TM Forum Standard

Information Framework (SID)

Market Sales Domain Business Entities
Information Framework Suite

GB922_MarketSales Domain Business Entities

Release R23.0.0

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Table of Contents

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1. General Information

To find the Information framework figure, refer to "GB991 Core Frameworks Concepts and Principles" guidebook.

2. Typographic Conventions

Relationships starting by a "/" correspond to shortcut and represent navigation relationships (aka derived relationship). A derived relationship corresponds to several relationships replaced by a unique derived relationship to give a synthetic view. It isn't needed to implement such relationships.

In diagrams, on Business Entities from a different ABE than the ABE being referred to in the diagram, the name after "from" represents the ABE where the Business Entity is located.
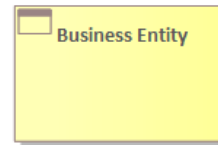
A Business Entity is represented by a *decorator* located to the top left.
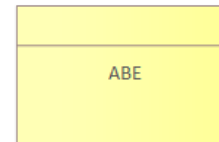
The Aggregated Business Entity (ABE) is represented similarly to ArchiMate.

3. Glossary

Name	Description
ABE	Aggregate Business Entity
BE	Business Entity
eTOM	enhanced Telecom Operation Map (TMF Framework)
ODA	Open Digital Architecture
SID	Shared Information Data model (TMF Framework) is the previous name of Information Framework
TAM	Telecom Applications Map (TMF Framework) is the previous name of Application Framework

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4. Market & Sales Domain

The Market & Sales Domain represents roles, information and activities pertaining to marketing and sales strategy, capability delivery, lifecycle management and support of parties (e.g. individuals / organizations) that move through sales lifecycle stages (e.g. contact / lead / prospect) as they learn about, inquire, choose, negotiate, order and are supported for goods and services (i.e. products) that are offered by an enterprise. On the Sales side, this includes sales contacts / leads / prospects through to the sales force and sales statistics. Market includes market strategy and plans, market segments, competitors and their products, through to campaign formulation and reporting.

4.1. [MSD-01] Market Sales ABEs Level 1

The diagram below lists the Market & Sales Domain's ABEs.

Market Sales Party Roles ABE

- Market Sales Party Roles ABE contains all PartyRoles related to the Market Sales Domain such as MarketingManager, SalesAgent...

Market Segment ABE

- Market Segment ABE supports market segments description.

Competitor ABE

- The Competitor ABE identifies other providers who compete in the same market segments, accumulates intelligence about the competitors, including products (price, Key Performance Indicators and so forth).

- The Competitor ABE provides information relative to the analysis of intelligence pertaining to an enterprise's competitors. It is crucial to understand who the competitors are, what their products are, what the target markets for their products are, and how successful their products are.

Market & Sales Strategy Plan ABE

- Market & Sales Strategy Plan ABE supports the business plans and strategies on how to address the market with appropriate products and channels.

Marketing Campaign ABE

- The Marketing Campaign ABE represents the strategy, or approach, for marketing new or existing ProductOfferings to identified target markets.

Marketing Performance ABE

- Marketing Performance ABE contains all information used to define Marketing and Sales performance objectives and Marketing indicators measured.

Sales Commission ABE

- The Sales Commission ABE contains all Business Entities used to specify commissions for Sales Agent, Employees... including commission rules and commissions applied.

Sales Lead and Opportunity ABE

- Sales Lead and Opportunity ABE provides the ability to track sales leads through their life cycle up until the time the prospect become customers, including proposals made to potential customers, and the amount of potential revenue the leads represent in the form of a sales pipeline.

Market Sales Forecast ABE (not fully developed)

- Market Sales Forecast ABE maintains market and sales forecasts, new service requirements, customer needs, and customer education.

Sales Channel ABE (not fully developed)

- Sales Channel ABE keeps track of distribution channels and sales activities, sales quotas, sales, contests, commission/bonus plans, commissions/bonuses, and maintain groups of individuals that make up the sales force.

Market Sales Statistics ABE (not fully developed)

- The Market Sales Statistics maintains market and sales key performance indicators about Sales & Marketing revenue and sales channel performance.

[MSD-01] Market Sales ABEs Level 1

4.2. Market Sales Party Roles ABE

Market Sales Party Roles ABE contains all PartyRoles related to the Market Sales Domain such as MarketingManager, SalesAgent...

4.2.1. Figure MS.00 - Market Sales Party Roles

The Market Sales Domain roles presently identified are:

- **MarketingCampaignRole**: A MarketingCampaignRole is a type of PartyRole involved in OperationalMarketingCampaigns and/or in MarketingCampaigns such as MarketingManager and MarketingOperator.

- **MarketingManager**: Agreed & done: A MarketingManager is a role played by a Party. A MarketingManager is responsible for the Marketing management process. It is the process of developing strategies and planning for product or services, advertising, promotions, sales to reach desired customer segment.

- **MarketingOperator**: The marketing campaign Operator is responsible for executing the campaign. He executes and tracks communication interactions with Parties using Media or communicationModes.

- **MarketingDesigner**: The marketing campaign Designer is responsible for the set-up of the campaign. He generates the target list and produces the campaign follow-up reports. He is in charge to monitor the campaign management performance in real time as the campaign is being executed and to propose corrective actions if necessary.

- **SalesAgent**: A SalesAgent is a role played by a Party. A SalesAgent is responsible for selling the Service Provider's ProductOfferings to wholesale and / or retail customers.

- **Competitor**: A Party playing a PartyRole that offers ProductOfferings similar to the enterprise's ProductOfferings in a MarketSegment.

- **Prospect**: A Prospect is a type of PartyRole played by a Party specifying the Party is a potential buyer of Products from the Service Provider. A Party playing a SalesLead role may play later several other PartyRoles such as Prospect and eventually Customer. The Party playing a SalesLead might be a Customer for some offers or not. Businesses gain access to sales leads through advertising, trade shows, direct mailings, third parties, and other marketing efforts.
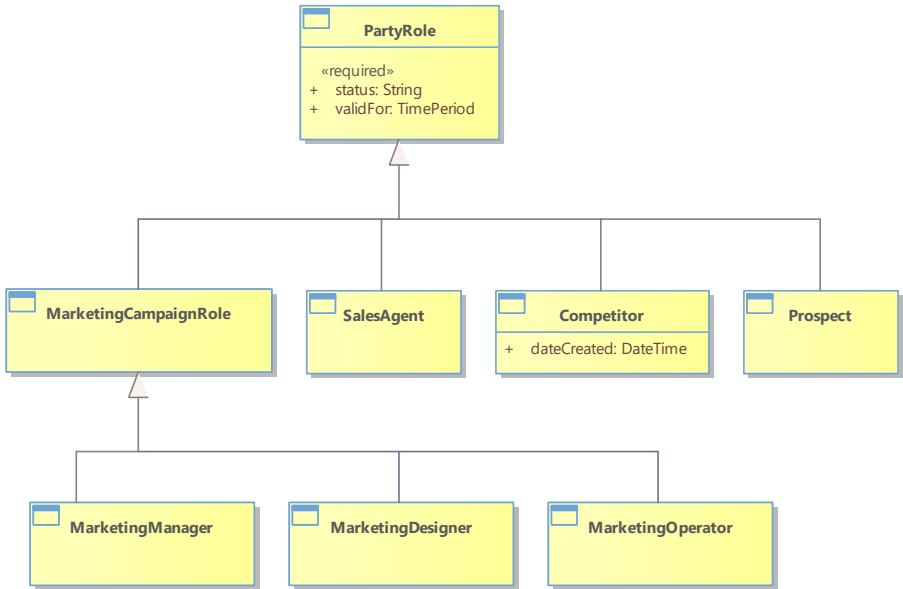
Figure MS.00 - Market Sales Party Roles

4.3. Market Segment ABE

Market Segment ABE supports market segments description.

4.3.1. Figure MS.01 - Basic Market Segment Entities

MarketSegments and other marketing ABEs and business entities rely heavily on their associations with demographics and profiles of parties, whether the party is a customer or a competitor. Therefore, before reading the MarketSegment description, refer to GB922 Party guidebook about Demographics and PartyProfiles.

A MarketSegment is key to market analysis and many other business processes. Market analysis uses the results of competitive analysis and demographic analysis to identify what constitutes a market, or MarketSegment. There are a number of ways to group entities, such as parties and sales channels) into MarketSegments for targeting by MarketingCampaigns, ProductPromotions, and so forth, from internal and Competitor perspectives. MarketSegments can be simple or complex. For example, one MarketSegment may be consumer customers, one may be all states west of the Mississippi, and another may be all consumer customers who live in California, have a family income over $50,000 a year, and use the Internet regularly.

Typically, MarketSegments encompass one or more GeographicAreas, target one or more PartyProfileTypes, and are serviced by one or more SalesChannels as shown in the figure below.
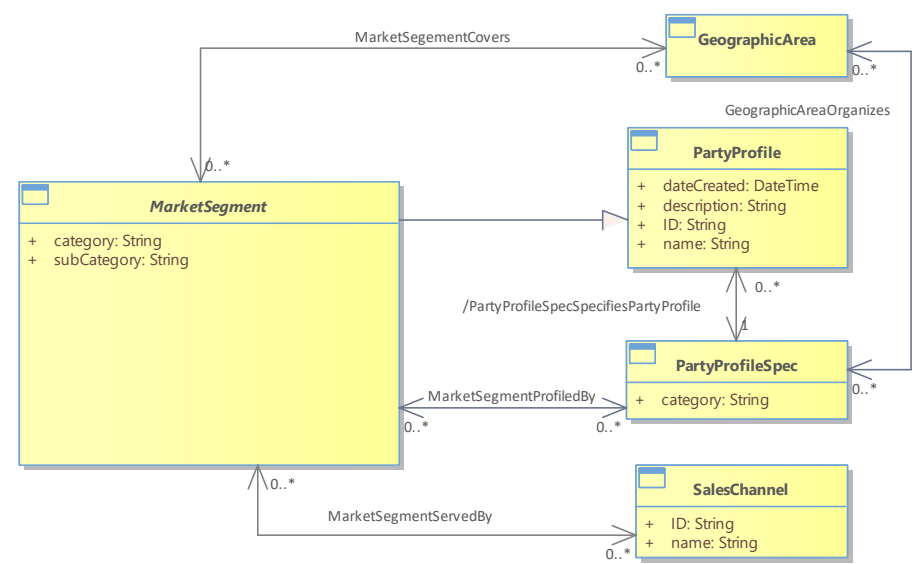
Figure MS.01 - Basic Market Segment Entities

4.3.2. Figure MS.02 - Composite and Atomic Market Segments

MarketSegments may be comprised of other MarketSegments. For example, the state of California may represent a composite MarketSegment made up of Northern and Southern California Market Segments. The SID Composite/Atomic pattern is employed (yet again) to accommodate this structuring of MarketSegments. The figure below depicts CompositeMarketSegment and AtomicMarketSegment.

Some simple MarketSegments, such as a segment that covers all states west of the Mississippi, can be handled by employing the association to GeographicAreas shown in figure MS.02. Other more complex MarketSegments, such as all consumer customers who live in California, have a family income over $50,000 a year, and use the Internet regularly, require the addition of characteristic entities to the MarketSegment ABE.

Figure MS.02 - Composite and Atomic Market Segments

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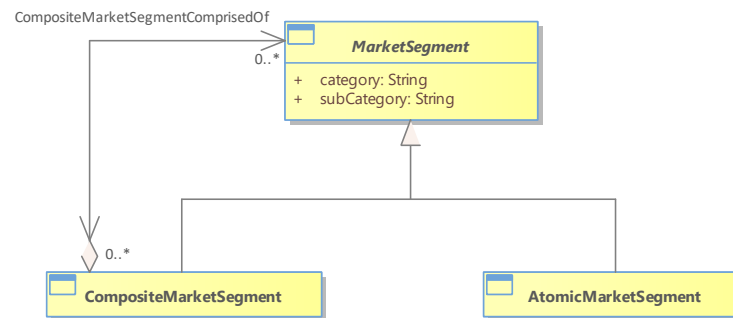
4.3.3. Figure MS.03 - Market Segment Characteristics

The CharacteristicSpec/Characteristic is another of the SID modeling patterns that is applied here. These entities are shown in the figure below; the figure following this one shows which entities are used to hold the details of the example complex segment.

Notice that MarketSegmentCharacteristic and MarketSegmentCharacteristicValue entities can be shared by one or more MarketSegments. This follows the same pattern that was described for PartyProfileTypeCharacteristics.

Figure MS.03 - Market Segment Characteristics

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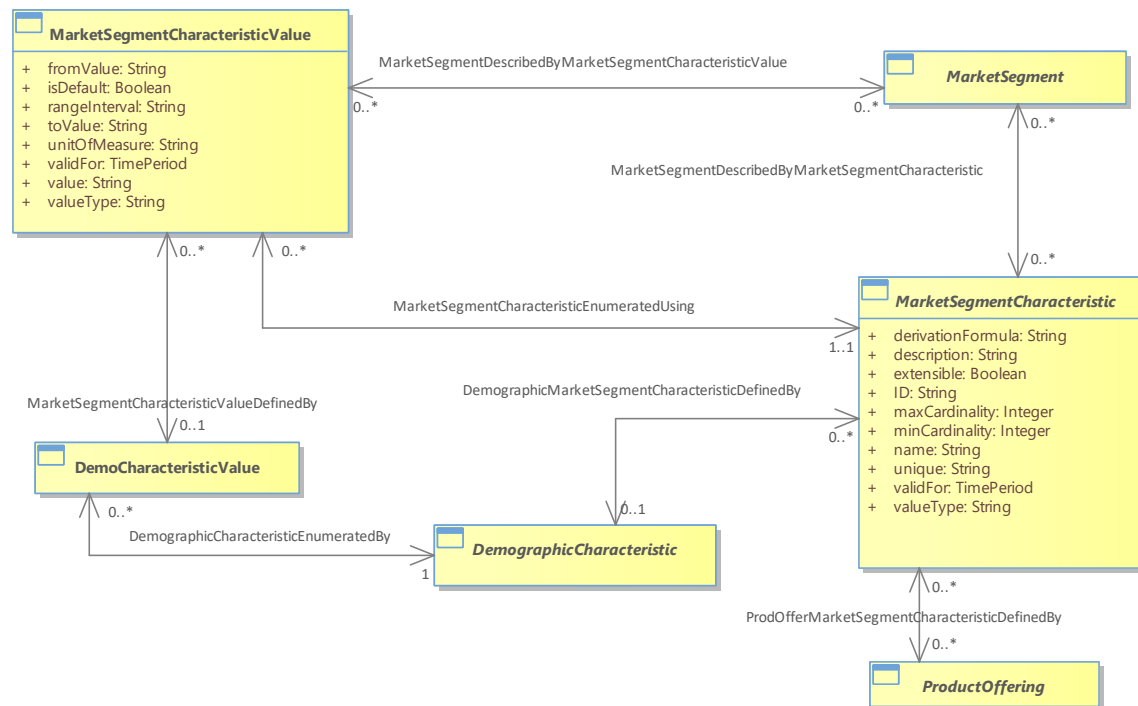
4.3.4. Illustration Figure MS.03- I01 - Market Segment Characteristics

There are some additional details of the model not shown in the example figure above.

The first is the use of the Characteristic/Characteristic Value pattern. The association from MarketSegmentCharacteristic to DemographicCharacteristic is optional. This member of the association is optional so that non-demographic characteristics can be used to define the MarketSegment. For example, the full complement of video conferencing offerings may define a MarketSegment. Similarly, the association from MarketSegmentCharacteristicValue back to DemoCharacteristicValidValue is optional. This member of the association is optional for two reasons. One is so that values not associated with demographics can be entered. The second is so that values can be entered for MarketSegmentCharacteristicValue that do not exist as a DemoCharacteristicValidValue. For example, one characteristic is the exact count of subscribers using a product; it doesn't make sense to put an extensive list of valid values together that ranges from one to some very large number.

The second is the association between MarketSegmentCharacteristic and ProductOffering. This association exists to enable tracking of the sales, inquiries made, and so forth of one or more ProductOfferings. If a MarketSegment's characteristics include the individual use of a number of ProductOfferings, then one instance of MarketSegmentCharacteristic is created for each ProductOffering; If a MarketSegment's characteristic includes the total use of a number of ProductOfferings, then a single MarketSegmentCharacteristic is created and associated with each of the ProductOfferings.

The third is that, as with all SID ABEs, this model provides a framework for a MarketSegment information model that is meant to be extended. For example, one extension could be the association of a MarketSegmentCharacteristic to the Product entity. This could be used to track the actual use of a product by a subscriber.
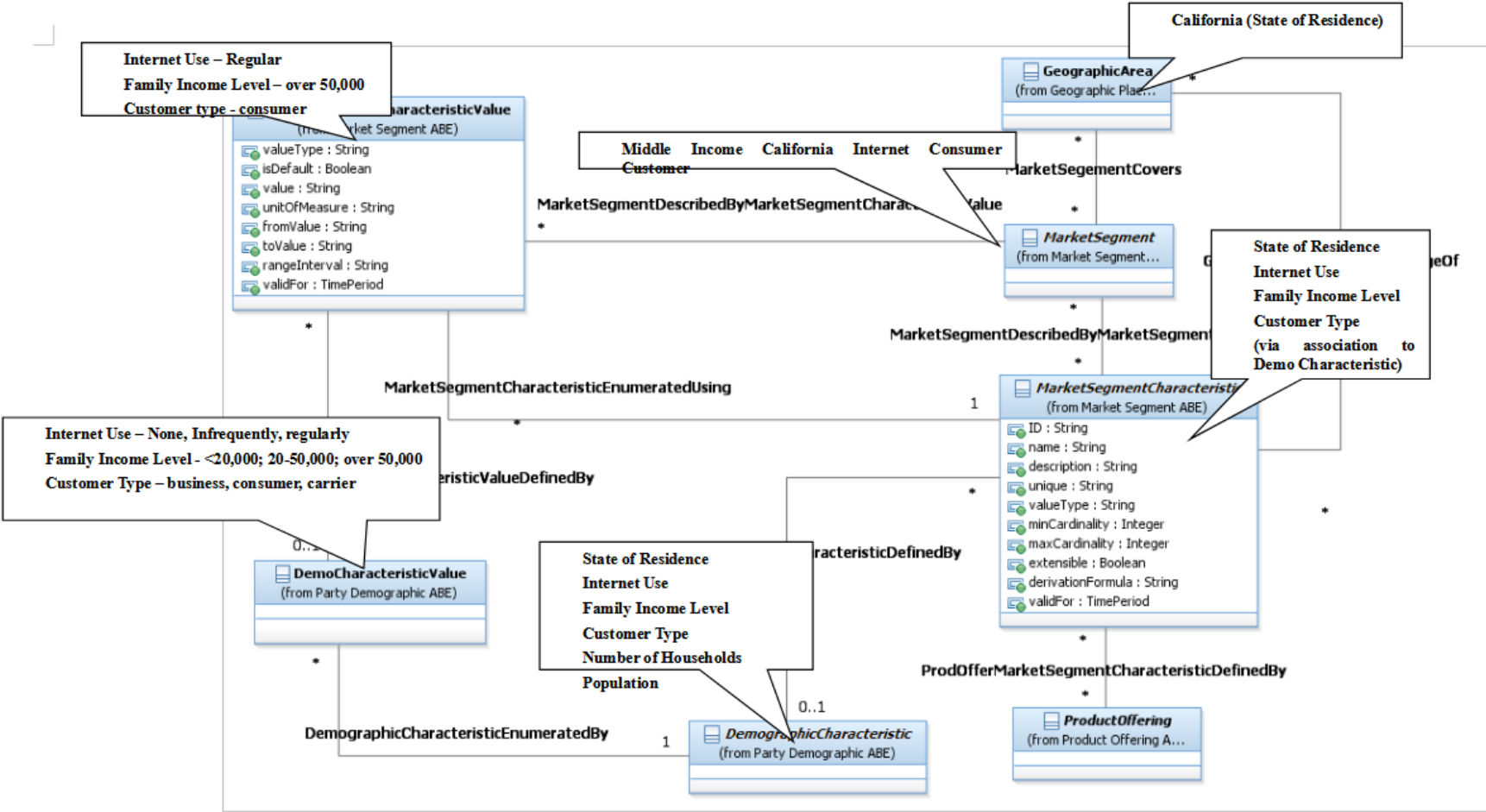
Illustration Figure MS.03- I01 - Market Segment Characteristics

4.3.5. Figure MS.05 - Composite and Atomic Market Segment Characteristics

The MarketSegmentCharacteristic also employs the Composite/Atomic pattern used by another Market/Sales domain ABEs. The figure below shows the application of this pattern.

Figure MS.05 - Composite and Atomic Market Segment Characteristics

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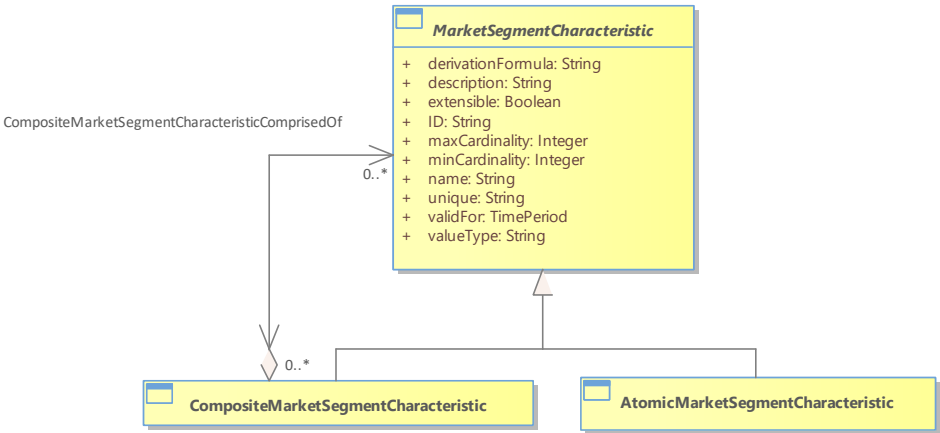
4.3.6. Figure MS.06 - Market Segment Associations With Other Entities

The associations shown in the MarketSegment figures up to this point are only a fraction of the associations that MarketSegment, as a key entity within the Market/Sales domain, has. The figure below depicts some of the associations that MarketSegment has with other business entities. These associations are also described in the addenda containing the related entities.
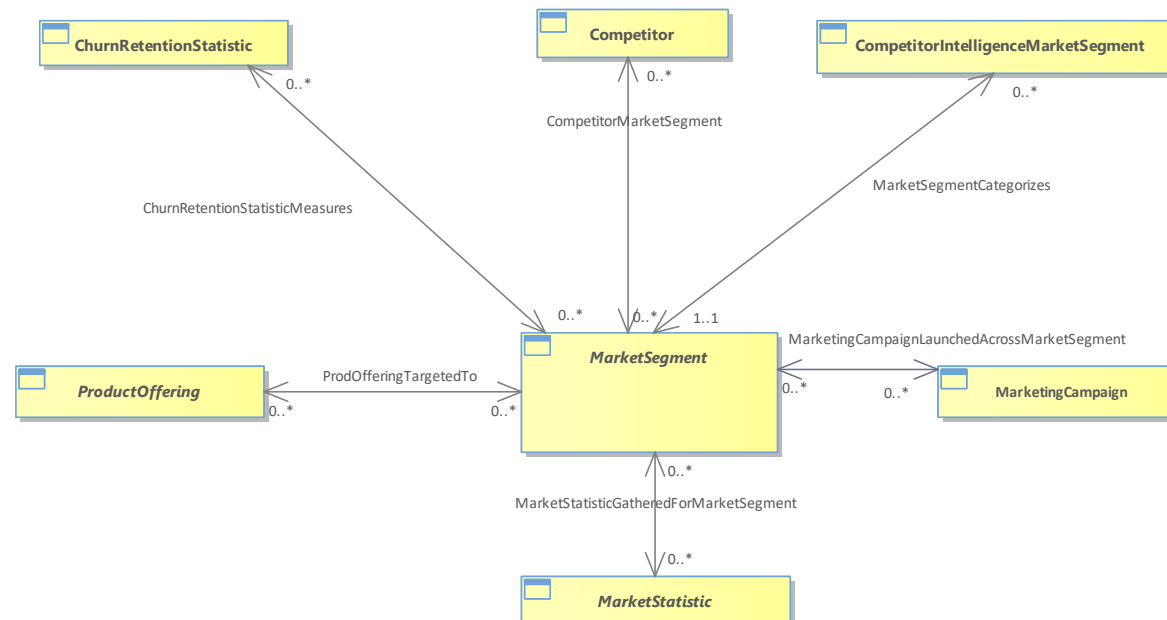
Figure MS.06 - Market Segment Associations With Other Entities

4.4. Competitor ABE

The Competitor ABE identifies other providers who compete in the same market segments, accumulates intelligence about the competitors, including products (price, Key Performance Indicators and so forth).

