insurance 1 63868 FUSA Visa 0% APR Summer Offer 12059 Credit Guard Sleeping
192	CMD Sellers Advantage	67748 CMD Pur Sellers				

The interface also includes a left-hand navigation menu with options like "Target to One", "Approval View", "Segments", "SubCampaign", "Cherry Pie", "IVR", "LS Web", "Support", and "Administration".

MARKETING TECHNOLOGIES IT APP MENU



The IT App menu, navigation bar (nav bar), is on the left. It displays different options representing the different parts of the app, and the Power nomenclature. Notice the “T1” just above the menu nav bar, and the first menu option. Just below “T1” is, “Target to One”.

The menu options and their functionalities, introduction:

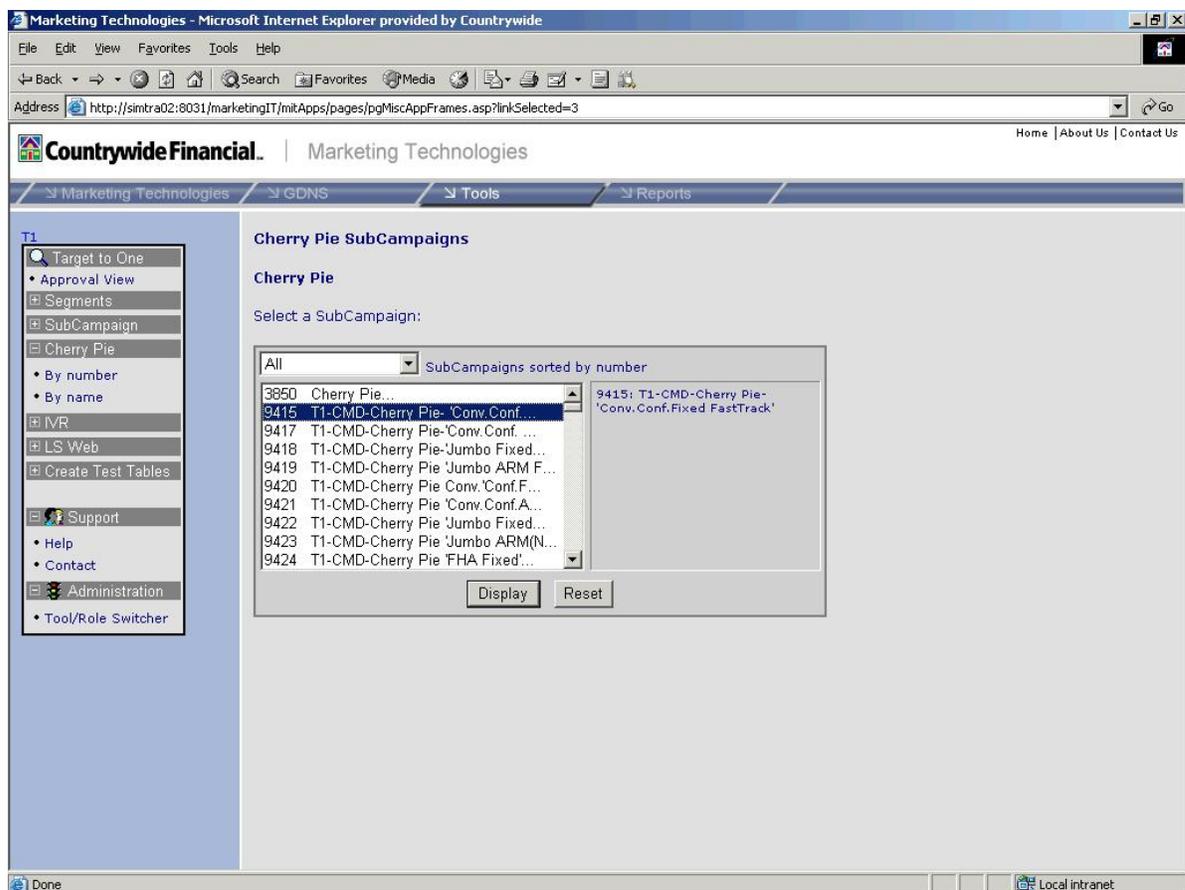
- **Target to One Menu Option – Approval View**
This is the default view that shows all segments that are currently live in production and their associated Sub-Campaign Numbers.
- **Segments Menu**
 - **New Segment** – Allows you to create a new segment
 - **Definitions**- Allows you to set priorities between segments
 - **View Assignments** – Provides an overview of segment approval status and this is where you associate sub-campaigns to segments.
- **Sub Campaign Menu**
This is where you can search for a sub-campaign number if you know it, otherwise use **Assignment View**.
- **Cherry Pie**
The name is from McDonald’s offering “and would you like a Cherry Pie with your order?”
This screen displays all sub-campaign by number or name.
- **IVR Menu**
Integrated Voice Recognition
- **LS Web**
Web customizations
- **Create Test Tables**

2.4. Cherry Pie: Find Sub-Campaign# Just Created

Sr. Marketing Manager opens Cherry Pie to locate the sub-campaign number just created in Pharos.

