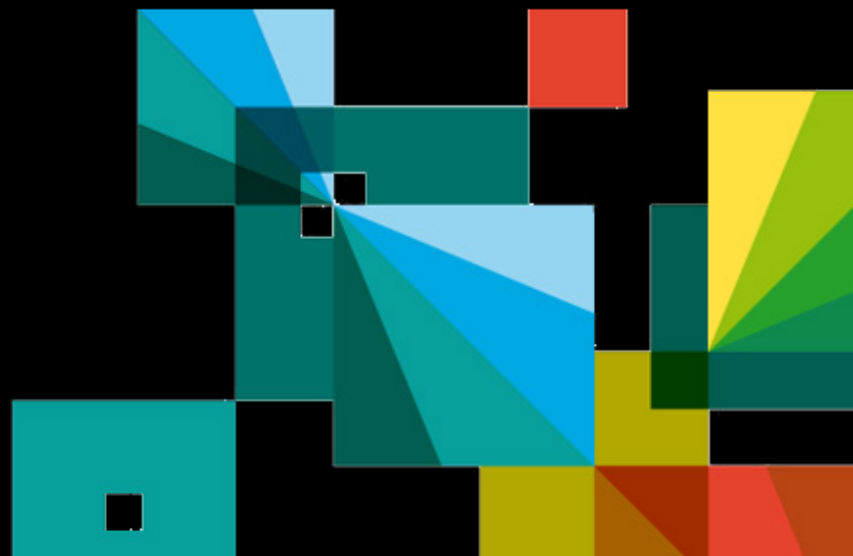


IBM Enterprise Marketing Management – Strategy and roadmap overview

November 2012



- IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion.
- Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.
- The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

Topics

- Version .next overview, a highlight of 3 modules
 - IBM Marketing Operations
 - IBM Campaign
 - IBM Interact

IBM Marketing Operations

- Allows Project Health to be tracked & analyzed
- Allows for Project Performance to be compared with other projects and across months/years
- Determines health based on user specified configurable rules
- Rules based on various Key Performance Indicators
 - % Tasks or Milestones Overdue,
 - % Time Overdue,
 - % Over Budget
- Project Health represented by states & color indicators
 - Healthy (Green), Warning (Yellow), Critical (Red)
 - Colors & Status labels are configurable
- Analysis, Reporting
 - Real time Portlet available on dashboard
 - Historical Reports via Cognos
- Daily Alerts can be defined & API support is available

- A number between 0 (lowest score) & 100. This allows us to rank projects based on the amount of time they have been in healthy, Warning or Critical state.
- Default Rule - Score = %Green + (%Yellow/10) + (%Red/100)
- The idea is to favor all of the Green status %, 1/10th of Yellow status % and 1/100th of the Red %.
- This score calculation can be configured by the administrator. UMO will ship a default rule.

April 2012 - Monthly Report - Across Projects				
	Project ABC	Project PQR	Project TEST	Project BEST
Health - Green	80%	50%	75%	100%
Health - Yellow	15%	30%	15%	0%
Health - Red	5%	20%	10%	0%
Health - Score	81.5	53	76.5	100

Real time dashboard for project health

My Project Health		
Show All Export		
Project Name [Project Code]	Health Status	% Complete
ArtworkRefresh_Project [TRS2001]	Critical	14 %
Tradeshow 2 [TRS1001]	Warning	20 %
Tradeshow 1 [TRS1000]	Healthy	7 %
Tradeshow 3 [TRS1002]	Healthy	0 %

Drill down provides insight into Project Status

Current Health Status: Critical



% Tasks delayed	0 %
% Milestone Tasks delayed	0 %
% Time Overdue	264 %
% Milestone Overdue	0 %
% Budget Overrun	0 %

Overdue Tasks: [Workflow](#)

Task Name	Type	Forecast/Actual Start	Forecast/Actual End
(1.1) Determine objectives and theme	Task		
(1.4) Budget and Theme Approval	Approval	08/15/2012 09:00:00 AM	08/30/2012 05:00:00 PM

View Health – in the context of the Project

All Projects and Requests > My Projects > ArtworkRefresh_Project (TRS2001)

Summary People Contact Info Workflow Budget Tracking **Health Status** Analysis

Current Health Status: Unknown

14%

% Tasks delayed	0 %
% Milestone Tasks delayed	0 %
% Time Overdue	15 %
% Milestone Overdue	0 %
% Budget Overrun	0 %

Overdue Tasks: [Workflow](#)

Task Name	Type
(1.4) Budget and Theme Approval	Approval

Project Health Status Rules

- Rules can be specified per project template
- Health status LABEL & COLOR can be specified Health parameters can be combined with AND OR operators

Project Options

- [Health status](#)
- [Health rules](#)
- [Recalculate Project Health](#)
- [Project Health Daily Mails - Unsubscribe](#)

Status	Label	Color	Icon
Healthy	<input type="text" value="Healthy"/>	Choose Color ▾	
Warning	<input type="text" value="Warning"/>	Choose Color ▾	
Critical	<input type="text" value="Critical"/>	Choose Color ▾	
Unknown	<input type="text" value="Unknown"/>	Choose Color ▾	

Sample Health Rule

Marketing Collateral, Database Marketing Campaign, AK Template - Rule 1

IF

```

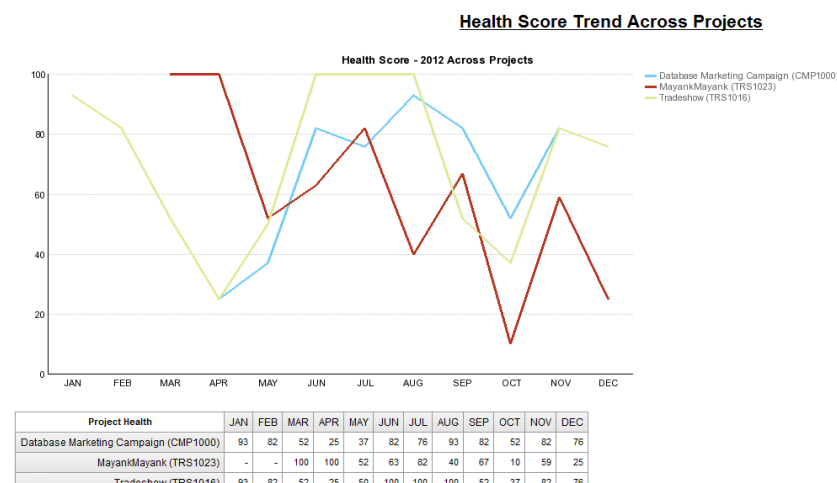
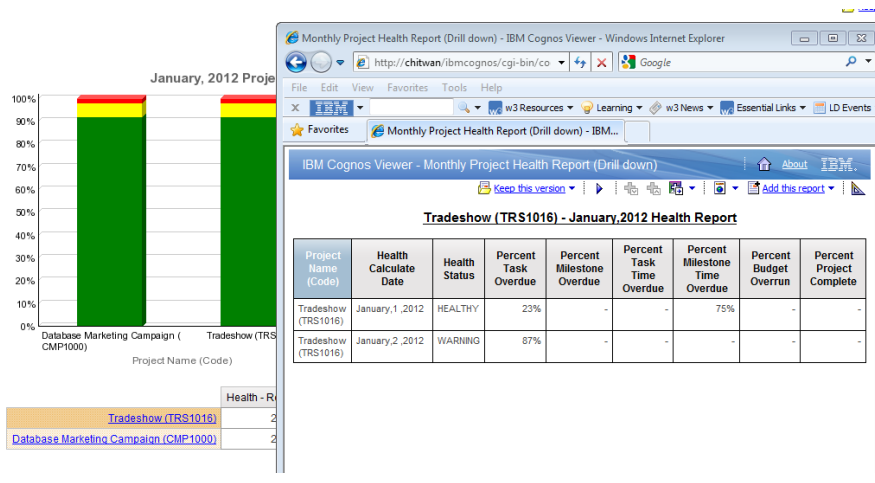
% Time Overdue <= 0 AND % Milestone Overdue <= 0 AND % Tasks delayed <= 0 AND % Milestone Tasks delayed <= 0 AND % Budget Overrun <= 0
THEN
  Healthy
ELSE IF
% Time Overdue > 0 AND % Time Overdue <= 10 AND % Milestone Overdue > 0 AND % Milestone Overdue <= 10 AND % Tasks delayed > 0 AND % Tasks delayed <= 10 AND
THEN
  Warning
ELSE IF
% Time Overdue > 10 AND % Milestone Overdue > 10 AND % Tasks delayed > 10 AND % Milestone Tasks delayed > 10 AND % Budget Overrun > 10
THEN
  Critical
OTHERWISE
  Unknown
        
```

■ Monthly Report

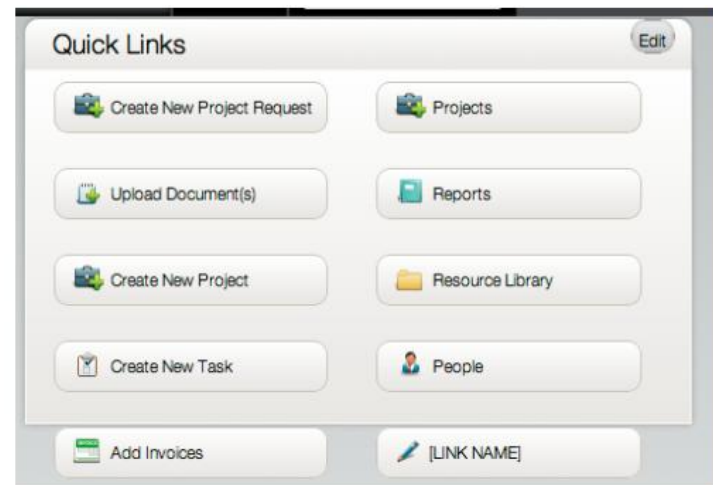
- Shows a stacked bar chart of health status for a group of selected projects
- Report shows status for a specific month/year
- Drill down option on Project shows daily health status for the selected project

■ Health Score Trend

- Shows a trend of health score for one more selected projects
- Trend is shown across (several selected) months



- QuickLinks Portlet has a collection of Static links for quick navigation
- There could be many Quick Link portlets in an instance of dashboard
- A Quick Links Portlet could have a mix of links from various components (like Campaign, MO, etc)
- A catalog of QuickLinks for MO will be presented to Dashboard Administrator
- Dashboard Administrator will select from this catalog/list of QuickLinks and assign one or more to a QuickLinks Portlet.
- One or more QuickLink Portlets can be created by the administrator
- The administrator can assign one or more QuickLinks Portlet to a user or a role.



Administrative Settings > List Definitions

Properties of Approval Deny Reasons

Basic Options

List Name:

Approval Deny Reasons

Description:

Management of approval deny reasons

Display:

Code - Name ▾

Storage Location:

uap_appr_deny_reasons

List Items

New or Selected Item:

Code:

Name:

List Items (4):

- 1 - Do not agree with content
- 2 - Require more details
- 3 - Not in the list
- 4 - Others

- Supported for Workflow approvals & Standalone approvals
- Administrator configures a list of reasons that can be selected while rejecting an approval
- These reasons can be associated with a project template or for standalone requests
- When end user rejects an approval request, end user can assign a reason for rejection
- Historical Report available for analysis

Project Wise Approval Deny Reason Analysis Report

Choose Project Template:

Project Name:

Report Start Date:

Report End Date:

Report is filtered on Project End Date, being greater than or equal to Report Start Date and less than or equal to Report End Date.

Project Name / Total Denials	Do not agree with content	Require more details	Not in the list	Others
UMO vFall12 May sprint project1 4	25 %	25 %	25 %	25 %
UMO vFall12 May sprint project 2 2	50 %	50 %	0 %	0 %
UMO vFall12 May sprint project3 10	40 %	30 %	20 %	10 %
UMO vFall12 May sprint project 4 4	50 %	25 %	25 %	0 %

Workflow View - OLD Page

Project 10 Tasks, 3 Stages	Status	% Complete	Forecast/ Actual Start	Forecast/ Actual End	Forecast/Actual Duration	Actual Effort	Schedule Through	Target Start	Target Ratio
1. New Stage									
1.1 Task		<input type="checkbox"/> 0%	02/29/2012 09:00 AM	02/29/2012 09:00 AM	00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
1.2 Task(1.1)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
1.3 Task(1.2)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
1. New Stage									
2.1 Task		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
2.2 Task(2.1)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
2.3 Approval(2.2)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M
2.4 Approval(2.3)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.		00D-00H-00M

- Incremental work spanning multiple releases
- Enhance usability, user experience, icons, art work, etc
- Scope - Workflow edit & view pages

Workflow View – NEW Page

Project 16 Tasks, 5 Stages	Status	% Complete	Forecast/ Actual Start	Forecast/ Actual End	Forecast/ Actual Duration	Actual Effort	Schedule Through	Target Start
1. New Stage								
1.1 Task		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.	
1.2 Task(1.1)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.	
1.3 sdsa		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.	
1.4 Approval(1.3)		<input type="checkbox"/> 0%			00D-00H-00M	00D-00H-00M	Bus.	

Recent | Dashboard | Operations Financials Analytics

All Projects and Requests > Active Projects and Requests > BN_Sales

asm admin

Save and Duplicate Save and Return to List

Project 12 Tasks, 1 Stages	Status	% Complete	Forecast/ Actual Start	Forecast/ Actual End	Forecast/Actual Duration	Actual Effort		Schedule Through	Target
1. New Stage									
1.1 Task		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M		Bus.	
1.2 Approval_BNSales		<input type="radio"/> 0%			02D-00H-00M	00D-00H-00M		Bus.	
1.3 Task(1.2)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M		Bus.	
1.4 Task_BNSales(1.3)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M		Bus.	
1.5 Approval(1.4)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M		Bus.	