The Competitor ABE provides information relative to the analysis of intelligence pertaining to an enterprise's competitors. It is crucial to understand who the competitors are, what their products are, what the target markets for their products are, and how successful their products are.

The Competitor ABE and Competitor entities also comprise the following level-two ABEs

- Competitor Intelligence

- A variety of Product domain ABEs relative to Competitors

4.4.1. Figure MS.13 - Basic Competitor Business Entities

Before any competitive analysis can be done, it is critical to identify and understand who the Competitors are. Competitors are any Party playing a PartyRole that offers ProductOfferings similar to the enterprise's ProductOfferings in a MarketSegment. Once a Competitor is identified and targeted, an "owner" PartyRole is established. The owner maintains information about a Competitor. The owner is notified whenever additional information about the owner's Competitor is obtained.

Competitors are also placed into "tiers". This placement varies depending on the MarketSegment. Examples of Competitor tiers include:

- Private line versus switched

- Small, medium, large

- Vertical (consumer, business, carrier)

- Horizontal (size, usage, customer)

An enterprise may wish to perform Strength, Weakness, Opportunity, Threat (SWOT) analysis on a Competitor. SWOT analysis is a formal framework of identifying and framing organizational growth opportunities. Additional information about SWOT Analysis can be found via an Internet search.

The figure below shows the model for basic Competitor business entities.
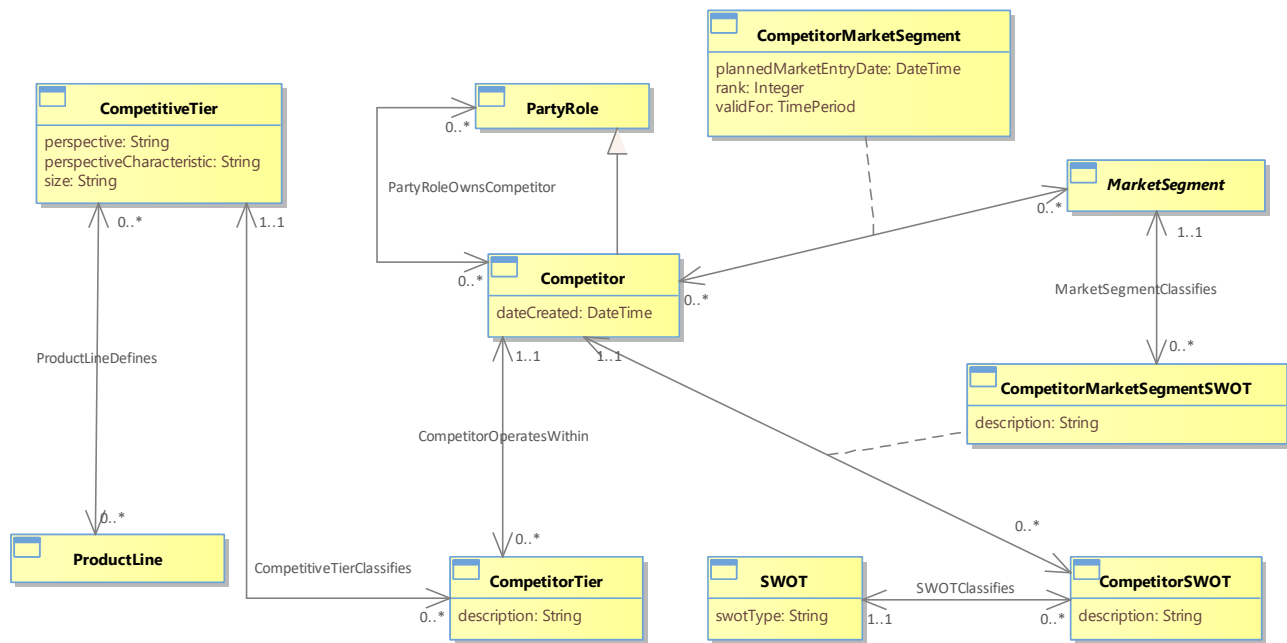
Figure MS.13 - Basic Competitor Business Entities

4.4.2. Figure MS.14 - Competitor Intelligence Basic Entities

CompetitorIntelligence are facts gathered about a Competitor's plans and activities that contributes to building a profile for a Competitor. This type of information may also be kept about internal organizations by treating them as Competitors. Many of the facts overlap with those gathered for the enterprise itself in the form of MarketStatistics. There are several sources from which to gather this information, including trade shows, networks, and the public domain (such as press releases).

CompetitorIntelligence can encompass, but is not limited to, the following

- Revenue (by geographic area, by product and so forth)

- Public financial information

- Press releases for information, such as personnel changes, product introductions, exits from MarketSegments, earnings, new agreements

- Product brochures

- Strategic alliances

- Market entry

- Person profiles of a Competitor's executives

- Prospects

- Rank within a MarketSegment

These facts can be used to perform Competitor SWOT analysis in order to better understand a Competitor.

CompetitorIntelligenceMarketSegment tracks the entry or planned entry of a Competitor into a MarketSegment. The association with ProductOffering may pertain to an enterprise's ProductOffering or to a Competitor's ProductOffering (use of Product domain ABEs and entities to model Competitor Product domain entities will be explained in the next section of this addendum). The association means that the intelligence pertains to a particular

ProductOffering or group of ProductOfferings. CompetitorIntelligencePartyRole captures the Party playing a PartyRole that gathered the intelligence. The association between PartyRole and MarketStatistics can be used to track Key Performance Indicators (KPIs) for a Competitor. KPIs measure such things as churn and retention, usage patterns, take rates, market penetration, market share changes, and so forth. The association with PartyRole also provides via PartyRole a means to create PartyProfiles for a Competitor.

The figure below depicts the basic entities that make up the CompetitorIntelligence ABE.
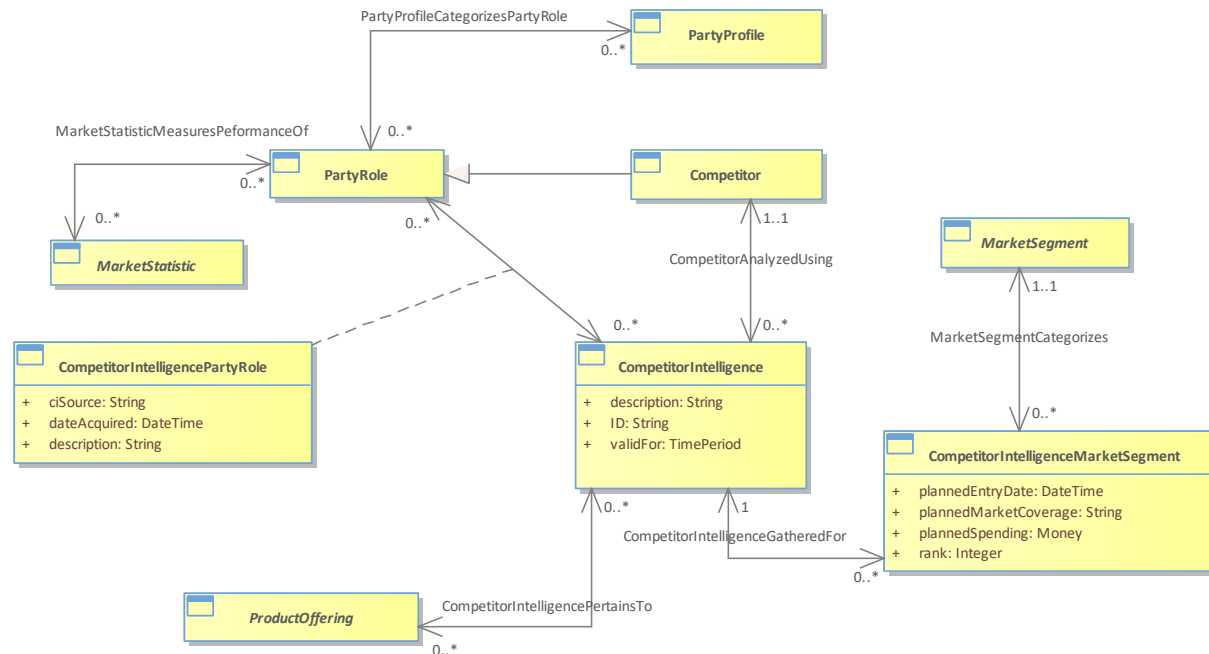
Figure MS.14 - Competitor Intelligence Basic Entities

4.4.3. Figure MS.15 - Competitor Intelligence Characteristics

As has been seen with other business entities contained within the Market/Sales domain there may be a number of other attributes that are important in characterizing CompetitorIntelligence. For example, the strategic alliances that have been formed by a Competitor, the coverage of a Competitor's network, the number of potential customers reached by a Competitor's network may be of interest. The CharacteristicSpec/Characteristic and Composite/Atomic patterns used through the Market/Sales domain are also applied here to accommodate this need.

An example of the use of the composite characteristic is the definition of a characteristic that consolidates all network-related attributes. This composite would be comprised of atomic characteristic instances representing name or location of the network associated with a MarketingCampaign, as well as instances representing the total number of potential customers that the networks support.

Notice that CompetitorIntelCharacteristic and CompetitorIntelCharacteristicValue entities can be shared by one or more instances of CompetitorIntelligence. This follows the same pattern that is used throughout the Market/Sales domain.

These entities as they relate to CompetitorIntelligence are shown in the figure below.
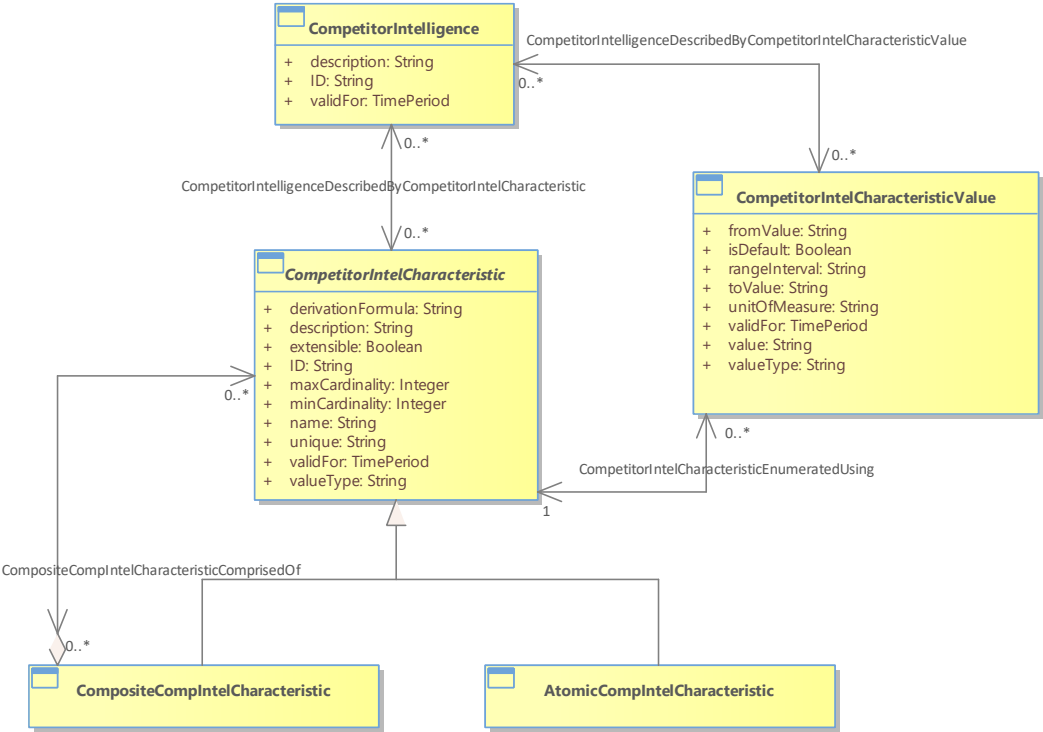
Figure MS.15 - Competitor Intelligence Characteristics

4.4.4. Figure MS.16 - Product Domain Entities Support of Competitor Product Information

The Competitor Product Correlation ABE compares an enterprise's ProductOfferings with its Competitors' ProductOfferings.

Gathering Competitor intelligence includes information about the ProductOfferings a Competitor markets, the ProductPrices for which payment is expected, ProductPromotions offered by Competitors, and so forth. Therefore, it would be expected that the SID model would contain these Product domain entities for Competitors. And, some modelers would expect to find entities such as CompetitorProductOffering, CompetitorProductPrice, and so forth. SID team members working in the Product and Marketing domains have in the past constructed a separate information model of these Competitor-related entities. And, when complete, have found striking similarities to Product domain entities.

It's really all a matter of perspective. Suppose a Competitor used the SID as the basis for an information model. The Competitor Product domain model would the same model as used by a competing enterprise. The perspective is provided by introducing the PartyRole entity into the Product domain as shown in the figure below.

When a Competitor is associated with an instance of ProductOffering, all related Product domains "inherit" the association to Competitor via their associations with ProductOffering. An enterprise can decide how much detail, in the form of instances of entities related to are necessary. For example, an enterprise may not be interested in keeping ProductPriceRules associated with a Competitor's ProductOfferings. Using PartyRole also provides a means for an enterprise to segregate ProductOfferings made available by different organizations within the enterprise.

Note: From an implementation view, an enterprise may choose to develop a database that only contains the enterprise's Product domain entities, and a separate one that contains the enterprise's Competitors' Product domain entities. Both data bases are based on the same information model.
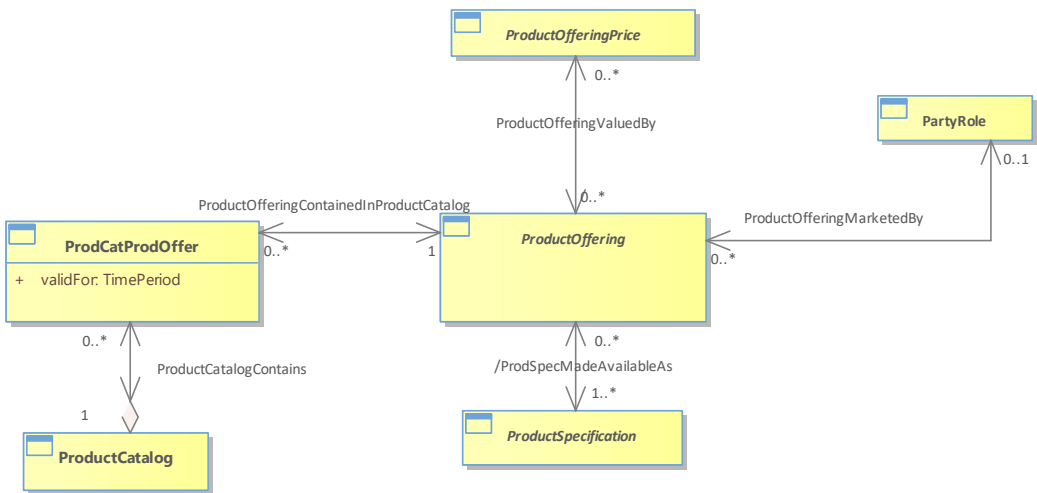
Figure MS.16 - Product Domain Entities Support of Competitor Product Information

4.4.5. Figure MS.17 - Competitor Product Correlation Basic Entities

CompetitorProductCorrelations represent a comparison of an enterprise's ProductOfferings and a ProductOffering's related entities, such as ProductPromotions, ProductOfferingPrices, and ProductPlacements. Within the SID model, a CompetitorProductCorrelation is represented as information about the association between two ProductOfferings. This is possible since the same model is used to represent an enterprise's ProductOfferings and those of its Competitors as was previously explained in this addendum. The correlation may be based on Jurisdiction (an area over which authority extends) and/or MarketSegment.

The figure below depicts the associations the basic associations that a CompetitorProductCorrelation has with other business entities.

Figure MS.17 - Competitor Product Correlation Basic Entities

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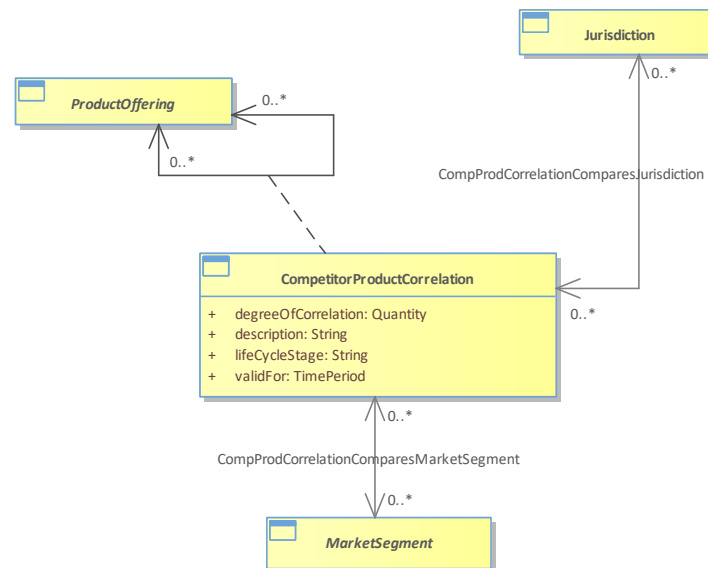
4.4.6. Figure MS.18 - Competitor Product Correlation Characteristics

As has been seen with other business entities contained within the Market/Sales domain there may be a number of other attributes that are important in characterizing CompetitorProductCorrelations. For example, the characteristic can take on a discrete value, such as geographic disbursement (central, national, cascading), can take on a range of values, (for example, Competitor ProductOffering revenue of $500,000 - $1,000,000), or can be derived from a formula (for example, number of MarketSegments in correlation = number of MarketSegments related to this correlation). The CharacteristicSpec/Characteristic and Composite/Atomic patterns used through the Market/Sales domain are also applied here to accommodate this need. These entities as they relate to CompetitorProductCorrelation are shown in the figure below.
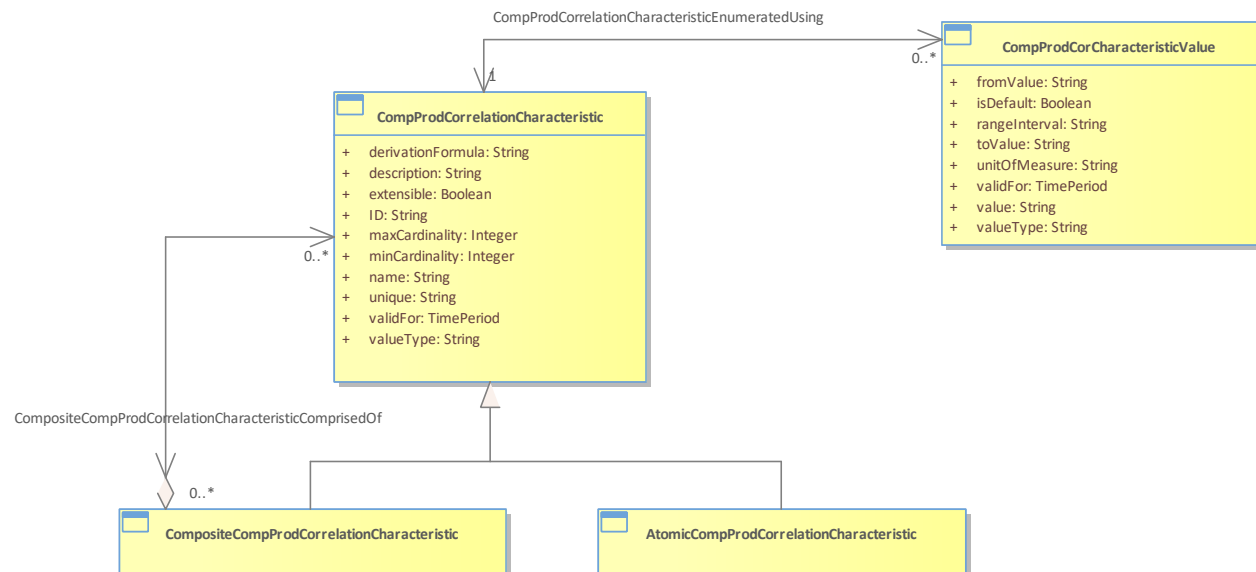
Figure MS.18 - Competitor Product Correlation Characteristics

4.4.7. Competitor Intelligence ABE

4.4.7.1. Figure CI.01 - Competitor Intelligence ABE Related Entities

Following are the business entities aggregated under the **Competitor Intelligence** Aggregate Business Entity
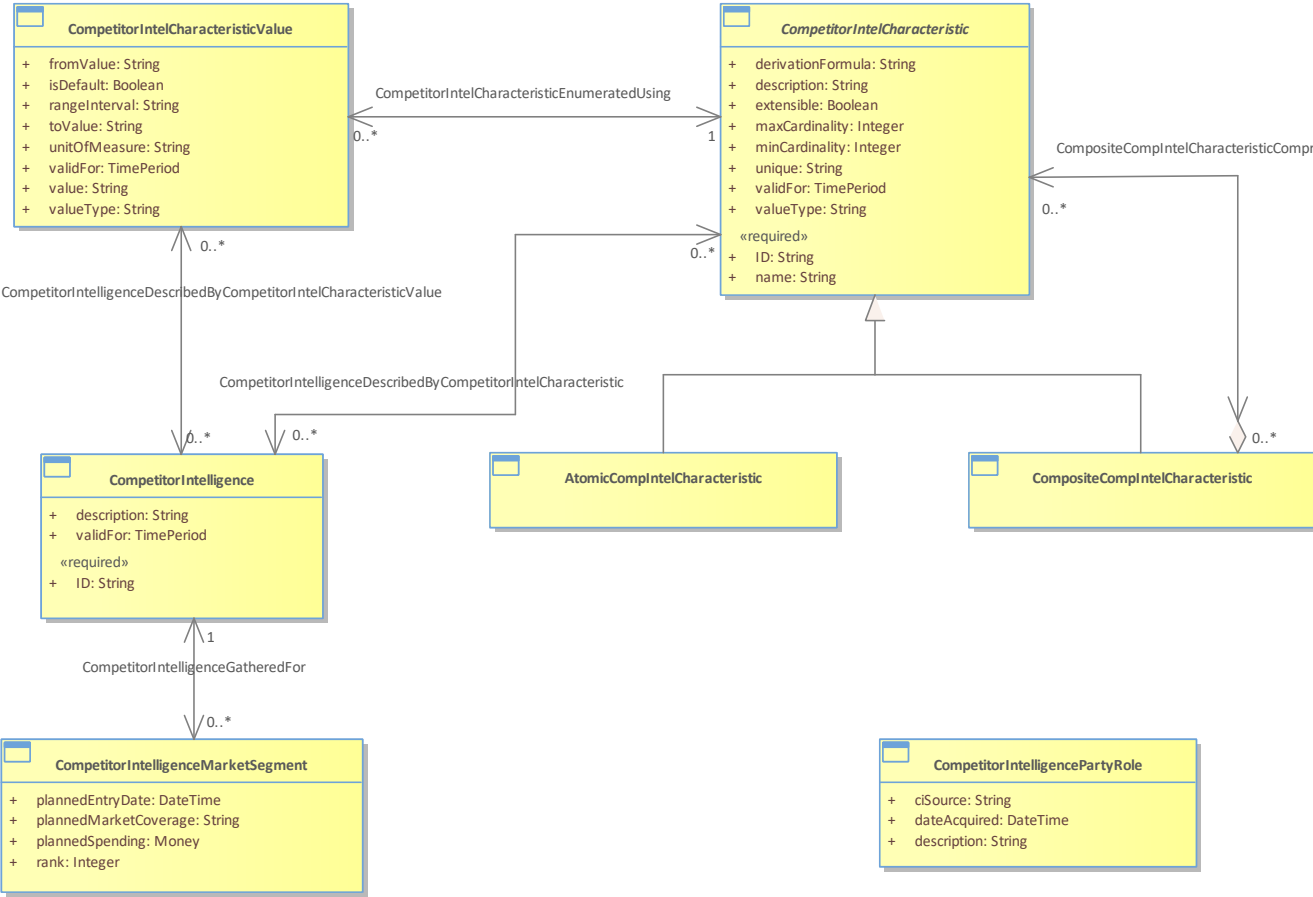
Figure CI.01 - Competitor Intelligence ABE Related Entities

