

MR 9-26-07
DECLASSIFIED

CONFIDENTIAL

**FPSC
Docket No. 050863-TP**

**AT&T Florida's
Attachment to**

Item No. 1-3

**DECLASSIFIED
CONFIDENTIAL**

(P+ 1 of 5)
DOCUMENT NUMBER-DATE

07025 AUG-95 *AK*

PROPRIETARY

FPSC-COMMISSION CLERK

CUSTOMER	Npa State Cd	BTN	Source Dt	Prev Mth Amount	Pymnts	Adj	Bal Fwd	Curr Chrgs	LPC	Total Billed Amt	Other Charges & Credits
DPI TELECONNECT INC	FL	305Q888437	12/1/2004	\$517.55	\$0.00	\$0.00	\$517.55	\$207.34	11.85	\$736.74	114.95
DPI TELECONNECT INC	FL	561Q888437	12/1/2004	\$4,390.87	\$0.00	\$0.00	\$4,390.87	\$2,149.92	11.85	\$6,552.64	780.4
DPI TELECONNECT INC	FL	904Q888437	12/1/2004	\$30,902.38	\$0.00	\$0.00	\$30,902.38	\$15,094.22	11.85	\$46,008.45	5,127.39
DPI TELECONNECT INC	FL	305Q888437	1/1/2005	\$736.74	(\$470.70)	\$0.00	\$266.04	\$71.57	12.5	\$350.11	-1.69
DPI TELECONNECT INC	FL	561Q888437	1/1/2005	\$6,552.64	(\$4,390.87)	\$0.00	\$2,161.77	\$2,156.22	12.5	\$4,330.49	835.18
DPI TELECONNECT INC	FL	904Q888437	1/1/2005	\$46,008.45	(\$15,292.74)	\$0.00	\$30,715.71	\$12,648.74	12.5	\$43,376.95	3,387.35
DPI TELECONNECT INC	FL	305Q888437	2/1/2005	\$350.11	(\$254.19)	\$0.00	\$95.92	\$118.97	12.5	\$227.39	45.71
DPI TELECONNECT INC	FL	561Q888437	2/1/2005	\$4,330.49	\$0.00	\$0.00	\$4,330.49	\$2,260.87	12.5	\$6,603.86	776.01
DPI TELECONNECT INC	FL	904Q888437	2/1/2005	\$43,376.95	\$0.00	\$0.00	\$43,376.95	\$16,014.29	12.5	\$59,403.74	6,022.81
DPI TELECONNECT INC	FL	305Q888437	3/1/2005	\$227.39	\$0.00	\$0.00	\$227.39	\$140.54	12.5	\$380.43	47.89
DPI TELECONNECT INC	FL	561Q888437	3/1/2005	\$6,603.86	\$0.00	\$0.00	\$6,603.86	\$2,390.41	12.5	\$9,006.77	754.83
DPI TELECONNECT INC	FL	904Q888437	3/1/2005	\$59,403.74	\$0.00	\$0.00	\$59,403.74	\$13,968.04	12.5	\$73,384.28	3,657.64
DPI TELECONNECT INC	FL	305Q888437	4/1/2005	\$380.43	(\$190.54)	(\$98.63)	\$91.26	\$59.31	12.5	\$163.07	-14.21
DPI TELECONNECT INC	FL	561Q888437	4/1/2005	\$9,006.77	\$0.00	(\$8,735.58)	\$271.19	\$1,720.84	12.5	\$2,004.53	391.52
DPI TELECONNECT INC	FL	904Q888437	4/1/2005	\$73,384.28	(\$30,715.71)	\$0.00	\$42,668.57	\$11,085.38	12.5	\$53,766.45	2,628.09
DPI TELECONNECT INC	FL	305Q888437	5/1/2005	\$163.07	\$0.00	\$0.00	\$163.07	\$36.72	12.5	\$212.29	-17.41
DPI TELECONNECT INC	FL	561Q888437	5/1/2005	\$2,004.53	\$0.00	(\$148.58)	\$1,855.95	\$1,500.20	12.5	\$3,368.65	548.27
DPI TELECONNECT INC	FL	904Q888437	5/1/2005	\$53,766.45	\$0.00	(\$51,807.28)	\$1,959.17	\$9,646.44	0	\$11,605.61	2,988.82
DPI TELECONNECT INC	FL	305Q888437	6/1/2005	\$212.29	\$0.00	\$0.00	\$212.29	\$110.95	12.5	\$335.74	51.44
DPI TELECONNECT INC	FL	561Q888437	6/1/2005	\$3,368.65	\$0.00	(\$0.70)	\$3,367.95	\$1,880.64	12.5	\$5,261.09	864.16
DPI TELECONNECT INC	FL	904Q888437	6/1/2005	\$11,605.61	\$0.00	\$0.00	\$11,605.61	\$7,743.92	12.5	\$19,362.03	1,493.09
DPI TELECONNECT INC	FL	305Q888437	7/1/2005	\$335.74	\$0.00	\$0.00	\$335.74	\$93.21	12.5	\$441.45	38.42
DPI TELECONNECT INC	FL	561Q888437	7/1/2005	\$5,261.09	\$0.00	\$0.00	\$5,261.09	\$1,526.32	12.5	\$6,799.91	501.05
DPI TELECONNECT INC	FL	904Q888437	7/1/2005	\$19,362.03	\$0.00	(\$9.80)	\$19,352.23	\$7,797.24	12.5	\$27,161.97	2,252.51
DPI TELECONNECT INC	FL	305Q888437	8/1/2005	\$441.45	\$0.00	\$0.00	\$441.45	\$306.01	12.5	\$759.96	178.5
DPI TELECONNECT INC	FL	561Q888437	8/1/2005	\$6,799.91	\$0.00	(\$1,043.43)	\$5,756.48	\$1,773.75	12.5	\$7,542.73	619.76
DPI TELECONNECT INC	FL	904Q888437	8/1/2005	\$27,161.97	\$0.00	(\$2,241.89)	\$24,920.08	\$8,828.64	12.5	\$33,761.22	3,212.32
DPI TELECONNECT INC	FL	305Q888437	9/1/2005	\$759.96	\$0.00	\$0.00	\$759.96	\$50.80	12.5	\$823.26	-17.32
DPI TELECONNECT INC	FL	561Q888437	9/1/2005	\$7,542.73	\$0.00	(\$7.40)	\$7,535.33	\$1,632.09	12.5	\$9,179.92	627.99
DPI TELECONNECT INC	FL	904Q888437	9/1/2005	\$33,761.22	\$0.00	\$0.00	\$33,761.22	\$7,869.53	12.5	\$41,643.25	2,346.02
DPI TELECONNECT INC	FL	305Q888437	10/1/2005	\$823.26	\$0.00	(\$76.43)	\$746.83	\$134.08	12.5	\$893.41	44.03
DPI TELECONNECT INC	FL	561Q888437	10/1/2005	\$9,179.92	\$0.00	(\$735.19)	\$8,444.73	\$1,753.13	12.5	\$10,210.36	617.72
DPI TELECONNECT INC	FL	904Q888437	10/1/2005	\$41,643.25	\$0.00	(\$3,859.41)	\$37,783.84	\$7,645.48	12.5	\$45,441.82	2,356.99
DPI TELECONNECT INC	FL	305Q888437	11/1/2005	\$893.41	(\$725.08)	\$0.00	\$168.33	\$304.08	12.5	\$484.91	141.19
DPI TELECONNECT INC	FL	561Q888437	11/1/2005	\$10,210.36	(\$3,189.92)	\$0.00	\$7,020.44	\$1,507.70	12.5	\$8,540.64	493.47
DPI TELECONNECT INC	FL	904Q888437	11/1/2005	\$45,441.82	(\$14,093.00)	(\$0.48)	\$31,348.34	\$7,945.19	12.5	\$39,306.03	2,524.99
DPI TELECONNECT INC	FL	305Q888437	12/1/2005	\$484.91	\$0.00	\$0.00	\$484.91	\$403.10	12.5	\$900.51	152.84
DPI TELECONNECT INC	FL	561Q888437	12/1/2005	\$8,540.64	(\$1,842.12)	(\$3.80)	\$6,694.72	\$1,578.81	12.5	\$8,286.03	492.7
DPI TELECONNECT INC	FL	904Q888437	12/1/2005	\$39,306.03	\$0.00	(\$12.90)	\$39,293.13	\$7,220.83	12.5	\$46,526.46	1,801.80
DPI TELECONNECT INC	FL	305Q888437	1/1/2006	\$900.51	(\$304.08)	\$0.00	\$596.43	\$211.21	12.5	\$820.14	-8.69
DPI TELECONNECT INC	FL	561Q888437	1/1/2006	\$8,286.03	(\$2,221.16)	(\$11.90)	\$6,052.97	\$1,428.15	12.5	\$7,493.62	341.21
DPI TELECONNECT INC	FL	904Q888437	1/1/2006	\$46,526.46	\$0.00	(\$148.39)	\$46,378.07	\$7,699.97	12.5	\$54,090.54	2,216.96
DPI TELECONNECT INC	FL	305Q888437	2/1/2006	\$820.14	\$0.00	\$0.00	\$820.14	\$913.33	12.5	\$1,745.97	462.06
DPI TELECONNECT INC	FL	561Q888437	2/1/2006	\$7,493.62	\$0.00	(\$472.17)	\$7,021.45	\$2,390.34	12.5	\$9,424.29	967.55
DPI TELECONNECT INC	FL	904Q888437	2/1/2006	\$54,090.54	\$0.00	(\$1,951.46)	\$52,139.08	\$9,401.14	12.5	\$61,552.72	3,256.76
DPI TELECONNECT INC	FL	305Q888437	3/1/2006	\$1,745.97	(\$614.31)	(\$134.98)	\$996.68	\$292.17	12.5	\$1,301.35	37.25
DPI TELECONNECT INC	FL	561Q888437	3/1/2006	\$9,424.29	(\$1,624.69)	(\$125.70)	\$7,673.90	\$1,445.97	12.5	\$9,132.37	319.85
DPI TELECONNECT INC	FL	904Q888437	3/1/2006	\$61,552.72	\$0.00	(\$603.30)	\$60,949.42	\$6,697.24	12.5	\$67,659.16	1,480.37
DPI TELECONNECT INC	FL	305Q888437	4/1/2006	\$1,301.35	\$0.00	(\$129.00)	\$1,172.35	\$389.79	12.5	\$1,574.64	222.55
DPI TELECONNECT INC	FL	561Q888437	4/1/2006	\$9,132.37	(\$1,930.26)	(\$412.48)	\$6,789.63	\$2,375.16	12.5	\$9,177.29	1,151.63
DPI TELECONNECT INC	FL	904Q888437	4/1/2006	\$67,659.16	(\$5,476.89)	(\$1,046.95)	\$61,135.32	\$7,924.35	12.5	\$69,072.17	3,353.64
DPI TELECONNECT INC	FL	305Q888437	5/1/2006	\$1,574.64	(\$970.53)	(\$5.30)	\$598.81	\$278.85	12.5	\$890.16	97.86
DPI TELECONNECT INC	FL	561Q888437	5/1/2006	\$9,177.29	(\$1,115.34)	\$0.00	\$8,061.95	\$1,379.99	12.5	\$9,454.44	522.28
DPI TELECONNECT INC	FL	904Q888437	5/1/2006	\$69,072.17	(\$9,464.14)	(\$5.96)	\$59,602.07	\$5,896.24	12.5	\$65,510.81	1,876.07