Workflow Edit Page – Old UI

Recent | Dashboard | Operations Financials Analytics

All Projects and Requests > Demo_project

Add Row in series Move Row Up Move Row Down Delete Row Recalculate Dates Tools Undo Redo Save Cancel

Task Approval Stage

	Status	% Complete	Forecast/ Actual Start	Forecast/ Actual End	Forecast	
1.1 Task		<input type="radio"/> 0%			00D-00H-00M	
1.2 Task(1.1)		<input type="radio"/> 0%			00D-00H-00M	
1.3 sdsa		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M
1.4 Approval(1.3)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M
1.5 Task(1.4)		<input checked="" type="radio"/> 100%			00D-00H-00M	00D-00H-00M
2. New Stage						

Save Save and Duplicate Save and Finish Save and Return to List

Workflow Edit Page – NEW UI

All Projects and Requests >
Test proj 002

An option to Import Workflow

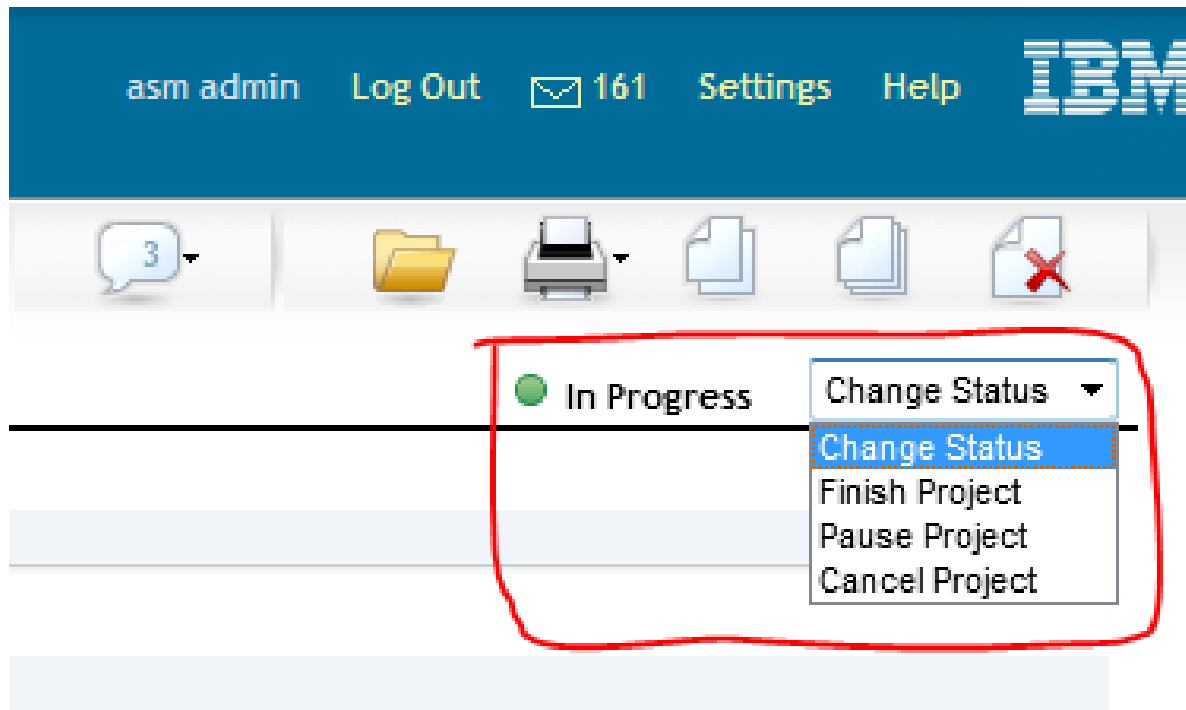
Save and Duplicate

Project 6 Tasks, 1 Stages	Status	% Complete	Forec Start	Actual	Forecast/Actual Duration	Actual Effort	Schedule Through
1. New Stage							
1.1 Task		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.
1.2 Task(1.1)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.
1.3 Approval(1.2)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.
1.4 Approval(1.3)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.
1.5 Task(1.4)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.
1.6 Task(1.5)		<input type="radio"/> 0%			00D-00H-00M	00D-00H-00M	Bus.

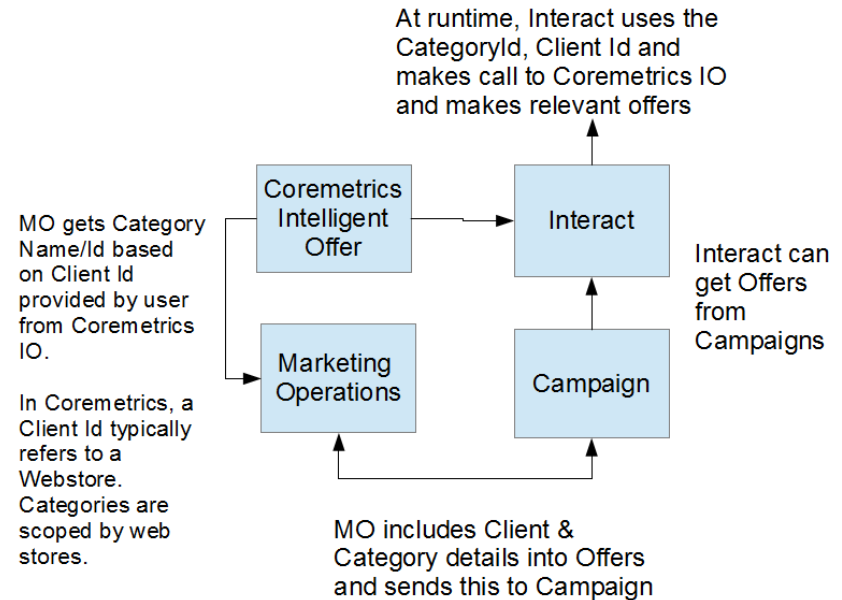
Context menu options: Copy, Paste, Paste Rows After, **Import Workflow**, Mark as Skipped, Mark as Finished, Mark as Active, Mark as Pending, Fill Down, Fill Up, Clear, Clear Column..., Clear All...

- "Import workflow" option would be available only for the projects which are in not started state
- All existing tasks/approvals would be deleted with their attachments / items irrespective of task/approvals state
- Project history would be updated on importing new workflow template with the message "Project workflow imported -Existing {25} task/approvals deleted"

- This is a Usability enhancement
- Make it easier to view current status of Project
- Make it easier to START, STOP, CANCEL (etc) a Project



- The use of Unica Interact in combination with IBM Coremetrics Intelligent Offer allows personalized offers to be delivered with product recommendations, increasing the relevance of appeal of personalized messages delivered in real time.
- This Marketing Operations based integration makes it easier to include Coremetrics Product Recommendation categories to be included in Unica Campaign & Interact offers
- Allows easier & error free integration of Client Id (Store), Category Id & Name from Coremetrics in Offer creation
- Provides a pick list to select category id, name which MO gets from CM IO



- Administrator can enable Coremetrics IO integration via UI
- 2 Coremetrics specific attributes available in Offers
- User specifies “Client Id” that is made available to her via Coremetrics IO subscription
- MO makes a REST/JSON call to Coremetrics IO URL over HTTP
- Populates Category Id, Category Name, Description based on user specified Client Id
- User selects Category Id & Name and includes this as part of Offer attributes

The screenshot displays the 'Offer Template Cm test 00001' configuration page. The interface includes a navigation bar with 'Properties', 'Tabs', 'Attachments', 'Custom Links', and 'Customize Alerts'. The 'Template Properties' section contains fields for Name, Description, Icon, Template ID, ID Prefix, Campaign Security Policy, Offer Code Pid Generator, Partition ID, Offer Code Format, Treatment Code Format, and Treatment Code Generator. A red box highlights the 'Use Coremetric Offer Integration' section, which includes a checked checkbox, the Coremetrics URL, and a list of Coremetrics Client IDs for the template. The list contains the ID '90007517' and includes 'Add', 'Import', and 'Remove' buttons. At the bottom, there are 'Save Changes', 'Revert to Saved', and 'Cancel' buttons.

■ Offer Instance

- Create Offers
- Get & Update Offer Attributes
- Find Offer By attributes
- Life Cycle support – Publish, Redraft, Retire Offers

■ Support for Static and Smart Offer Lists

- Create, Update Offers
- Get Offer Attributes
- Get Offer List Items
- Find Offer List by Attributes
- Life Cycle support – Publish, Redraft, Retire Offers Lists

■ Support for Offer Folders

- Create, Update Offer Folders
- Folder Move operations
- Get Offer Folders
- Find Offer Folders by Attributes
- Life Cycle support – Publish, Redraft, Retire Offer Folders

■ Delete APIs not supported

Offer Integration with Campaign - Creative URL Support

All Projects and Requests > My Projects >
Copy of 2107 of kb project template

▼ Summary (kb project template)

Name: **
 Copy of 2107 of kb project template

Description:

▼ 123

Group

Creative URL: **
 Sample Asset

[All Libraries >](#)

Upon accepting of an asset, a copy of the current version will be made.

Choose an Asset Library / Description

[kb Library](#)

Cancel

[All Libraries >](#)

kb Library Asset List ▾

Upon accepting of an asset, a copy of the current version will be made.

kb Library | [Search/Filter...](#) [Add Asset](#)

Name	Description	Owner(s)	Date Updated	Status
Sample Asset	Sample Asset (Version 1.0)	asm admin	08/15/2012 10:49:50 AM	<input type="radio"/> Draft

Cancel

- Project Owner or Request Owner can view all OOO members and their delegates in the people tab of the Project
- UMO Administrator can view all OOO users and their delegates across ALL Projects, Requests and approvals to the UMO administrator:

Administrative Settings: Out Of Office Users and Delegation Summary

Projects/Requests	Name	Type	User	Delegate	Delegation Start Date
None	ArtworkRefresh_Project(TRS2001)	Project	kbch	Admin	08/16/2012
All			kanchan	Admin	08/16/2012
2107 of kb project template(2107)			alison admin	Admin	08/16/2012
AK Project For Health Rule 2(2001)					
AK Project For Health Rule 2(2002)					
AK Project For Health Rule 2(2003)					
AK Project For Health Rule 2(2004)					
AK Project For Health Rule 2(2005)					
AK Project For Health Rule 2(2006)					

ArtworkRefresh_Project (TRS2001)

Summary **People** Contact Info Workflow Budget Tracking

Design Project People and Roles

Project Members (Access Level)

Unassigned

Unassigned

Unassigned

asm admin(Owner)

alison admin(Participant)

asm admin(Owner)

kanchan(Participant)

kbch(Participant)

[Edit Member/Role Settings](#)

Reviewers

admin1

[Edit Reviewer/Role Settings](#)