4.4.8. Competitor Product Correlation ABE

4.4.8.1. Figure CPC.01 - Competitor Product Correlation ABE Related Entities

Following are the business entities aggregated under the **Competitor Product Correlation** Aggregate Business Entity
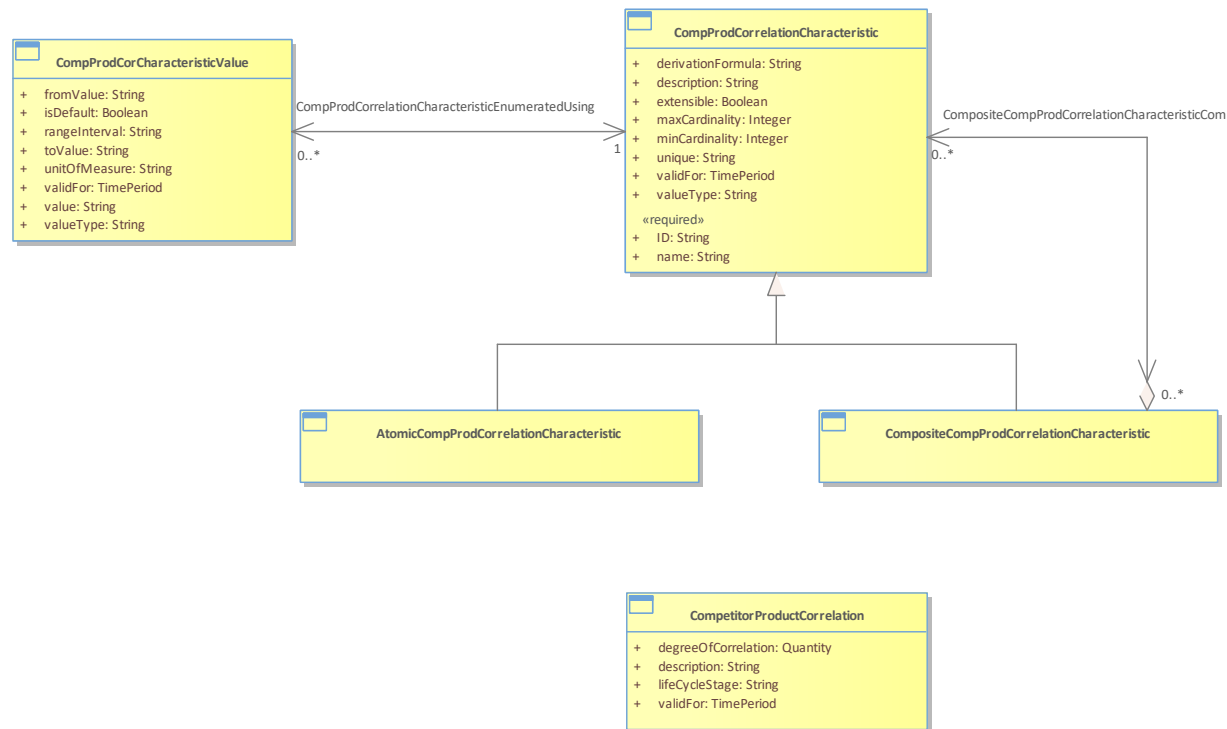
Figure CPC.01 - Competitor Product Correlation ABE Related Entities

4.5. Market & Sales Strategy Plan ABE

Market & Sales Strategy Plan ABE supports the business plans and strategies on how to address the market with appropriate products and channels.

4.5.1. Figure MC.01 - Marketing Campaign Party Roles

The Market Campaign party roles presently identified are:

- **MarketingCampaignRole**: A MarketingCampaignRole is a type of PartyRole involved in OperationalMarketingCampaigns and/or in MarketingCampaigns such as MarketingManager and MarketingOperator.

- **MarketingManager**: Agreed & done: A MarketingManager is a role played by a Party. A MarketingManager is responsible for the Marketing management process. It is the process of developing strategies and planning for product or services, advertising, promotions, sales to reach desired customer segment.

- **MarketingOperator**: The marketing campaign Operator is responsible for executing the campaign. He executes and tracks communication interactions with Parties using Media or communicationModes.

- **MarketingDesigner**: The marketing campaign Designer is responsible for the set-up of the campaign. He generates the target list and produces the campaign follow-up reports. He is in charge to monitor the campaign management performance in real time as the campaign is being executed and to propose corrective actions if necessary.

Figure MC.01 - Marketing Campaign Party Roles

4.5.2. Figure MC.02 - OperationalMarketingPlan

The OperationalMarketingPlan is an abstract class that defines the hierarchical view of a package of OperationalMarketingPlan item.

It may be:

- A Composite OperationalMktPlan corresponding to several OperationalMktPlan item that are associated together within in the same marketing program.

- An Atomic OperationalMktPlan corresponding to a campaign plan which is the smallest level of the OperationalMarketingPlan hierarchy.

Marketing Plan is a Composite OperationalMktPlan composed of Marketing Programs

Marketing Program is a Composite OperationalMktPlan composed of Campaign Plans

A Marketing Campaign is associated to a Campaign Plan that is an AtomicOperationalMktPlan

A Campaign Plan gathers several marketing campaigns that should be executed to reach the desired business objectives for a specific market segment and their sequence.

It consists in a planned set of actions grouping together campaigns over a given period.

For each campaign, the name, objectives, high-level target, channels & expected results should be defined. A campaign plan could be defined for a year and reviewed quarterly.
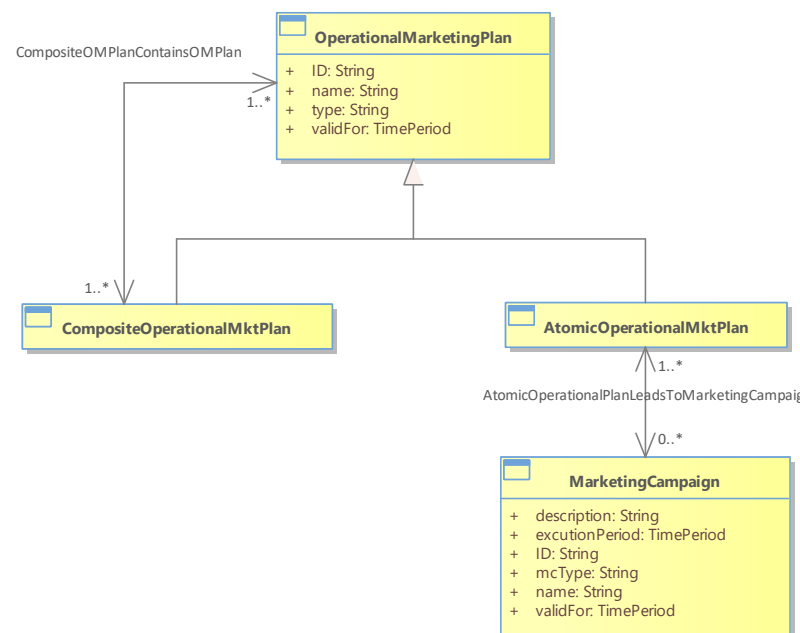
Figure MC.02 - OperationalMarketingPlan

4.5.3. Figure MC.03 - Operational Marketing Plan detailed view

MarketingCampaigns promote a product through different media, including television, radio, print and online platforms. Campaigns don't have to rely solely on advertising and can also include demonstrations, word of mouth and other interactive techniques. Businesses operating in highly competitive markets may initiate frequent marketing campaigns and devote significant resources to generating brand awareness and sales.

Marketing campaigns can be designed with different goals in mind, including building a brand image, introducing a new product, increasing sales of a product already on the market, or even reducing the impact of negative news. Defining a campaign's goal usually dictates how much marketing is needed and what media are most effective.

A MarketingCampaign specifies:

- the Budget allocated, forcasted and achieved,

- the targeted Parties (PartyProfile),

- the SaleChannel and the CommunicationMode or Media to be used,

- the ProductSpecification and ProductOffering it gives away or aims to place,

- the creative used during the campaign (Document and DocumentSpecification),

- and the MktCampaignRules such as rules that will be evaluated for triggering an event-based Marketing Campaign.

A MarketingCampaign is managed by a MktCampaigneManager and designed by a MktCampaignOperator.

A MarketingCampaign is split into waves (MktCampaignWave).

A Marketing Campaign is described in a marketing campaign brief (Document) which describes all the information required to prepare the campaign.

The brief puts the campaign into context and sets campaign objectives. It brings together the information necessary to create a campaign:

- Campaign objectives which are the smallest level of the hierarchy of marketing objectives. They deal with the selected actions to attempt to reach the marketing objectives defined at the Marketing plan level (e.g. action such as sale of an option, stimulate usage, retain with promotions, sale of a mobile or accessories, optimize ARPU, …);

- Metrics and KPIs to measure the performance of a campaign based on MktIndicatorSpec referring to quantitative data such as proposition take rate or click-through objectives for example (achieve a click-through rate of 4% or higher, achieve a proposition take rate of 1.5% or higher, ….);

- a target market which is composed by party segments;

- a message based on a general idea or sentence that summarises what you want to say to the customers;

- a budget which is the smallest part of a marketing plan budget allocated at a campaign;

- propositions based on offer specification or/and product specification.

Figure MC.03 - Operational Marketing Plan detailed view

4.5.4. Figure MC.03-I01a - Campaign Plan for High-Value customers' Objectives

Let's consider an Operational Marketing Plan defined as follows.
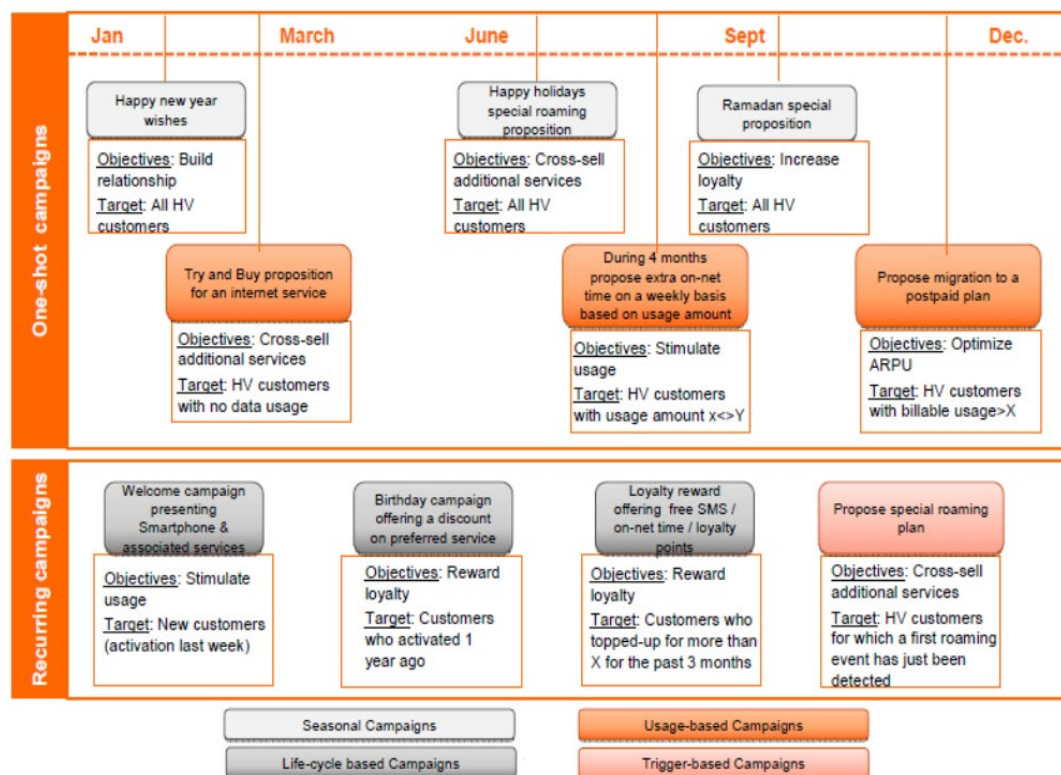
Figure MC.03-I01a - Campaign Plan for High-Value customers' Objectives

4.5.5. Figure MC.03-I01b - Campaign Plan for High-Value customers' Objectives

An OperationalMktPlanfor High-Value customers is defined with the following objectives:

- Build relationships with Customers

- Achieve a target size between 200 000 and 300 000

- achieve a total gain higher than 500 000 €

- stimulate additional usages

The OperationalMktPlan for High-Value customers leads to many MarketingCampaigns.

One of them is the Extra Time on a weekly basis campaign with an objective of additional usages higher than 100 000 minutes and a target size between 50 000 and 100 000.

Another one is the Happy new year wishes with an objective of building relationships and a target size between 100 000 and 150 000.
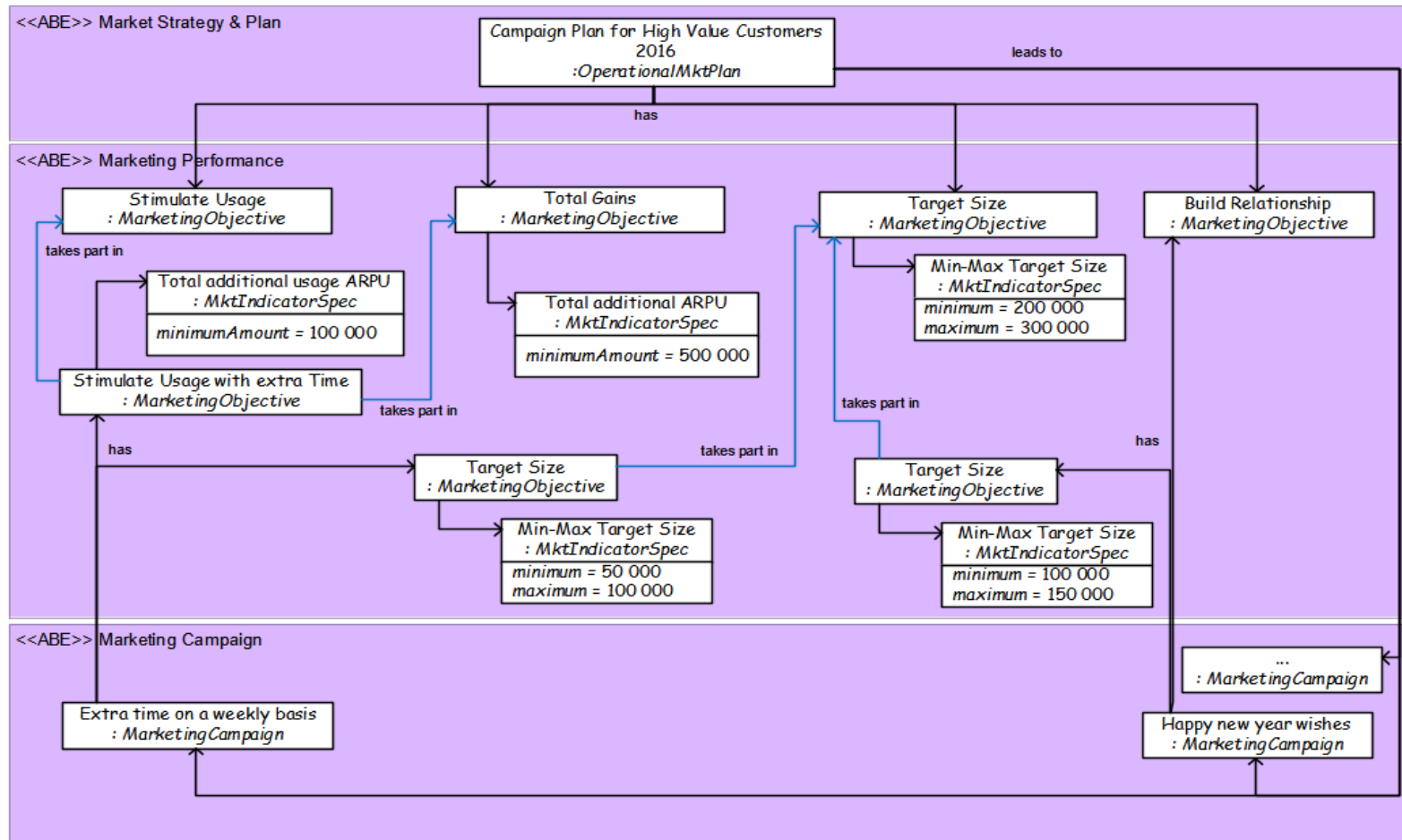
Figure MC.03-I01b - Campaign Plan for High-Value customers' Objectives

4.5.6. Figure MC.03-I02 - Campaign Plan for High-Value customers: Budget

An OperationalMktPlanfor High-Value customers is defined with the following budget:

- a Development Cost allocated budget of 20 000 €

- and a Channel execution Cost of 100 000 €

The OperationalMktPlan for High-Value customers leads to many MarketingCampaigns.

One of them is the Extra Time on a weekly basis campaign with the following budgets

- a Development Cost allocated budget of 5 000 €

- and a Channel execution Cost of 20 000 €

Another one is the Happy new year wishes with the following budgets

- a Development Cost allocated budget of 10 000 €

- and a Channel execution Cost of 10 000 €

Note: The sum of allocated budgets for marketing Campaigns might be lower than the complete budget allocated for the Operational Marketing Plan, waiting for other Marketing Campaigns.

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Figure MC.03-I02 - Campaign Plan for High-Value customers: Budget

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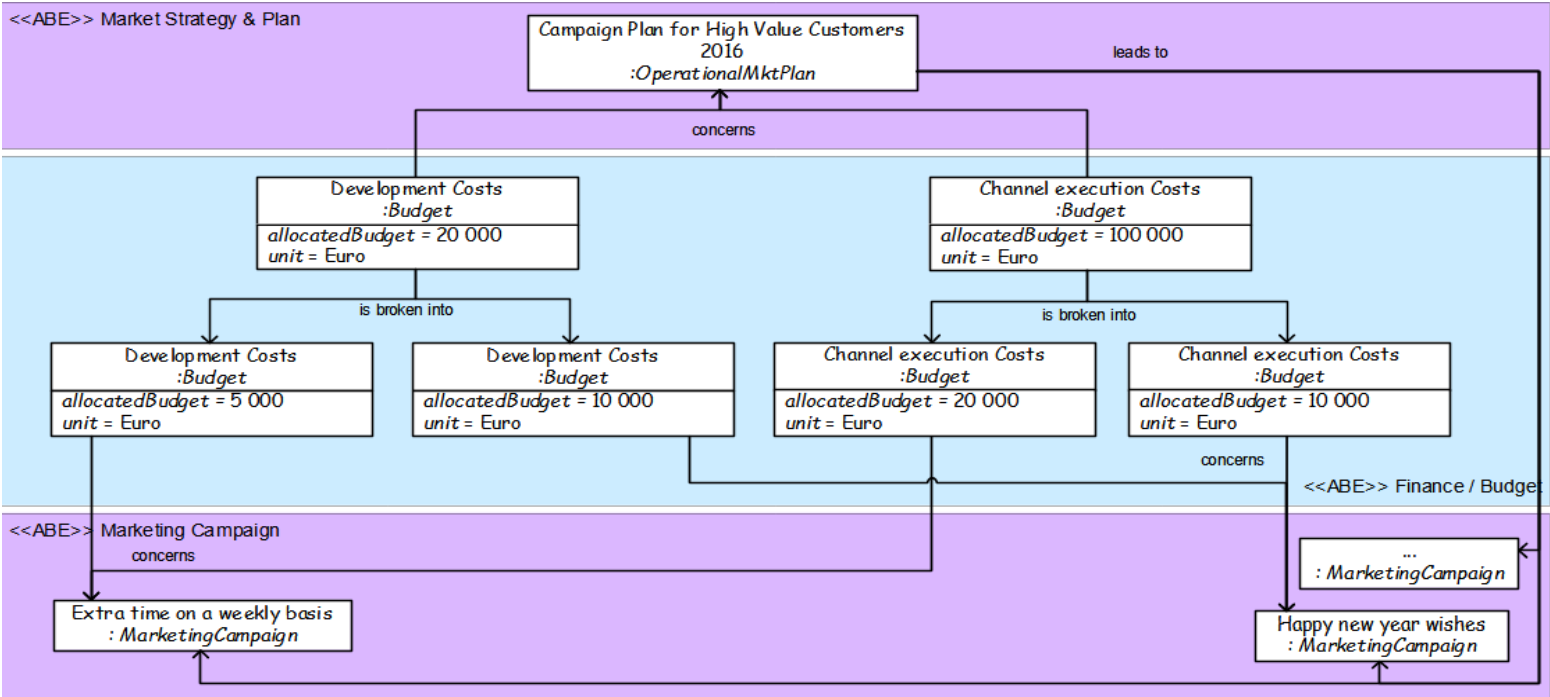
4.5.7. Figure MC.03-I03 - Campaign Plan for High-Value customers: Proposition

An OperationalMktPlanfor High-Value customers is defined aiming to place Mobile's OfferSpecifications.

The OperationalMktPlan for High-Value customers leads to many MarketingCampaigns.

One of them is the Extra Time on a weekly basis campaign aiming to place the "SMS Top-Up" OfferSpecification.