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FPSC

Docket No. 050863-TP

**AT&T Florida's
Attachment to**

Item No. 1-16

MM S.S.09
DECLASSIFIED

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*(pt 2 of 5)
DN 07025-07
8-9-07*

PROPRIETARY

Item 1-16: 000001

M O B I 772 794 3967 12 / 16 / 04 DRGB89R9 CPX3560 ORDER DISPLAY
004 UP PQFS

772-794-3967 967 BILL DATE 12-16-04 DRGB89R9 CPX3560

PAGE 1

CPX772562AM Y N
772 794-3967 96720041216VBR 20041216100820041216
DRGB89R9A 4COUEPRXYAQBML20041216
ZRTI V, QS, 800 773-4967, RM, 205714
CENT ROY
AECN 104B, UEPRX
OTTRA772 562
QS N
RRSO NR1RMHW7

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OLN CROWNOVER, DALE
OLA 1422 16TH S*T, VERO BEACH
OSA 1422 16TH ST, VERO BCH, FL
OLOC APT 25
ODZIP32960

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BN1 DEI TELECONNECT

PAGE 1 OF 4 MORE...
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PF7=MAIN PF8=SCROLL PF11=BACK PRINTER ID:

DECLASSIFIED

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 BA3 2997 LBJ FREEWAY
 BA4 #225
 PO DALLAS TX 75234
 TAR 052,805
 BTN 561 Q96-8453-453
 IPON 50384273C
 IDCR BC
 MAN C104B
 BIR BSBDB
 BIR BSBON
 ---S&E
 O1 UEPRC
 /TN 772 794-3967
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ORDER DISPLAY
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PF6=FAX

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O1 NSS

PAGE 2 OF 4 MORE...

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D04 UP

ORDER DISPLAY
PQFS
PAGE 3

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ARIM, 800 414-2065
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01 SOMEC

PAGE 3 OF 4 MORE...

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PF7=MAIN PF8=SCROLL PF11=BACK PRINTER ID:

DECLASSIFIED

M O B I 772 794 3967 12 / 16 / 04 DRGB89R9 CPX3560 ORDER DISPLAY
D04 UP PQFS

/BI WNR

---RMKS

ZCBR 800 414-2065

RMK DISCONNECT PER CLEC

RMK (2) FOC

---ASGM

RCSO CRREULRMHW7

G1 TN 772 794-3967

FA 1422 16TH ST, VERO BCH, FL/LOC

APT 25/RT 3101/RZ 13

OOE 00014-00000-53/EXK 772 562/TN

772 794-3967/LPS/DF

F13-02-191G

G2 WC 772 567

OF1 /CA 4/PR 636/DF F13-01-079V

/PRQ Y/BP 336/OBP 110/TEA R

1429 19TH PL; EXJ/TPR 310104

/RMTE ISDN COMPATIBLE

OF2 /CA 1429FL19/PR 110/BP 10/TEA

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MORE...

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PF6=FAX

PF7=MAIN PF8=SCROLL

PF11=BACK PRINTER ID:

DECLASSIFIED

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D04 UP
772-794-3967 960 BILL DATE 12-16-04 NR1RMHW7 CPX3560

ORDER DISPLAY
PQFS

PAGE 1

CPX772562AM Y N
772 794-3967 96820041216VBH 20041216102320041216
NR1RMHW7B / PC1FR YAXQBML2C041216 W
ZRTI V, QS, 800 773-4967, RM, 205714

ICENTROX
RRSO DRGB89R9
SEQ (A) DRGB89R9
CFAC 1

ITTRA772 562
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ILN CROWNOVER, DALE
ILA 1422 16TH S*T, VERO BEACH
ISA 1422 16TH ST, VERO BCH, FL
ILOC APT 25
IDZIP32960

IFCTN772 794-3967;D
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PAGE 1 OF 3 MORE...
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PF7=MAIN PF8=SCROLL PF11=BACK PRINTER ID:

DECLASSIFIED

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 D04 UP PQFS
 IDDA DALE CROWNOVER
 1422 16TH ST APT 25
 VERO BEACH FL 32960
 IDEL A1
 ---BILL
 IBN1 DPI TELECONNECT
 IBA2 INC
 IBA3 2997 LBJ FREEWAY
 IBA4 #225
 IPO DALLAS TX 75234
 ITAR 052,805
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 PAGE 1 OF 3 MORE...
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DECLASSIFIED

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PAGE 1 OF 3 MORE...
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DECLASSIFIED

M O B I 772 794 3967 12 / 16 / 04 NR1RMHW7 CPX3560
D04 UP

ORDER DISPLAY
PAGE PQFS
2

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RMK DISCONNECT PER CLEC
RMK (2) FOC
ZCBR 800 414-2065

---ASGM(A)
RCSO CRREURMHW7
G1 TN 772 794-3967
*FA 1422 16TH ST, VERO BCH, FL/LOC
APT 25/RT 3101/R2 13/RMKS

PAGE 2 OF 3 MORE...
PF2=SEARCH PF3=DISPLAY PF4=PRINT PF6=FAX
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FPSC
Docket No. 050863-TP

AT&T Florida's
Attachment to

Item No. 1-22

PHM 5/5/09
DECLASSIFIED

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PROPRIETARY

(P4 3 of 5)
8-9-07
DN 07025-07

Butler, Ann W

From: Lemoine, Annamarie
Sent: Monday, January 10, 2005 2:20 PM
To: Harden, Graham; Hogeman, Bert; Seagle, Kristy; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey
Cc: Gilbert, Kirven
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

That is what I thought given Graham's last email. So the only time a customer would get the benefit of the acquisition/winover promotions is when it is getting phone service for the first time, which would be a new business or someone who is a first time telephone subscriber. How would a customer who initially had only cellular service then subscribes to a BST for his first land line service be treated - as a winover or new customer??

-----Original Message-----

From: Harden, Graham
Sent: Monday, January 10, 2005 10:25 AM
To: Hogeman, Bert; Seagle, Kristy; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie
Cc: Gilbert, Kirven
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

We identify reacquisition, winover and new customers based on phone number, not the address.

- If a customer left and comes back with the **same phone number**, regardless of address, they are considered a **reacquisition**.
- If a customer left and has a **different phone number**, regardless of address, they are considered a **winover**.
- If a customer **does not have existing service** with anyone, such as someone moving from Los Angeles to Atlanta or a brand new business, they are considered a **new customer**.

Keep the questions rolling until we all are on the same page.

-----Original Message-----

From: Hogeman, Bert
Sent: Monday, January 10, 2005 10:12 AM
To: Seagle, Kristy; Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie
Cc: Gilbert, Kirven
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

At the risk of confusing this area further, here is what I understand.

1. Customer A switched from BST to CLEC 1 at same address. If switches back to BST at same address, this is deemed a **reacquisition**.
2. Customer A moved to new address after switching to CLEC 1, maintained service with CLEC 1 at new address and then switched to BST. This would be deemed a **winover**.
3. Customer A moved to new address after switching to CLEC 1 and switched back to BST at the new address. Customer A would be treated as a **new customer**.

Stated differently, my understanding is what happens at a given address.

-----Original Message-----

From: Seagle, Kristy
Sent: Friday, January 07, 2005 5:21 PM
To: Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

Graham,

Am I reading this correctly? Does consumer and SBS only check for reacquisition? If so then, do they define winover the same as reacq? If they don't qualify for reacq, are they denied the promotion? Or does

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Item 1-22: 000001

Consumer/SBS have another way to check for winover? Sorry - I'm a little confused. Thanks.