FIND SUB-CAMPAIGN NUMBER

Brandon expands the Cherry Pie menu and clicks on the By Number menu option. All the sub-campaign numbers created in Pharos are listed. The sub-campaign number for the particular segment being set up needs to be located and selected. Select the sub-campaign and click the Display button.



2.5. Cherry Pie: Add Script and Approve Sub-Campaign Association

ADD SCRIPT TO SUB-CAMPAIGN

Brandon has located the sub-campaign by expanding the Cherry Pie Menu, and clicking on the sub-campaign currently being worked on. The Cherry Pie Sub-Campaign screen opens. Brandon adds the script approved by Legal to the new segment in this screen, then checks the Approved check box and clicks the Save button to create the new sub-campaign to script association.

The screenshot displays the 'Marketing Technologies' web application interface. The browser window title is 'Marketing Technologies - Microsoft Internet Explorer provided by Countrywide'. The address bar shows the URL: <http://simtra02:8031/marketingIT/mitApps/pages/pgMiscAppFrames.asp?linkSelected=3>. The page header includes 'Countrywide Financial.' and 'Marketing Technologies'. The navigation menu on the left includes 'Target to One', 'Approval View', 'Segments', 'SubCampaign', 'Cherry Pie', 'IVR', 'LS Web', 'Create Test Tables', 'Support', and 'Administration'. The main content area is titled 'Cherry Pie SubCampaign' and contains the following fields:

Number	Text Code	Name
9422	M9422	T1-CMD-Cherry Pie 'Jumbo Fixed(Non-Fast Track)'

View assigned segments for this sub-campaign...

Subject (Limited to 60 characters.)
T1-CMD-Cherry Pie 'Jumbo Fixed(Non-Fast Track)'

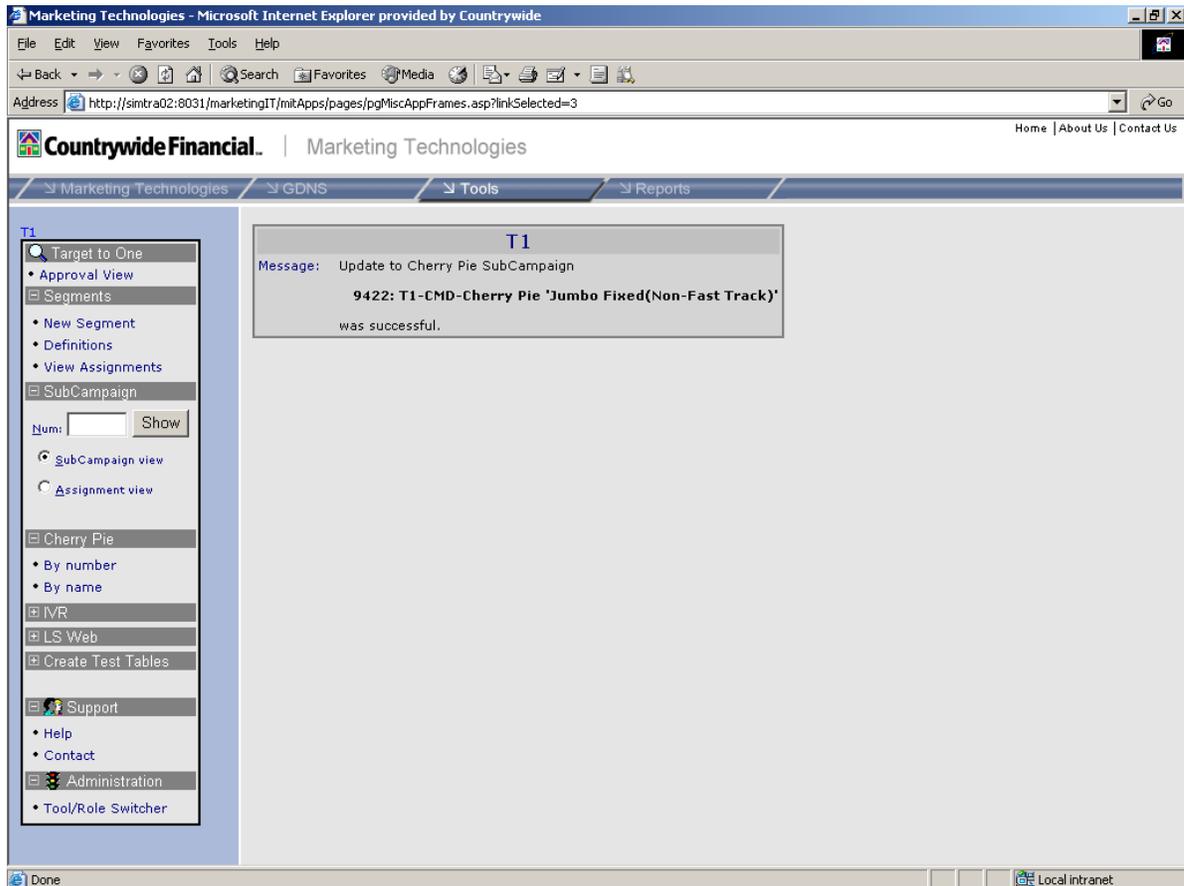
Body (Limited to 700 characters.)
YOU'RE ELIGIBLE TO REFINANCE & LOWER YOUR MONTHLY PAYMENT. WE ALSO HAVE PROGRAMS THAT CAN HELP YOU TAKE CASH OUT OF YOUR HOME'S EQUITY OR REDUCE THE TERM OF YOUR LOAN. INTEREST RATES ARE NEAR A 2YR LOW, WOULD YOU LIKE TO SPEAK TO A LOAN EXPERT NOW?