Another one is the Happy New Year wishes giving away the "Data Top-Up" OfferSpecification.
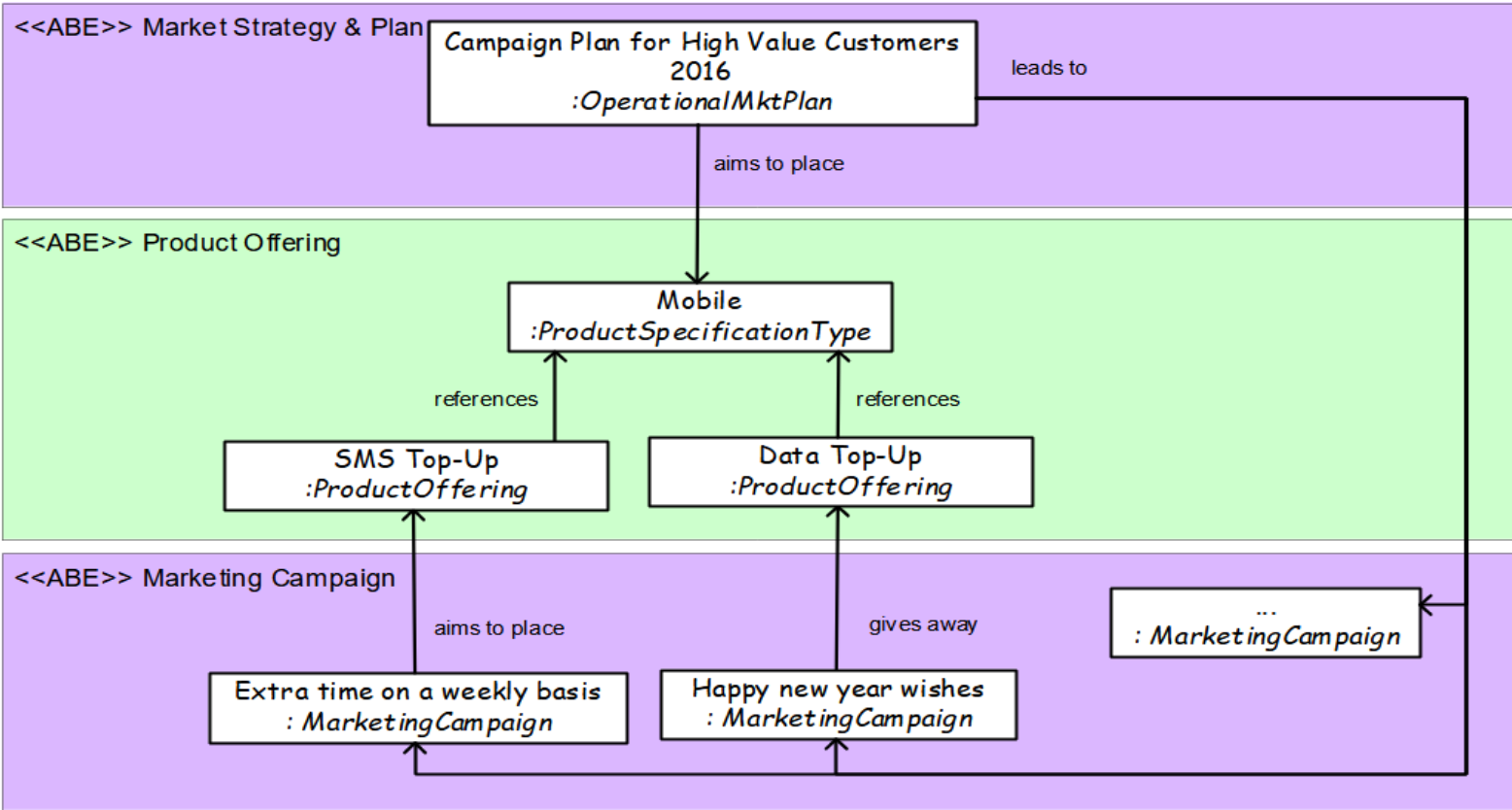
Figure MC.03-I03 - Campaign Plan for High-Value customers: Proposition

4.5.8. Figure MC.04 - Marketing Objective and measures (copy of MP.01)

A MetricDefinition defines for an Entity a group of measures with targeted values and associated actions when the thresholds aren't respected (MetricSpecMeasure).

A MetricMeasurementObservation calculates for an instance of Entity for a specific period, the values of measures that helps identifying actions to be applied when the thresholds aren't respected (MetricMeasure).

A MetricMeasurementObservation is described by a MetricDefinition.

A MetricMeasure is described by a MetricDefMeasure.

Marketing objective is a set of action in charge of to specify, CSP communications and presence according to strategic axes, to support product introductions and specific promotions to sell products, retain customers, and bring in new customers.

Example:

- drive profitable sales with marketing objectives such as sell on value, promote strategic products, improve sales cycle…

- grow customer profitability with marketing objectives such as retain & grow strategic accounts, customer P&L sales focus…

MarketingObjectiveDefinition is defined by metrics to evaluate with threshold that must be achieved and possibly actions that must be applied when the thresholds are not achieved. These metrics and thresholds are specified with MarketingIndicatorDef.

MarketingObjectiveDefinition is a type of MetricDefinition.

Each MarketingObjectiveDefinition might take part in one or many MarketingObjectiveDefinitions.

A MarketingIndicatorDefinition is a type of MetricDefMeasure in the context of OperationalMarketingPlans and / or MarketingCampaigns.

A MarketingObjectiveMeasure is a type of MetricMeasurementObservation described by a MarketingObjectiveDefinition and containing one or many MarketingIncators.

A MarketingIndicator is a type of MetricMeasure described by MarketingIndicatorDefinition that contains the result of a MaktIndicatorDefinition's evaluation for an instance of Entity for a specific period.

Figure MC.04 - Marketing Objective and measures (copy of MP.01)

4.5.9. Figure MC.04-I01 - Marketing Objectives for High-Value Customer
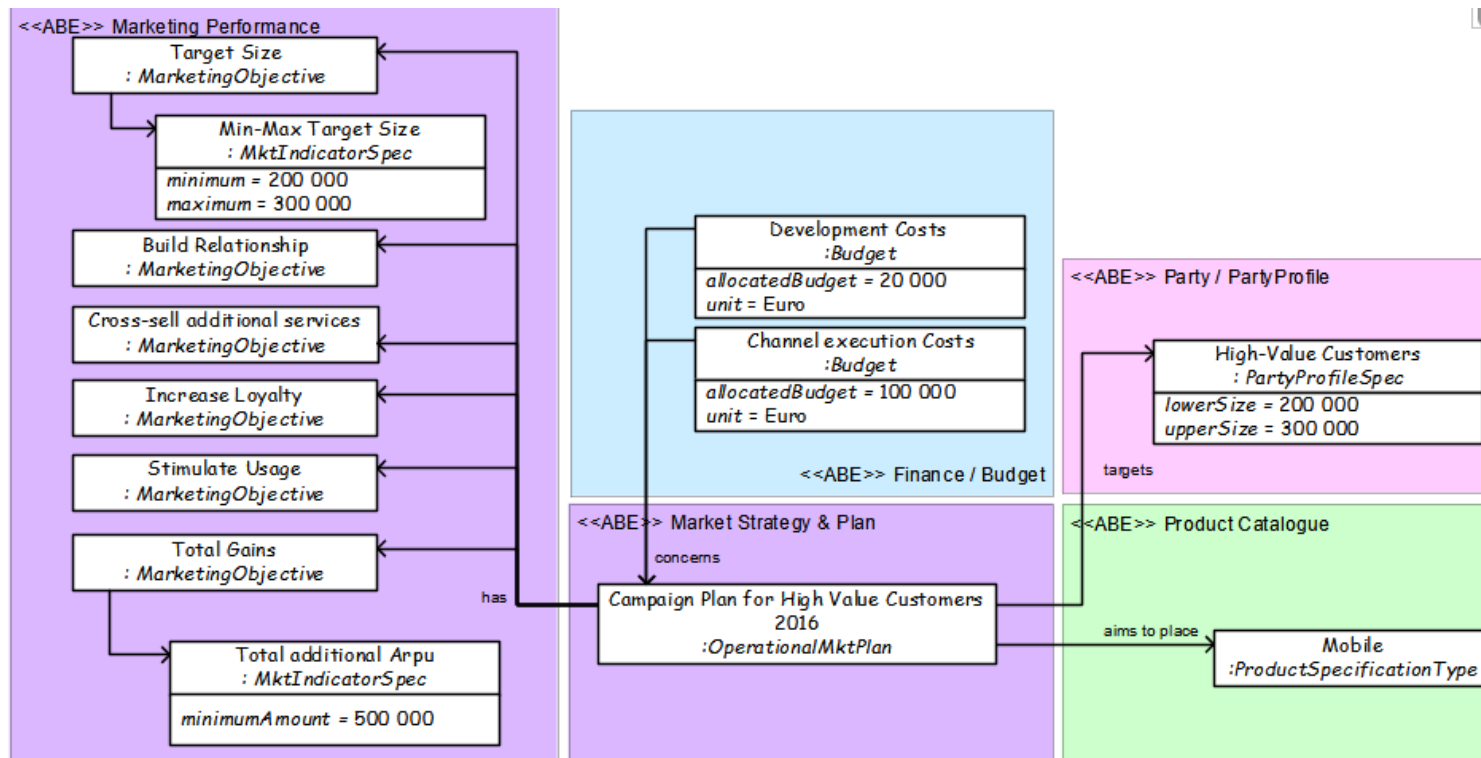
Figure MC.04-I01 - Marketing Objectives for High-Value Customer

4.6. Marketing Campaign ABE

The Marketing Campaign ABE represents the strategy, or approach, for marketing new or existing ProductOfferings to identified target markets. The campaign could be for one of the following:

- The launch of a pre-paid ProductOffering with multiple promotions across SalesChannels, MarketSegments, and so forth

- A new campaign for an existing ProductOffering; the ProductOffering is not new, but the relationships, collateral, and so forth could be new

- A re-launch of a campaign for an existing ProductOffering

4.6.1. Figure MC.05 - Marketing Campaign Characteristics

As with other business entities contained within the Market/Sales domain there may be a number of other attributes that are important in characterizing a MarketingCampaign. For example, the brokerage houses that have picked up a campaign, the number of press releases associated with a campaign, or the number of prospects intended to be reached by a campaign may be of interest. The CharacteristicSpec/Characteristic and Composite/Atomic patterns used through the Market/Sales domain are also applied here to accommodate this need. These entities as they relate to a MarketingCampaign are shown in the figure below.

An example of the use of the composite characteristic is the definition of a characteristic that consolidates all brokerage house attributes. This composite would be comprised of atomic characteristic instances representing brokerage house names associated with a MarketingCampaign, as well as an instance representing the total number of brokerage houses that took up the MarketingCampaign.

- *Notice that MarketingCampaignCharacteristic and MarketingCampaignCharacteristicValue entities can be shared by one or more MarketingCampaigns. This follows the same pattern is used through the Market/Sales domain.*
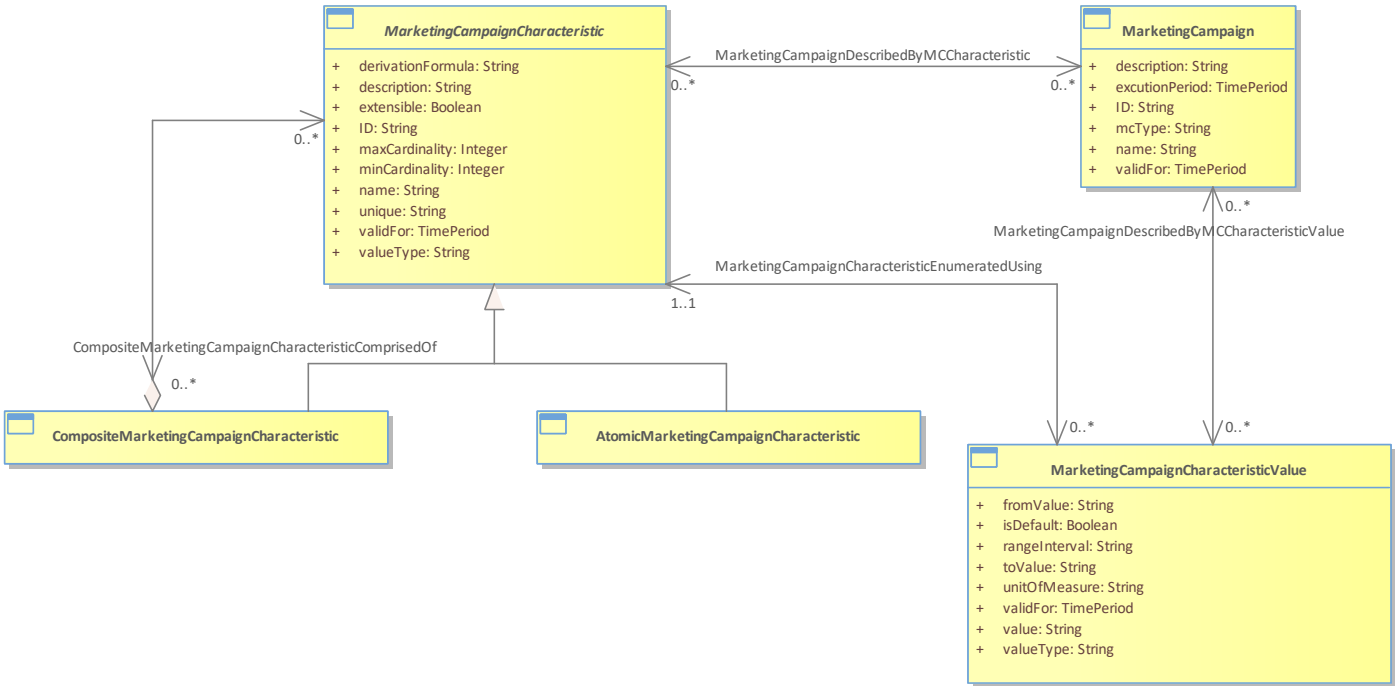
Figure MC.05 - Marketing Campaign Characteristics

4.6.2. Figure MC.06 - Marketing Campaign overview

Marketing campaigns promote a product through different media, including television, radio, print and online platforms.

A Marketing Campaign refers to an OperationalMarketingPlan item which is in this case the smallest level of the OperationalMarketingPlan hierarchy. Budget, MarketingObjectiveDefinition and PartyProfile related to MarketingCampaign correspond to sub-set of those which are specified at the OperationalMarketingPlan level.

It is launched across a PartyProfile.

The criteria used to define the MarketingCampaign's target (PartyProfileSpec) reuse the criteria specified for the target at the OperationalMarketingPlan's level and refines existing criteria and/or adds other criteria.

Figure MC.06 - Marketing Campaign overview

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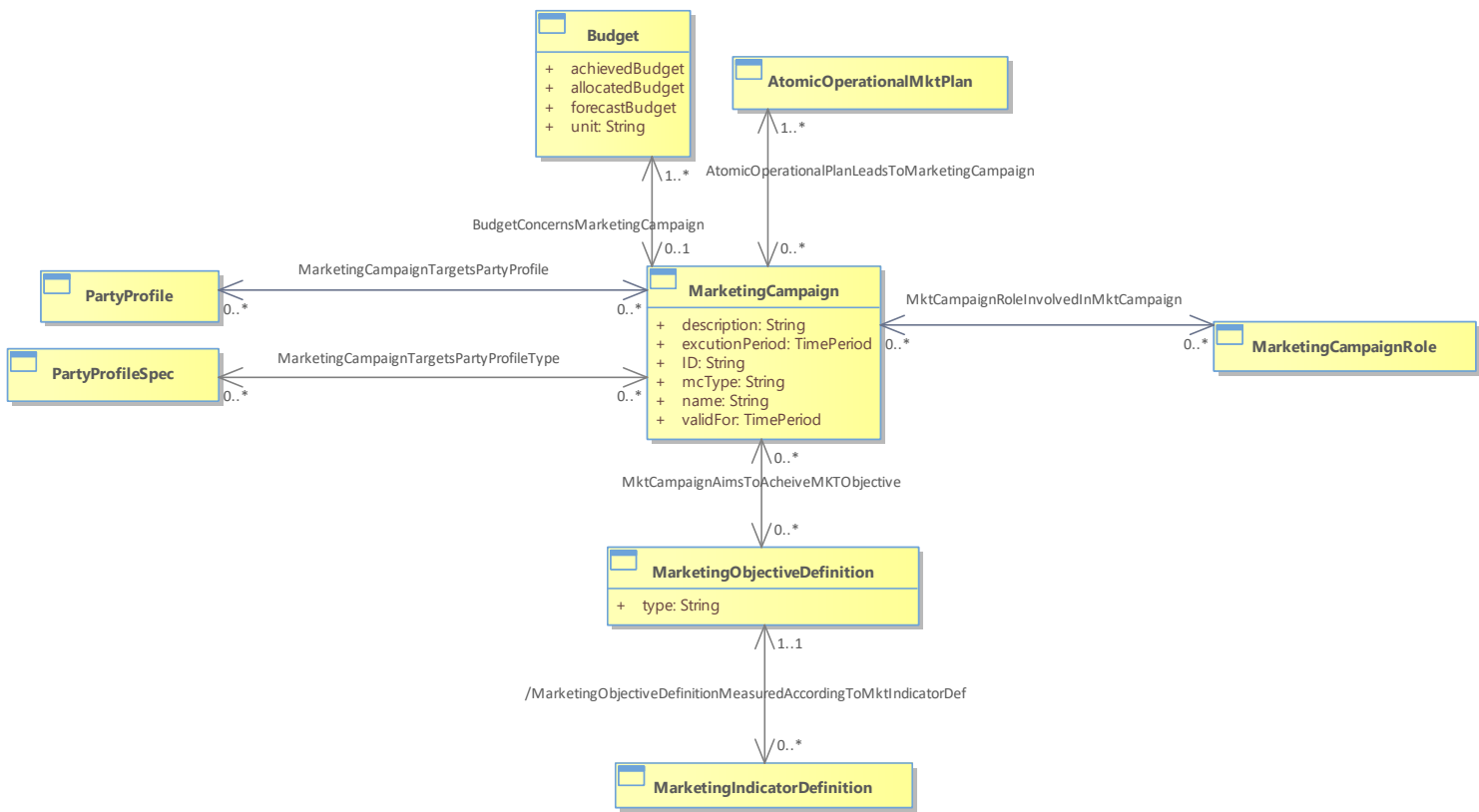
4.6.3. Figure MC.06-I01 - Advertising Mkt Campaign (outbound)

A MarketingCampaign "Orange Digital Company" has been specified. This is an advertising Campaign using TV with the objectives of increasing Customer feelings with regards to Orange and wants to target at least 2 000 000 people.

The target is defined with the "evening TV watchers".
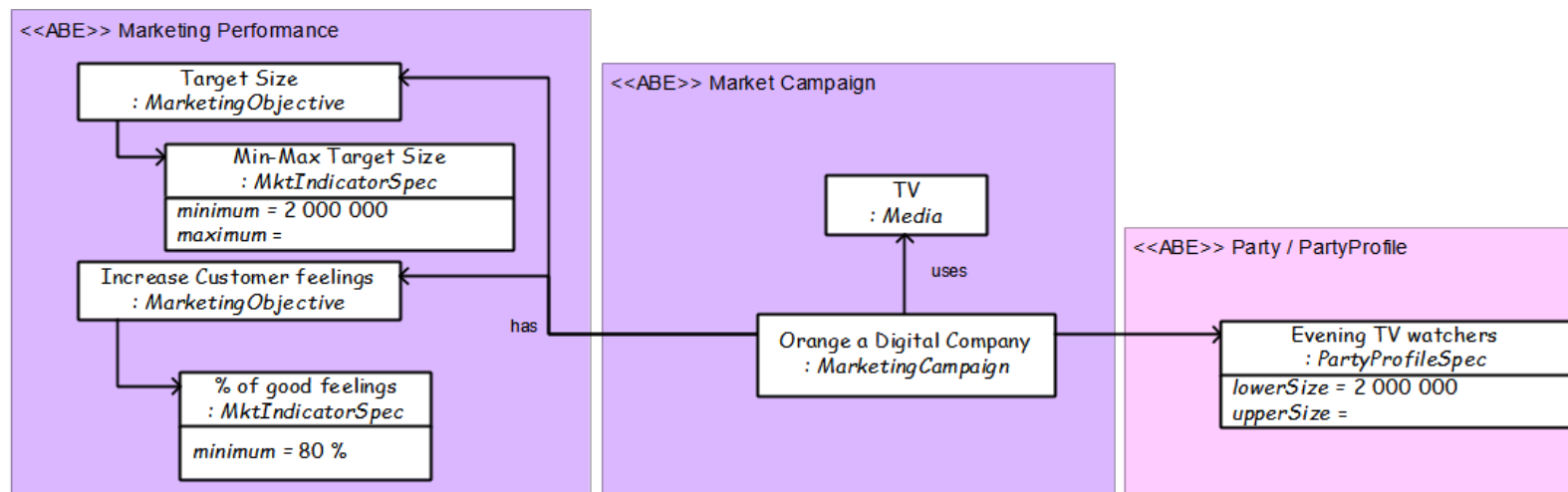
Figure MC.06-I01 - Advertising Mkt Campaign (outbound)

4.6.4. Figure MC.07 - Marketing Campaign in detail

Marketing campaigns promote a product through different media, including television, radio, print and online platforms. Campaigns don't have to rely solely on advertising and can also include demonstrations, word of mouth and other interactive techniques. Businesses operating in highly competitive markets may initiate frequent marketing campaigns and devote significant resources to generating brand awareness and sales.

Marketing campaigns can be designed with different goals in mind, including building a brand image, introducing a new product, increasing sales of a product already on the market, or even reducing the impact of negative news. Defining a campaign's goal usually dictates how much marketing is needed and what media are most effective.

A MarketingCampaign specifies:

- the Budget allocated, forecasted and achieved,

- the targeted Parties (PartyProfile),

- the SaleChannel and the ContactMedium or Media to be used,

- the ProductSpecification and ProductOffering it gives away or aims to place,

- the creative used during the campaign (Attachment),

- and the MktCampaignRules such as rules that will be evaluated for triggering an event-based Marketing Campaign.

A MarketingCampaign is managed by a MktCampaignManager, designed by a MktCampaignDesigner and implemented by a MktCampaignOperator (MarketingCampaignRoles).

Media is a mechanism by which marketing campaigns, promotions, and product placements can be launched into the marketplace. It describes such mechanisms as the press, radio, trade shows, internet, and so forth. It is also used to advertise other provider.

Example: A campaign for mobile internet market segment which has objective to increase active customers and revenue will use several media such as TV, Radio, press and online.

The MarketingCampaign specifies ContactMedium to be used and corresponding CommunicationInteractionMeans (way of interacting with a ContactMedium) is identified at the MktCampaignWave level. For instance, concerning a mobile phone number the CommunicationInteractionMeans can be: phone call, SMS, MMS. As CommunicationMode it also exists face-to-face, letter, mail, chat...

The MarketingCampaignRule represents rules that will be evaluated for triggering marketing campaigns for an event-based Marketing Campaign. It specifies:

- the MktCampaign Event to be evaluated;

- the MktCampaignCondition to be compared with;

- the MktCampaignAction to be applied if the rule test result is true.

A MarketingCampaign is split into waves (MktCampaignWave).

A Marketing Campaign is described in a marketing campaign brief (Attachment) which describes all the information required to prepare the campaign.

The brief puts the campaign into context and sets campaign objectives. It brings together the information necessary to create a campaign:

- Campaign objectives which are the smallest hierarchy level of marketing objectives. They deal with the selected actions to attempt to reach the marketing objectives defined at the Operational Marketing plan level (e.g. action such as sale of an option, stimulate usage, retain with promotions, sale of a mobile or accessories, optimize ARPU, …);

- Metrics and KPIs to measure the performance of a campaign based on MktIndicatorSpec referring to quantitative data such as proposition take rate or click-through objectives for example (achieve a click-through rate of 4% or higher, achieve a proposition take rate of 1.5% or higher, ….);

- a target market which is composed by party segments;

- a message based on a general idea or sentence that summarises what you want to say to the customers;

- a budget which is the smallest part of a marketing plan budget allocated at a campaign;

- propositions based on offer specification or/and product specification.