Kristy

-----Original Message-----

From: Harden, Graham
Sent: Friday, January 07, 2005 3:03 PM
To: Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Seagle, Kristy; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

All,

Reacquisition is defined as someone who is with a competitor, but was formerly a BellSouth customer.

Winover is defined as someone who is with a competitor and has not been a BellSouth customer.

Bert, your example of a customer who left BellSouth for a competitor, moved, and then came back to BellSouth would be considered a reacquisition if they had the same phone number and a winover if that number had changed.

Spoke with both reacq teams, Consumer and SBS, to get better definitions on this. BellSouth bases everything off of phone number to determine whether or not a customer is a reacquisition. Those phone numbers are checked against a generated list because our systems cannot automatically identify a reacq customer. If the customer is not on a list that we have generated, then they do not qualify as a reacquisition customer. Any customer disagreements would then be escalated on a customer-by-customer basis. Since we currently do not separate out reacquisition and winover customers in our promotions, this has not been an issue as all reacquisitions and winovers must currently have service with a competitor.

Neither COU has a written definition of the above.

Let me know if there is anything else I can provide that will help.

Graham

-----Original Appointment-----

From: Willis, Michael
Sent: Thursday, December 16, 2004 11:13 AM
To: Willis, Michael; Davis, James C; Zambito, Kelly; Harden, Graham; Maziarz, Jim; Seagle, Kristy; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: Updated: Clarification on "reacquisition or winover customer" Promotions
When: Friday, January 07, 2005 3:00 PM-4:00 PM (GMT-05:00) Eastern Time (US & Canada).
Where: 34Q/Bridge 205-968-9300 Access Code 9277597
Importance: High

This meeting is being rescheduled to 1-7 from 3:00-4:00 to ensure that we have all of the necessary participants. Thanks

<< File: LCCW tariff notification.doc >> << File: Promotion Language.doc >> Consistent with BellSouth's obligations it has to make its retail promotions available to its CLEC customers. There are currently 3 promotions that qualify a CLEC to the promotion based on "reacquisition or winover customer. This meeting is to gain an understanding of what qualifies a resale end user as a "reacquisition or winover customer" on the wholesale side of the house to assist the resale managers in policing the CLECs requesting the promotional credits.

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I have attempted to add the appropriate channel managers to the distro, so please advise if you do not think you should be involved and if there are others that we need as well.

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Item 1-22: 000003

Butler, Ann W

Subject: FW: Clarification on "reacquisition or winover customer" Promotions
Location: 34Q/Bridge 205-968-9300 Access Code 9277597

Start: Fri 1/7/2005 3:00 PM
End: Fri 1/7/2005 4:00 PM
Show Time As: Tentative

Recurrence: (none)

Meeting Status: Not yet responded

Importance: High

Kristy,

Update me on the outcome of this call.
Thanks

Ad

-----Original Appointment-----

From: Seagle, Kristy **On Behalf Of** Willis, Michael
Sent: Thursday, January 06, 2005 4:07 PM
To: Willis, Michael; Allen, Advemall
Subject: FW: Clarification on "reacquisition or winover customer" Promotions
When: Friday, January 07, 2005 2:00 PM-3:00 PM (GMT-06:00) Central Time (US & Canada).
Where: 34Q/Bridge 205-968-9300 Access Code 9277597
Importance: High

Ad - If you could attend this meeting tomorrow at 2 CST, it would be great. It's on definition of "reacquisition/winover."
Thanks.

Kristy

-----Original Appointment-----

From: Willis, Michael
Sent: Thursday, December 16, 2004 10:13 AM
To: Willis, Michael; Davis, James C; Zambito, Kelly; Harden, Graham; Maziarz, Jim; Seagle, Kristy; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: Updated: Clarification on "reacquisition or winover customer" Promotions
When: Friday, January 07, 2005 2:00 PM-3:00 PM (GMT-06:00) Central Time (US & Canada).
Where: 34Q/Bridge 205-968-9300 Access Code 9277597
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LCCW tariff notification.doc (... nguage.doc (35 KB)



Promotion

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on "reacquisition or winover customer. This meeting is to gain an understanding of what qualifies a resale end user as a "reacquisition or winover customer" on the wholesale side of the house to assist the resale managers in policing the CLECs requesting the promotional credits.

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Notice

Notification Type: Promotion

Jurisdiction: ALABAMA

Notice Date: 11/05/2003

Filing Package Number: AL2004-003

Service Name: Line Connection Charge Waiver

Tariff Sections: n/a

Expected Issue Date: 12/12/2003

Expected Effective Date: 01/02/2004

Descriptive Narrative: December 3, 2003 – Effective date has been revised from 01/01/04 to 01/02/04.

Waived line connection charge to reacquisition or winover customers who purchase BellSouth® Complete Choice® plan, BellSouth® PreferredPack SM plan or basic service and one feature (TN 2) and who are currently not using BellSouth for local service.

All BellSouth marks contained herein are owned by BellSouth Intellectual Property Corporation

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ICS Marketing Directive

Date directive established: November 23, 2004

Please select from list below:

- UNE
- Switched Access
- Regulatory Mandate
- Local Interconnection
- ICO

- Resale
- Wireless
- Special Access
- PSP

Please state issue you need resolved:

Clarification of language in retail promotions.

Please explain the issue in detail:

BellSouth is required to make available to Resale CLECs the same promotions that are offered to BellSouth retail end users. Resale CLECs turn in BAR (dispute) forms to Resale Product Management monthly to apply for these promotional credits. When we receive the forms with the accompanying spreadsheet of end user information, we check the end users to make sure that the resale end users meet the qualifications of the promotions.

There are currently 3 different retail promotions available to resale CLECs with the following wording:

Waived (promotion offer) to **reacquisition or winover** customers who purchase BellSouth® Complete Choice® plan, BellSouth® PreferredPack SM plan or basic service and one feature (TN 2) and who are currently not using BellSouth for local service.

We need clarification as to what qualifies a resale end user as a "reacquisition or winover customer" on the wholesale side of the house.

DIRECTIVE STATEMENT:

STAKEHOLDER(S)

Legal

Regulatory & Policy Support

Wireless and Product Management

Regulatory

Private/Proprietary

Not for use or disclosure outside
BellSouth except under written agreement

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IMPLEMENTATION CHECKLIST

- Product Manager
- Finance
- Account Team
- Billing

- Network
- Operations
- Regulatory
- Market Manager
- ICS Negotiators

ADDENDUMS

Please attach any additional information pertinent to the issue such as maps, drawings, etc.

Private/Proprietary

Not for use or disclosure outside
BellSouth except under written agreement

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Item 1-22: 000008

Butler, Ann W

From: Harden, Graham
Sent: Monday, January 10, 2005 10:25 AM
To: Hogeman, Bert; Seagle, Kristy; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie
Cc: Gilbert, Kirven
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

We identify reacquisition, winover and new customers based on phone number, not the address.

- If a customer left and comes back with the **same phone number**, regardless of address, they are considered a **reacquisition**.
- If a customer left and has a **different phone number**, regardless of address, they are considered a **winover**.
- If a customer **does not have existing service** with anyone, such as someone moving from Los Angeles to Atlanta or a brand new business, they are considered a **new customer**.

Keep the questions rolling until we all are on the same page.

-----Original Message-----

From: Hogeman, Bert
Sent: Monday, January 10, 2005 10:12 AM
To: Seagle, Kristy; Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie
Cc: Gilbert, Kirven
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

At the risk of confusing this area further, here is what I understand.

1. Customer A switched from BST to CLEC 1 at same address. If switches back to BST at same address, this is deemed a **reacquisition**.
2. Customer A moved to new address after switching to CLEC 1, maintained service with CLEC 1 at new address and then switched t BST. This would be deemed a **winover**.
3. Customer A moved to new address after switching to CLEC 1 and switched back to BST at the new address. Customer A would be treated as a **new customer**.

Stated differently, my understanding is what happens at a given address.

-----Original Message-----

From: Seagle, Kristy
Sent: Friday, January 07, 2005 5:21 PM
To: Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

Graham,

Am I reading this correctly? Does consumer and SBS only check for reacquisition? If so then, do they define winover the same as reacq? If they don't qualify for reacq, are they denied the promotion? Or does Consumer/SBS have another way to check for winover? Sorry - I'm a little confused. Thanks.

Kristy

-----Original Message-----

From: Harden, Graham
Sent: Friday, January 07, 2005 3:03 PM
To: Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Seagle, Kristy; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: RE: Clarification on "reacquisitlon or winover customer" Promotions

All,

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Bert, your example of a customer who left BellSouth for a competitor, moved, and then came back to BellSouth would be considered a reacquisition if they had the same phone number and a winover if that number had changed.

Spoke with both reacq teams, Consumer and SBS, to get better definitions on this. BellSouth bases everything off of phone number to determine whether or not a customer is a reacquisition. Those phone numbers are checked against a generated list because our systems cannot automatically identify a reacq customer. If the customer is not on a list that we have generated, then they do not qualify as a reacquisition customer. Any customer disagreements would then be escalated on a customer-by-customer basis. Since we currently do not separate out reacquisition and winover customers in our promotions, this has not been an issue as all reacquisitions and winovers must currently have service with a competitor.