Out Of Office Members and Delegation Summary

User

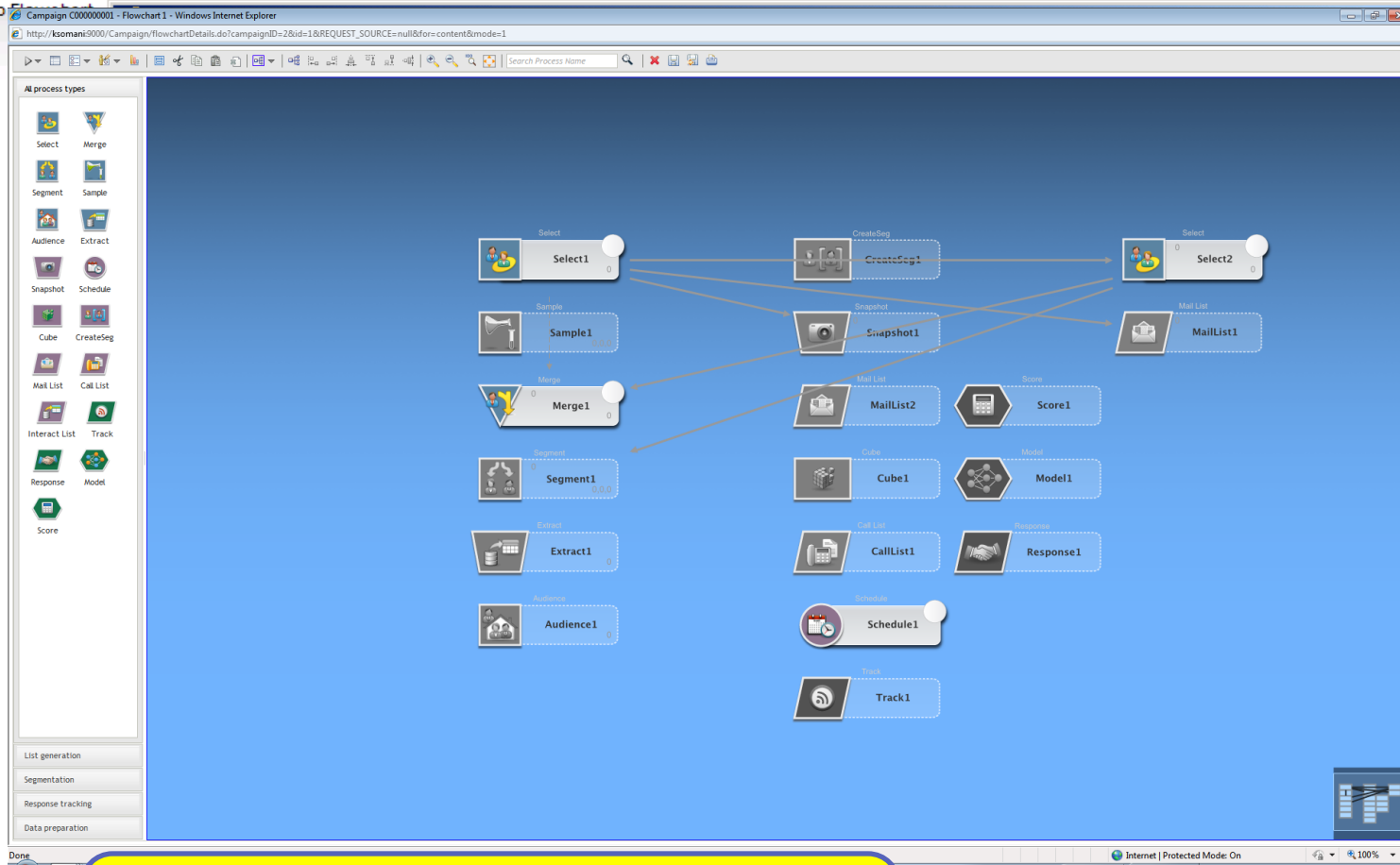
kbch

kanchan

alison admin

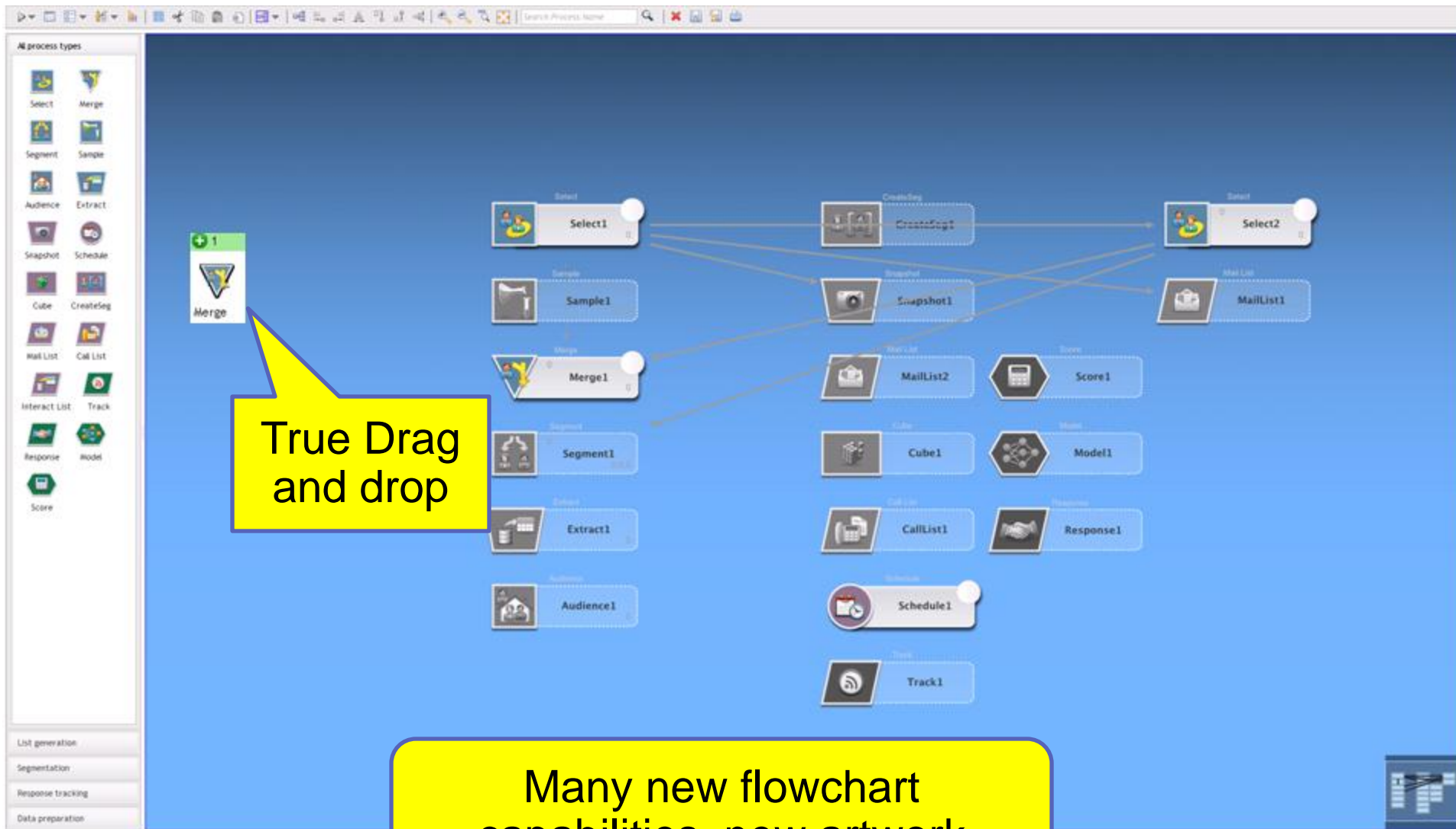
IBM Campaign

- The popup window
- The interface
- Drag and drop
- Flowchart example
- Flowchart breakdown
- Zoom in on Toolbar capabilities
 - menu options
 - Autofit
 - Search
 - Alignment options
 - Auto layout options
 - Select all option
 - Connection points and arrowed connections
 - Panning area
- Process artwork

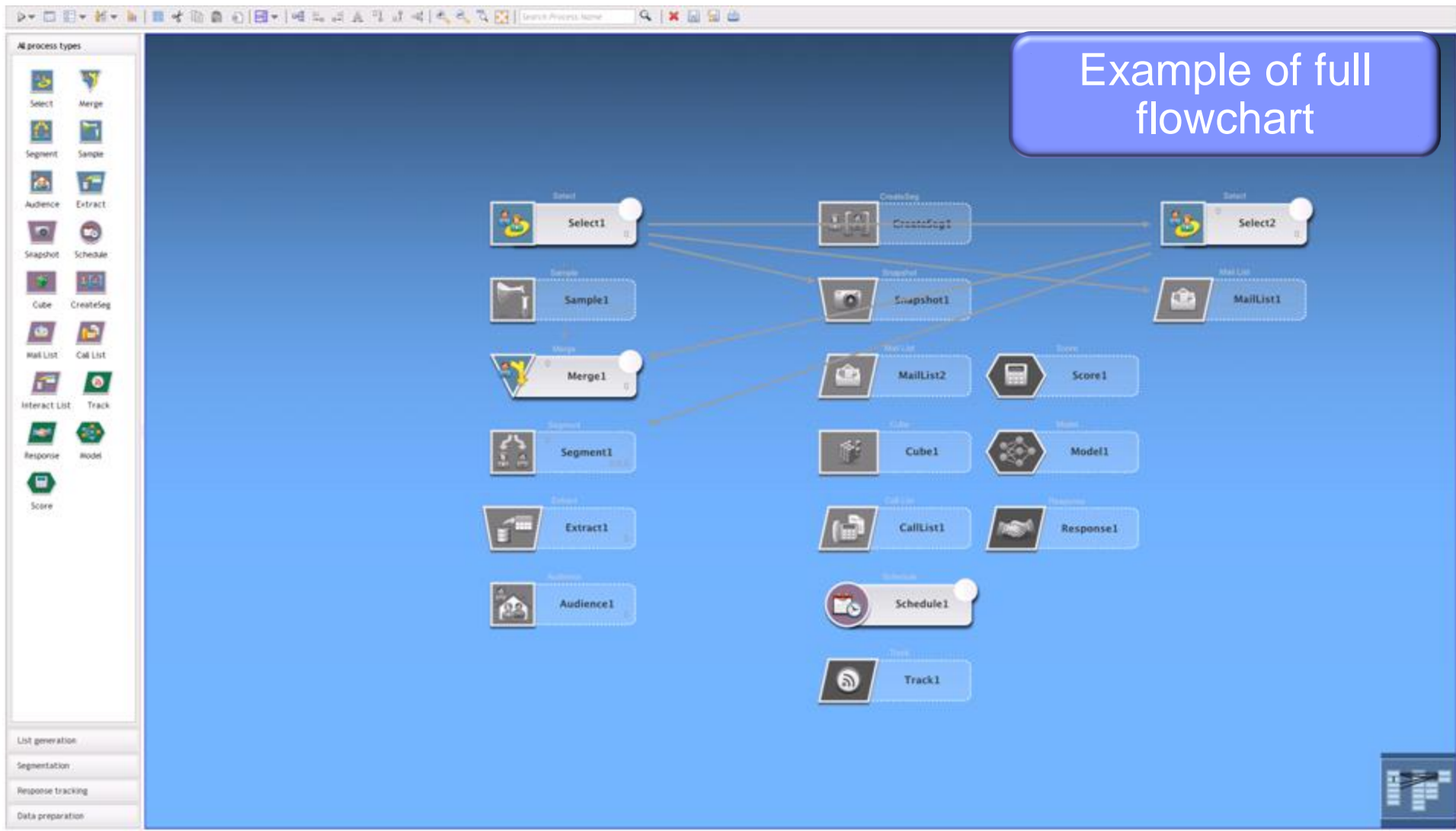


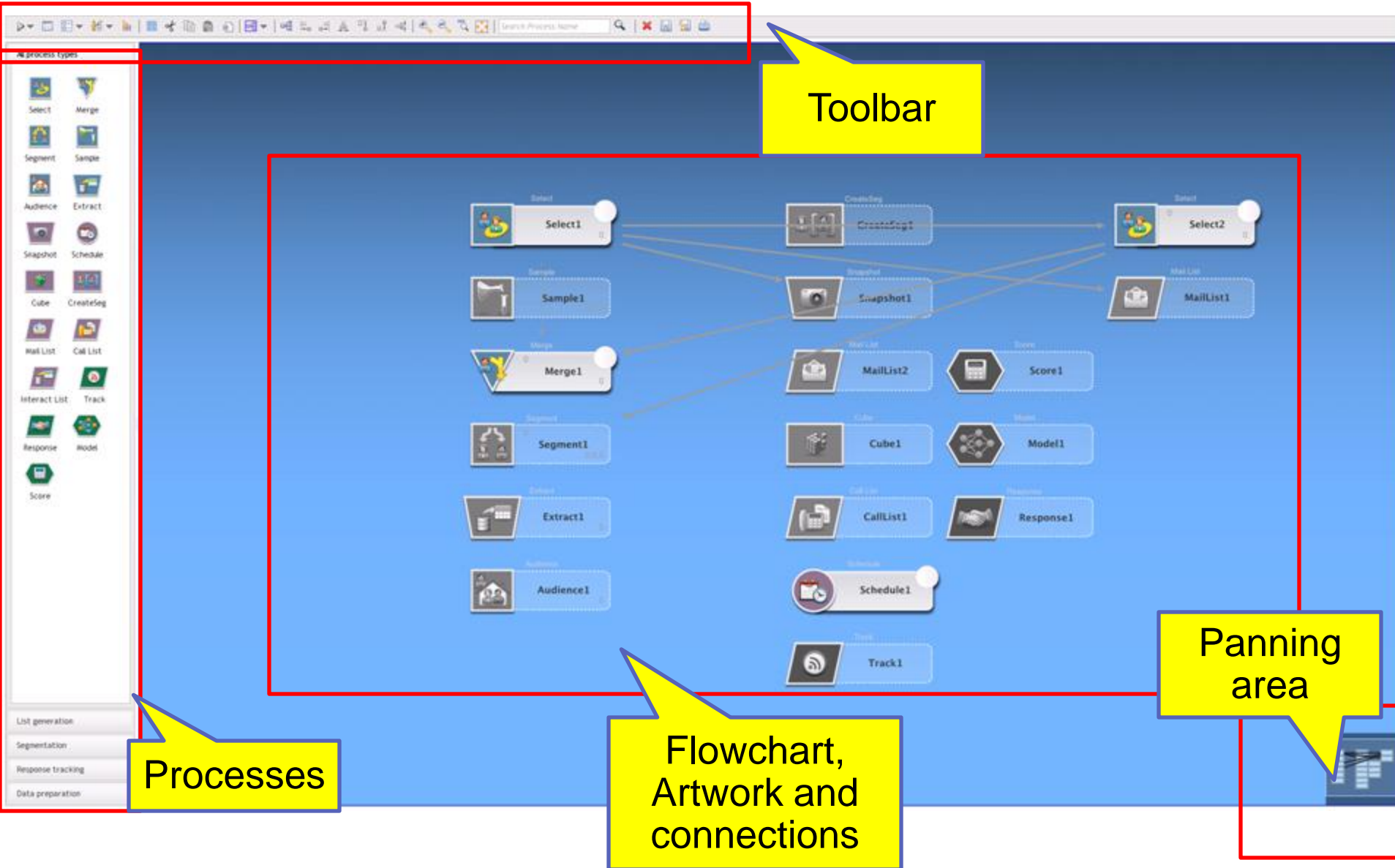
[Click here](#) to access this flowchart