Figure MC.07 - Marketing Campaign in detail

Figure MC.07-I01 - Marketing Campaign Happy New Year: overview

The Happy New Year Wishes campaign is specified with the following criteria:

- use outbound SMS and phone calls

- has the objective to build relationships with the customers and targets between 100 000 and 150 000 people

- has an allocated budget of 10 000€ for channel execution costs and of 10 000 for development costs

- aims to place the ProductOffering Data Top-Up

and targets High-Value Customers inactive for more than 14 days
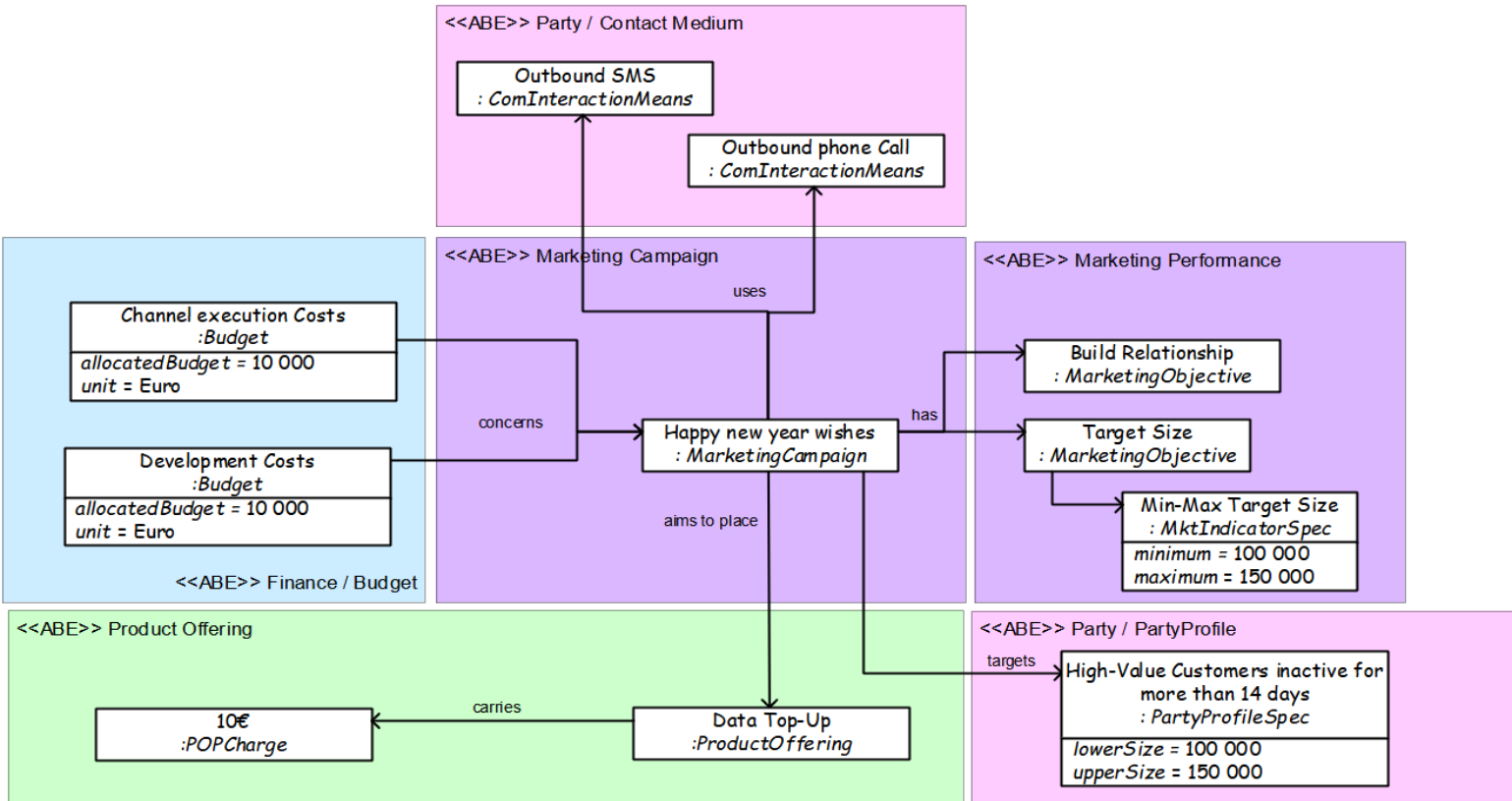
Figure MC.07-I01 - Marketing Campaign Happy New Year: overview

4.6.5. Figure MC.07-I02 - Mkt Campaign Apologize for drop calls

The Mkt Campaign Apologize for drop calls specifies that

- if the user has X drop calls on outgoing call (international) during the last Y hours,

- then the user will receive 2 minutes of free international calls,

- only if the subscriber did in total (including off-net, on-net,...) 70 minutes during the last 4 weeks

The subscriber would be the notified by SMS of the voice minutes deposit.

The campaigns will stop after 50 000 applications of the 2 minutes top-up.
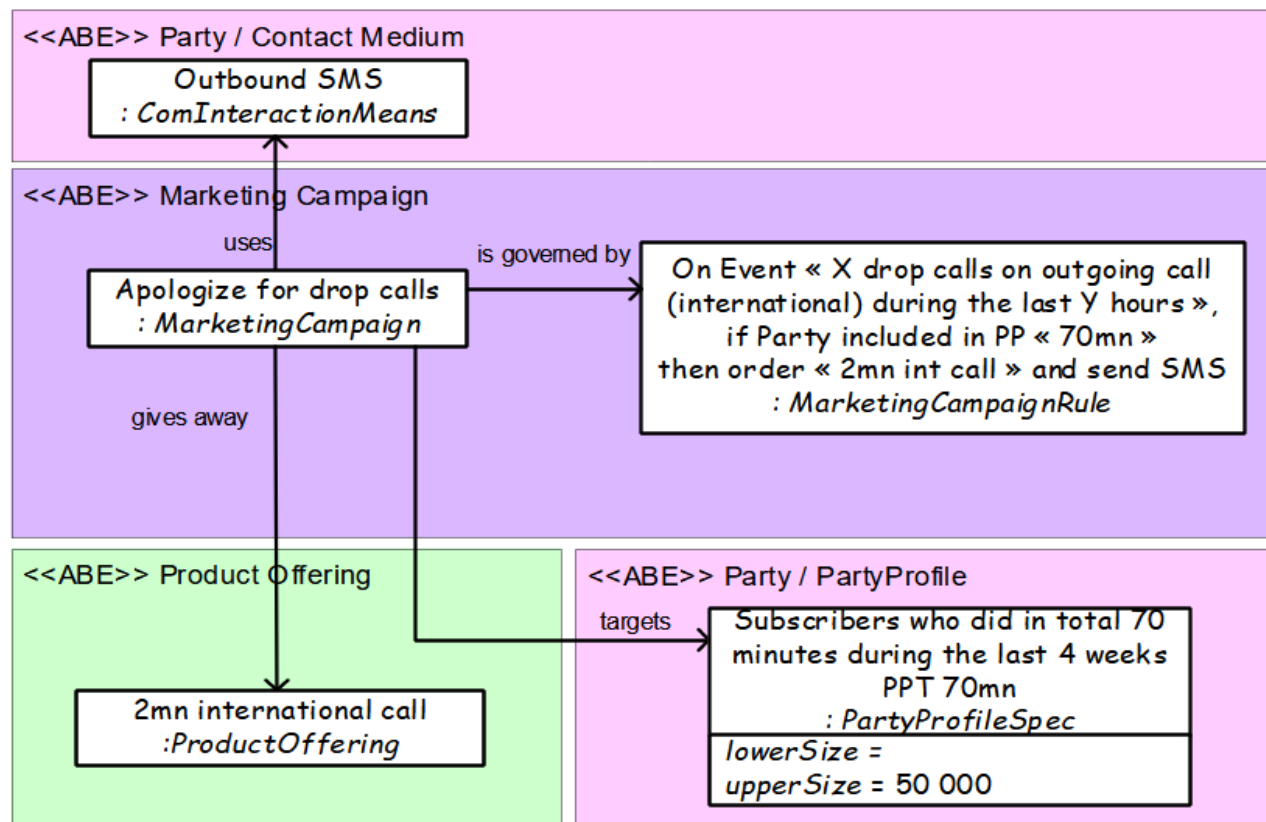
Figure MC.07-I02 - Mkt Campaign Apologize for drop calls

4.6.6. Figure MC.08 - Marketing Campaign Wave

In a multichannel campaign management system, marketing campaign management requires to subdivide a campaign in several marketing campaign waves. A marketing campaign wave should use one communication mode and one target. It could be outbound or inbound.

The MktCampaignWave is the smallest operational subdivision of a campaign, with a unique target (set of segmentation criteria to define which persons or legal entities to reach), unique interaction channel (1014, 3000, external call-center), media (ads in Le Monde newspaper, ads in the subway…), a duration. It may be inbound (people try to reach the CSP) or outbound (the CSP tries to reach them).

In addition, a MktCampaignWave specifies

- the ProductOffering and AlterationSpecifications it aims to place,

- and specific Attachments used to communicate adapted to the CommunicationMode,

A WaveList is a type of PartyProfile that corresponds to a sub-part of the MarketingCampaign's PartyProfile.

A WaveList lists the CommunicationInteractions related to Parties from the WaveList in relation to the concerned WaveList.
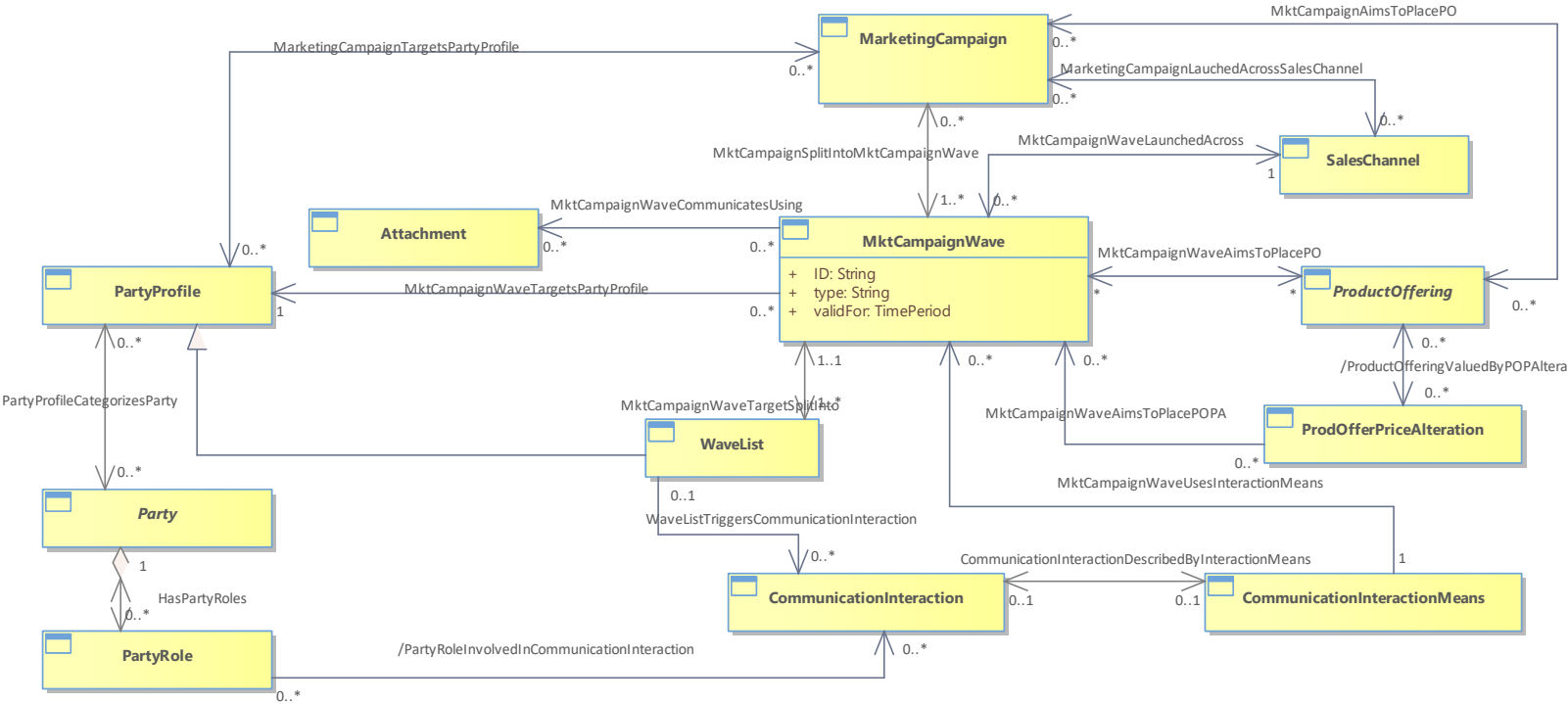
Figure MC.08 - Marketing Campaign Wave

4.6.7. Figure MC.08-I01 - Mkt Campaign Happy New Year: in detail

The Mkt Campaign Happy New Year is split into three waves: two waves dedicated to use outbound SMS and one to use outbound phone calls.

The Mkt Campaign Happy New Year targets High-Value Customers inactive for more than 14 days.

Each of the three waves targets sub-segments from the campaign.

The marketing campaign aims to place the "Data Top-Up" ProductOffering with three possible alterations (10%, 20% and 30%).
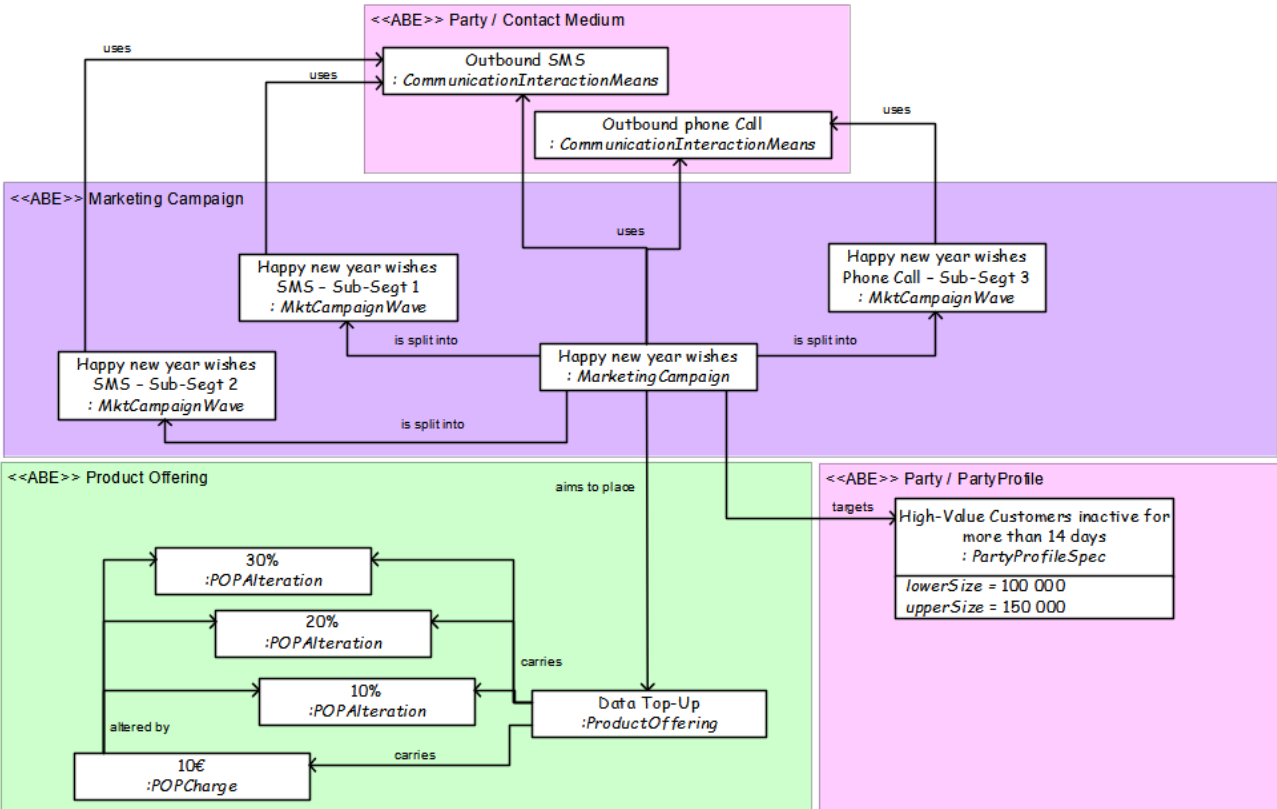
Figure MC.08-I01 - Mkt Campaign Happy New Year: in detail

4.6.8. Figure MC.08-I02 - Mkt Campaign Happy New Year and its target's specification

The Mkt Campaign Happy New Year is split into three waves.

The Mkt Campaign Happy New Year targets High-Value Customers inactive for more than 14 days.

Each of the three waves targets sub-segments from the campaign:

- the sub-segment wave 1 addresses only customers with less than 30€ on the previous invoice

- the sub-segment wave 2 addresses only customers with the previous invoice between 30€ and 50€

the sub-segment wave 3 addresses only customers with more than 50€ on the previous invoice
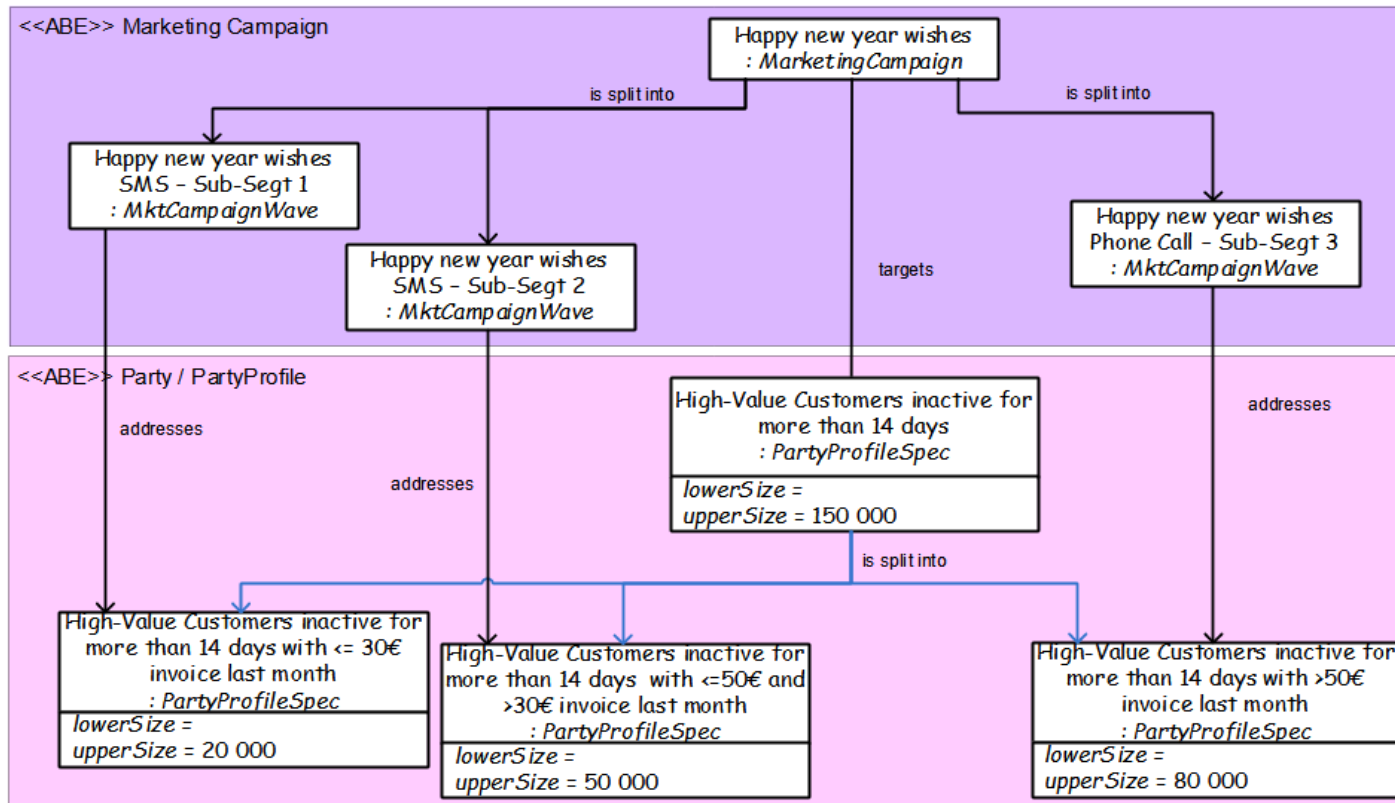
Figure MC.08-I02 - Mkt Campaign Happy New Year and its target's specification

4.6.9. Figure MC.08-I03 - Mkt Campaign Happy New Year's MktWaves

The Mkt Campaign Happy New Year is split into three waves.

The Mkt Campaign Happy New Year targets High-Value Customers inactive for more than 14 days.

Each of the three waves targets sub-segments from the campaign:

- the sub-segment wave 1 addresses only customers with less than 30€ on the previous invoice

- the sub-segment wave 2 addresses only customers with the previous invoice between 30€ and 50€

- the sub-segment wave 3 addresses only customers with more than 50€ on the previous invoice

Each of the three waves aims to place a different alteration with the "Data Top-Up" OfferSpecification:

- the sub-segment wave 1 aims to place 10% of alteration

- the sub-segment wave 2 aims to place 20% of alteration

- the sub-segment wave 3 aims to place 30% of alteration
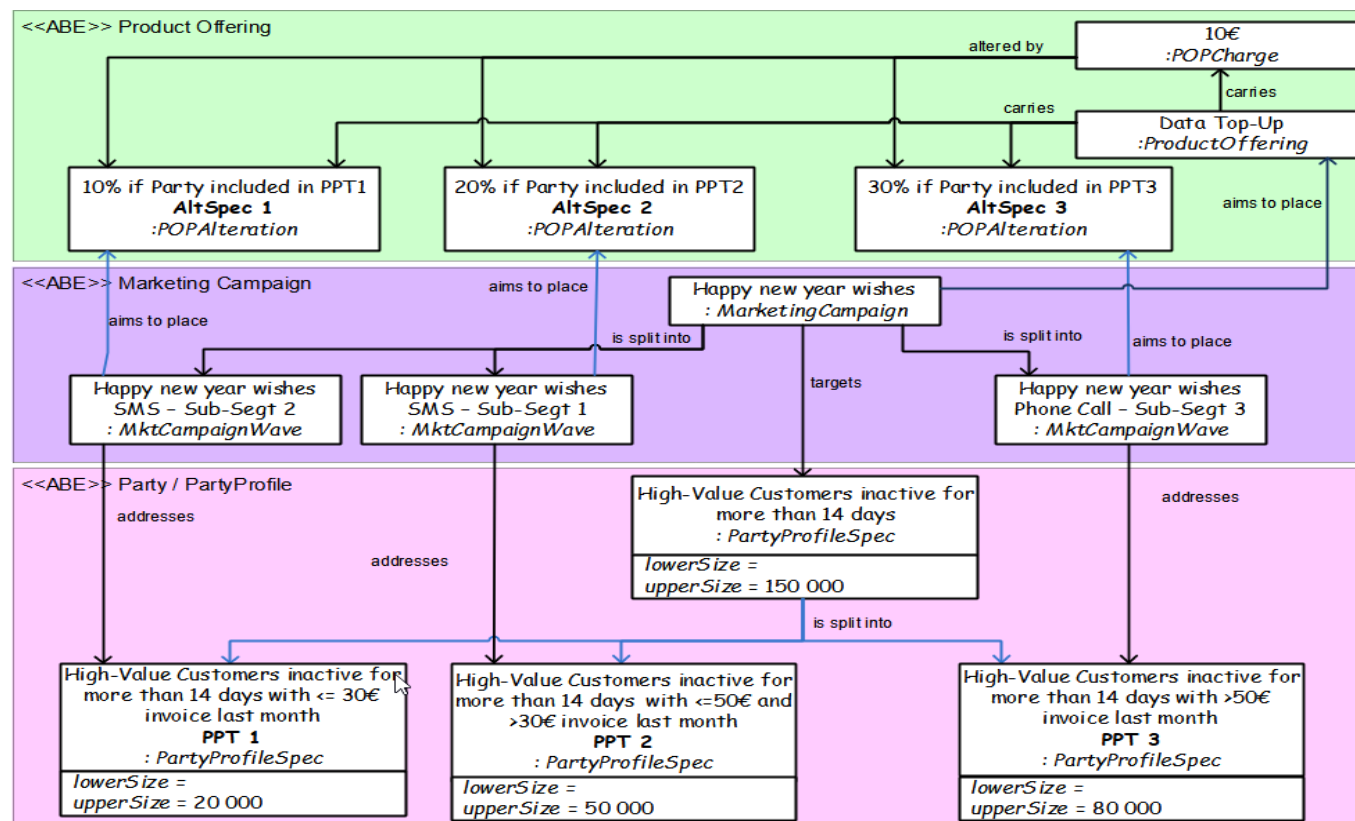
Figure MC.08-I03 - Mkt Campaign Happy New Year's MktWaves

4.6.10. Figure MC.08-I05 - Mkt Campaign Happy New Year: Wave List's results

When the WaveList 1 is executed, the first party contacted is Party 1.1.