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I have attempted to add the appropriate channel managers to the distro, so please advise if you do not think you should be involved and if there are other that we need as well.

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Butler, Ann W

From: Hogeman, Bert
Sent: Monday, January 10, 2005 10:12 AM
To: Seagle, Kristy; Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie
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Butler, Ann W

From: Harden, Graham
Sent: Monday, January 10, 2005 9:42 AM
To: Seagle, Kristy; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
Subject: RE: Clarification on "reacquisition or winover customer" Promotions

Kristy,

Qualification for reacquisition is tricky because our systems do not automatically perform this check; therefore we only have a single main method to check for reacquisition status. When a customer comes back, we check their number against a generated list of competitively disconnected numbers (done in accordance with procedures determined by legal) to see if they qualify as a reacquisition customer.

If they fail to qualify as a reacquisition, our safety net to qualify the customer is proof of existing service - this is how we identify winover customers and is the only way we check for winover status. Though reacquisition and winover customers are defined differently, they both have two things in common: 1) they do not currently have service with BellSouth, and 2) they currently have service with someone else.

If the customer still does not qualify, they are escalated on a case-by-case basis.

Hope this helps. Let me know if you have other questions.

Graham

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Sent: Friday, January 07, 2005 5:21 PM
To: Harden, Graham; Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
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To: Willis, Michael; Davis, James C; Zambito, Kelly; Maziarz, Jim; Seagle, Kristy; Blake, Kathy; Brooks, Lisa; Jordan, Parkey; Lemoine, Annamarie; Hogeman, Bert
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PROPRIETARY

Item 1-22: 000015



COU: Consumer Requesting Mgr: Caroline Morris Product Marketing Mgr/Offer Mgr: Tonya Lauf Segment Manager: Cherise Cameron	Telephone: 404.986.1026 Telephone: 404.986.1067 Telephone: 404.986.1148	I-Pager: csanderson_morris I-Pager: tlauf I-Pager: ccameron
Promotion, offer or bonus program name: ReAcquisition 1FR with 2 Free Features (3 features in TN) for 12 Months Promotion Offer 10-15- 2003 thru 12-31 2003 in AL, FL, KY, LA, MS, NC SC. GA 10/15/03 – 4/12/04. TN will be included but customers will receive 3 features and will run 10/15/03 thru 1/13/04.		
PSAP = 0308026		
Does this initiative have an ICMA funding Source? Y <input type="checkbox"/> N <input type="checkbox"/> If yes, under what item? _____ ▪ See http://home.customermarkets.bls.com/cmt/icma/icma for reference. If no, must receive Marketing Roundtable approval and ICMA prioritization before development proceeds. ▪ See http://productmanagementdev.bls.com/isp/mr.isp for Marketing Roundtable approval guidelines.		
Description of products and/or partnerships involved in this project (include product codes, where applicable): 1FR (local line) and land line verticals		

SECTION 1: OVERVIEW

Request for: <input checked="" type="checkbox"/> Customer promotion only <input type="checkbox"/> Sales bonus program only <input type="checkbox"/> Both of the above <input type="checkbox"/> Extension of existing program	Product(s)/Service(s) are (check all that apply): <input checked="" type="checkbox"/> Regulated products/services <input type="checkbox"/> Non-regulated products/services <input type="checkbox"/> Both regulated and non-regulated products <input type="checkbox"/> New product/service <input type="checkbox"/> Product enhancement	Product Family: <input checked="" type="checkbox"/> Voice <input type="checkbox"/> Data <input type="checkbox"/> DSL <input type="checkbox"/> Services/Applications
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Description of Promotion:

2 Free features (3 in TN) for 12 months for reacquisition or winover customers who purchase a 1FR (local line) from BellSouth and who are currently not using BellSouth for local service in:

- AL, FL, KY, LA, MS, NC and SC from 10/15/ 2003 thru 12/31/2003
- GA 10/15/03 thru 4/12/04
- TN 10/15/03 thru 1/13/04

List of features included in this offer is in separate attachment.

Offer Criteria:

1. Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned.
2. Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines.
3. Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address.
4. Customer must have not had local service with BellSouth at least 10 days prior to the new service connection date.
5. The customer must switch their local service to BellSouth and purchase BellSouth Basic Service
6. The customer must place the order on or before 12/31/03 in AL, FL, KY, LA, MS, NC and SC. 4/12/04 in GA. 1/13/04 in TN.
7. Offer valid for only one (1) service line at the intended local service address.
8. The customer must place their order through a BellSouth business office or outbound telemarketing vendor or alternate channels as indicated.
9. Once the customer completes the above requirements they will receive two local line features for free for 12 months. If the customer cancels or discontinues the qualifying service, he will be ineligible.
10. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.
11. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.
12. Offer may be combined with cash back offers or other promotional offers on the same services, as such offers may be concurrently available from time to time, provided that the Company reserves the right to prohibit the combination of this promotion with any other promotion, at the Company's sole discretion. Initially, this promotion may NOT be combined with the Reacquisition \$100 1RF + 2 features (3 TN) Cash Back offer 8-25-2003 thru 12-

31-2003

Key date and timeframe goals related to this project: Extension? Y N
Start Date: 10/15/ 2003 End Date: 12/31/03 AL, FL, GA, KY, LA, MS, NC and SC. 4/12/04 in GA. 1/13/04 in TN.

CLEC Notice Date (regulated products): N/A File Date:

Geographic availability (states, MSAs, cities, etc.): AL, FL, GA, KY, LA, MS, NC, SC, TN.

Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

- Key industries:
- Size of company:
- Number of lines:
- Title(s) of decision makers:
- Existing or new customers:
- Current products they need to utilize our offering:
- Other:

- Current customers
- New customers
- Former customers
- Non BellSouth customers
- General Business
- Major
- Enterprise (Global/National)

Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply):

Customer Markets Key Imperatives

- Drive Growth, Retention, & Reacquisition
- Grow Share of Voice
- Lead with Service
- Meet Financial Targets
- Other (identify):
- Execute Metro Strategy in Consumer & SBS
- Deliver Consumer Bundling Capability

Explanation:

Objectives/Expected Results

Project and revenue objectives (check all that apply):

- Current Year Planned Retention Revenue:
- Current Year Planned Expenses:
- Maintain or increase market share by %
- Generate \$ in new revenue
- New Sales Leads
- Market to new customer segment
- Customer retention/up-selling
- Customer Acquisition
- Re-Acquisition

- Current year Planned Booked Revenue:
- # units to be added through promotion (current year)
- Expected Contract revenue
- Average Sales Cycle:
- Product Retention
- Product Re-Acquisition
- Lead Generation
- Customer awareness
- Employee awareness
- Sales support and/or training
- Other

Indicate if available for resale: Yes No
With additional discount? Yes No

Are there any billing issues associated with this promotion/offer?

All billing issues are resolved. If not provide status:
Will CBR be used in billing of the promotion / offer? Yes No If yes, obtain tax accounting approval:
(signature) _____ and Legal approval: (signature) _____

Sales Channels

Sales Channels (check all that apply):

- BellSouth Business (Large Business)
- Direct
- Customer Care
- Nortel Call Center
- Other (identify):

Small Business Services (SBS)

- AMC
- SBTC
- Telesales
- BSC
- 3rd Party
- Specialists
- Indirect/Distribution¹

Consumer

- Large Team
- E-Store
- 3rd Party
- Outbound Telemarketing
- Other Outbound Telemarketing vendor

¹ If audience is a BellSouth Business customer, BellSouth Business SalesOps should be notified.

	<input type="checkbox"/> Other:	transferring sale to Acquisition Gate
--	---------------------------------	---------------------------------------

Sales Channel Training: Yes No

Eligibility Restrictions (CSAs/SAs, SRFs, etc.): Customers who are currently out of the BellSouth region and establishing a new order within the BellSouth region (out-of-region N orders) and customers within the region who are not currently receiving local service from any provider are not eligible for this promotion. This promotion is for reacquisition and winover customers only who are establishing service at the same address in the BellSouth region where they presently receive local or equivalent [same as above] telephone service or at a different address if the customer is moving to a different address within 30 days of responding to the offer.

Collaboration (within and across Segments)

Concurrence within and across business segments is required for approval. THIS OFFER IS CONSUMER ONLY

Name	Role	Contact Number	I-Pager	Concurred?
	Product Marketing			
	Product Manager			
	BellSouth Business Segment Marketing			
	Small Business Services Marketing			
	Consumer			
	Strategic Pricing			

Measuring Effectiveness

How will results be measured and tracked? Be specific. Campaign codes? System codes? Which systems will be used? How will they be reported? Tracked via MKIS reports

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:
Mickey Debruin will receive tracking reports from MKIS

How do you plan to track leads, sales and usage: Leads are pulled from MKIS from a pool of competitive disconnects. These leads are scrubbed for customers in treatment. Viable leads are then put into the reacquisition process which will contact leads via DM and OBTM.
Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion? Mickey Debruin

When will the results be available? Early 2004
Initial: July 2003
Final: January 2004

Legal/Regulatory

Compliance Alert

- Promotion/Offer concept has been reviewed by Segment Attorney.
Note: A promotion or offer that packages or links two or more products must be reviewed by Segment Attorney, Regulatory and Regulatory Accounting.
 - A compliance review by CORT was required. Date of CORT review and concurrence _____.
- Attach a copy of any contract or letter of election affected by or associated with this promotion.

SECTION 2: FINANCIALS

Revenue/Expense Analysis by State.
Remember to add an additional 70% to estimates for sales bonus program awards to account for tax.