Pop up window flowchart approach



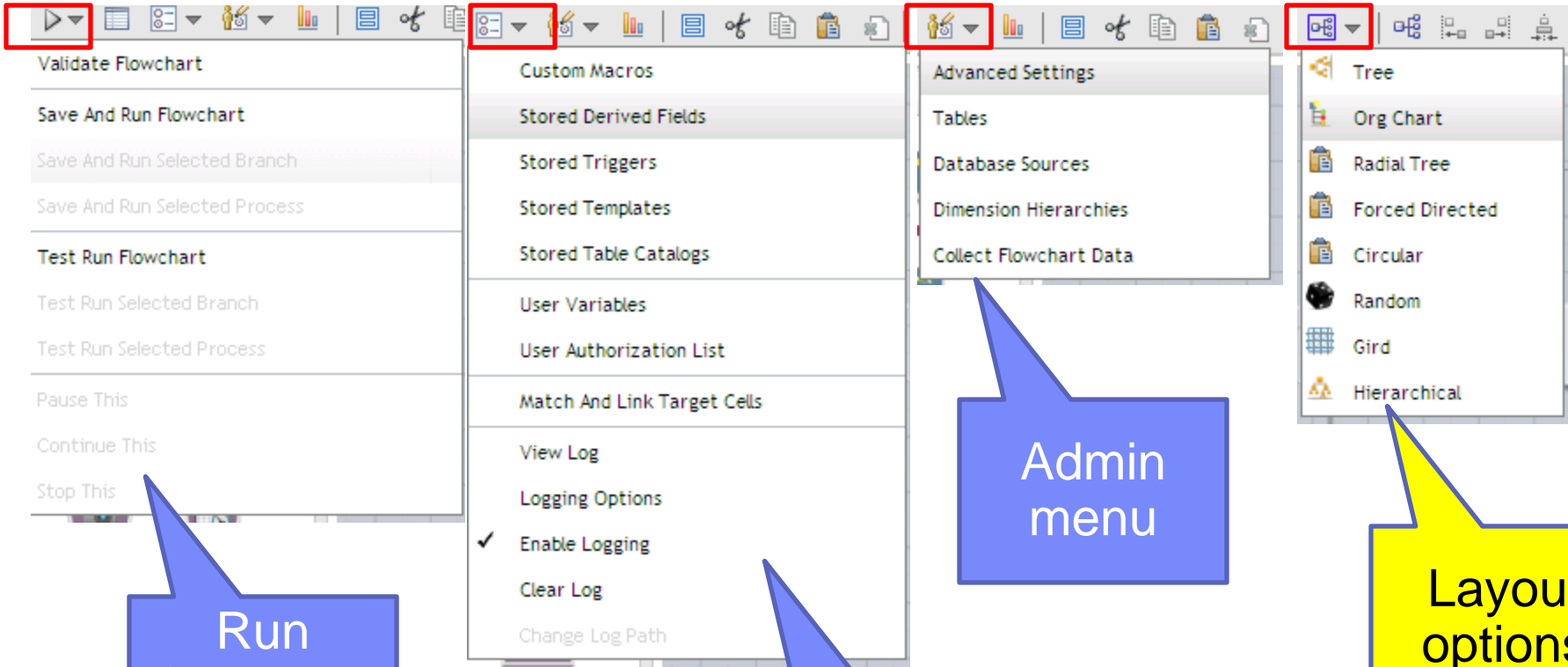
Example of full flowchart







Toolbar



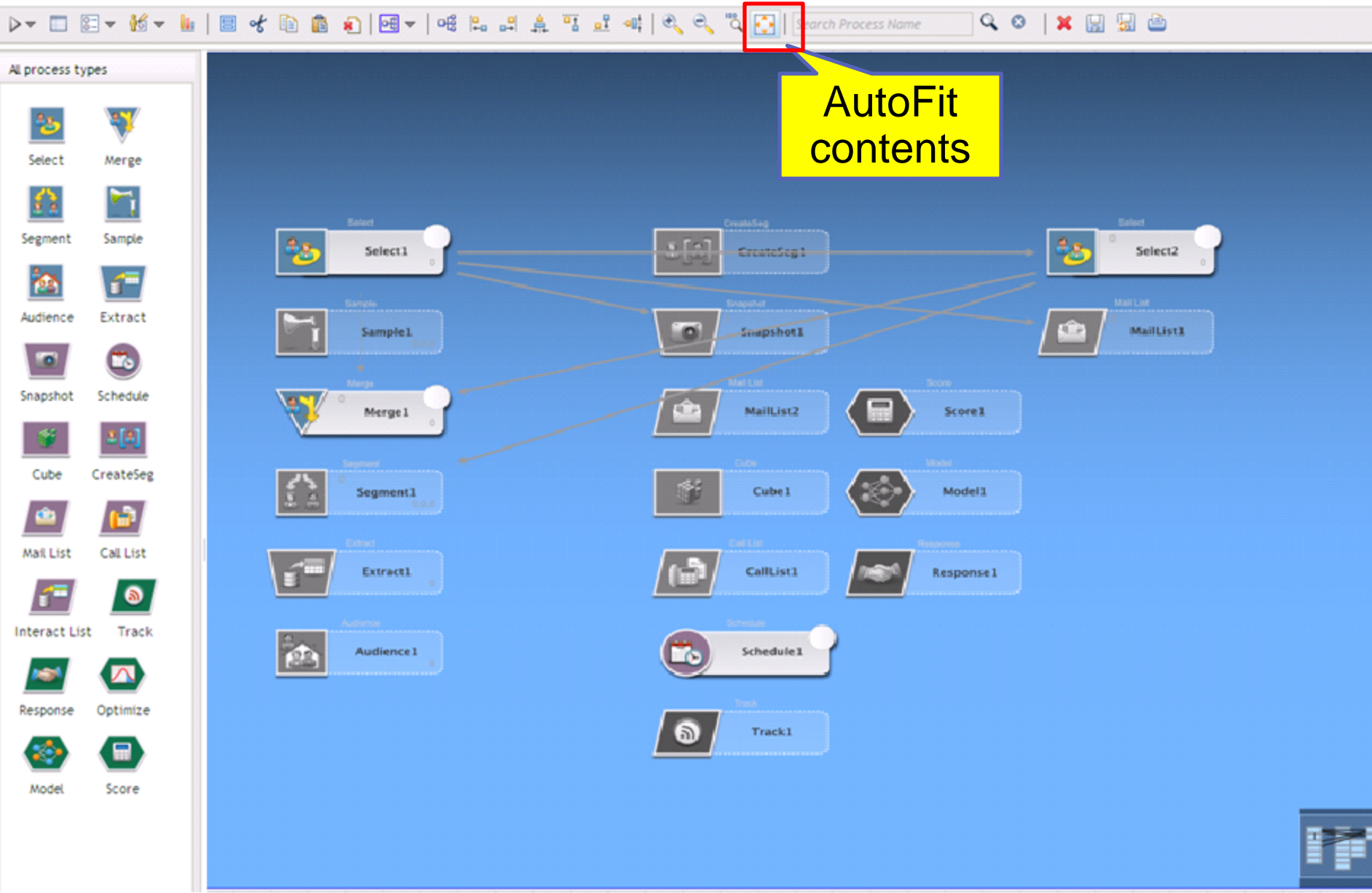
Run flowchart options

Options menu

Admin menu

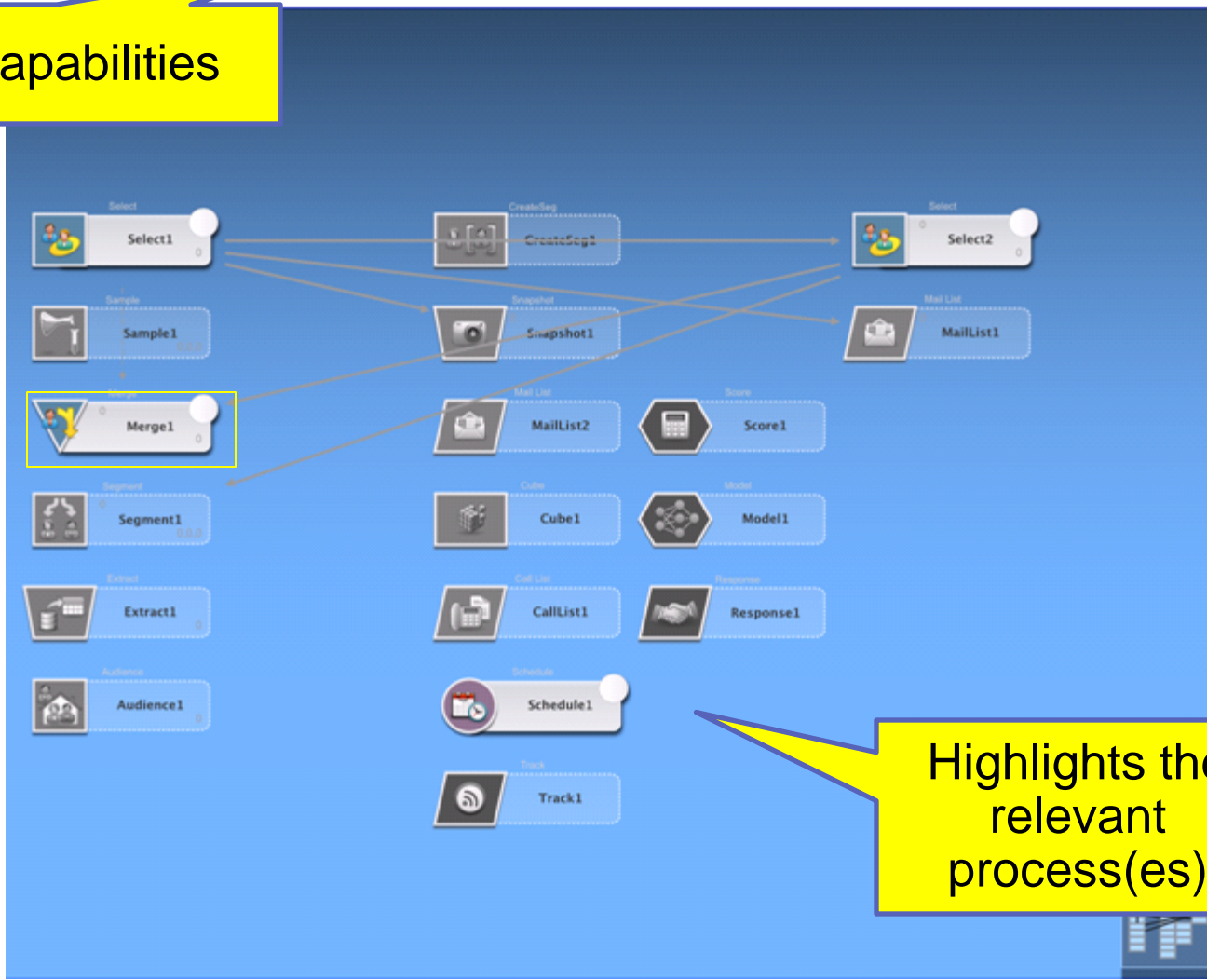
Layout options

Toolbar



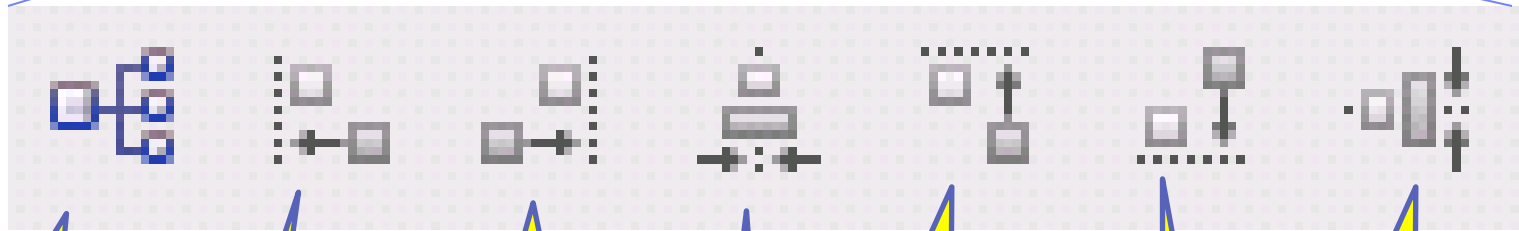


Search capabilities



Highlights the relevant process(es)

Alignment options



View Horizontal / Vertical

Align Right

Align Top

Align Center Horizontal

Align left

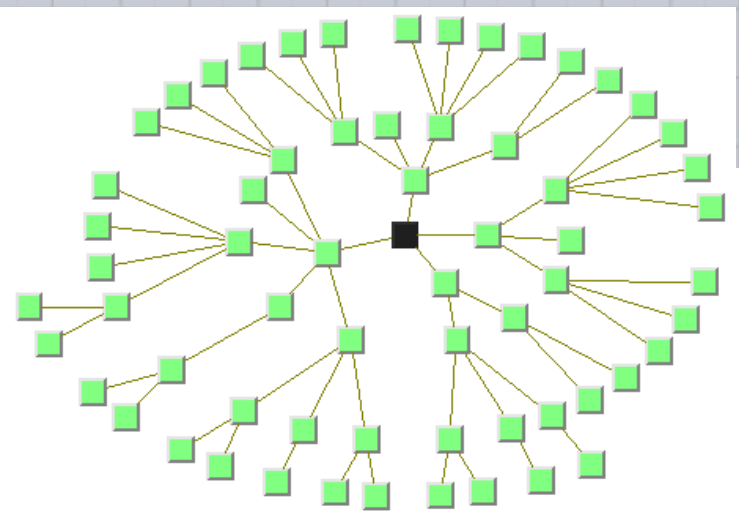
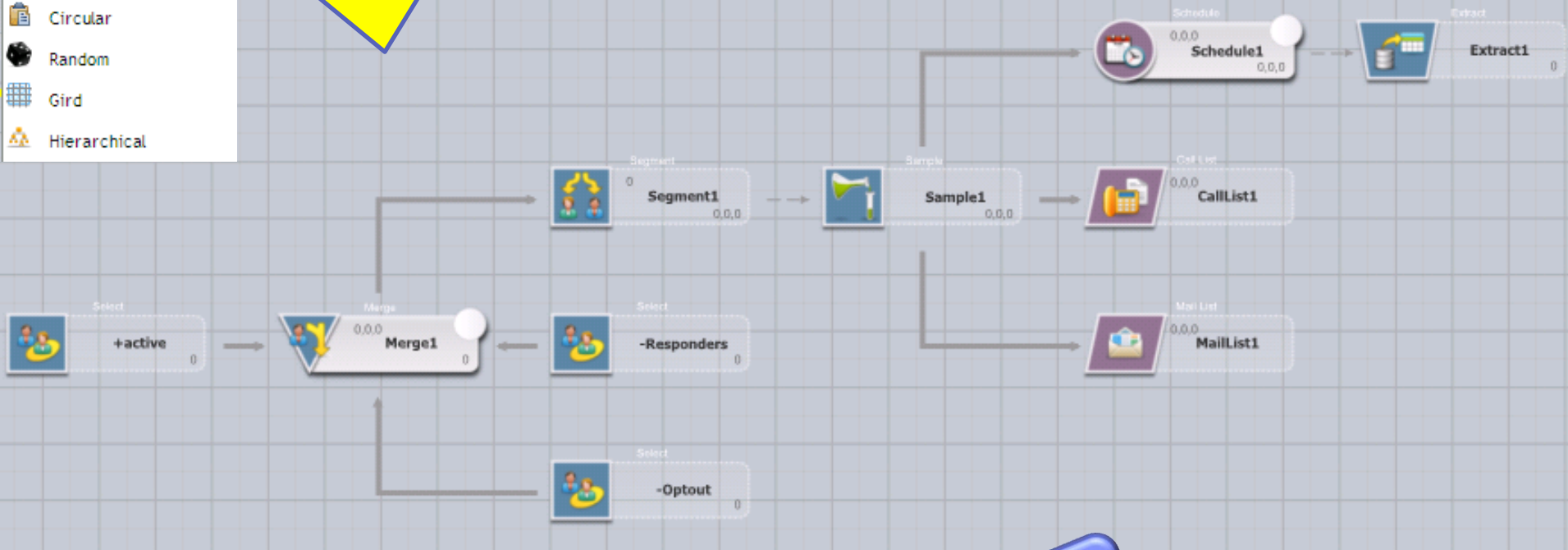
Align Center vertical