Variables:
APR
AnnualSavings
Call2ndLienLoanNu
Escrow
FixedPeriod
HelocEligibleAmt
HelocLoanOrigAmt
LifetimeIntSavings

Approved
(Approved/data changed by Seroj Shirvanian on 1/10/02 11:25 AM)

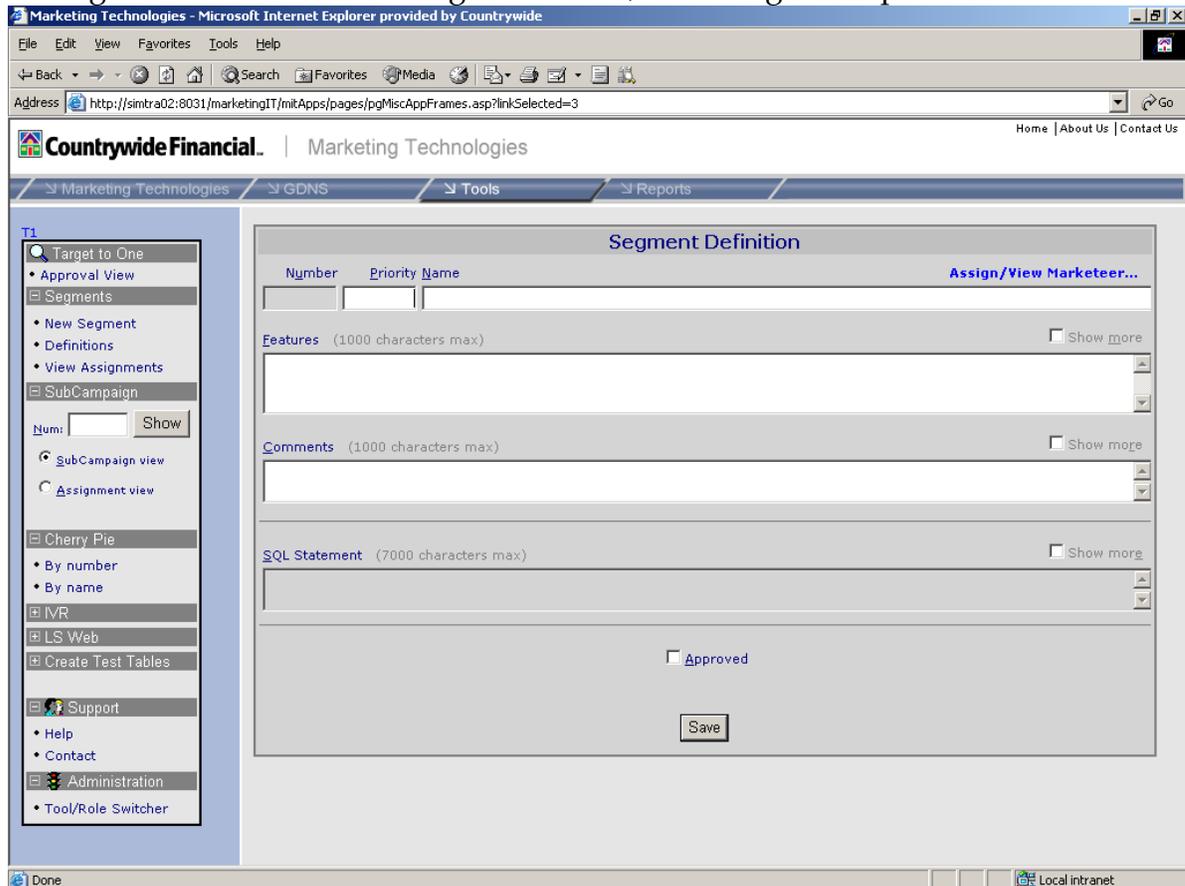
Save

A confirmation message is displayed.