Review and concurrence by Strategic Pricing completed.

Revenue Considerations: Forecast Average revenue per sale	Expense Considerations: Average expense per sale Expected award payout
------------------------------------------------------------------------	-------------------------------------------------------------------------------------

Number of potential customers Close Rate/Take rate Pricing Schedule Allocation among bundled/integrated products Response Rate	Cannibalization of existing products Contra Revenue (Amount of recurring/non-recurring waived) IT impact Additional Resources (Sales Channel, Repair/Customer Care, Contract Service Arrangement Resources) Marketing Communications (Advertising, Sales Collateral, Direct Mail, Printing, Multi-Media Resources, etc.) COGS
--------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Revenue & Cost Analysis Spreadsheet & Requirements
Key Assumptions

REVENUE

Plan

Forecasted or Planned Units without program
 YTD Forecasted Units and YTD Actual Units

Penetration

Number of Customers in targeted market by State by Segment
 Number of Customers in Potential Market by State by Segment (Eligibility restrictions, Method for contacting, Number to be contacted)
 Number of Proposals by State by Segment
 Expected take rate/close rate by State by Segment
 Number of Planned Sold Units by State by Segment
 Planned Sold Incremental Units by State by Segment (Planned Sold Units – Forecasted Units)

Average Unit Sales Price (Price for typical configuration*)

* Products with multiple typical configurations may require the sum of formulas for each typical configuration.

Average Unit Sales Price without Promotion
 Average Unit Sales Price with Promotion

Incremental Units X Average Unit Sales Price = Incremental Revenue
 Incremental revenue X 12 months = Annualized Revenue
 Incremental revenue X the number of contract months = Contract Revenue

EXPENSE

Contra Revenue – Revenue forgone as part of program. For example, if program waives installation, then the revenue forgone for installation is the amount of contra revenue

Direct Expense – Expenses incurred as part of program for which BellSouth must write a check. For example, marketing communications expenses, cash back offers, etc.

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SECTION 3: COMMUNICATIONS

Internal Audience

Who is the internal target audience (i.e. to whom are we talking)

- AEs AVPs Sales Support Sales Managers Sales Specialists VPGMs
- Customer Care

Marketing Titles (list them): Marketing Team within Pam Jones' group: Retention, ReAcquisition, Answers, etc.

Other Internal audience will be Large Team in order for this group of reps to know this offer exists and to be able to transfer inquiring customers to Acquisition Gate should a lead fall outside of the "winback process" (specifically outbound and DM). Other initiative owners within Marketing will be aware of this reacquisition effort for information purposes.

Based on the business issues you are facing, describe your Internal communications goals:

- Employee education on your product or service or campaign
- Employee awareness program on your product or service

Our business issue is decreasing marketing market share due to competitive line loss and flow share line loss of consumers who currently reside in the BellSouth footprint, but have service with another carrier.

What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions: ReAcquisition is a key effort to winback market share and maintain our cost structure
- What is the business problem: Business problem is that BellSouth is losing customers; primarily high value customers
- What is the business solution: In addition to offers, business solution is to address consumers' product needs with relevant messaging.

Describe issues facing your product or service:

- Your sales channel is in need of qualified leads to grow revenues.
- Initial employee training is not sufficient to convert qualified leads into sales.
- Low awareness and/or mindshare of your product with employees.
- Other: n/a

Primary message: What do we want the internal audience to understand and do: understand the promotions terms and be able to service customers appropriately.

For an externally directed project, how will you inform/educate internal audiences about it: n/a

External Audience

Project name (if promotion is not involved): n/a

² **What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):**

Description:

Targeted Verticals:

- Education Finance Government Healthcare Retail Other:

Targeted Small Business Tiers:

If you need external marketing communications, what is your goal:

- Generate awareness
- Generate leads
- Drive prospect to seek additional information located on a Web site
- Deliver information – white paper, PDF of sales collateral
- Competitive Response:
- Other:

Describe the business issues you are facing with your product or service:

- Increase your market share by _____ %

²: All new product/package names must be cleared by marketing through Intellectual Property to resolve any potential trademark issues.



Maintain your current position in the market.
 We have penetration in a specific industry or customer segment but want to market to new segments.
 Promoting services in which BellSouth has low awareness as a provider in that space.
 Partnering with a vendor (i.e., IBM, Sun, Dell, Nortel) to promote your product or service.
List Partners:

What are the customer's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the primary business problem:
- What is the primary business solution:

Primary message: What do we want the audience to understand and do:

Why should the customer select BellSouth vs. another vendor; how does it benefit them:

What issues or roadblocks might the sales team encounter:

List and describe known issues and/or conflicts (Channel, Product, Regulatory):

Has BellSouth Public Relations been engaged: Yes No

If yes, are they developing a press release or white paper:
 For consistency, provide MarCom with the content you provided to the PR group:

Partner Information-External

³ **If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:** APAC is the OBTM vendor

If dollars are coming from vendors/partners, how much are they contributing? n/a

Do you have a co-marketing agreement signed in addition to the business agreement? n/a

Tactical Information

If only basic tools are needed, suggestions or ideas for type of deliverable(s) to meet the project objective:

<input type="checkbox"/> Bill Insert	<input type="checkbox"/> Solutions Guide	<input checked="" type="checkbox"/> Other Job Aid for LT is necessary
<input type="checkbox"/> Sales Sheet	<input type="checkbox"/> PowerPoint	

Suggestions or ideas for type of deliverable(s) meet the project objective:

<input checked="" type="checkbox"/> Direct Mail/External Campaign	<input type="checkbox"/> Virtual Tour
<input type="checkbox"/> Postcard	<input type="checkbox"/> Webinar (online seminar)
<input type="checkbox"/> HTML e-Mail	<input type="checkbox"/> Other:
<input type="checkbox"/> Seminar	

List any legal notes that must be included (e.g. tariff information):

Delivery and Distribution Information

Fill in all information that applies:

- External Direct Mail: source of mailing list and approximate quantity to be mailed:
 *The mail list must be provided according to timeline.
- Bill Inserts: specific instructions required:
- Internet or Intranet postings: what URLs (addresses) and other specific instructions:

³: NOTE: Management of vendor/partner involvement will be the responsibility of the project initiator, including gathering content, obtaining logos/trademark info, approvals, etc. If an external vendor/partner logo is to be included in a BellSouth piece, a legally executed co-branding agreement must be in place with BellSouth Intellectual Property. All logos and trademark information are due at the MarCom kickoff meeting.

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SECTION 4: SALES BONUS PROGRAM DETAILS (IF APPLICABLE)

If the bonus program coincides with a customer promotion, please explain:
No specific bonus program is associated with this promotion

Describe the basis of the award (units, revenue, margin or other). If the awards are based on integrated sales, please explain:

Eligible Sales Titles (check all that apply):

- | | |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <input type="checkbox"/> Account Executives/Account Managers/NAMs/NAEs | <input type="checkbox"/> Sales Engineers (sales support for voice equipment) |
| <input type="checkbox"/> Account Management Sales Managers | <input type="checkbox"/> Design Engineers (sales support for data equipment) |
| <input type="checkbox"/> Account Management Sales AVPs | <input type="checkbox"/> Applications Engineers (sales support for CIS) |
| <input type="checkbox"/> Sales Specialists | <input type="checkbox"/> Networking Consultants (sales support for MNS/DotNet) |
| <input type="checkbox"/> Specialist Sales Managers | <input type="checkbox"/> VP/GMs |
| <input type="checkbox"/> Network Solutions Sales AVPs | <input type="checkbox"/> EC Specialists |
| <input type="checkbox"/> System Designers | <input type="checkbox"/> Other: |

Non-sales titles eligible for the awards (i.e. CSAs, Service Technicians, etc.):

Describe or illustrate the award structure for eligible jobs. Will the award be structured as a "team award" to be split among the team, or will specific amounts be identified for each team member?

Awards "Trigger":

- Order:
- Installation:
- Referral:
- Other:

Explain:

Award Cap: Yes No If yes, describe cap:

Form Required: Yes No If yes, please attach.

Describe actions required by Sales to track:

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SECTION 5: PRELIMINARY RESOURCE ASSESSMENT

COMPLETE ONLY FOR PRODUCT PACKAGE OFFERS THAT REQUIRE IRB REVIEW

This form communicates at a high level what resources are necessary for engaging this initiative—from participating as SMEs in building the Business Requirements, to working the project as a member of the project team. This is not an all-inclusive list. Identify the appropriate resources.