Align Bottom

Toolbar

- Tree
- Org Chart
- Radial Tree
- Forced Directed
- Circular
- Random
- Gird
- Hierarchical

From free form to Tree format

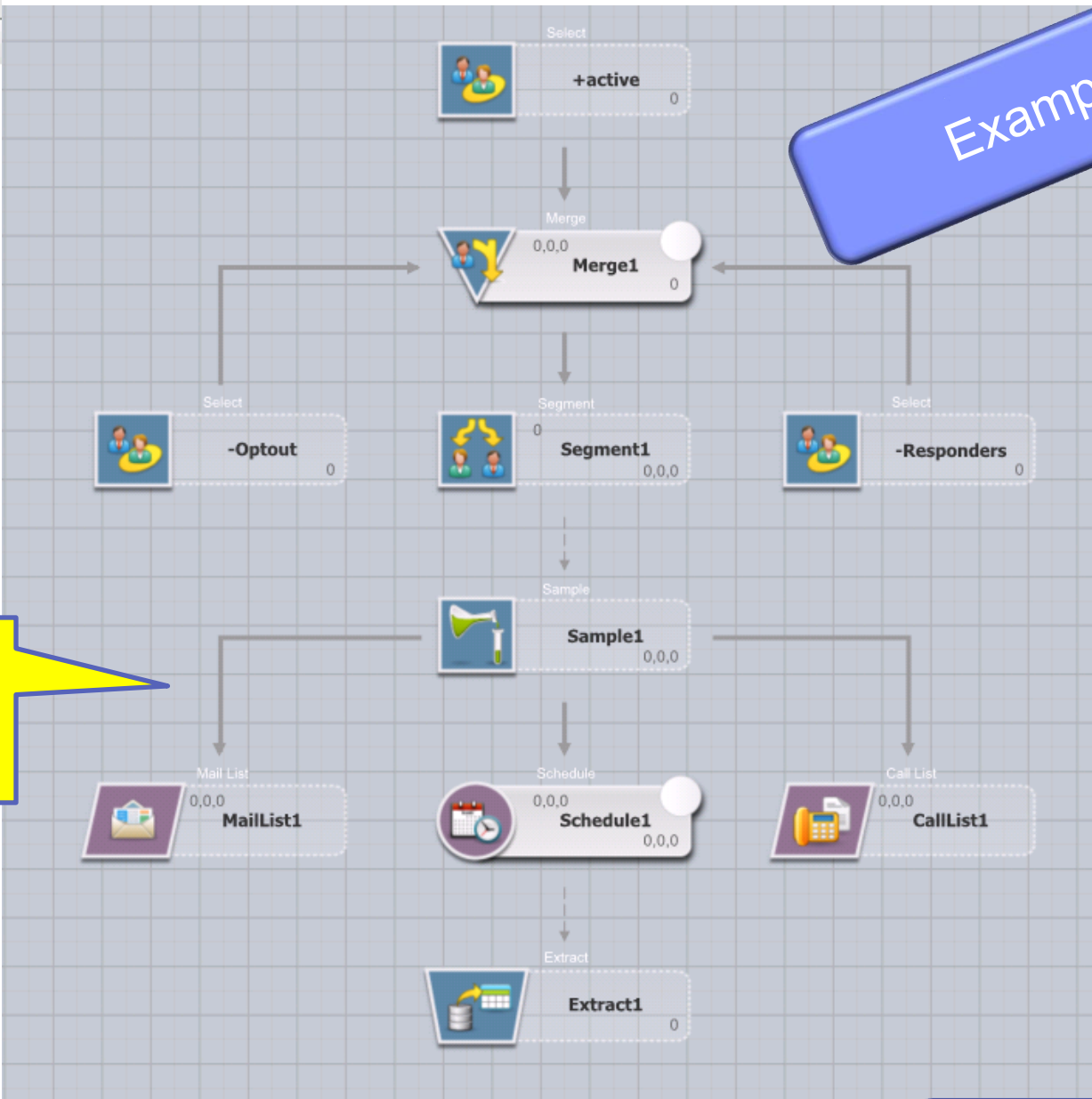


Example

Toolbar: Auto Layout options

- Tree
- Org Chart
- Radial Tree
- Forced Directed
- Circular
- Random
- Gird
- Hierarchical

Example

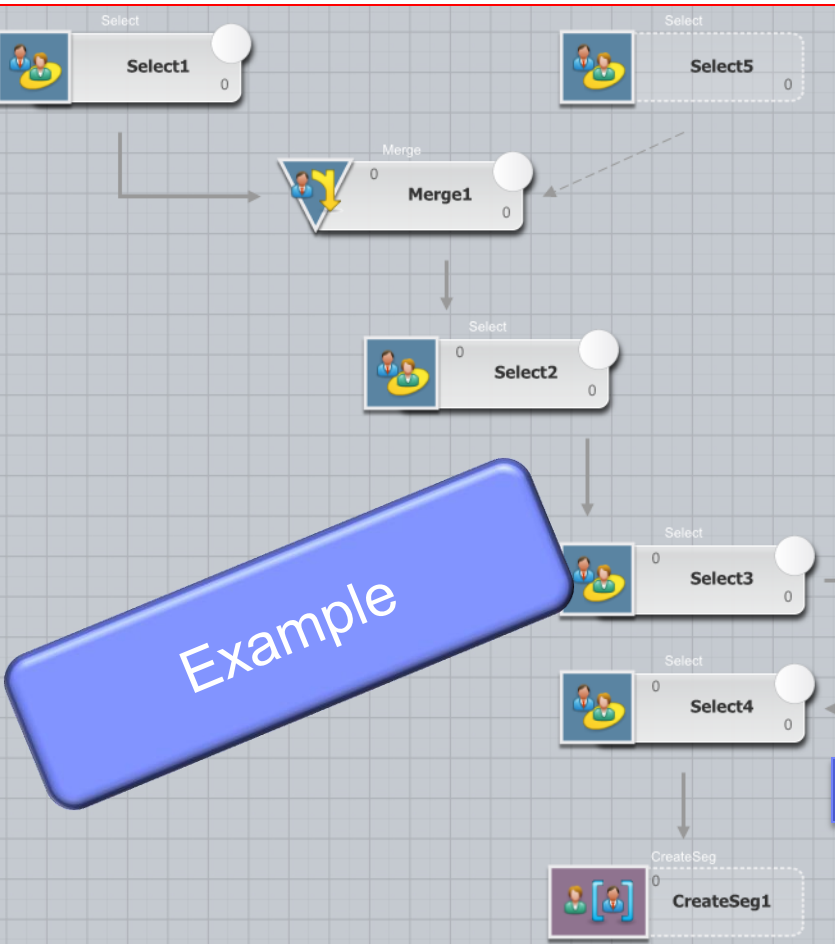
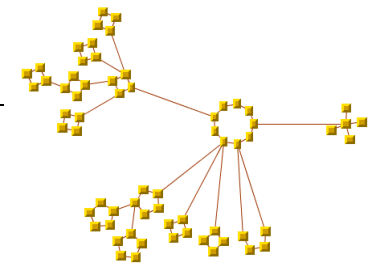


From free form to Org chart

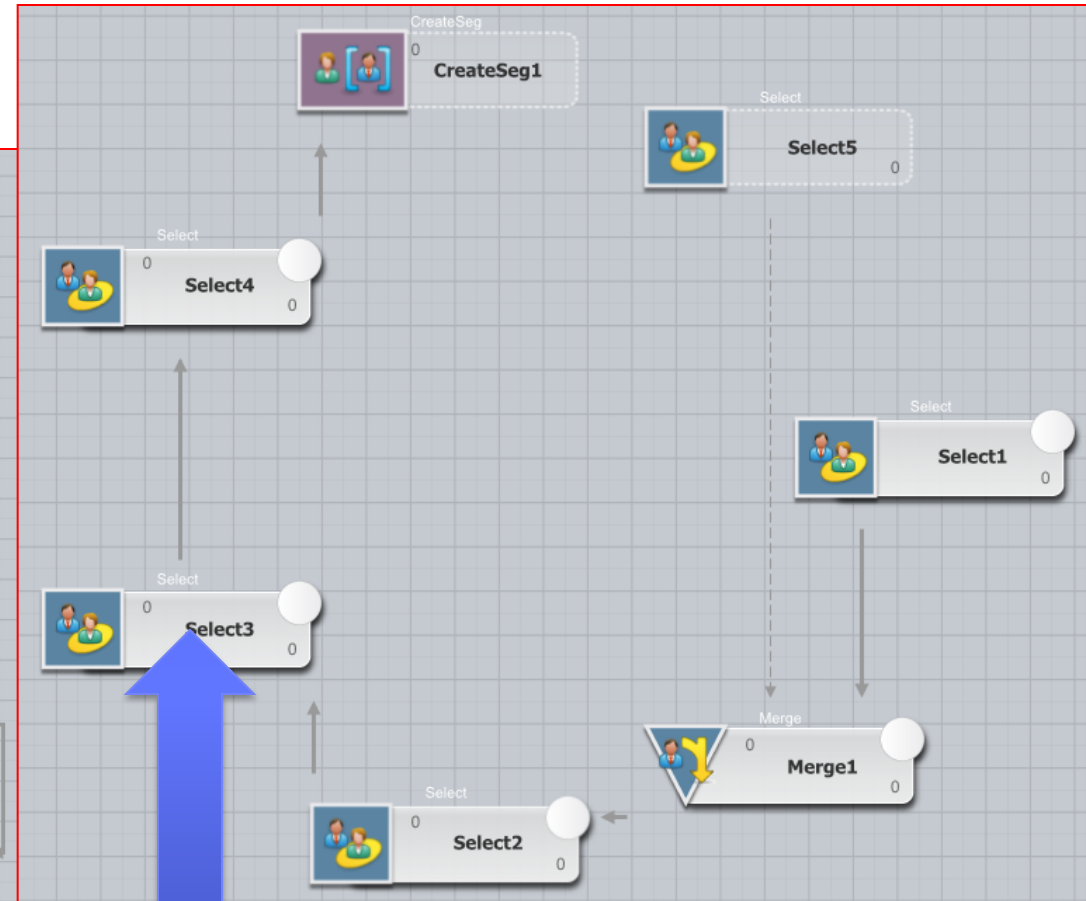
Toolbar: Auto Layout options

- Tree
- Org Chart
- Radial Tree
- Forced Directed
- Circular
- Random
- Gird
- Hierarchical

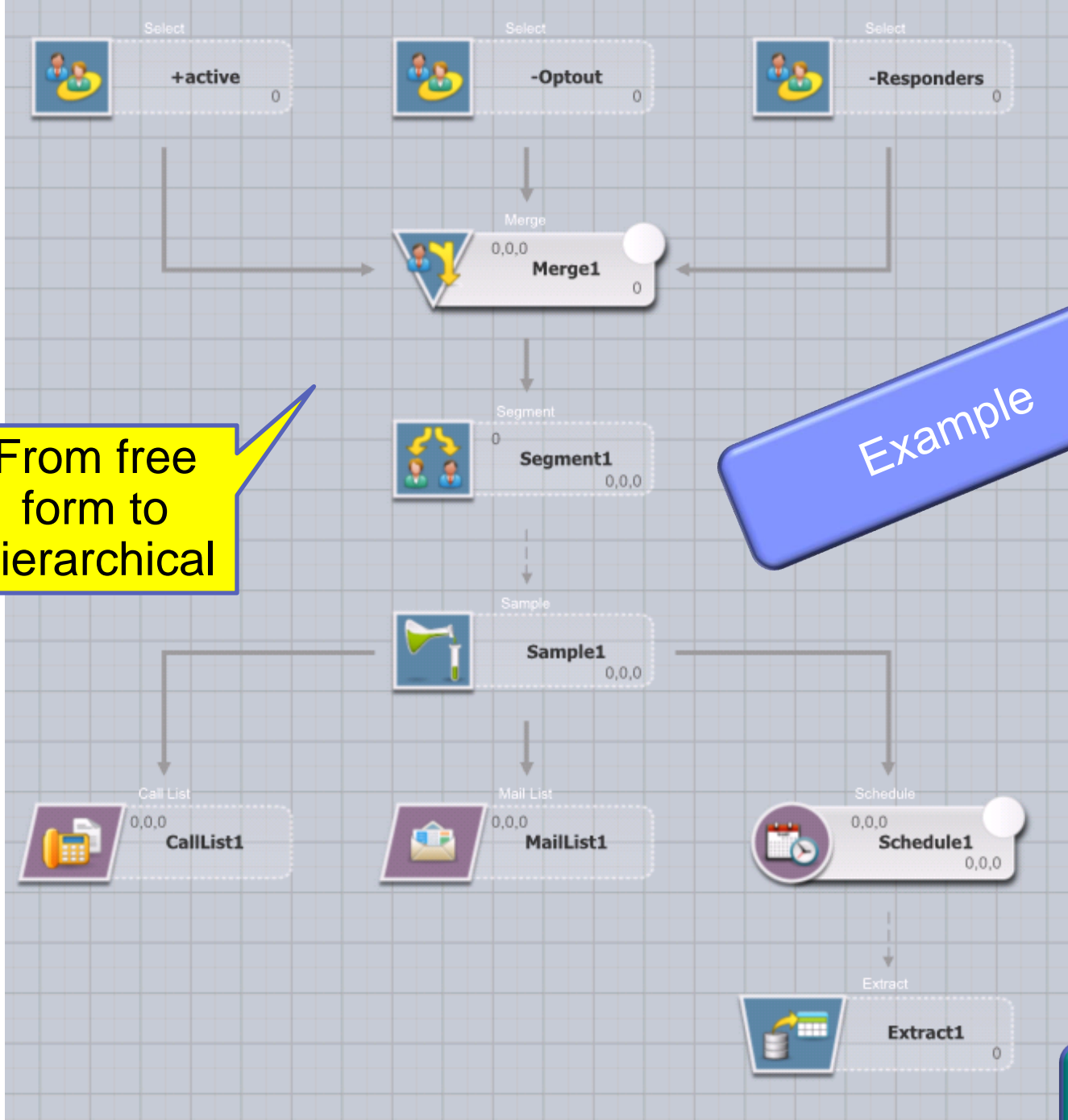
From free form to Circular



Example



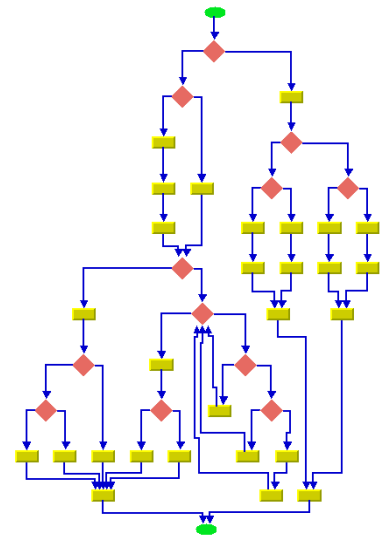
Toolbar: Auto Layout options



- Tree
- Org Chart
- Radial Tree
- Forced Directed
- Circular
- Random
- Gird
- Hierarchical