2.6. Cherry Pie: Create Segment

After verifying the Legal Request Tracker database for legal approval of the script the segment is created in the Segment Menu, in the Segment option screen.



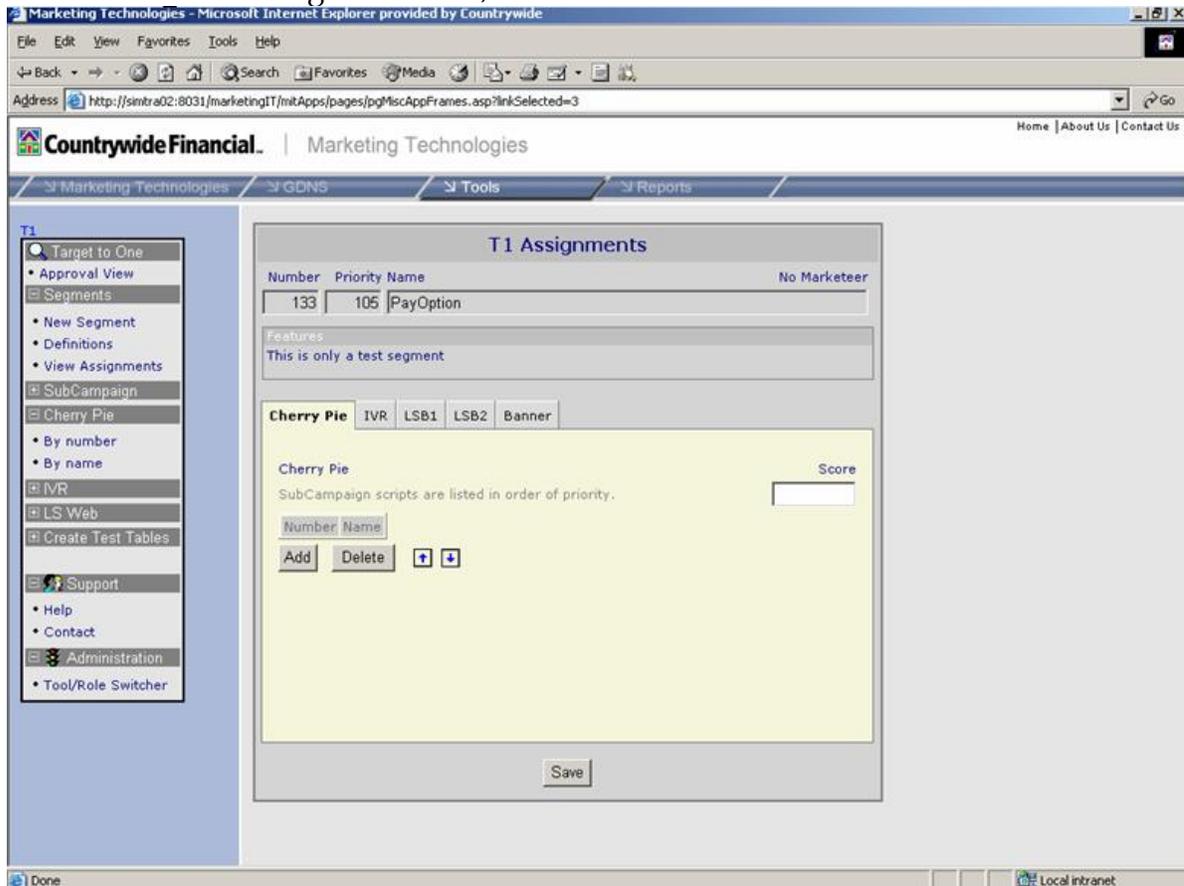
This screen lists all the segments currently in the IT App. “Approved Removed” means that the segment is no longer being used in production but is still available should it be needed in the future. Find the segment just created and click on the automatically assigned number. This is the screen where the sub-campaign number is associated to the segment

The screenshot shows a web browser window titled "Marketing Technologies - Microsoft Internet Explorer provided by Countrywide". The address bar shows the URL: <http://simtra02:8031/marketingIT/mitApps/pages/pgHiscAppFrames.asp?linkSelected=3>. The page header includes "Countrywide Financial. | Marketing Technologies" and navigation links for "Home | About Us | Contact Us".