Resource	Yes/No	Resource Name if Known (i.e., John Doe)	Estimated Timeframe Resources to be Engaged (i.e., 1Q/2Q)
Architect/Database Architect			
Billing Consultant			
Business Development Analyst			
Configuration Management			
CRM Operations Management			
Developer			
Documentation Specialist			
End-to-End Project Management			
Financial Analyst		Ana Listopad	
Help/Service Desk Training Developer			
Interface Designer			
IT Project Management			
Life Cycle Management		Tonya Lauf	
Marketing Communications		Steve Scannell	
Marketing Planning		Tonya Lauf	
Marketing Project Manager			
Network – Wholesale (DSG)			
Network Engineer			
Operations Planning		Jeannette Napp	
Operations Project Management			
Process Engineer			
Product Development Manager			
QA/IL Engineer			
Quality Analyst			
Regulatory/Legal		Susan Callaghan, Kirven Gilbert, Graham Harden	
Sales Training Developer			
Strategic Pricing		Jennifer Crowe, Graham Harden	
Systems Administrator			
Systems Analyst			
Technical Lead			
Web Management			
Other: Offer Development		Caroline Morris	
Other:			
Other:			

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Offer Management Information:		
COU: Consumer	PSAP #: 0308026	Tracking #: 2004C00576
Requesting Mgr./Dir.: Mark Goldstein	Phone: 404-986-1013	I-Pager: mgoldstein1
Offer Development Mgr.: Jeremy Duncan	Phone: 404-986-1062	I-Pager: jwduncan
Segment Manager:	Phone:	I-Pager:
Approving Director: AnnMarie Romano	Phone: 404-986-1096	I-Pager: aromano
<p>Offer/Promotion name: 4Q04-Cons-1FR + 2 Free Features Extension? Yes</p> <p>If yes, please provide original P3 tracking ID:</p> <p>Offer Status: Final Document</p> <p>What is the final offer name, as it will appear in internal and external communications: 1FR+2 Free Features</p> <p>Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.</p> <p>Does this initiative have an ICMA funding source?</p> <ul style="list-style-type: none"> • See http://home.customermarkets.bls.com/cmt/icma/lcma for reference. <p>If no, must receive Marketing Roundtable approval and ICMA prioritization before development proceeds.</p> <ul style="list-style-type: none"> • See http://productmanagementdev.bls.com/jsp/mr.jsp for Marketing Roundtable approval guidelines. 		
SECTION 1: CONCEPT OVERVIEW		
		Section 1 Comments
1.1 Description of Offer:		
Describe Business Situation addressed by this offer:		
2 Free features for 12 months for reacquisition or winover customers who purchase a 1FR (local line) from BellSouth and who are currently not using BellSouth for local service in: AL, FL, GA, KY, LA, MS, NC, SC, TN 10/09/04 - 03/31/05		
Describe Offer Concept in detail:		
2 Free features for 12 months for reacquisition or winover customers who purchase a 1FR (local line) from BellSouth and who are currently not using BellSouth for local service in: AL, FL, GA, KY, LA, MS, NC, SC, TN 10/09/04 - 03/31/05		
Offer Criteria:		
1. Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned.		
2. Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines.		
3. Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address.		
4. Customer must have not had local service with BellSouth at least 10 days prior to the new service connection date.		
5. The customer must switch their local service to BellSouth and purchase BellSouth Basic Service		
6. The customer must place the order on or before 03/31/2005		
7. Offer valid for only one (1) service line at the intended local service address.		
8. The customer must place their order through a BellSouth business office or outbound telemarketing vendor or		

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Item 1-22: 000024

alternate channels as indicated.

9. Once the customer completes the above requirements they will receive two local line features for free for 12 months. If the customer cancels or discontinues the qualifying service, he will be ineligible.

10. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.

11. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.

12. This promotion may NOT be combined with the Reacquisition \$100 1RF + 2 features Cash Back offer

13. Offer may not be combined with any cash back offers however, this offer may be combined with other promotional offers on the same services, as such offers may be concurrently available from time to time, provided that the Company reserves the right to prohibit the combinatin of this promotion with any other promotion, at the Company's sole discretion

1.2 Key Dates

Key Date and timeframe goals related to this project:

Start Date: 10/09/2005 End Date: 03/31/2005

CLEC Notice Filed (regulated products-must be posted on web a minimum of 45 days prior to the start of the promotion)

1.3 Request for:

Product(s)/Service(s) are (check all that apply):

Product Family:

Regulated products/services

Voice

1.4 Identify all products and product owners involved in this offer. Check all product owners that apply and list products included in offer. (Please note that BBS is an agent and has no products or customers of its own.)

Product Owner Products Included in Offer (Include product code if aivable)

BST Products Included

Products Included:

Which entity/affiliate is funding this offer?

BST Funding Offer

1.5 Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

New customers
Former customers
Non BellSouth customers

Consumer Segments:
1 to 3
4 to 6
7 to 9
Propensity to Buy:

1.6 Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply)

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<i>Customer Markets Key Imperatives</i>		
Key Imperative is Reacquisition		
Other:	Explanation:	
1.7 Objectives/Expected Results		
Project and revenue objectives (check all that apply): Current Year Planned Retention Revenue: Current Year Planned Expenses: % in new revenue New Sales Leads	Current year Planned Booked Revenue: # units to be added through promotion (current year) Expected Contract Revenue: Average Sales Cycle: Other:	
Get Approvals Before Proceeding		
SECTION 2: PLANNING & ANALYSIS		
		Section 2 Comments
2.1 Sales Channels		
BellSouth Business (Large Business) Other:	Small Business Services (SBS) Other:	Consumer Large Team Outbound Telemarketing Sales Channel Other:
Impact of offer on Sales Channel: <i>(Complete this information in collaboration with Sales Operations contact)</i> Does the sales channel have the capacity to execute the offer during the desired launch window? Yes Will additional capacity be required to execute the offer? No If yes, what will the impact be? Will Sales channel training be required: No Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be? Will a sales incentive be used in conjunction with this offer? No What are the the known operational risks associated with this offer? What are your mitigation plans that address these risks?		
2.2 Geographic Availability		
All States	Markets: Entire Region	
MSAs, cities, etc. Include a list of wire centers if applicable:		
2.3 Billing		

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Provide the following information in collaboration with Billing Customer Account Manager

- What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM) Vickie Capuzzo
- What billing system will be used for this offer? CRIS
- Will CBR be used in billing of the promotion/offer for rewards? No If so:

- Are there non-CBR rewards or discounts? Yes
- Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No
- Will there be changes to Bill Presentation (paper bill and electronic bill)? No
- Are Affiliate products or services included? No
- Are Term Agreements and/or rate stabilization involved? No
- Is this a bundled offer? No

Are there any billing issues associated with this program?

If not, provide status:

2.4 Legal

Name of the attorney: Kirven Gilbert

Date of CORT review and concurrence:

Attach a copy of any contract or letter of election affected by or associated with this program.

List any legal notes that must be included (e.g. tariff information, material terms and conditions):

Legal language/restrictions provided by Legal to be added to external deliverables:

What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):

2.5 Parity Assurance

Indicate if available for resale: No With additional discount?
if yes, is there a parity issue that requires review by Parity Assurance PMO?
If yes, forward copy of P3 to Parity Assurance PMO parity.assurance@bellsouth.com for review and comments.

2.6 Eligibility Restrictions

(CSAs/SAs, SRFs, etc.):

- Does this offer exclude any type of product or customer? Yes
- If so, which ones specifically? see section 1
- Can a customer qualify for this offer more than once? No
- Is there a maximum reward or discount that this customer can receive? Yes
- What time frame do the orders need to be placed in? see section 1
- Is there a minimum or maximum purchase required to receive this promotion?
If yes, minimum: maximum:
- Is there a minimum amount of time the customer must stay with BellSouth? No
- Is there any termination liability? No
If yes, what is the termination liability?
If yes, is it for the full amount, prorated for the time left on the contract?
- Are out of region customers eligible for this promotion? No
- Can this promotion be combined with any other offers? No
If so, which ones?
If this promotion cannot be combined with other offers, list which ones:

2.7 Collaboration (within and across Segments)

Concurrence within and across business segments is required for approval.

Name	Role	Contact Number	I-Pager	Concurred?

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Product Marketing
Product Manager
BellSouth Business Segment Marketing
Small Business Services Marketing
Consumer
Strategic Pricing - Pricing Mgr
Strategic Pricing - Regulatory Compliance Mgr
Advertising

2.8 Measuring Effectiveness

How will results be measured and tracked? Be specific.

Which systems will be used? How will they be reported? MKIS

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:
Mickey DeBruin

How do you plan to track leads, sales and usage: MKIS
Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion?
Mickey DeBruin

When will the results be available? Initial: Final:

2.9 Operational Readiness Testing (ORT)

Engagement of ORT manager is required at beginning of Planning and Analysis

- **Who is the primary contact to handle the coordination of activities supporting this offer/promo?** (Name of person in Sales Operations, Channel Support and/or Customer Care) Jake Taylor

FINANCIAL ANALYSIS/BUSINESS CASE BY STATE

Note: This section is for guidance only. Consult with your COU Finance contact for the appropriate spreadsheet template.

Revenue Considerations:

Forecast
Average revenue per sale
Number of potential customers
Close Rate/Take rate
Pricing Schedule
Allocation among bundled/integrated products
Response Rate

Expense Considerations:

Average expense per sale
Expected award payout
Cannibalization of existing products
Contra Revenue (Amount of recurring/non-recurring waived)
IT impact
Additional Resources (Sales Channel, Repair/Customer Care, Contract Service Arrangement Resources)
Marketing Communications (Advertising, Sales Collateral, Direct Mail, Printing, Multi-Media Resources, etc.)
COGS
If parity issue exists, must consider cost of wholesale marketing response to maintain parity.
Remember to add an additional 70% to estimates for sales bonus program awards to account for tax and overhead.