From free form to hierarchical

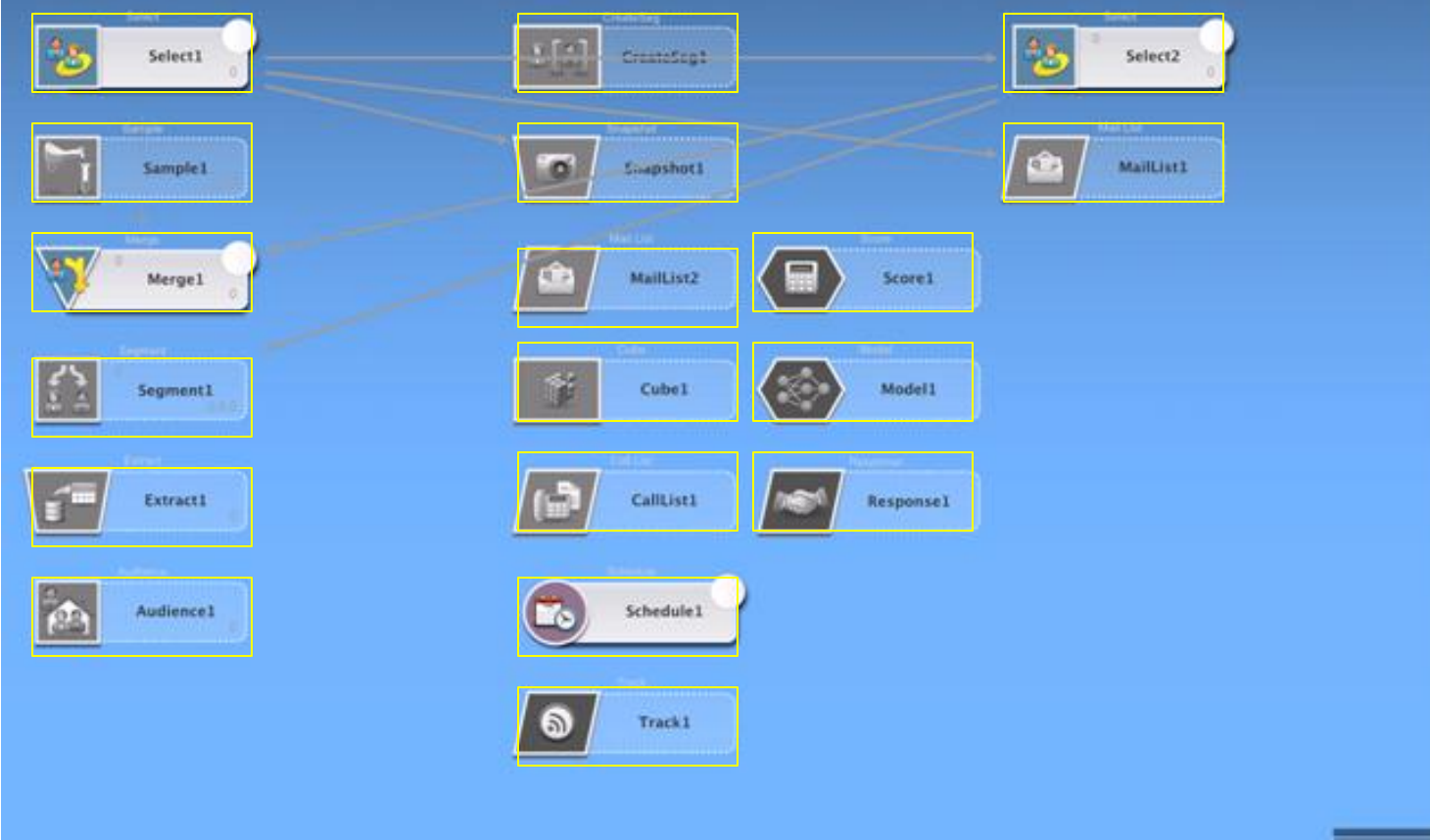
Example



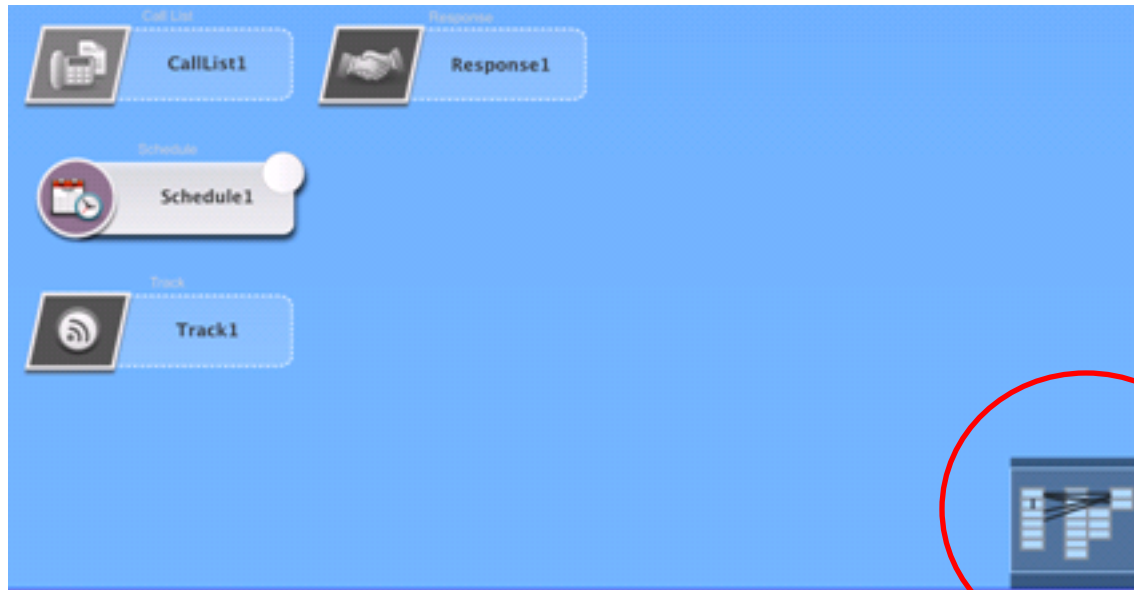
Toolbar: Auto Layout options



Toolbar
select all
option



Toolbar



Easy navigation in large flowchart with mouse over capabilities

Panning area



Select



Audience



Segment



Sample



Extract



Snapshot



Track



Response



Mail List



Call List



Interact List



Select



Merge



Segment



Sample



Audience



Extract



Snapshot



Schedule



Cube



CreateSeg



Mail List



Call List



Interact List



Track



Response



Optimize



Model



Score

Core processes,
square format

Export processes,
trapezoid format

Processes incl.
offers,
parallelogram



Optimize



Model



Score



Cube



CreateSeg



Merge



Schedule

Special processes
related to addtl.
Modules, Hexagon

Creating
segments out of
data apart from
segment process

Specific
functionality,
specific shapes

Flowchart
processes
artwork

Several anchor points around the process

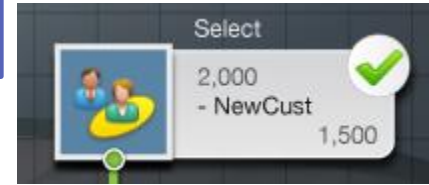
Active process



Running animated icon

Multiple segments

Completed process



Error in process



"Greyed out" icon

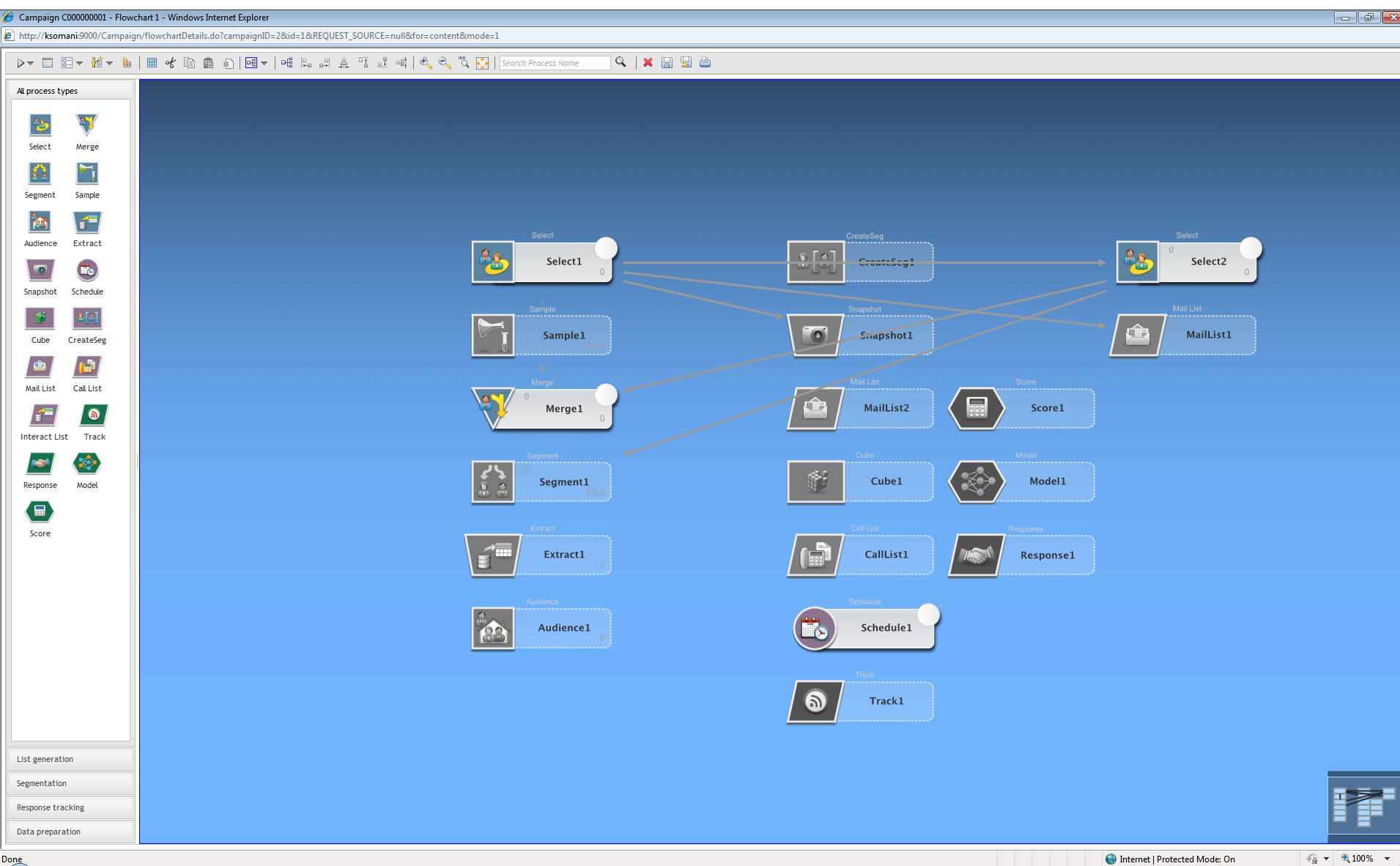
Dotted line indicates unconfigured

Status

- Running
- Complete
- Error
- Warning

Status indicators (TBD)

Flowchart processes artwork



IBM Interact

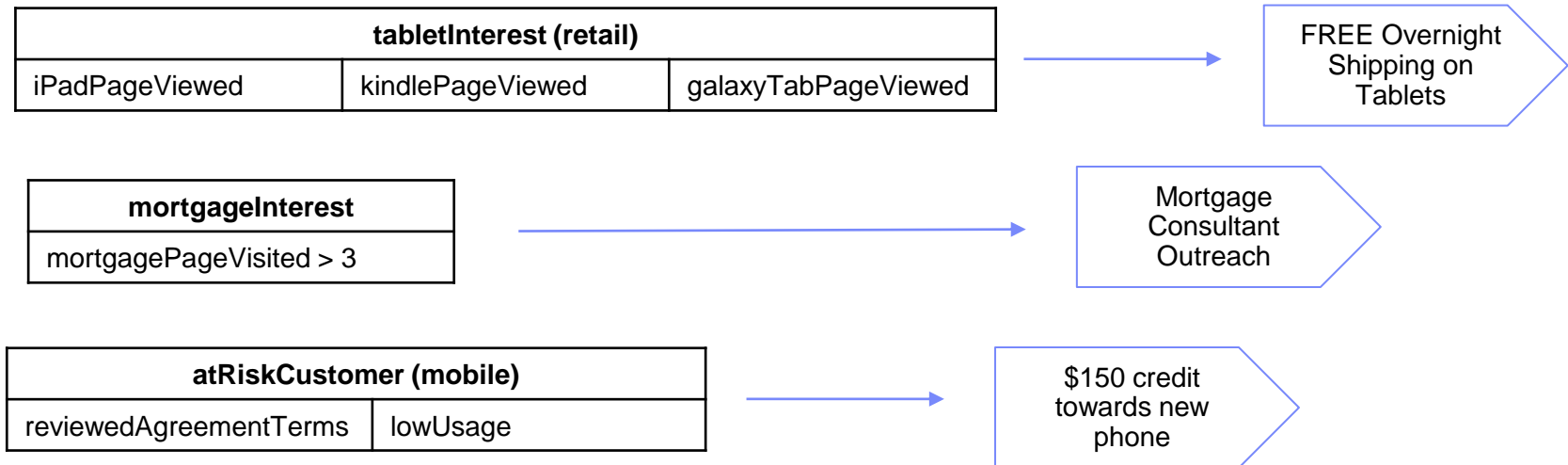
Event-based Personalization

- Behaviors (i.e. customer events) indicate near-term propensity and purchase potential
 - Service request initiated
 - Pages visited
 - Search terms used
 - Media viewed
 - Documents downloaded
- Target customers with personalized offers when “behavioral triggers” fire












What is a Behavioral Trigger?