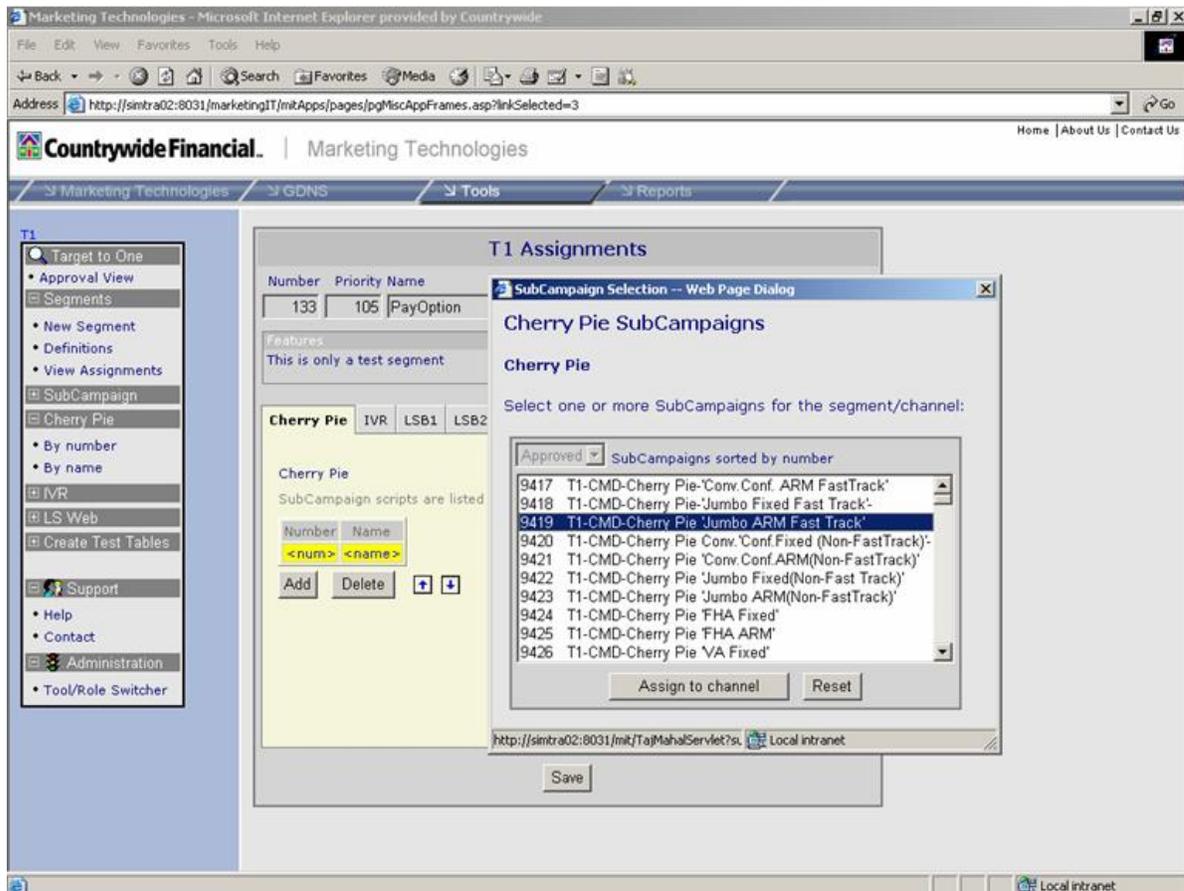
The main content area displays a table of segments. On the left, there is a sidebar menu with options like "Target to One", "Approval View", "Segments", "New Segment", "Definitions", "View Assignments", "SubCampaign", "Cherry Pie", "By number", "By name", "IVR", "LS Web", "Create Test Tables", "Support", "Help", "Contact", "Administration", and "Tool/Role Switcher".