Revenue & Cost Analysis Spreadsheet & Requirements
Key Assumptions

REVENUE

Plan

Forecasted or Planned Units without program
YTD Forecasted Units and YTD Actual Units

Penetration

Number of Customers in targeted market by State by Segment
Number of Customers in Potential Market by State by Segment (Eligibility restrictions, Method for contacting, Number to be contacted)

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Number of Proposals by State by Segment
 Expected take rate/close rate by State by Segment
 Number of Planned Sold Units by State by Segment
 Planned Sold Incremental Units by State by Segment (Planned Sold Units - Forecasted Units)

Average Unit Sales Price (Price for typical configuration*)

* Products with multiple typical configurations may require the sum of formulas for each typical configuration.
 Average Unit Sales Price without Promotion
 Average Unit Sales Price with Promotion Incremental Units X Average Unit Sales Price = Incremental Revenue
 Incremental revenue X 12 months = Annualized Revenue
 Incremental revenue X the number of contract months = Contract Revenue

EXPENSE

Contra Revenue - Revenue forgone as part of program. For example, if program waives installation, then the revenue forgone for installation is the amount of contra revenue
Direct Expense - Expenses incurred as part of program for which BellSouth must write a check. For example, marketing communications expenses, cash back offers, etc.

Get Approvals Before Proceeding

SECTION 3: DEVELOPMENT/IMPLEMENTATION

Section 3 Comments

3.1 Communication Marketing Brief - Marcom

3.1.1 Internal Audience

Who is the internal target audience (i.e. to whom are we talking)

Marketing Titles (list them):
 Other:

Based on the business issues you are facing, describe your Internal communications goals:

What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the business problem:
- What is the business solution:

Describe issues facing your product or service:

Other:

Primary message: What do we want the internal audience to understand and do:

For an externally directed project, how will you inform/educate internal audiences about it:

3.1.2 External Audience

If you need advertising/marketing communications, what is your goal:

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Other:
Describe the business issues you are facing with your product or service: %
List Partners:
Positioning Statement:
What are the customer's perceptions (positive or negative) regarding the products and the market in general and why: • Perceptions: • What is the primary business problem: • What is the primary business solution:
Primary message: What do we want the audience to understand and do:
Key Customer Benefit: Why should the customer select BellSouth vs. another vendor; how is it different than competitors:
Tone (how you say what you say):
Other considerations: (execution considerations, special considerations, instructions)
Key features/takaways for customer:
What issues or roadblocks might the sales team encounter:
Product weaknesses/drawbacks:
Must customer purchase other services to make this offer work?
Incompatible with other products/services?
List and describe known issues and/or conflicts (Channel, Product, Regulatory):
List key competitors:
Has BellSouth Public Relations been engaged: If yes, are they developing a press release or white paper: For consistency, provide MarCom with the content you provided to the PR group:
3.1.3 Partner Information-External
If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:
If dollars are coming from vendors/partners, how much are they contributing?
Do you have a co-marketing agreement signed in addition to the business agreement?
3.1.4 Media Vehicle

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Other:

3.1.5 Delivery and Distribution Information

Fill in all information that applies:

- External Direct Mail: source of mailing list and approximate quantity to be mailed:
 *The mail list must be provided according to timeline.
- Bill Inserts: specific instructions required:
- Internet or Intranet postings: what URLs (addresses) and other specific instructions:
- Estimated # of mailing/email lists:
- Source of lists:
- If preliminary MKIS pull, how many can we market to?

3.1.6 Advertising/Legal Information

Have the following been included in external communications? (See section 2.5)

Get Approvals Before Proceeding

SECTION 4: Launch

Section 4 Comments

Date of PSAP final ruling:
 Date Operational Readiness Testing complete:
 Date of PDF approval: 04/08/04
 Regulatory filing complete:
 Date Offer Launched into channel(s): 04/12/2004
 Launch Date Marcom:
 Launch Kit posted on website:

Monthly Billed Revenue:

Jan:	Feb:	Mar:
Apr:	May:	June:
July:	Aug:	Sept:
Oct:	Nov:	Dec:

Final Review with Business Case post mortem:
 Date Lessons Learned placed in repository:

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Pending review by Vicky Milne

P3 Request Form

For use with Promotions, Packages and Programs



COU: Consumer	Telephone: 404.986.1026	I-Pager: csanderson_morris
Requesting Mgr: Caroline Morris	Telephone: 404.986.1067	I-Pager: tlauf
Product Marketing Mgr/Offer Mgr: Tonya Lauf	Telephone: 404.986.1148	I-Pager: ccameron
Segment Manager: Cherise Cameron		

Promotion, offer or bonus program name: ReAcquisition Line Connection Charge Waiver Offer AL, FL, KY, LA, MS, NC, SC, TN 1/1/04 thru 12/25/04 GA 12-28- 2003 thru 6/24/2004

PSAP =

Does this initiative have an ICMA funding Source? Y N If yes, under what item? _____

See http://home.customermarkets.bls.com/cmt/icma/icma for reference.

If no, must receive Marketing Roundtable approval and ICMA prioritization before development proceeds.

See http://productmanagementdev.bls.com/jsp/mr.jsp for Marketing Roundtable approval guidelines.

Description of products and/or partnerships involved in this project (include product codes, where applicable):

The service connection waiver for new acquisition or reacquisition customers purchasing BellSouth Complete Choice, BellSouth Preferred Pack, or BellSouth Basic Service and one feature (or 1FR+1) except TN where the customer must purchase 2 features.

SECTION 1: OVERVIEW

Request for:

- Customer promotion only
- Sales bonus program only
- Both of the above
- Extension of existing program

Product(s)/Service(s) are (check all that apply):

- Regulated products/services
- Non-regulated products/services
- Both regulated and non-regulated products
- New product/service
- Product enhancement

Product Family:

- Voice
- Data
- DSL
- Services/Applications

Description of Promotion:

Waived line connection charge to reacquisition or winover customers who purchase BellSouth Complete Choice plan BellSouth Preferred Pack plan or Basic Service and one feature (TN 2) and who are currently not using BellSouth for local service in:

- AL, FL, KY, LA, MS, NC, SC and TN from 1/1/ 2004 thru 12/25/2004
- GA 12/28/03 thru 6/24/04

Offer Criteria:

1. Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned.
2. The target customer for this promotion is a customer that switches service from either a facility based or reseller CLEC. This promotion is not valid for out of region customers who are new to BellSouth.
3. Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines.
4. Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address.
5. The customer must switch their local service to BellSouth and purchase any one of the following:
 - a. The BellSouth Complete Choice plan
 - b. The BellSouth Preferred Pack Plan
 - c. BellSouth Basic Service and one (TN 2) custom calling (or touch star) local feature(s).
6. The customer must place the order on or before 12/25/04 AL, FL, KY, LA, MS, NC, SC and TN. GA 6/24/04.
7. Offer valid for only one (1) service line at the intended local service address.
8. The customer must place their order through a BellSouth business office or outbound telemarketing vendor or alternate channels as indicated.
9. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.
10. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.
11. Offer may be combined with other offers for the same service at the same time.

Key date and timeframe goals related to this project:

Start Date: 1/1/04 AL, FL, KY, LA, MS, NC, SC, TN. 12/28/ 2003 GA

Extension? Y N

End Date: 12/25/04 AL, FL, KY, LA,

MS, NC, SC and TN. GA 6/24/04.

CLEC Notice Date (regulated products): N/A

File Date:

Geographic availability (states, MSAs, cities, etc.): AL, FL, GA, KY, LA, MS, NC, SC, TN.

Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

- Key industries:
- Size of company:
- Number of lines:
- Title(s) of decision makers:
- Existing or new customers:
- Current products they need to utilize our offering:
- Other:

- Current customers
- New customers
- Former customers
- Non BellSouth customers
- General Business
- Major
- Enterprise (Global/National)

Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply):

Customer Markets Key Imperatives

- Drive Growth, Retention, & Reacquisition
- Grow Share of Voice
- Lead with Service
- Meet Financial Targets

- Execute Metro Strategy in Consumer & SBS
 - Deliver Consumer Bundling Capability
- Explanation:

Other (identify): This promotion is designed as "table stakes" for the consumer voice market. Many competitors of BellSouth either do not require a "service connection fee" or they waive this fee. In order to compete with existing CLECs, BellSouth is opting to waive this fee in order to establish parity with its competition

Objectives/Expected Results

Project and revenue objectives (check all that apply):

- Current Year Planned Retention Revenue:
- Current Year Planned Expenses:
- Maintain or increase market share by %
 - Generate \$ in new revenue
 - New Sales Leads
 - Market to new customer segment
 - Customer retention/up-selling
 - Customer Acquisition
 - Re-Acquisition

- Current year Planned Booked Revenue:
- # units to be added through promotion (current year)
- Expected Contract revenue
- Average Sales Cycle:
- Product Retention
 - Product Re-Acquisition
 - Lead Generation
 - Customer awareness
 - Employee awareness
 - Sales support and/or training
 - Other

Indicate if available for resale: Yes No
With additional discount? Yes No

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Are there any billing issues associated with this promotion/offer?

All billing issues are resolved. If not provide status:

Will CBR be used in billing of the promotion / offer? Yes No If yes, obtain tax accounting approval:

(signature) _____ and Legal approval: (signature) _____

Sales Channels

Sales Channels (check all that apply):

BellSouth Business (Large Business)

- Direct
- Customer Care
- Nortel Call Center
- Other (identify):

Small Business Services (SBS)

- AMC
- SBTC
- Telesales
- BSC
- 3rd Party
- Specialists
- Indirect/Distribution¹
- Other:

Consumer

- Large Team
- E-Store
- 3rd Party
- Outbound Telemarketing
- Other Outbound Telemarketing vendor transferring sale to Acquisition Gate

Sales Channel Training: Yes No

Eligibility Restrictions (CSAs/SAs, SRFs, etc.): Customers who are currently out of the BellSouth region and establishing a new order within the BellSouth region (out-of-region N orders) and customers within the region who are not currently receiving local service from any provider are not eligible for this promotion. This promotion is for reacquisition and winover customers only who are establishing service at the same address in the BellSouth region where they presently receive local or equivalent [same as above] telephone service or at a different address if the customer is moving to a different address within 30 days of responding to the offer.