In Interact, behavioral trigger = **“Event Pattern”**

- Consists of one or more events initiated by your customer
- Events can come from any combination of channels
- Interact listens for and tracks relevant events at the AudienceID level until pattern criteria is met
- Patterns can also be used in segmentation logic
- Patterns can also triggers one or more actions when criterion is met



Previously, Events were used to Log Contacts or Trigger Re-segmentation

Summary					Interaction Points	Events	Constraints	Self Learning	Deployment	Analysis
										
<input type="checkbox"/> Categories and Events										
Description						System Reactions				
						Trigger Re-segmentation	Log Offer Contact	Log Offer Acceptance	Log Offer Rejection	
System Defined Category										
<input type="checkbox"/>		End Session	Mark the end of a visitor's interactive session			-	-	-	-	
<input type="checkbox"/>		Get Offer	Request a list of recommended offers to serve to the visitor			-	-	-	-	
<input type="checkbox"/>		Get Profile	Request visitor profile data stored in the session; this includes temporal data read in from the profile table			-	-	-	-	
<input type="checkbox"/>		Set Audience	Change visitor's audience level within the visitor's interactive session			-	-	-	-	
<input type="checkbox"/>		Set Debug	Override the current logging level for the visitor's interactive session			-	-	-	-	
<input type="checkbox"/>		Start Session	Mark the start of a visitor's interactive session			-	-	-	-	
Miscellaneous										
<input type="checkbox"/>		Offer Accept Event				-	-	✓	-	
<input type="checkbox"/>		Offer Contact Event				-	✓	-	-	
<input type="checkbox"/>		Offer Reject Event				-	-	-	✓	
<input type="checkbox"/>		Reseg Event				✓	-	-	-	

Redesigned “Events” Tab Continues to Support The Previous Functionality...

Summary Interaction Points **Events** Constraints Self Learning Deployment Analysis (old Events UI)

▼ Events (20)

Name	Description	Category	Trigger Re-segmentation	Log Offer Contact	Log Offer Acceptance	Log Offer Rejection	Trigger User Expression	Trigger Event(s)
another misc event 2	sssff	Miscellan	-	✓	-	-	-	-
another misc event 2 2	sssff	Miscellan	-	✓	-	-	-	-
another misc event 3	sssff	Miscellan	-	✓	-	-	-	-
another misc event 2 3	sssff	Miscellan	-	✓	-	-	-	-
another misc event 2 2 2	sssff	Category 1	-	✓	-	-	-	-
another misc event 3 2	sssff	Miscellan	-	✓	-	-	-	-
another misc event 2 4	sssff	Miscellan	-	✓	-	-	-	-
another misc event 3 3	sssff	Miscellan	-	✓	-	-	-	-
another misc event 4	sssff	Miscellan	-	✓	✓	-	-	-
another misc event 5	sssff	Miscellan	✓	✓	✓	✓	-	✓

▼ Event Patterns (9)

Name	Events	Enabled	Description	Category	Trigger Re-segmentation	Log Offer Contact	Log Offer Acceptance	Log Offer Rejection	Trigger User Expression	Trigger Event(s)
pattern A	event1 another misc event	✓		Cat3d	✓	✓	-	-	-	-
Pat2	mmm event another misc event event1	✓	afdafdsaff	Miscellan	-	✓	✓	-	-	-

...And adds ability to edit *Event Patterns*

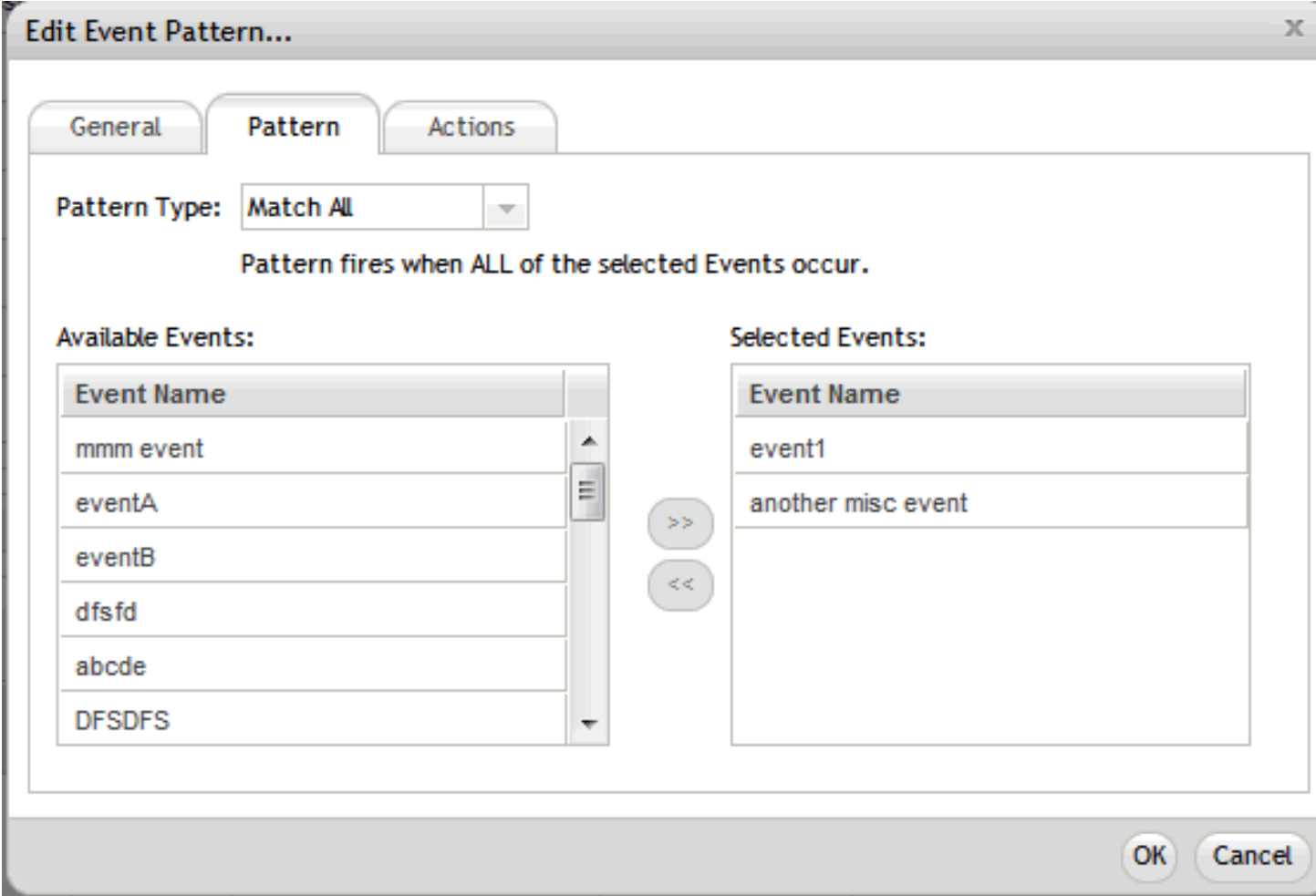
Summary Interaction Points Events Constraints Self Learning Deployment Analysis (old Events UI)

Events (20)

Event Patterns (9)

Name	Events	Enabled	Description	Category	Trigger Re-segmentation	Log Offer Contact	Log Offer Acceptance	Log Offer Rejection	Trigger User Expression	Trigger Event(s)
pattern_A	event1 another misc event	✓		Cat3d	✓	✓	-	-	-	-
Pat2	mmm event another misc event event1	✓	afdafdsaff	Miscellan	-	✓	✓	-	-	-
pat4	mmm event another misc event event1	-		Cat3d	-	-	-	-	-	-
pat5	event1	-	abcedfd	Cat3d	-	-	-	-	-	-
aaaaa	event1 mmm event	✓	bbb	Cat3d	-	-	-	-	-	-
EventPatternNew		✓		Cat3d	-	-	-	-	-	-
Pattern_B	mmm event eventB	✓		cat 112	-	-	-	-	-	-
EventPatternNew_2		✓		Cat3d	-	-	-	-	-	-
aqdssdf	another misc event event1	✓	asdga	cat 112	✓	✓	-	-	✓	-

Edit Event Pattern – Match All Pattern



Edit Event Pattern...

General **Pattern** Actions

Pattern Type: ▼

Pattern fires when ALL of the selected Events occur.

Available Events:

Event Name
mmm event
eventA
eventB
dfsfd
abcde
DFSDFS

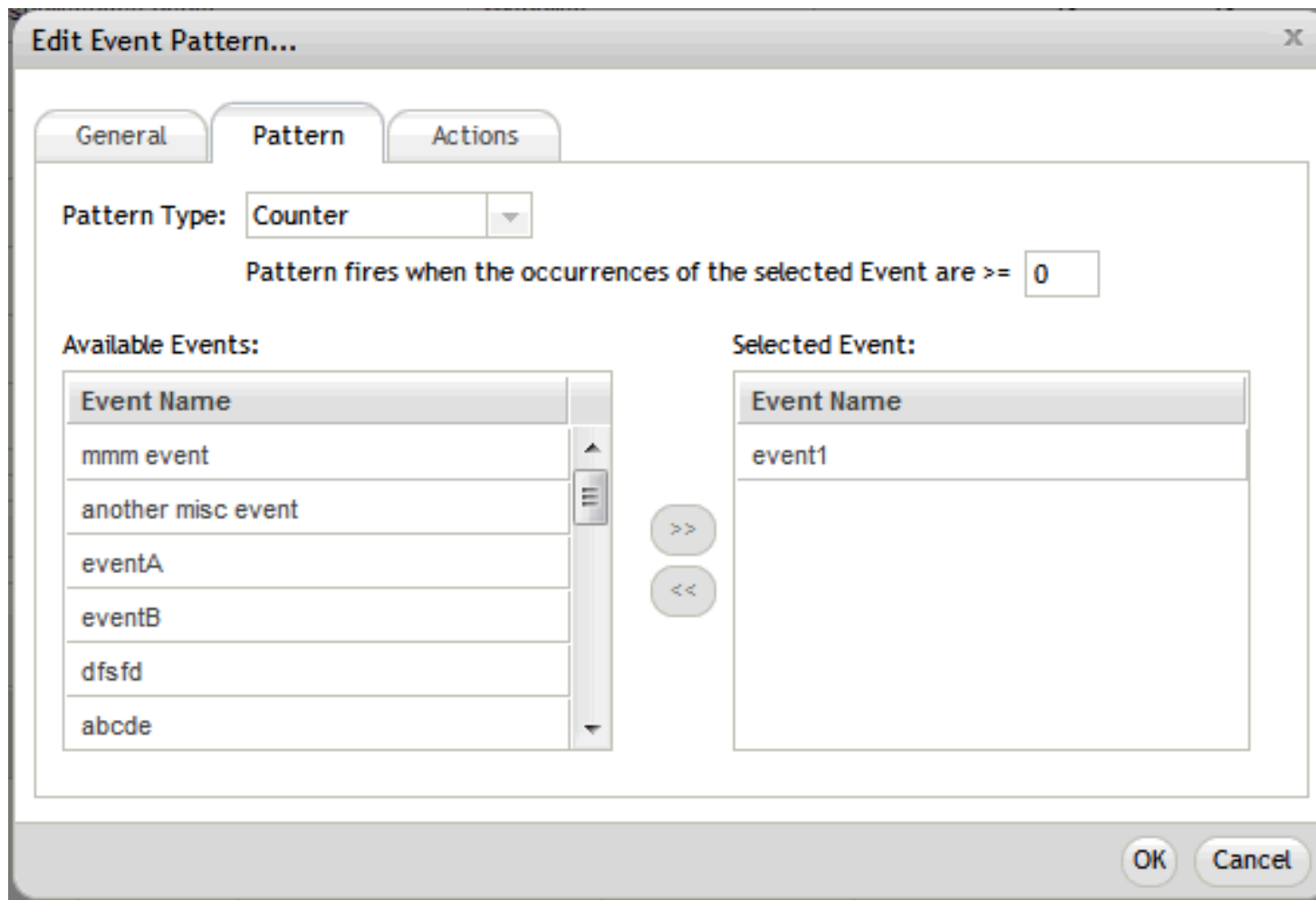
Selected Events:

Event Name
event1
another misc event

>> <<

OK Cancel

Edit Event Pattern – Counter Pattern



Edit Event Pattern...