ID	Segment Name	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Status
204	81 FSL Month 12	X	-	X	-	X	-	Approved
179	82 FSL Refi Port Discount	X	-	X	-	X	-	Approved
180	83 FSL Refi Hybrid (2/28 & 3/27) PreConversion	X	-	-	-	-	-	Approved
181	84 FSL Refi Hybrid (2/28 & 3/27) PostConversion	X	-	-	-	-	-	Approved
182	85 FSL Refi 2nd Liens Only	X	-	-	-	-	-	Approved
183	86 FSL Refi Streamline Refi Eligible	X	-	-	-	-	-	Approved
184	87 FSL Refi General B/C Refi	X	-	X	-	-	-	Approved
185	88 FSL Refi Former A Existing	X	-	-	-	-	-	Approved
186	89 FSL Refi Former A New	X	-	-	-	-	-	Approved
187	90 FSL Refi Former A Recurring	X	-	-	-	-	-	Approved
188	91 FSL Refi B/C Solicitation Leftover	X	-	-	-	-	-	Approved
189	92 FSL Refi B/C to A	X	-	-	-	-	-	Approved
191	93 FSL Refi Expanded Approval	X	-	-	-	-	-	Approved
193	94 PPD CW Visa	X	-	-	-	-	-	Approved
238	95 PPD2 CW Visa	X	-	-	-	-	-	Approved
229	96 CIS FIMC	-	-	-	-	-	-	Approved
194	97 CW Bank	-	-	-	-	-	-	Approved
195	98 Default Segment	-	-	-	-	-	-	Approved
196	99 Spanish Banners	-	-	-	-	-	-	Approved
197	100 EquitySmart Eligibles	-	-	-	-	-	-	Approved
101	101 Contractual Refi	X	-	-	-	-	-	Approved
102	102 Contractual Heloc	X	-	-	-	-	-	Approved
103	103 Contractual Purchase	X	-	-	-	-	-	Approved
104	104 Contractual Credit Card	X	-	-	-	-	-	Approved
133	105 PayOption	-	-	-	-	-	-	Approval Removed
109	106 CMD Anniversary 2+	-	-	-	-	-	-	Approval Removed
115	107 CMD Heloc Competitor	-	-	-	-	-	-	Approval Removed
134	108 Cashout Lite	-	-	-	-	-	-	Approval Removed
144	109 CMD Refi Term 15 Static	-	-	-	-	-	-	Approval Removed
145	110 CMD Refi Term 10 Static	-	-	-	-	-	-	Approval Removed

The T1 Assignment screen is displayed. Brandon scrolls through the segments to find the one he is working on. This is the screen where the sub-campaign number is associated to the segment. Next, click on the Add button.



Commit the segment to the sub-campaign by clicking on the Assign to Channel button.



2.7. Cherry Pie: Set the Segment, Name, Priority and Describe Segment Features

This screen allows you to name the segment, set the priority, and describe segment features. There is also room to make any reminder notes about any technical information, or features.

The screenshot shows a web browser window titled "Marketing Technologies - Microsoft Internet Explorer provided by Countrywide". The address bar shows the URL: <http://simtra02:8031/marketingIT/mitApps/pages/pgMiscAppFrames.asp?linkSelected=3>. The page header includes the "Countrywide Financial" logo and "Marketing Technologies" text. A navigation bar contains tabs for "Marketing Technologies", "GDNS", "Tools", and "Reports".

The main content area is titled "Segment Definition" and contains the following fields and controls:

- Number**: A text input field.
- Priority**: A text input field.
- Name**: A text input field.
- Assign/View Marketeer...**: A blue link.
- Features**: A text area with a label "(1000 characters max)" and a "Show more" checkbox.
- Comments**: A text area with a label "(1000 characters max)" and a "Show more" checkbox.
- SQL Statement**: A text area with a label "(7000 characters max)" and a "Show more" checkbox.
- Approved**: A checkbox.
- Save**: A button.

A left-hand navigation menu is visible, containing the following items:

- Target to One
 - Approval View
- Segments
 - New Segment
 - Definitions
 - View Assignments
- SubCampaign
- Cherry Pie
 - By number
 - By name
- IVR
- LS Web
- Create Test Tables
- Support
 - Help
 - Contact
- Administration
 - Tool/Role Switcher

The status bar at the bottom shows "Done" and "Local intranet".

2.8. Get UNIVTYPE

The Univtype is used for mapping. The Sr. Programmer provides this.

2.9. Cherry Pie: Commit Campaign

Once the coding is complete and the campaign is verified, tested and complete, and the Univtype input, the Sr. Marketing Manager turns the segment on in Cherry Pie by clicking the Commit button, thus executing the campaign.

The screenshot shows a web browser window displaying the 'Marketing Technologies' interface. The browser title is 'Marketing Technologies - Microsoft Internet Explorer provided by Countrywide'. The address bar shows the URL: <http://simtra02:8031/marketingIT/mtApps/pages/pgMiscAppFrames.asp?lnkSelected=3>. The page header includes 'Countrywide Financial.' and 'Marketing Technologies'. The main content area is divided into sections: 'Marketing Technologies', 'GDNS', 'Tools', and 'Reports'. A left sidebar contains navigation options like 'Target to One', 'Approval View', 'Segments', 'SubCampaign', 'Cherry Pie', 'IVR', 'LS Web', 'Create Test Tables', 'Support', and 'Administration'. The main table lists various campaigns with the following data:

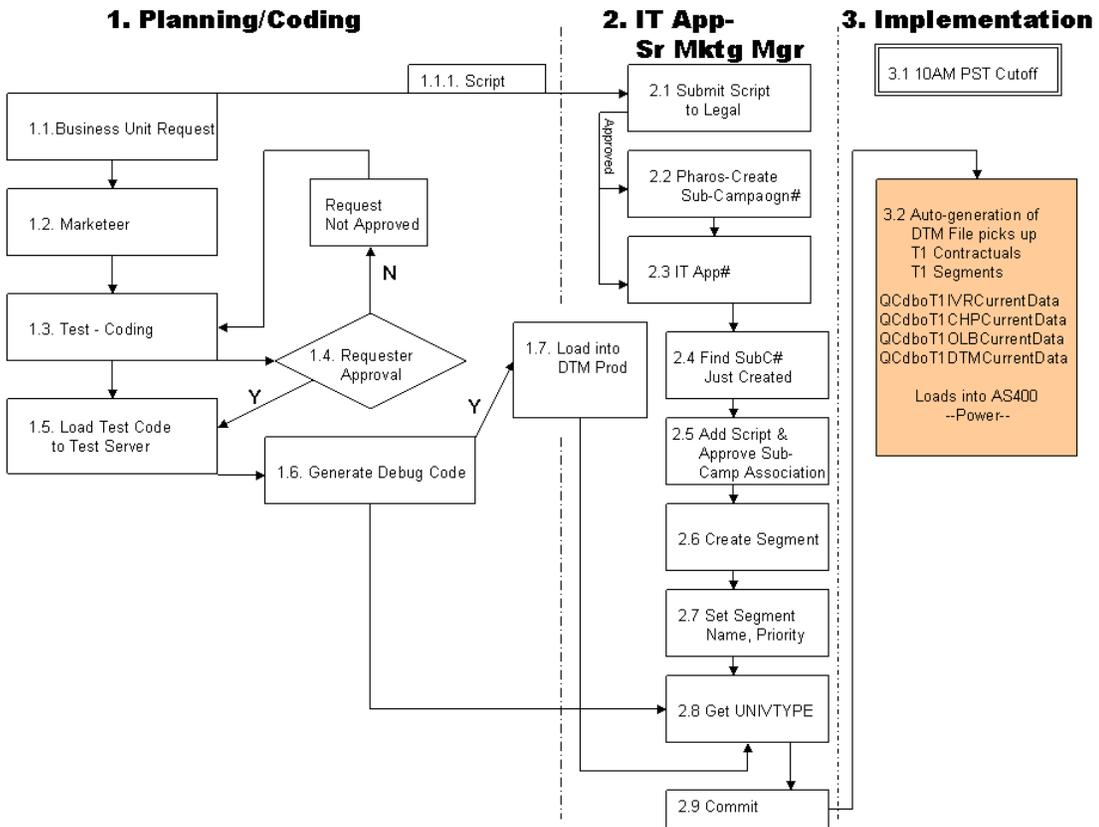
ID	Name	Description
10582	T1-FSL Ref Gen Eligible	
63	Collections-FSL	
10671	T1-FSL BC	
64	Existing Angels - FSL CSR Pilot	
11495	T1-FSL Ref Frm A Existing	
65	New Angels - FSL CSR Pilot	
11496	T1-FSL Ref FmrA New/Recur	
66	FSL Port 13 Month	
11442	FSL Ref Port 13 Month	
70	FSL 'A' Refi - FSL CSR Pilot	
12165	T1-FSL Ref BC to A	
83	First USA Credit Card	
67746	First USA Credit Card	
84	Month 9 to 11 FSL-CSR	
66439	FSL-CSR Month 9 to 11	
85	Month 12 FSL-CSR	
66438	FSL-CSR Month 12	

At the bottom of the table, there is a 'Commit to Production' button.

3. Implementation

Once the campaign is confirmed, the Univtype is entered into a spreadsheet and the Commit button clicked in the IT App front end. The Univtype associates with the segment number. The Commit button then runs the campaign.

When everything is ready to go live, the campaign loads to the production side server after everything is verified and ready, when Brandon clicks the Commit button in the Cherry Pie front end which transfers the data. The VP Marketing Data Integration (Harry ██████████) does server maintenance and QA to make sure the upload does not fail. Harry oversees the production rollout, which is automated. If the upload fails, Brandon sees Harry to find out why it failed.



4. System Components

The following components comprise or are utilized to generate DTM. (This list is incomplete, please fill in.) Where are these located and housed?