The interaction happened November the 23rd and leads to an order of the "Data Top-Up" ProductOffering.
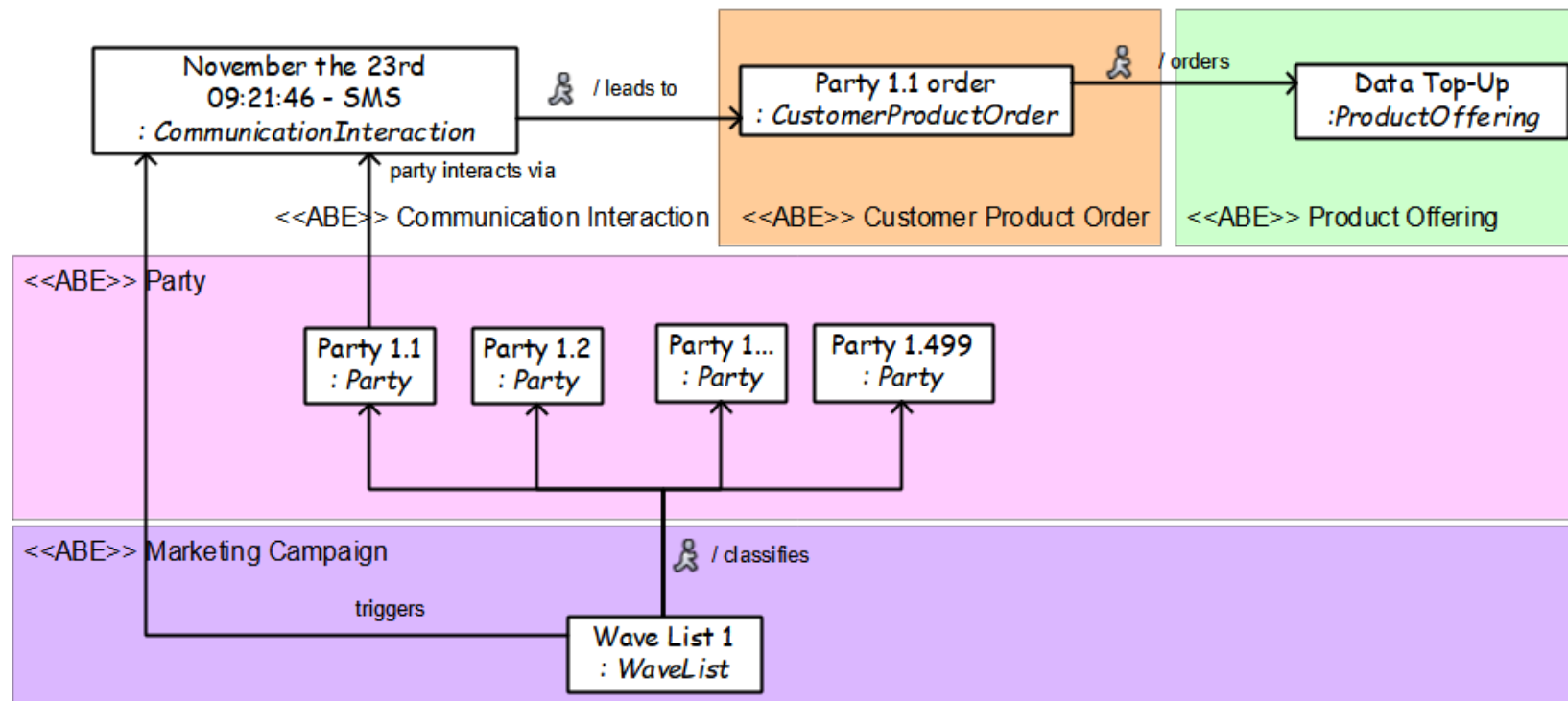
Figure MC.08-I05 - Mkt Campaign Happy New Year: Wave List's results

4.6.11.   Figure MC.09 - Marketing Budget

A Budget is a global class which contains the different budgets allocated to at least one Party. The Party might be an Organisation. A Budget might be split into several parts related to a sub-division of the initial Budget.

A CompositeBudget is broken down into Budgets atomic or not.

To find examples of CompositeBudget refer to the Marketing Campaign ABE.

A Budget specifies the unit used for each amount: allocated, forecasted and achieved.

A Marketing budget is a budget related to an OperationalMarketingPlan

- It concerns the different budgets (allocated, forecasted and achieved) for each Operational MarketingPlan item which can be split into several parts related to a sub-division of the initial budget;

- Each Composite OperationalMarketingPlan, AtomicOperationalMarketingPlan or MarketingCampaign will be concerned by a part of this budget.

Figure MC.09 - Marketing Budget

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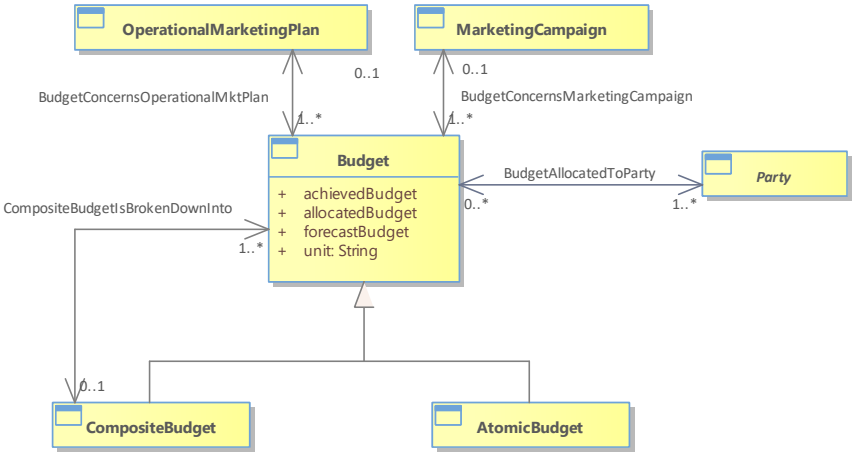
4.7. Marketing Performance ABE

Marketing Performance ABE contains all information used to define Marketing and Sales performance objectives and Marketing indicators measured.

4.7.1. Figure MP.01 - Marketing Objective and measures

A MetricDefinition defines for an Entity a group of measures with targeted values and associated actions when the thresholds aren't respected (MetricSpecMeasure).

A MetricMeasurementObservation calculates for an instance of Entity for a specific period, the values of measures that helps identifying actions to be applied when the thresholds aren't respected (MetricMeasure).

A MetricMeasurementObservation is described by a MetricDefinition.

A MetricMeasure is described by a MetricDefMeasure.

Marketing objective is a set of action in charge of to specify, CSP communications and presence according to strategic axes, to support product introductions and specific promotions to sell products, retain customers, and bring in new customers.

Example:

- drive profitable sales with marketing objectives such as sell on value, promote strategic products, improve sales cycle…

- grow customer profitability with marketing objectives such as retain & grow strategic accounts, customer P&L sales focus…

MarketingObjectiveDefinition is defined by metrics to evaluate with threshold that must be achieved and possibly actions that must be applied when the thresholds are not achieved. These metrics and thresholds are specified with MarketingIndicatorDef.

MarketingObjectiveDefinition is a type of MetricDefinition.

Each MarketingObjectiveDefinition might take part in one or many MarketingObjectiveDefinitions.

A MarketingIndicatorDefinition is a type of MetricDefMeasure in the context of OperationalMarketingPlans and / or MarketingCampaigns.

A MarketingObjectiveMeasure is a type of MetricMeasurementObservation described by a MarketingObjectiveDefinition and containing one or many MarketingIncators.

A MarketingIndicator is a type of MetricMeasure described by MarketingIndicatorDefinition that contains the result of a MaktIndicatorDefinition's evaluation for an instance of Entity for a specific period.

Figure MP.01 - Marketing Objective and measures

4.8. Sales Commission ABE

The Sales Commission ABE contains all Business Entities used to specify commissions for Sales Agent, Employees... including commission rules and commissions applied.

4.8.1. Figure SC.01 Sales Commission overview

The Figure "SC.01 – Sales Commission overview" presents the Sales Commission main entities.

The primary business entities in the Sales Commission model are SalesCommission, SalesCommissionSpecification and SalesCommissionSpecificationType.

- The SalesCommissionSpecification is the type of EntitySpecification which represents a sales commission specification as perceived by the business user and specifies how the commission is calculated at a functional level (i.e. what are the rules, which conditions are applicable). The commission might be a fixed value, a percentage or even a more complex formula.

- A SalesCommissionSpecificationType is a type of EntitySpecificationType and represents a classification that groups SalesCommissionSpecification that share common characteristics. For e.g. SalesCommissionSpefication "Sales" is composed of different Sales Categories "Handset", "Accessories" etc.

- SalesCommission is an Entity and it represents a form of remuneration (fixed value, percentage or formula) for services rendered or products sold by a sales agent.

The SalesCommissionSpecificationType categorises the SalesCommissionSpecification, one or more SalesCommissionSpecificationType can be used to provide SalesCommissionSpecification categories based upon e.g., Product (device/service) ProductUsage. SalesCommissionSpecification further defines the SalesCommission.

SalesCommissionSpecification is applicable for a PartyRoleSpecification (the specification used to describe the PartyRole).

SalesCommission is applied to the PartyRole (Sales Agent, Employee etc.).

Additional business entities, unique to a given enterprise, can be added to extend this model.
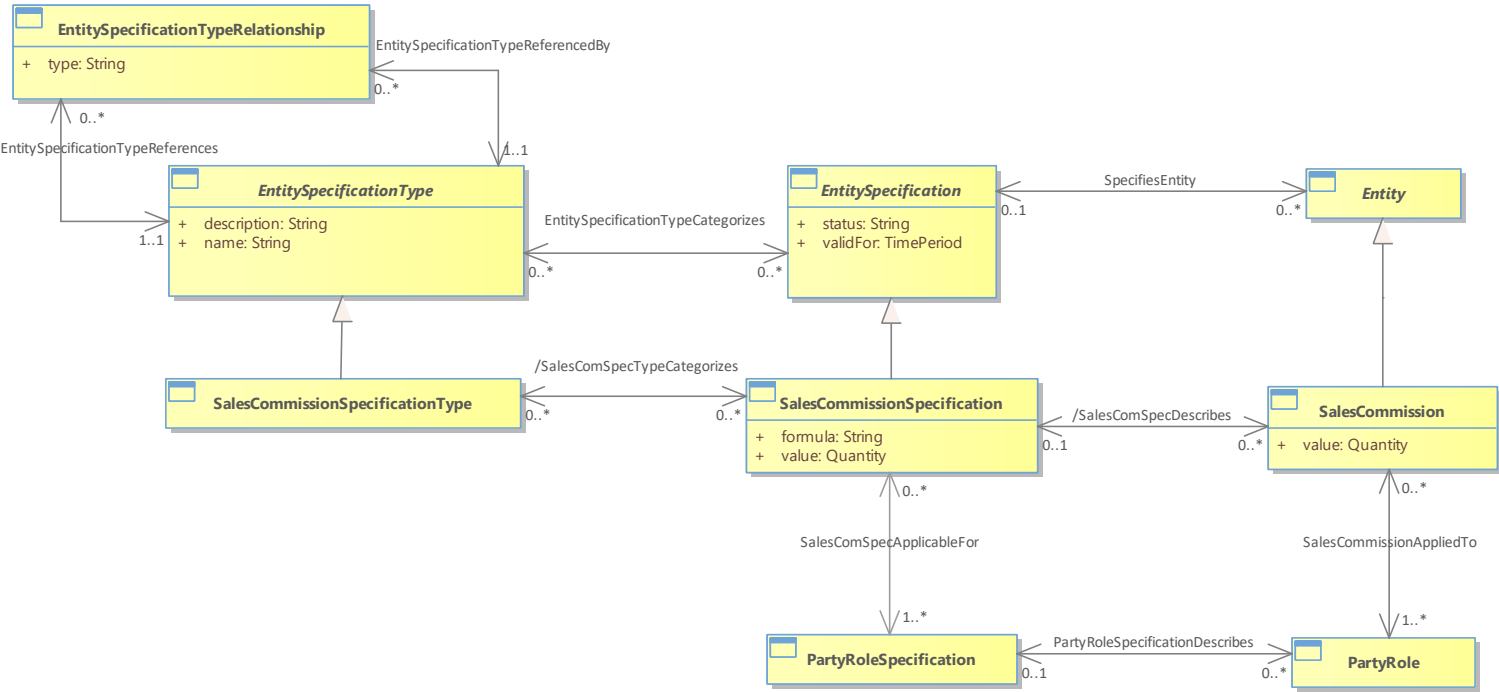
Figure SC.01 Sales Commission overview

4.8.2. Figure SC.01-I01 Sales Commission overview – SalesCommisionSpecification for Retail Sales Agent

John (PartyRole: employee) is an employee of the CSP and he is a RetailSalesAgent.

The CSP provides Sales Commission to the retail sales agents, when they achieve a Sales target.

Three commissions (SalesCommissionSpecification) are specified and triggered every first of a month (defined as SalesCommissionRule):

- for handset device sold 5% of total amount if total amount is above $100

- for accessory sold 6% of total amount if total amount is above $50

- for Usage Volume Products (such as $50 national calls) sold $1 for each Usage Volume Product equal or above $50
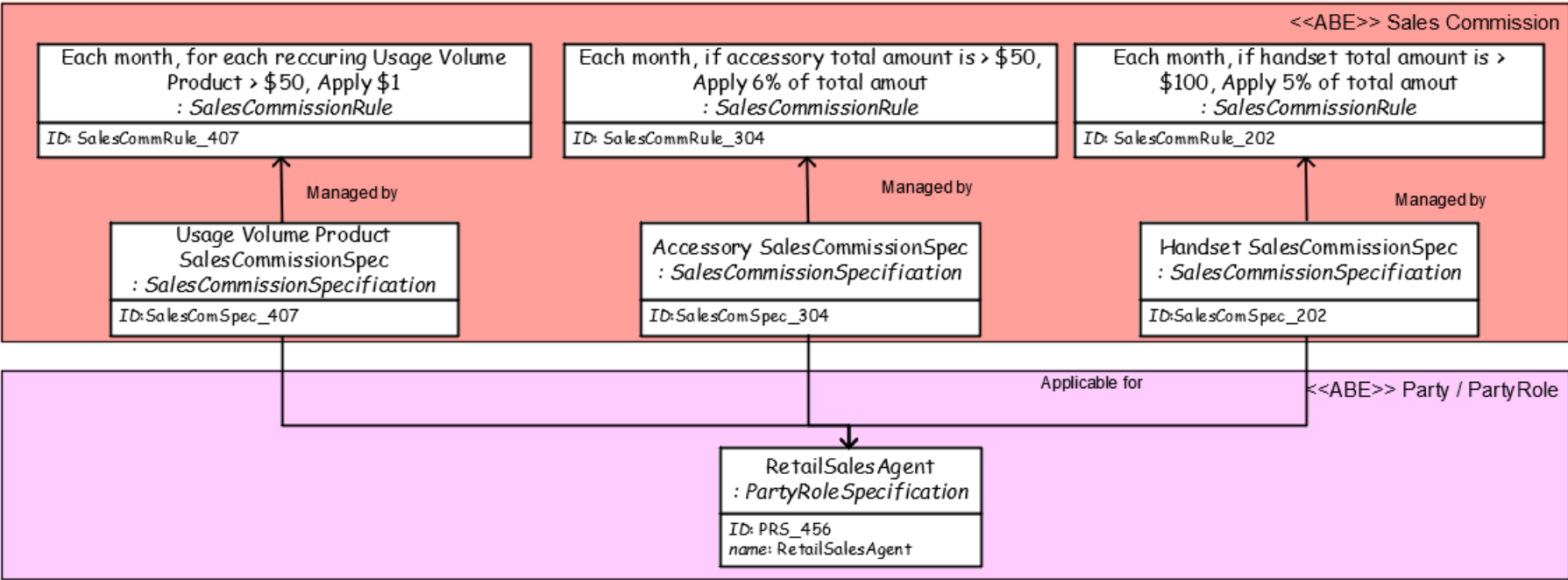
Figure SC.01-I01 Sales Commission overview – SalesCommisionSpecification for Retail Sales Agent

4.8.3. Figure SC.02 Sales Commission Specification

The Figure "SC.02 – Sales Commission Specification" presents the SalesCommissionSpecification main entities.

The primary business entities in the Sales Commission Specification model are SalesCommissionSpecification, SalesCommissionSpecificationType and SalesCommissionRule.

SalesCommissionSpecification are further managed by the SalesCommissionRule. Additional business entities, unique to a given enterprise, can be added to extend this model.

A SalesCommissionRule is a type of PolicyRule. The SalesCommissionRule is used to add complex rule, as the formula supplied as part of the SalesCommissionSpecification is simple in nature. The SalesCommissionRule specifies:

- Events triggering the evaluation of the rule (Sales Events)

    - Ex: Every first of a month, on reaching a predefined amount of sale or on the request of an employee/agent

- Conditions that need to be checked

    - Ex: If the invoice amount is above 100 $, If more than 2 hours of international call etc.,

- Actions that should be performed if the condition clause is evaluated to TRUE

    - Ex: Calculate the Sales Commission based upon percentage of the Sales Value.
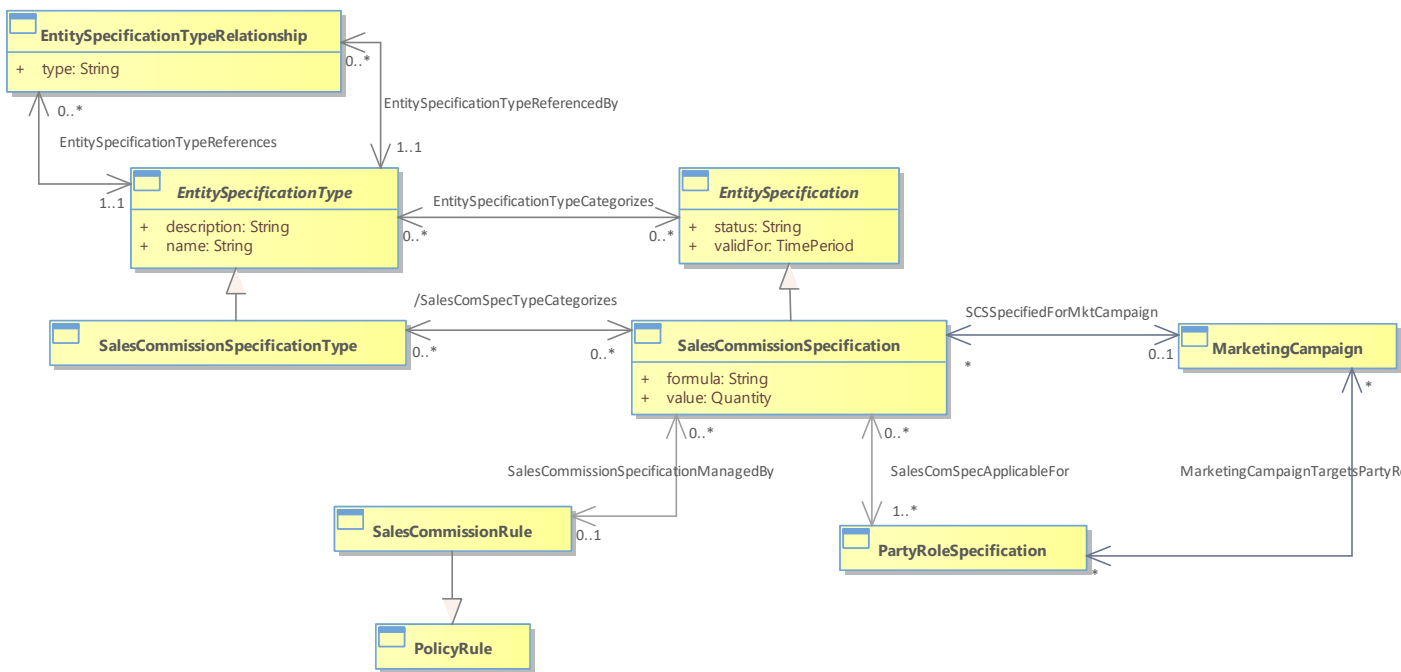
Figure SC.02 Sales Commission Specification

4.8.4. Figure SC.03 Sales Commission applied

The Figure "SC.03 – Sales Commission Applied" presents the SalesCommission main entities.

The primary business entities in the Sales Commission model are SalesCommission, SalesCommissionSpecification, CustomerProductOrder, Product and ProductUsage. SalesCommission is applied to the PartyRole (Sales Agent, Partner, Employee etc.,) and is applied as per the ProductUsage, CustomerProductOrderItem, or CustomerBill. Additional business entities, unique to a given enterprise, can be added to extend this model.