General **Pattern** Actions

Pattern Type: Counter

Pattern fires when the occurrences of the selected Event are \geq 0

Available Events:

Event Name
mmm event
another misc event
eventA
eventB
dfsfd
abcde

Selected Event:

Event Name
event1

>> <<

OK Cancel

Edit Event Pattern – Weighted Counter Pattern

Edit Event Pattern... X

General **Pattern** Actions

Pattern Type: ▼

Pattern fires when TOTAL score \geq

Available Events:

Event Name
mmm event
another misc event
eventA
eventB
dfsfd
abcde

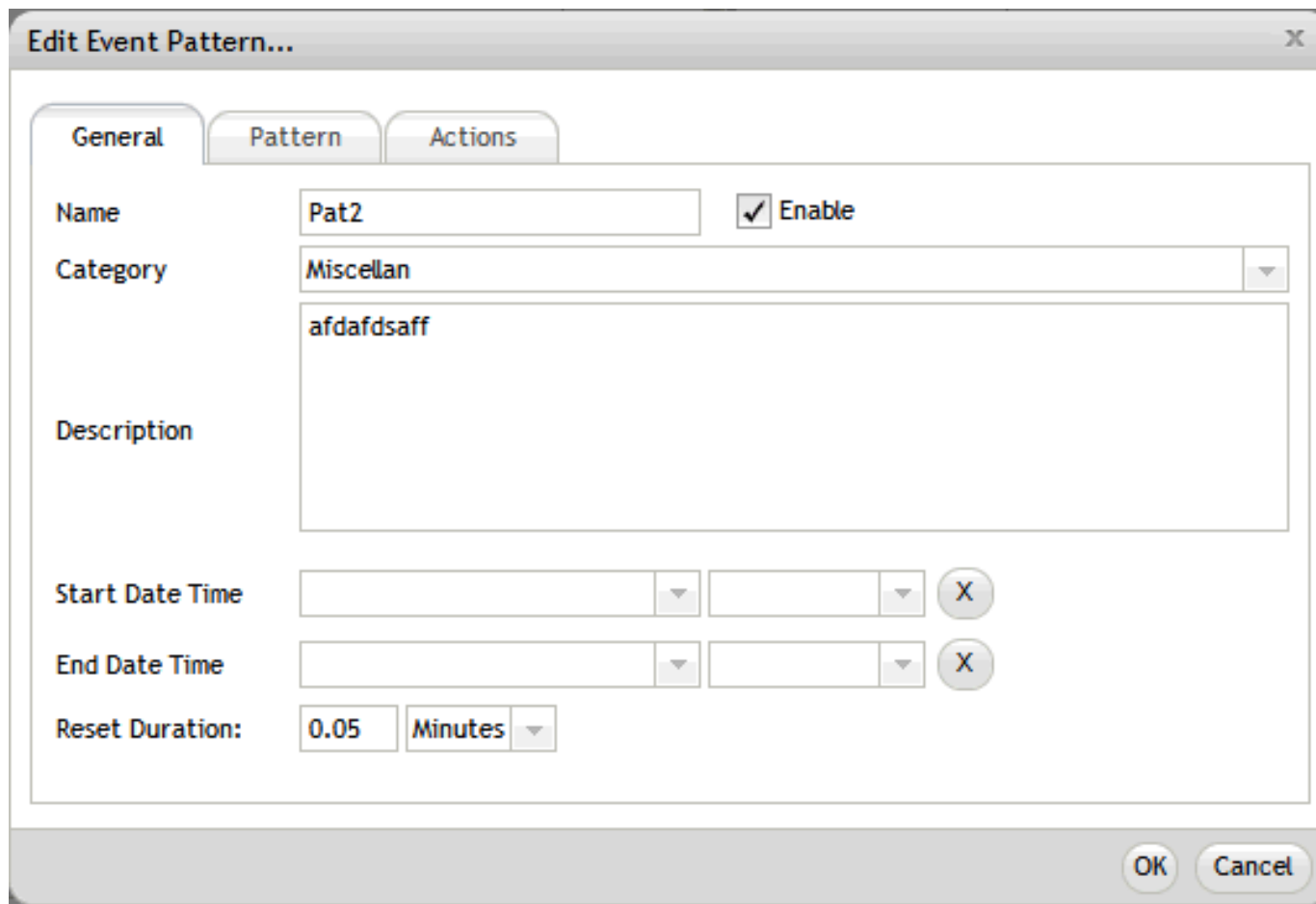
Selected Events:

Event Name	Score
event1	1

>> <<

OK Cancel

Edit Event Pattern – Start/End Date and Reset Duration



Edit Event Pattern...

General | Pattern | Actions

Name: Pat2 Enable

Category: Miscellan

Description: afdafdsaff

Start Date Time: [] [] [X]

End Date Time: [] [] [X]

Reset Duration: 0.05 Minutes

OK Cancel

How Can Marketers Use Event Patterns?

Event Patterns in Segmentation Logic

HighNetWorth Customers - Release Training Session 1

System Administrator | Log Out

Cancel

All Types ▾

- Select
- Sample
- Decision
- Snapshot
- Interaction
- Populate Seg

Interaction1
HighNetWorth
Decision1
TestSample
PopulateSeg

Edit Branch

Branch Name:

Select All Customer IDs

Select Customer IDs With:

Field Name	Oper.	Value	And/Or
tabletInterest	=	TRUE	

Select Based On:

Available Fields:

- dbo_customer_audience
- eventPatterns
 - tabletInterest
 - mortgageInterest
 - atRisk

Text Builder | Query Helper... | Check Syntax

<- Use | Profile | Derived Fields...

OK | Cancel

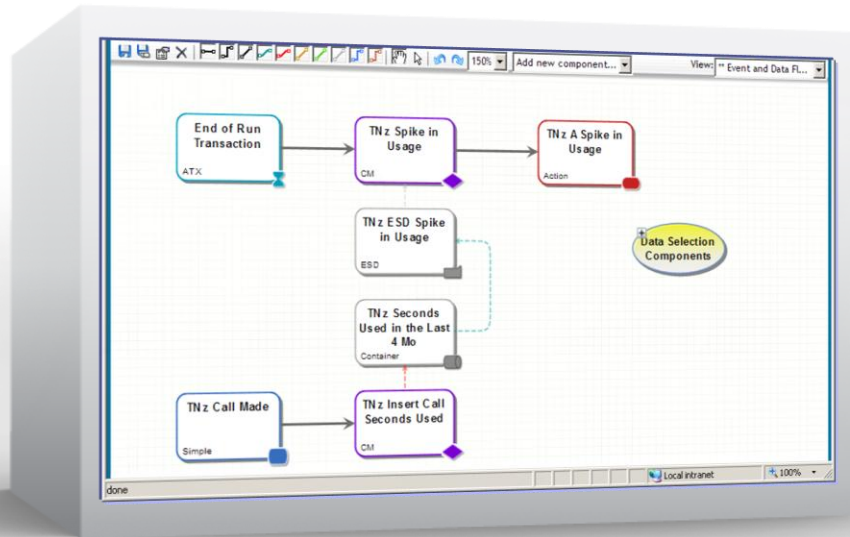
Done

Internet | Protected Mode: On

What Is Detect?

EVENT-BASED MARKETING

software:

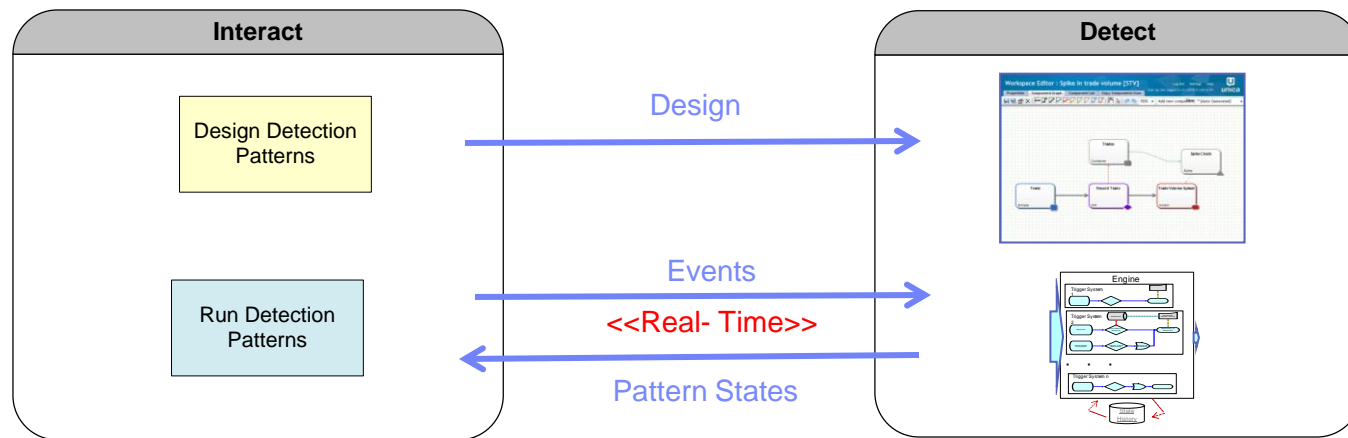


- Monitors granular event data and identifies meaningful behavioral changes that indicate an attrition risk or cross-sell opportunity
- Enables campaigns to react to customer need
- Can work with overwhelmingly large volumes of data

Detect and Interact Integration

In 2013, Detect plans to provide

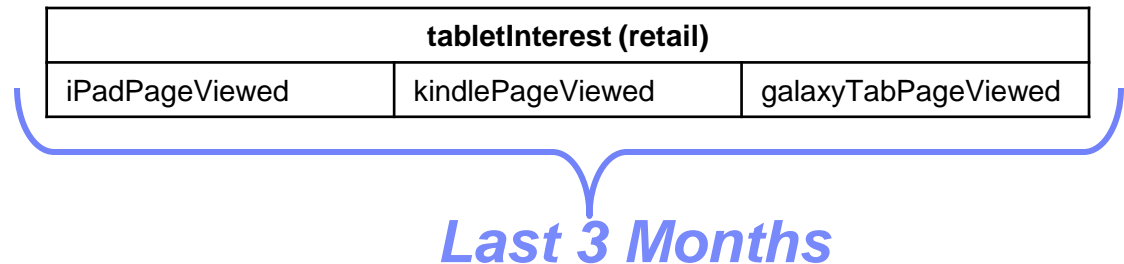
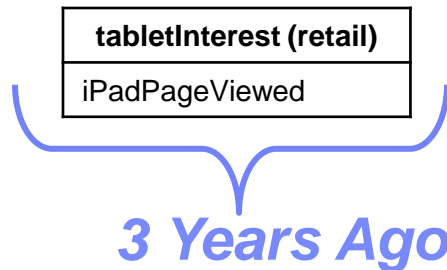
- Integrated functionality with Interact
- Enhanced set of patterns
- Pattern creation in Interact UI
- Real-time operations



Powerful Event Patterns Delivered via Dedicated Detect Engine

EXAMPLES

■ Time-bound Patterns



■ Sequenced Patterns



■ Powerful “Batch” Patterns

- Backwards/Forwards Inactivity
- Spike
- Trend

■ Combine Batch and Real-time Patterns

Redesigned Interactive Flowchart

The screenshot displays the SmarterCommerce redesigned interactive flowchart tool interface. At the top, a toolbar contains various icons for editing and navigation, along with a search bar labeled "Search Process Name". On the left side, a vertical panel titled "All process types" lists various process categories such as Select, Merge, Segment, Sample, Audience, Extract, Snapshot, Schedule, Cube, CreateSeg, Mail List, Call List, Interact List, Track, Response, Optimize, Model, and Score. The main workspace is a grid where a flowchart is being constructed. The flowchart starts with a "Schedule1" process at the top, which branches into three "Select" processes: "+Active", "-Responders", and "-Optout". These three processes feed into a central "Merge1" process. From "Merge1", the flow goes to a "Segment1" process, which then connects to an "Extract1" process. The "Extract1" process leads to a "Sample1" process, which finally branches into two output processes: "MailList1" and "CallList1". A yellow callout box labeled "Toolbar" points to the top toolbar. Another yellow callout box labeled "Processes" points to the left-hand menu. A third yellow callout box labeled "Flowchart, Artwork and connections" points to the main workspace. A fourth yellow callout box labeled "Panning area" points to a small inset window in the bottom right corner showing a zoomed-in view of the flowchart.

REST API

- Interact currently supports two message protocols
 - **SOAP** is recognized standard that is easy to integrate but incurs a performance hit due to Interact payload
 - **Java Serialization** is fast

- New Rest-like API
 - JSON over HTTP
 - Like SOAP, enables Interact to be accessed from any technology (not just Java)
 - Payload is clear text (like SOAP) but without XML overhead
 - Preliminary tests suggest significantly faster than SOAP, but still a little slower than Java Object Serialization

Offer Tiebreaker: What happens in the event of a tie?

QUESTION: Today, if *Interact Self-Learning* is “off” and the final candidate offer list is as follows:

	Offer	Marketer's Score
MALE →	Offer1	75
GLOBAL OFFERS →	Offer2	70
BOSTON →	Offer3	65
WHITELIST →	Offer4	65

What would the following `getOffers` call return?
getOffers (... , #Offers=3)

New Offer Tiebreaker Configuration Randomizes Ties

EXAMPLES

CANDIDATE LIST 1

Offer	Marketer's Score
OfferA	75
OfferB	70
OfferC	65
OfferD	65

getOffers (... , #Offers = 3)
would return:

- OfferA->OfferB->OfferC
50% of the time
- OfferA->OfferB->OfferC
50% of the time

CANDIDATE LIST 2

Offer	Marketer's Score
OfferA	65
OfferB	65
OfferC	65
OfferD	65

getOffers (... , #Offers = 1)
would return:

- OfferA 25% of the time
- OfferB 25% of the time
- OfferC 25% of the time
- OfferD 25% of the time

Thanks

Arjen van der Broek
IBM Enterprise Marketing Management