- T1 Tables
- Pharos
- Master Table
- Master List

5. Definitions, Acronyms and Glossary of Terms

TERM	DEFINITION
Campaign/Sub-Campaign	<p><i>Campaign is the offer. Variables determine and define the sub-campaign. The sub-campaign number is created in Pharos. There is a 1:1 relationship with a sub-campaign number to a campaign number. There are no 2 different scripts per product. Each product has its own sub-campaign number. The sub-campaign number is a tracking number for marketing reporting purposes. The scripts are associated to a sub-campaign number that is associated to a segment which is a campaign.</i></p> <p><i>Product and sub-product = sub-campaignmodel.</i></p>

Cherry Pie	<i>Old Cherry Pie, New Cherry Pie and Cherry Pie: Old Cherry Pie was (just!) a stored procedure run against a database with the same name. Old Cherry Pie was channel specific database and stored procedure, a (refi_eig) for direct mail for customer support. It was run as database scrubs against DNS. New Cherry Pie and Cherry Pie are the same things: The Cherry Pie software front end.</i>
Criteria	<p><i>Criteria are different campaigns. They are technical SQL coding not easily read by a non-tech person</i></p> <p><i>Criteria are different for every segment. Marketeer sends Richard criteria.</i></p> <p><i>Criteria are not sub-campaign #'s. A sub-campaign is separate from criteria</i></p>
Marketeer	<p><i>Variables are contained in Marketeer, but are not listed or viewed in Marketeer. However, there is a pull down list of the variables in the New Cherry Pie front end.</i></p> <p><i>Segment requests are input in Marketeer. Segment request can be for a new segment or can change an existing segment. New segments can be based on existing segments, pulling in a certain order, so there can be overlap in segments. Segments must be pulled and pushed and synchronized for product.</i></p> <p><i>Business Divisions work with Marketing Managers to take criteria to make a new universe/segment.</i></p>
Power	<i>The power of the Power procedures is the overlap in segmentation to not be in violation of contracts.</i>
Segment/Campaign#	<p><i>A segment is a universe type (univtype). A campaign is the actual output of a message to a segment. These terms are used interchangeably referring to the pushing and pulling of information in and out of the marketing systems to define segments for campaigns.</i></p> <p><i>Segment = columns = variable = field</i></p> <p><i>A Segment is generated from a criteria field provided by Marketing Manager to aggregate campaigns with similar messages for specific product. The segment is for a specific product, sent to a specific group, is the act of segmentation.</i></p> <p><i>After the sub-campaign number is created in Pharos, the script is associated to it in IT App. See Brandon's screen shot on how to</i></p>

	<p>create a new segment, and then how to name it, prioritize it, and create the segment. The next available number is associated, and then the sub-campaign number is associated to the campaign number.</p> <p>The Commit button is clicked when everything is ready to go live. Before committing, Richard, and Brandon look over the code before signing off. At this point, Richard can run a sample of 5 or 6 to examine the result before signing off. Then Brandon signs off, and passes it on to Gary, in IT App. Gary verifies the code is in place and approves.</p>
Segmentation	How we determine who we are sending to based on the criteria from a larger audience.
Segments=Univers	Segment is also used and considered as synonymous with Universe. A universe is a group of customers, such as those in California, or those having a CW credit card. A segment is also a slice of a universe such as all California customers that have a CW credit card.
Scripts	Messages targeted to customer attributes
Target to One	<p>Approved target segments associated to one sub-campaign. Is the DTM a target going to one segment? Or vice versa? What is the significance of this software name? Or is the target the subcampaign? Did this name originally mean, one message (target) to one channel (one)?</p> <p>Also referred to as the Script Master, "The New App", "The IT AP Front End"</p>
Variable	<p>In DTM, these are used within a script for the customer offer. In old Cherry Pie, these were generic, in New and improved Cherry Pie, these are personalized offers. Power gives the ability to personalize a script for a customer based on loan qualifications. Variables can be thought of as mail merge data fields used to pull data.</p> <p>Variables are required to Marketing Managers to define the segments. They can request new variables by submitting a request through the Marketeer to Richard and Steve B.</p> <p>Variables determine and define the sub-campaign (script/message).</p> <p>Scripts are the sub-campaigns which are defined by variables. Brandon associates the scripts to the sub-campaign segment which is one campaign (output message for a segment).</p>

	<p><i>Variable is used within a script to personalize the offer, by personalizing the script for specific customers. The script is the offer.</i></p> <p><i>Variables are populated fields in Richard's databases, and they are listed in the New Cherry Pie front end that Brandon uses to initiate, commit and execute campaigns.</i></p> <p><i>Issue: We are not using the variables as much as we had planned because we are not sure of their effectiveness.</i></p> <p><i>You do not see variables in Marketeer (there is a list of variables) if it is not currently in system. If there is one not there, it needs to be created. (Are variables available in pull down menus in Brandon's Cherry Pie front end?)</i></p>