Figure SC.03 Sales Commission applied

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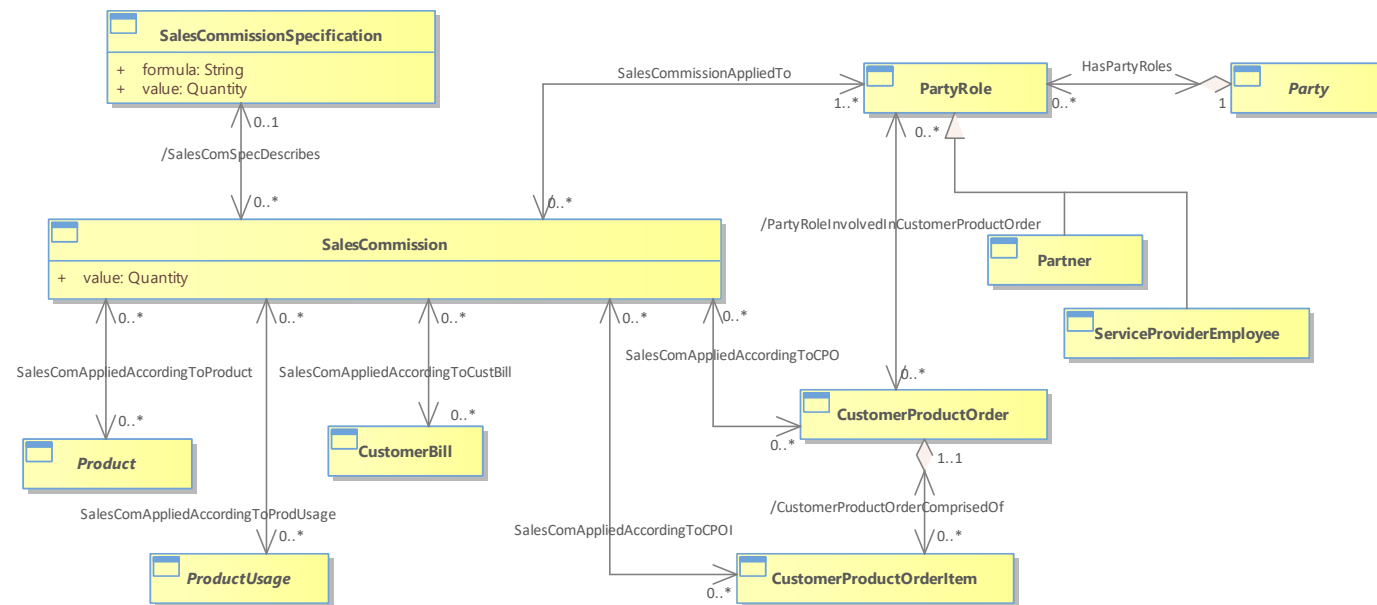
4.8.5. Figure SC.03-I01 Sales Commission context

Let's consider John has placed two orders in January

- One containing an iPhone 12 Pro Max for $200, AirPods Pro for $15 and a Big Usage Volume Package for $50

- The other containing a Samsung handset for $50, headset for $10 and a Small Usage Volume Package for $20

Figure SC.03-I01 Sales Commission context

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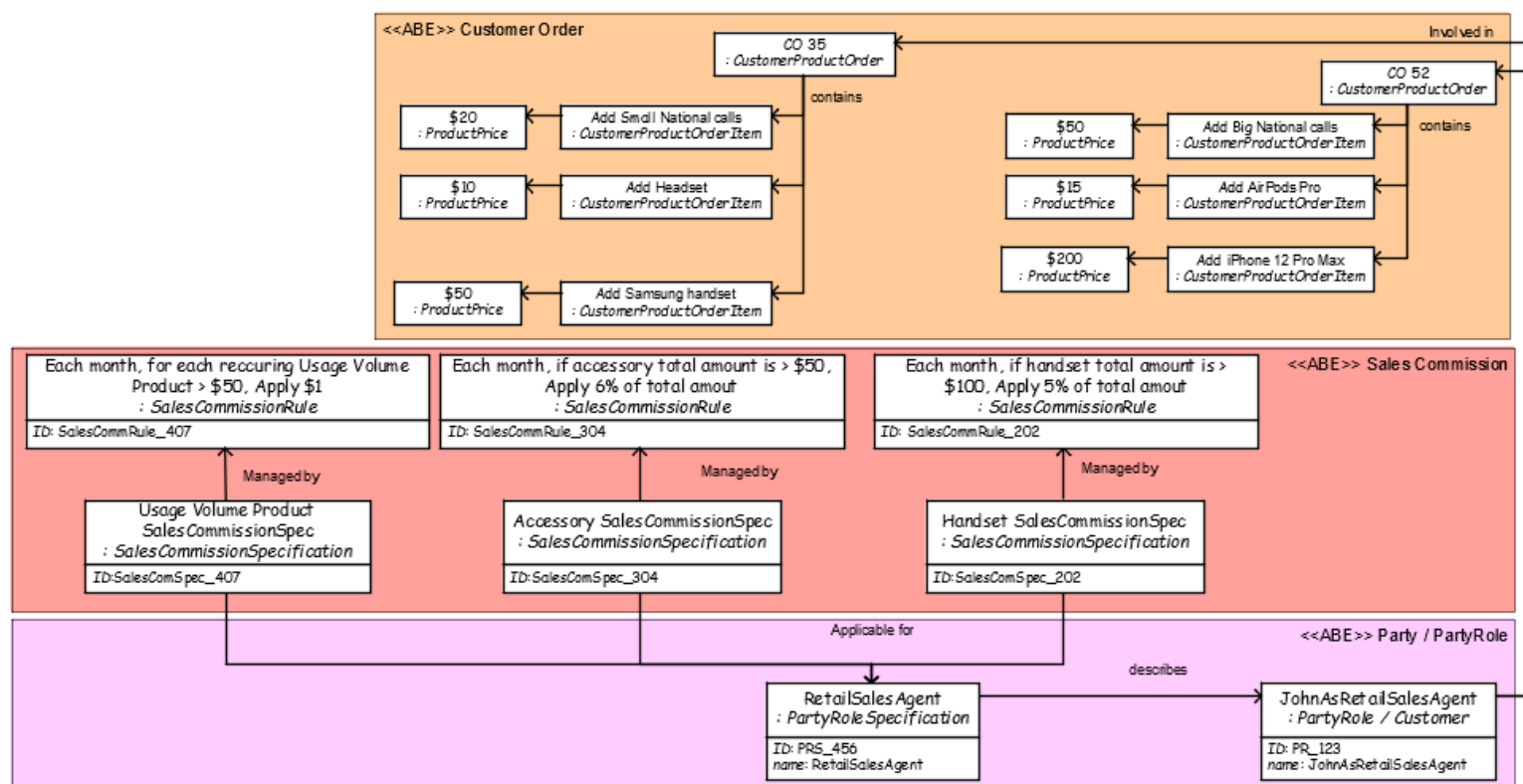
4.8.6. Figure SC.03-I02 Sales Commission applied

For January, the Handset commission for John is based on iPhone 12 Pro Max and Samsung handset he has sold.

The corresponding total amount is $250 ($200+$50). The Commission rule specifies the condition "if handset total amount is > $100", so the condition is True.

Then the formula is 5% of total amount, so $250 * 5% = $12.5.
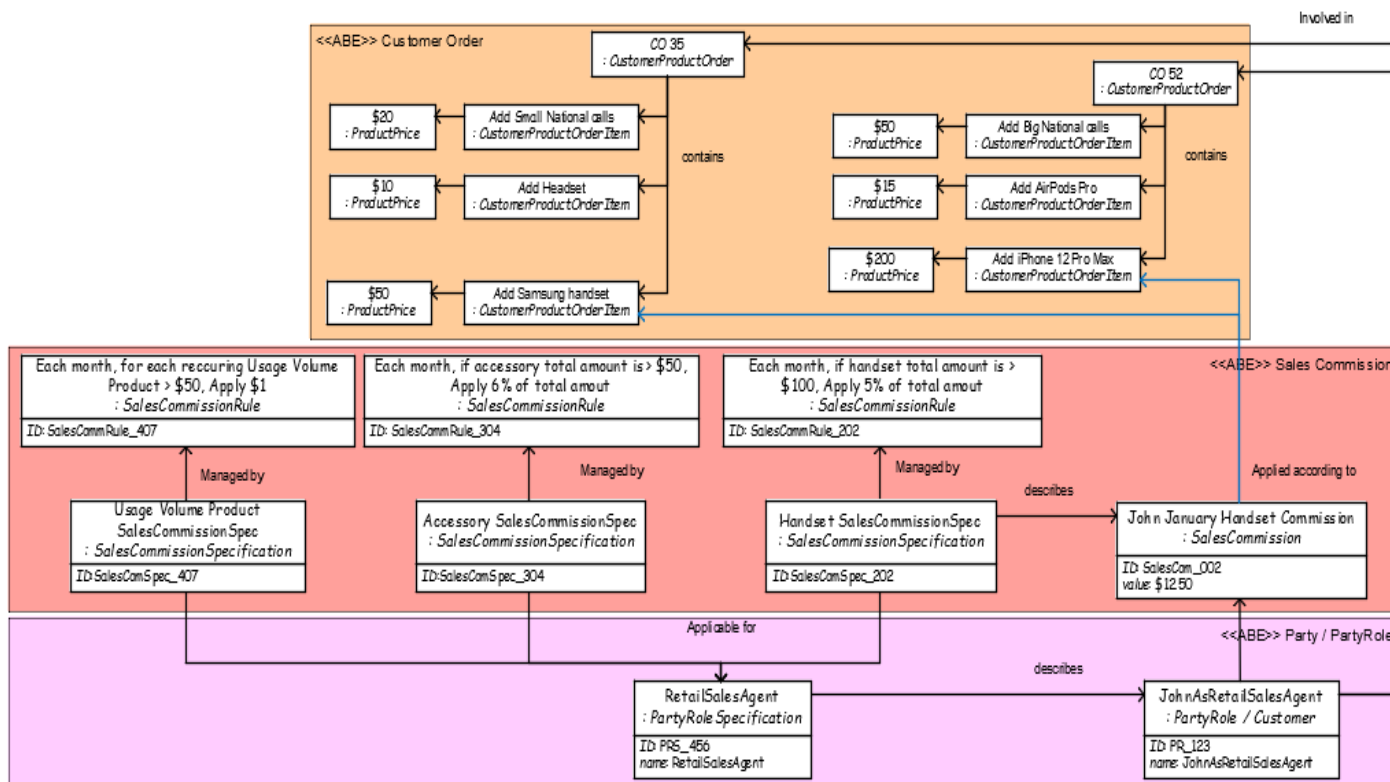
Figure SC.03-I02 Sales Commission applied

4.8.7. Figure SC.03-I03 Sales Commission applied

For January, the Accessory commission for John is based on AirPods Pro and Headset he has sold.

The corresponding total amount is $25 ($15+$10). The Commission rule specifies the condition "if accessory total amount is > $50", so the condition is False. John won't have any accessory commission in January.

For January, the Usage Volume commission for John is based on Big National calls and Small National calls he has sold.

The Commission rule specifies the condition "if Usage Volume price is > $50", so the condition is False for the small National calls and True for the Big National call. So commission is only applicable for the Big National calls.

So John will have $1 for the Usage Volume Product commission.
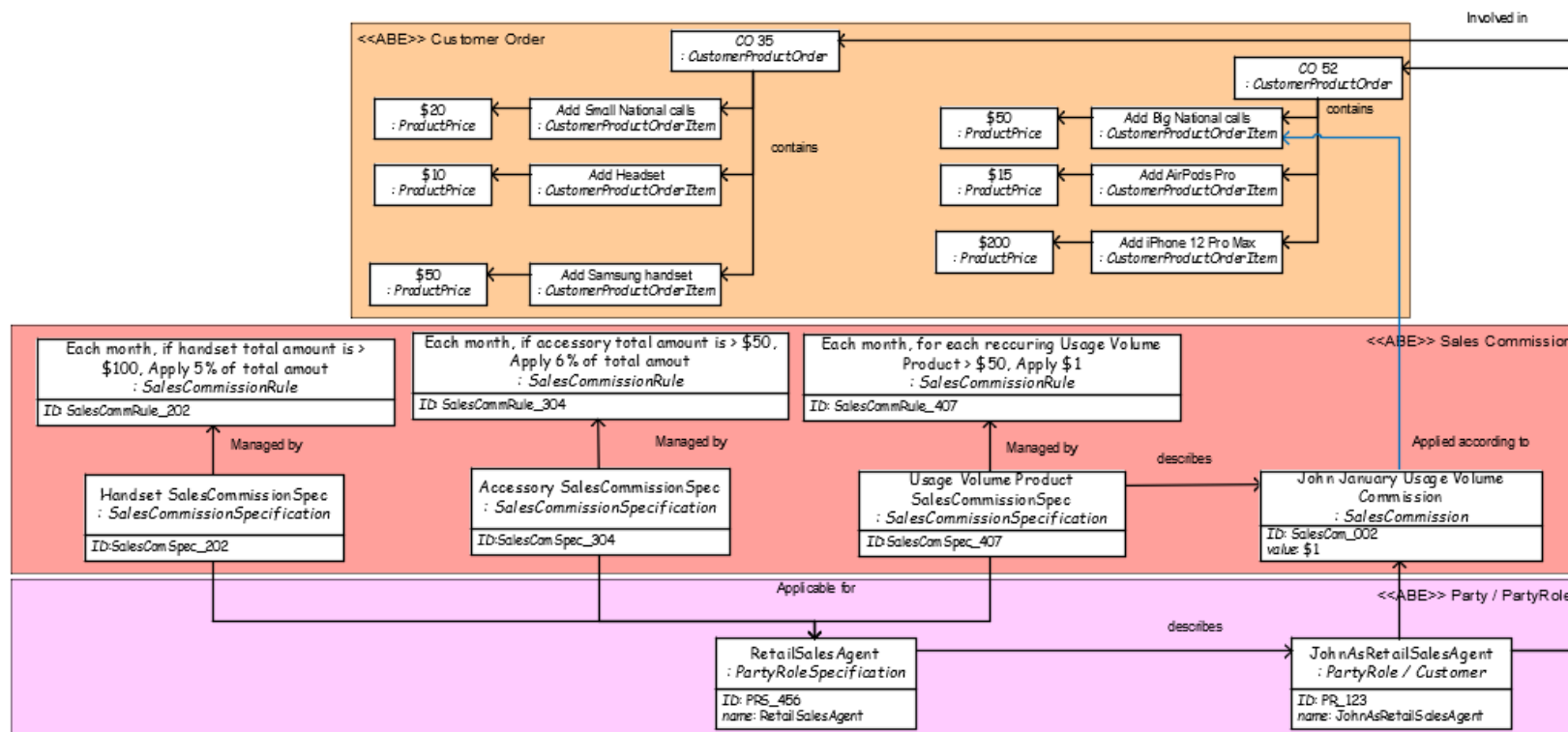
Figure SC.03-I03 Sales Commission applied

4.9. Sales Lead and Opportunity ABE

Sales Lead and Opportunity ABE provides the ability to track sales leads through their life cycle up until the time the prospect become customers, including proposals made to potential customers, and the amount of potential revenue the leads represent in the form of a sales pipeline.

4.9.1. Figure SLO.01 - SalesLead Overview

The SalesLead corresponds to the nominal result of an CommunicationInteraction involving a Prospect towards CSP's ProductOffering, ProductSpecification and / or ProductSpecificationType (the first stage (S) of the SPANCO process).

In a nominal way, once the interest (SalesLead) is confirmed, the Prospect clearly identified and the interest represent a complex requirement with an important possible revenue, then one or many SalesOpportunity are created according to the SalesLead.

PartyRoles are assigned to the SalesOpportunity such as the Seller.

Figure SLO.01 - SalesLead Overview

tmforum.org
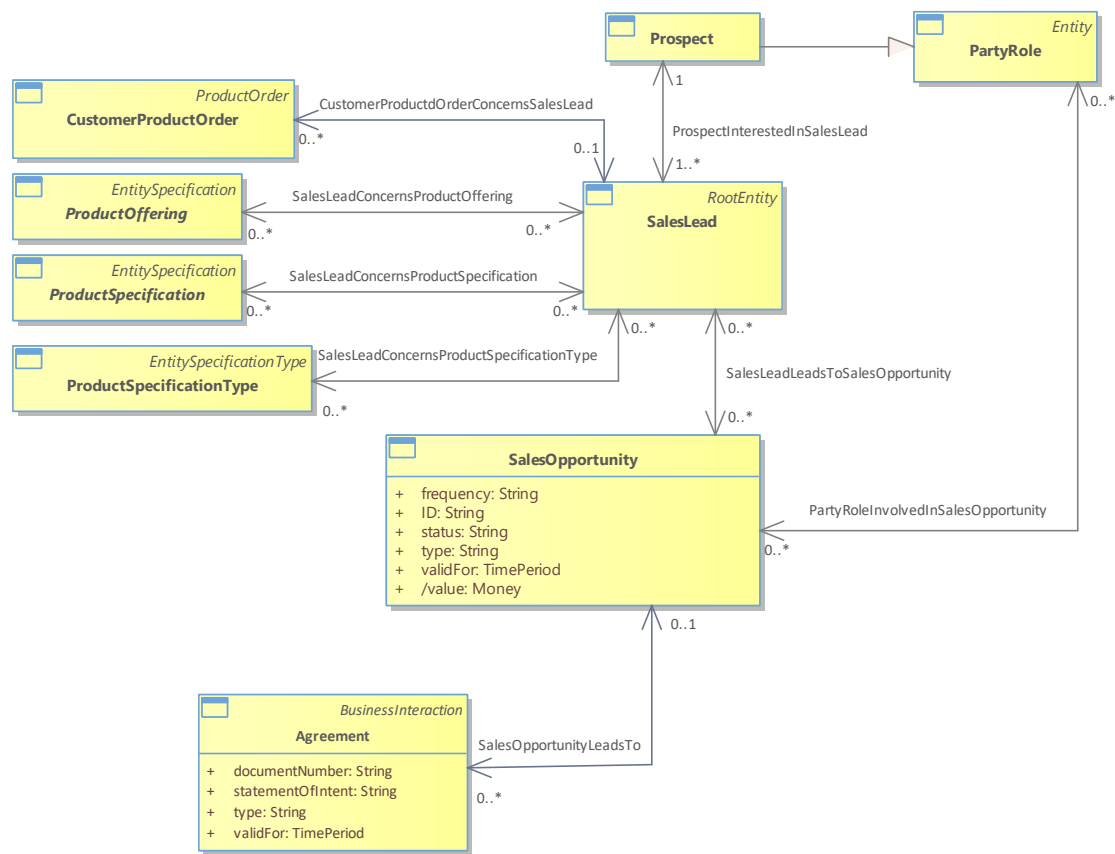
4.9.2. Figure SLO.02 - SalesOpportunity Overview

A SalesOpportunity is an opportunity to generate revenue from a Prospect that can already be an existing Customer. Opportunities are the pending deals that need to be tracked. Opportunities build the pipeline, which will contribute to the forecast. A SalesOpportunity represents an interest expressed by a Party known as a Prospect to at least one ProductOffering/ProductSpecification proposed by the CSP.

A SalesOpportunity contains one or many SalesOpportunityItems. Each SalesOpportunityItem details a wished ProductOffering.

A SalesProject is a type of Project which achieves a business goal in the context of a sale and concerns a SalesOpportunity. The aims of a SalesProject is to detail the need of the Prospect up to lead to Agreement(s) and / or CustomerProductOrders.

A SalesQuote is a document that allows a Prospect to view the cost involved in purchasing specific Products. It is generally used by suppliers or resellers to begin a business transaction and specifies validity period for acceptance of the quote and possibly an authorisation process depending on the value of the quote.

A SalesOpportunity may lead to one or many SalesQuotes.
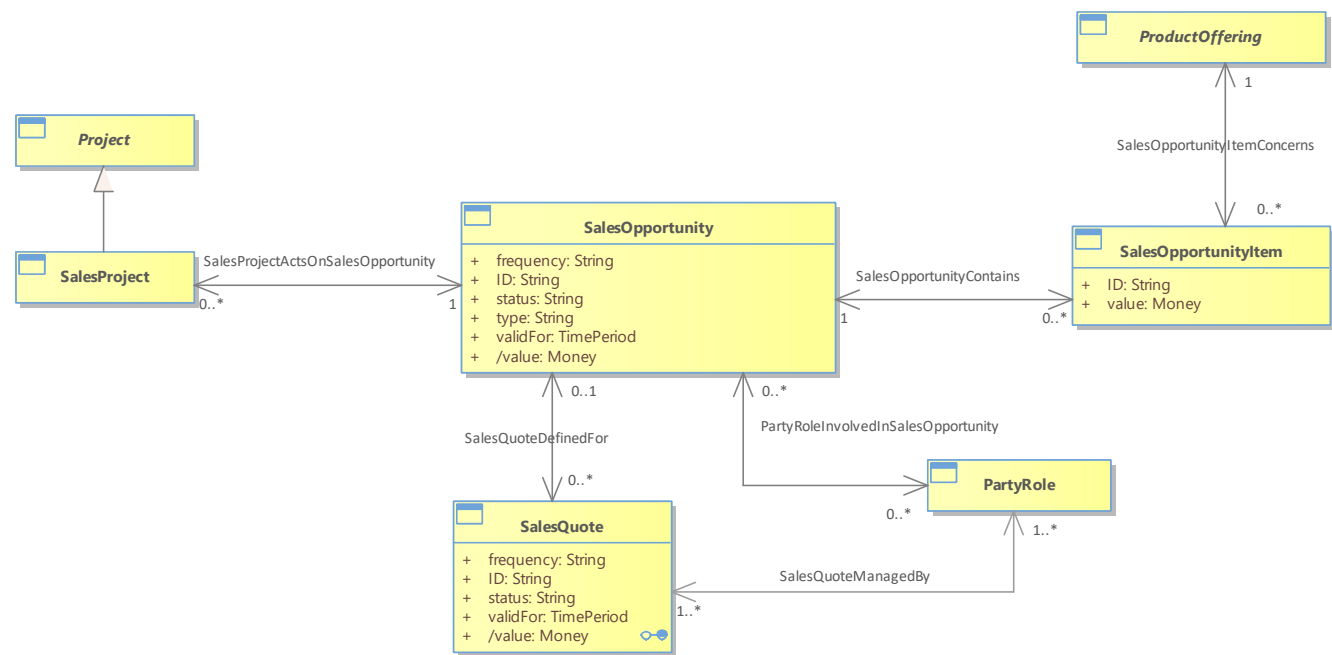
Figure SLO.02 - SalesOpportunity Overview

4.9.3. Sales Opportunity Life Cycle

- New : When a SalesLead is closed and converted, it becomes the default status of a SalesOpportunity.

- **Active** : When the opportunity has been progressed and work has been carried out on the Sales Opportunity. This can be further placed in the sub -status placed in the example below but not limited to the same

1. **Qualified** : When the opportunity has been qualified either internal to CSP based on the customer onboarding criteria or qualified by the prospect in the scenario of the bid process

2. **Negotiated**: Defines the opportunity negotiation status where the interaction takes place between prospect and CSP

3. **Proposed**: Defines the stage where the proposal to the offerings and Products takes place

- **Closed** : When the opportunity has been closed based on the final outcome of the interaction between CSP and Prospect

1. **Closed** - Won : The Sales Opportunity has been won and can be moved onto the Order process.

2. Closed - Lost : The Sales Opportunity has been lost based on the negotiation process or not meeting expected outcome

3. Closed - No Deal : The Sales Opportunity has been lost with no deal at the initial stage without any interaction.
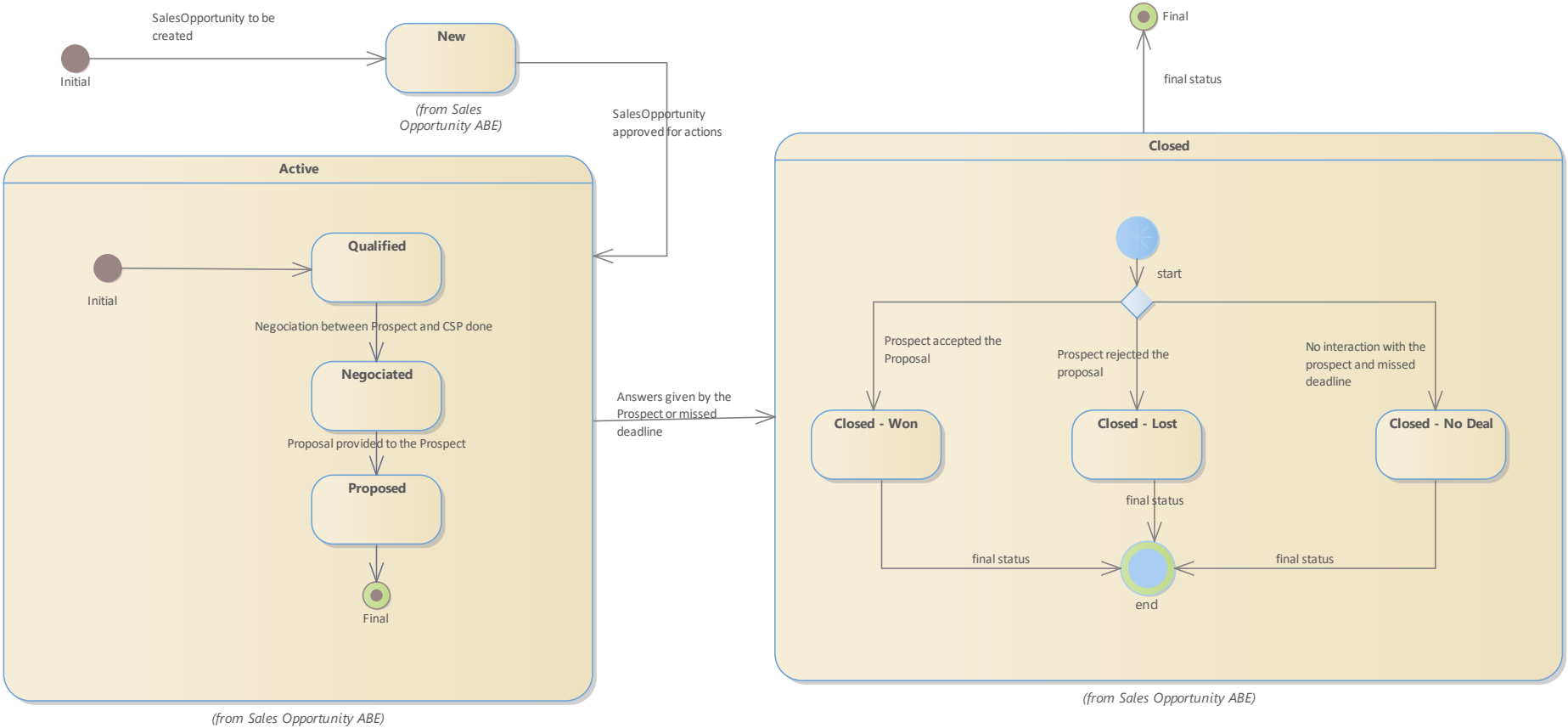
Sales Opportunity Life Cycle

4.9.4. Figure SLO.03 - SalesQuote Overview

A SalesOpportunity may lead to one or many SalesQuotes.

A SalesQuote is a document that allows a Prospect to view the cost involved in purchasing specific Products. It is generally used by suppliers or resellers to begin a business transaction and specifies validity period for acceptance of the quote and possibly an authorisation process depending on the value of the quote.

For specifying Products proposed, their configuration and the related cost, the SalesQuote proposes one or many CustomerProductOrders.

A SalesQuote might be described by a SalesQuoteSpecification.

SalesQuoteSpecification is used to define the common characteristics (attributes, constraints and relationships) of a SalesQuote i.e. CSP would have a pre-defined template (specification) to generate the quote for different customer segments &/or products.

  - e.g. SalesQuote specification might be different depending on type of products. The quote specs for broadband products will differ from those for mobile.

  - e.g. the SaleQuote specification might be different depending on the size of enterprise lead. The quote generated for SOHO (Small Office Home Office) may be in a different format to that for an SME (Small and Medium sized Enterprises).

  - e.g. MPLS multi-protocol label switching. Though it is one overarching complex product it has multiple subtypes of products that should be included in the SalesQuote.

Each SalesQuoteSpecification might be categorized by one or many SalesQuoteSpecificationType.

To be able to propose a SalesQuote to the Prospect, it might need to be validated internaly by the CSP. This is tracked through a SalesQuoteAgreement and its related AgreementApproval.

A SalesQuote might be represented by one or many Attachement such as a document that might be sent to the Prospect through an email. Several Attachements might be associated to the same SalesQuote for example if the validPeriod of the SalesQuote is updated, a new attachement is generated.
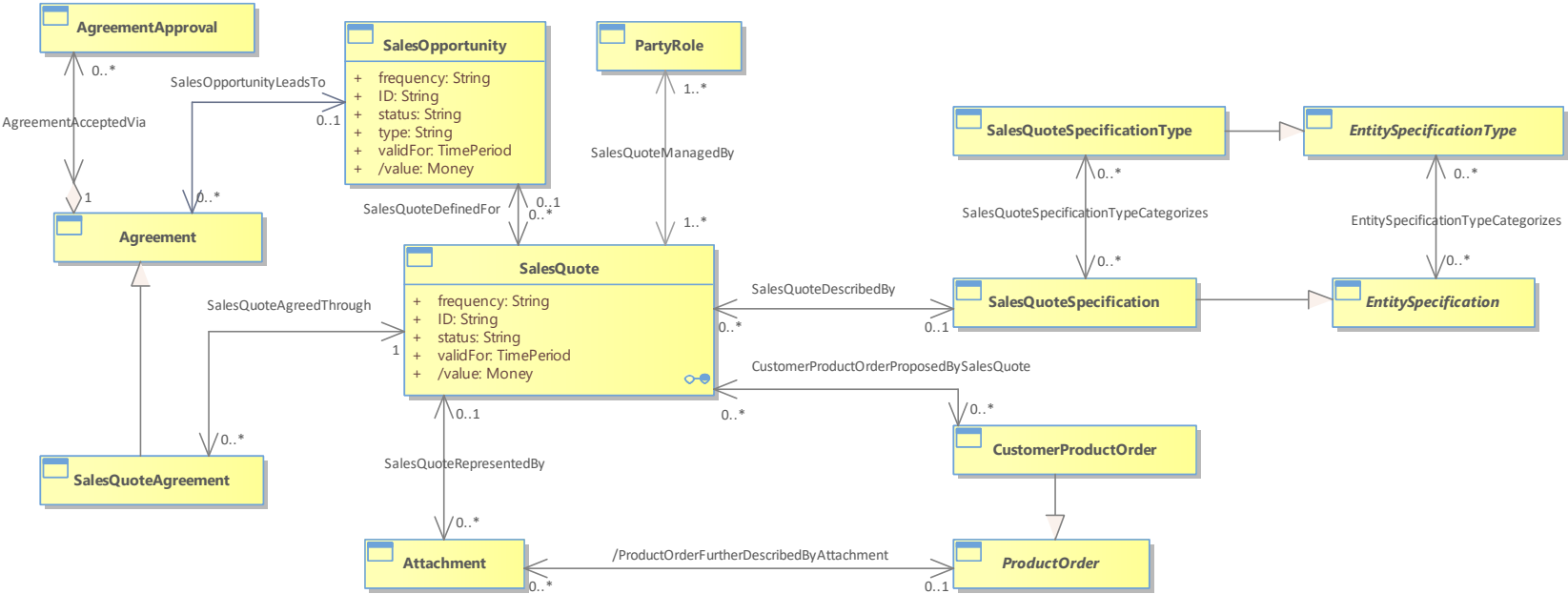
Figure SLO.03 - SalesQuote Overview

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4.9.5. Figure SLO.04 - Sales Lead and Opportunity Example

John (PartyRole: employee) is an employee for a CSP and works for the Sales team and is responsible to organise marketing and awareness events. The CSP holds a marketing event for Enterprises to provide details about the new 5G Network launch with slicing of the bandwidth, based upon the demand. From one of the popular automaker Michael registers for the event shows interest in the new offerings for the autonomous car product line.

John captures the details of the enterprise and Michael as a Sales Lead. The Organisation details are captured as a Sales Lead and the Michael as the point of contact in for the Sales Lead.

Based upon the discussions with Michael and others in the organisation the requirements information is captured as Sales Opportunity. The Sales team allocates a Sales Project and as part of the project multiple activities are performed and Sales Opportunity information is gathered at the SalesOpportunityItem level.

Based upon the Sales Opportunity an initial Quote is sent across to the Autocar maker's key stake holders. Once the Quote is agreed a Sales order is placed and the Sales lead is onboarded as a new customer.

- John generates a Lead for an Autocar Maker and capture the requirements for 5G slicing as a **SalesOpportunity**. The Lead details are captured as **Saleslead** and requirements are captured as a SalesOpportunity.

- John after talking to Michael and other colleagues of his understands that the Lead is of worth $1.5 Million annualy. John creates a **SalesProject** to track the detailed activities.

- One of the key Sales Project Activity is to capture the details of the Network slice and bandwidth with the year on expected growth. Based upon the clear requirements the SalesOpportunity individual **SalesOpportunityItems** are created.

- John and team works on sales project and start the work for the Initial **SalesQuote** that needs to be provided to Michael and team.

- Based upon the worth of the SaleQuote John acquires the necessary approvals within the CSP which is getting tracked in the **SalesQuoteAgreement** . Once the approvals are in place John creates a formal SalesQuote using the **SalesQuoteSpecification** based template for the SME.

- John shares across the SalesQuote targeting the individual requirements to Michael and his team at the Autocar Maker.

- Once the SalesQuote is agreed by the Autocar Maker the Autocar Maker places a CustomerProductOrder and onboards to the CSM as a new Customer.
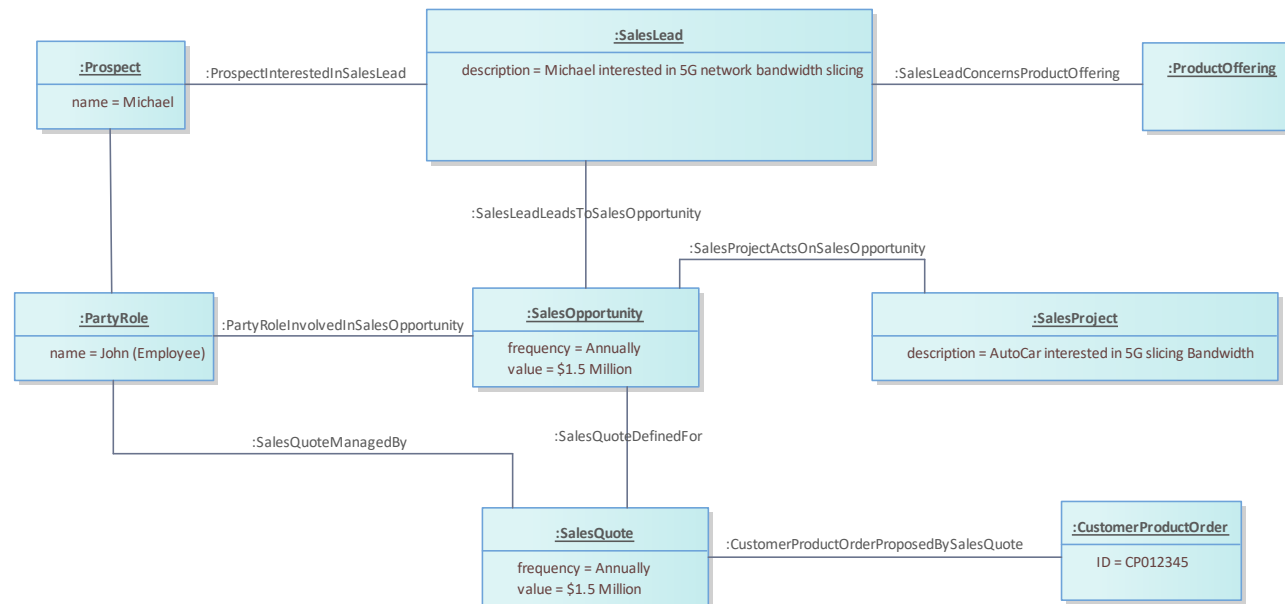
Figure SLO.04 - Sales Lead and Opportunity Example

4.9.6. Sales Opportunity ABE

Sales Opportunity ABE provides the ability to track pending deals and the amount of potential revenue the leads represent in the form of a sales pipeline including proposals made to potential customers.

4.9.6.1. Figure SO.01 - Sales Opportunity ABE Related Entities

Following are the business entities aggregated under the **Sales Opportunity** Aggregate Business Entity
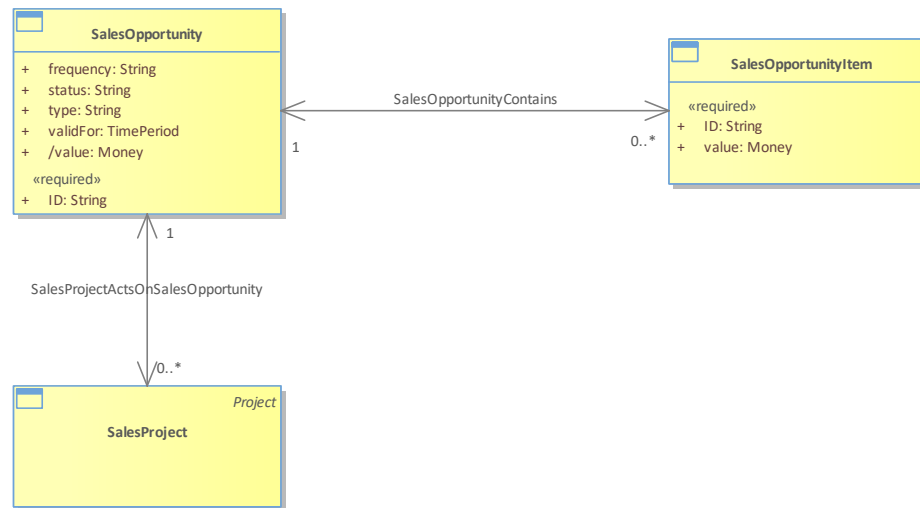
Figure SO.01 - Sales Opportunity ABE Related Entities

4.9.7. Sales Lead ABE

Sales Lead ABE provides the ability to track sales leads through their lifecycle up until the time the prospect becomes a customer.

4.9.7.1. Figure SL.01 - Sales Lead ABE Related Entities

Following are the business entities aggregated under the **SalesLead** Aggregate Business Entity
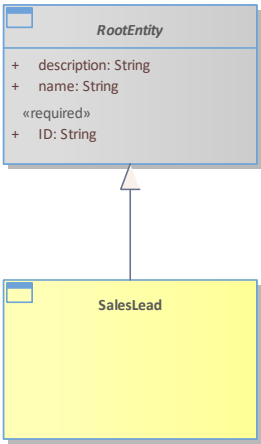
Figure SL.01 - Sales Lead ABE Related Entities

4.10. Market Sales Forecast ABE «notFullyDeveloped»

Market Sales Forecast ABE maintains market and sales forecasts, new service requirements, customer needs, and customer education.

4.11. Market Sales Statistics ABE «notFullyDeveloped»

The Market Sales Statistics maintains market and sales key performance indicators about Sales & Marketing revenue and sales channel performance.

4.11.1.   Figure MS.07 - Market Statistics and Related Entities

A MarketStatistic tracks performance measurements (some of which represent Key Marketing Performance Indicators, or KPIs) for both a service provider and a service provider's Competitors via an association to PartyRole. Performance measurements include churn and retention, usage patterns, take rates (procurement of a ProductOffering by the market), and market penetration. Any mix of ProductOfferings and ProductPromotions, MarketSegments, SalesChannels, and GeographicAreas can categorize the statistics over any time period. The figure below shows MarketStatistic and its related entities.

When a MarketStatistic represents a KPI, the CompositeMarketStatistic can be used to represent a roll-up of statistics. For example, manager level statistics can roll up to director level statistics, which in turn can roll up to enterprise officer level statistics.
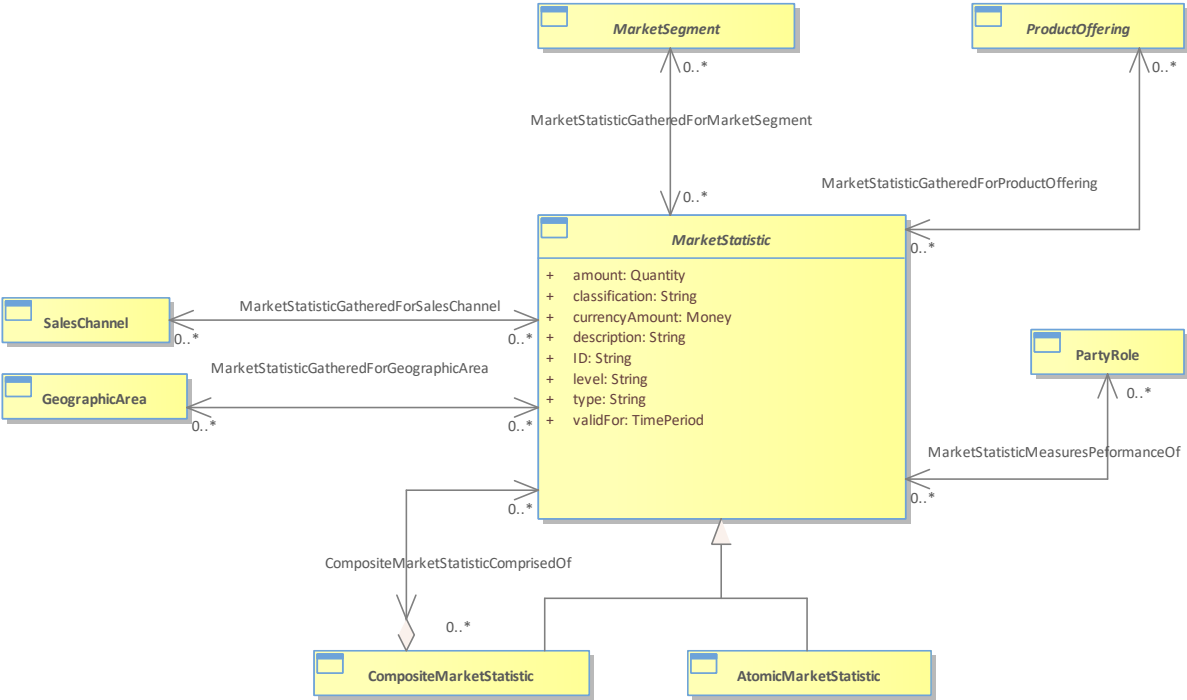
Figure MS.07 - Market Statistics and Related Entities

4.12. Sales Channel ABE «notFullyDeveloped»

Sales Channel ABE keeps track of distribution channels and sales activities, sales quotas, sales, contests, commission/bonus plans, commissions/bonuses, and maintain groups of individuals that make up the sales force.

5. Administrative Appendix

This Appendix provides additional background material about the TM Forum and this document. In general, sections may be included or omitted as desired; however, a Document History must always be included.

5.1. About this document

This is a TM Forum Guidebook. The guidebook format is used when:

The document lays out a 'core' part of TM Forum's approach to automating business processes. Such guidebooks would include the Telecom Operations Map and the Technology Integration Map, but not the detailed specifications that are developed in support of the approach.

Information about TM Forum policy, or goals or programs is provided, such as the Strategic Plan or Operating Plan.

Information about the marketplace is provided, as in the report on the size of the OSS market.

5.2. Document History

5.2.1. Version History

Version Number	Date Modified	Modified by:	Description of changes
1.0a	Aug 2004		First Draft
1.0b	Oct 2004		Completed draft Market domain entities and model
1.0c	Jul 2005	John Reilly	Updated based on team member feedback
1.1	November 2005	Tina O'Sullivan	Converted template and other minor changes.
1.2	November 2005	Tina O'Sullivan	Figure labels
1.3	November 2005	Tina O'Sullivan	Modified some figures to handle A4 or Letter.
1.4		Tina O'Sullivan	Updated notice statement & document status
2.0	March 2008	John Reilly	Updates to characteristics
2.1	July 2008	Tina O'Sullivan	Minor corrections.
2.2	May 2009	Alicja Kawecki	Minor updates to reflect TM Forum Approved status
2.3	January 2011	Josh Salomon	Update based on approved change requests

Version Number	Date Modified	Modified by:	Description of changes
2.4	March 2011	Alicja Kawecki	Updated Notice, minor formatting corrections prior to web posting and ME
2.5	September 2011	Alicja Kawecki	Updated to reflect TM Forum Approved status
2.5.1	November 2013	Alicja Kawecki	Applied rebranding, updated cover, header, footer & Notice
17.0.0	April 2017	Cécile Ludwichowski	Remove SID framework figure from the guide book
17.0.1	28 June 2017	Alicja Kawecki	Applied rebranding and minor cosmetic edits prior to publication for Fx17
17.0.2	22 Nov 2017	Adrienne Walcott	Minor cosmetic edits prior to publication
17.5.0	20 Nov 2017	Cécile Ludwichowski	fix attribute name
17.5.1	14 Dec 2017	Adrienne Walcott	Minor cosmetic edits prior to publication
17.5.2	06 Mar 2018	Adrienne Walcott	Updated to reflect TM Forum Approved Status
18.0.0	10-Jul-2018	Alan Pope	Updated for Release 18
18.0.1	11-Jul-2018	Adrienne Walcott	Formatting/style edits prior to R18 publishing.
18.0.2	09-Oct-2018	Adrienne Walcott	Updated to reflect TM Forum Approved Status
19.5.0	28-July-2019	Cécile Ludwichowski	Guide book generated from RSA with BIRT report.
21.0.0	03-June-2021	Cécile Ludwichowski	Adds Sales Commission ABE according to the Change Request SID - Introduce Sales Commission

Version Number	Date Modified	Modified by:	Description of changes
21.5.0	23-Nov-2021	Cécile Ludwichowski	Introduce Sales Lead, Prospect and Opportunity according to the Change Request https://projects.tmforum.org/jira/browse/FX-1137?src=confmacro
22.0.0	09-June-2022	Cécile Ludwichowski & Kevin Scaggs	Update Marketing Campaign, create Market & Sales Strategy Plan and Market Performance per ISA-366. Also, as part of this publication, the INformation Model was moved from RSA to Sparx Enterprise Architect.
23.0.0	16-June-2023	Kevin Scaggs	Updated Sales Lead & Opportunity ABE, including an example per ISA-712

5.2.2. Release History

Release Number	Date Modified	Modified by:	Description of changes
8.0	19 Jul 2008	John Reilly	Updates to characteristics
9.5	9 Feb 2011	Josh Salomon	Update based on approved change requests
17.0	April 2017	Cécile Ludwichowski	Remove SID framework figure from the guide book
17.0.1	November 2017	Adrienne Walcott	Updated to reflect TM Forum Approved Status
17.5.0	December 2017	Cécile Ludwichowski	fix attribute name
17.5.1	06 Mar 2018	Adrienne Walcott	Updated to reflect TM Forum Approved Status
18.0.0	30 May 2018	Cécile Ludwichowski	Change attribute "default" to "isDefault"
18.0.1	10-Oct-2018	Adrienne Walcott	Updated to reflect TM Forum Approved Status
19.5.0	28-July-2019	Cécile Ludwichowski	Guide book generated from RSA with BIRT report.
21.0.0	03-June-2021	Cécile Ludwichowski	Adds Sales Commission ABE according to the Change Request SID - Introduce Sales Commission
21.5.0	23-Nov-2021	Cécile Ludwichowski	Introduce Sales Lead, Prospect and Opportunity according to the Change Request https://projects.tmforum.org/jira/browse/FX-1137?src=confmacro
22.0.0	03-June-2022	Cécile Ludwichowski & Kevin Scaggs	Update Marketing Campaign, create Market & Sales Strategy Plan and Market Performance per ISA-366.

Release Number	Date Modified	Modified by:	Description of changes
			Also, as part of this publication, the INformation Model was moved from RSA to Sparx Enterprise Architect
23.0.0	16-June-2023	Kevin Scaggs	Updated Sales Lead & Opportunity ABE, including an example per ISA-712

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5.3. Acknowledgments

This document was prepared by the members of the TM Forum Information Framework (SID) team.

The Shared Information/Data Model is a genuinely collaborative effort. The TM Forum would like to thank the following people for contributing their time and expertise to the production of this document. It is just not possible to recognize all the organizations and individuals that have contributed or influenced the introduction. We apologize to any person or organization we inadvertently missed in these acknowledgments.

Key individuals that reviewed, provided input, managed, and determined how to utilize inputs coming from all over the world, and really made this document happen were:

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