Collaboration (within and across Segments)

Concurrence within and across business segments is required for approval. THIS OFFER IS CONSUMER ONLY

Name	Role	Contact Number	I-Pager	Concurred?
	Product Marketing			
	Product Manager			
	BellSouth Business Segment Marketing			
	Small Business Services Marketing			
	Consumer			
	Strategic Pricing			

Measuring Effectiveness

How will results be measured and tracked? Be specific. Campaign codes? System codes? Which systems will be used? How will they be reported? Tracked via MKIS reports

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points: Mickey Debruin will receive tracking reports from MKIS

How do you plan to track leads, sales and usage: Leads are pulled from MKIS from a pool of competitive disconnects. These leads are scrubbed for customers in treatment. Viable leads are then put into the reacquisition process which will contact leads via DM and OBTM.

Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion? Mickey Debruin

When will the results be available? Early 2004

Initial: Feb 2004

Final: January 2005

Legal/Regulatory

¹ If audience is a BellSouth Business customer, BellSouth Business SalesOps should be notified.

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Compliance Alert

Promotion/Offer concept has been reviewed by Segment Attorney.

Note: A promotion or offer that packages or links two or more products must be reviewed by Segment Attorney, Regulatory and Regulatory Accounting.

A compliance review by CORT was required. Date of CORT review and concurrence _____.

Attach a copy of any contract or letter of election affected by or associated with this promotion.

SECTION 2: FINANCIALS

Revenue/Expense Analysis by State.

Remember to add an additional 70% to estimates for sales bonus program awards to account for tax.

Review and concurrence by Strategic Pricing completed.

Revenue Considerations:

Forecast
Average revenue per sale
Number of potential customers
Close Rate/Take rate
Pricing Schedule
Allocation among bundled/integrated products
Response Rate

Expense Considerations:

Average expense per sale
Expected award payout
Cannibalization of existing products
Contra Revenue (Amount of recurring/non-recurring waived)
IT impact
Additional Resources (Sales Channel, Repair/Customer Care, Contract Service Arrangement Resources)
Marketing Communications (Advertising, Sales Collateral, Direct Mail, Printing, Multi-Media Resources, etc.)
COGS

Revenue & Cost Analysis Spreadsheet & Requirements
Key Assumptions

REVENUE

Plan

Forecasted or Planned Units without program
YTD Forecasted Units and YTD Actual Units

Penetration

Number of Customers in targeted market by State by Segment
Number of Customers in Potential Market by State by Segment (Eligibility restrictions, Method for contacting, Number to be contacted)
Number of Proposals by State by Segment
Expected take rate/close rate by State by Segment
Number of Planned Sold Units by State by Segment
Planned Sold Incremental Units by State by Segment (Planned Sold Units – Forecasted Units)

Average Unit Sales Price (Price for typical configuration*)

* Products with multiple typical configurations may require the sum of formulas for each typical configuration.

Average Unit Sales Price without Promotion
Average Unit Sales Price with Promotion

Incremental Units X Average Unit Sales Price = Incremental Revenue
Incremental revenue X 12 months = Annualized Revenue
Incremental revenue X the number of contract months = Contract Revenue

EXPENSE

Contra Revenue – Revenue forgone as part of program. For example, if program waives installation, then the revenue forgone for installation is the amount of contra revenue

Direct Expense – Expenses incurred as part of program for which BellSouth must write a check. For example, marketing communications expenses, cash back offers, etc.

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SECTION 3: COMMUNICATIONS

Internal Audience

Who is the internal target audience (i.e. to whom are we talking)

- AEs AVPs Sales Support Sales Managers Sales Specialists VPGMs
Customer Care

Marketing Titles (list them): Marketing Team within Pam Jones' group: Retention, ReAcquisition, Answers, etc.
Other Internal audience will be Large Team in order for this group of reps to know this offer exists and to be able to transfer inquiring customers to Acquisition Gate should a lead fall outside of the "winback process" (specifically outbound and DM). Other initiative owners within Marketing will be aware of this reacquisition effort for information purposes.

Based on the business issues you are facing, describe your internal communications goals:

- Employee education on your product or service or campaign
Employee awareness program on your product or service

Our business issue is decreasing marketing market share due to competitive line loss and flow share line loss of consumers who currently reside in the BellSouth footprint, but have service with another carrier.

What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions: ReAcquisition is a key effort to winback market share and maintain our cost structure
What is the business problem: Business problem is that BellSouth is losing customers; primarily high value customers
What is the business solution: In addition to offers, business solution is to address consumers' product needs with relevant messaging.

Describe issues facing your product or service:

- Your sales channel is in need of qualified leads to grow revenues.
Initial employee training is not sufficient to convert qualified leads into sales.
Low awareness and/or mindshare of your product with employees.
Other: n/a

Primary message: What do we want the internal audience to understand and do: understand the promotions terms and be able to service customers appropriately.

For an externally directed project, how will you inform/educate internal audiences about it: n/a

External Audience

Project name (if promotion is not involved): n/a

What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):

- BellSouth® Complete Choice® plan
BellSouth® PreferredPack plan
BellSouth® basic service and one (TN 2) feature(s)

Description:

Targeted Verticals:

- Education Finance Government Healthcare Retail Other:

Targeted Small Business Tiers:

2: All new product/package names must be cleared by marketing through Intellectual Property to resolve any potential trademark issues.

If you need external marketing communications, what is your goal:

- Generate awareness
- Generate leads
- Drive prospect to seek additional information located on a Web site
- Deliver information – white paper, PDF of sales collateral
- Competitive Response:
- Other:

Describe the business issues you are facing with your product or service:

- Increase your market share by %
- Maintain your current position in the market.
- We have penetration in a specific industry or customer segment but want to market to new segments.
- Promoting services in which BellSouth has low awareness as a provider in that space.
- Partnering with a vendor (i.e., IBM, Sun, Dell, Nortel) to promote your product or service.

List Partners:

What are the customer's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the primary business problem:
- What is the primary business solution:

Primary message: What do we want the audience to understand and do:

Why should the customer select BellSouth vs. another vendor; how does it benefit them:

What issues or roadblocks might the sales team encounter:

List and describe known issues and/or conflicts (Channel, Product, Regulatory):

Has BellSouth Public Relations been engaged: Yes No
 If yes, are they developing a press release or white paper:
 For consistency, provide MarCom with the content you provided to the PR group:

Partner Information-External

³ **If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:** APAC is the OBTM vendor

If dollars are coming from vendors/partners, how much are they contributing? n/a

Do you have a co-marketing agreement signed in addition to the business agreement? n/a

Tactical Information

If only basic tools are needed, suggestions or ideas for type of deliverable(s) to meet the project objective:

<input type="checkbox"/> Bill Insert	<input type="checkbox"/> Solutions Guide	<input checked="" type="checkbox"/> Other Job Aid for LT is necessary
<input checked="" type="checkbox"/> Sales Sheet	<input type="checkbox"/> PowerPoint	

Suggestions or ideas for type of deliverable(s) meet the project objective:

<input checked="" type="checkbox"/> Direct Mail/External Campaign	<input type="checkbox"/> Virtual Tour
<input type="checkbox"/> Postcard	<input type="checkbox"/> Webinar (online seminar)
<input type="checkbox"/> HTML e-Mail	<input type="checkbox"/> Other:
<input type="checkbox"/> Seminar	

List any legal notes that must be included (e.g. tariff information):

Delivery and Distribution Information

Fill in all information that applies:

³: NOTE: Management of vendor/partner involvement will be the responsibility of the project initiator, including gathering content, obtaining logos/trademark info, approvals, etc. If an external vendor/partner logo is to be included in a BellSouth piece, a legally executed co-branding agreement must be in place with BellSouth Intellectual Property. All logos and trademark information are due at the MarCom kickoff meeting.



- External Direct Mail: source of mailing list and approximate quantity to be mailed:
*The mail list must be provided according to timeline.
- Bill Inserts: specific instructions required:
- Internet or Intranet postings: what URLs (addresses) and other specific instructions:

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SECTION 4: SALES BONUS PROGRAM DETAILS (IF APPLICABLE)

If the bonus program coincides with a customer promotion, please explain:

No specific bonus program is associated with this promotion

Describe the basis of the award (units, revenue, margin or other). If the awards are based on integrated sales, please explain:

Eligible Sales Titles (check all that apply):

- | | |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <input type="checkbox"/> Account Executives/Account Managers/NAMs/NAEs | <input type="checkbox"/> Sales Engineers (sales support for voice equipment) |
| <input type="checkbox"/> Account Management Sales Managers | <input type="checkbox"/> Design Engineers (sales support for data equipment) |
| <input checked="" type="checkbox"/> Account Management Sales AVPs | <input type="checkbox"/> Applications Engineers (sales support for CIS) |
| <input type="checkbox"/> Sales Specialists | <input type="checkbox"/> Networking Consultants (sales support for MNS/DotNet) |
| <input checked="" type="checkbox"/> Specialist Sales Managers | <input type="checkbox"/> VP/GMs |
| <input type="checkbox"/> Network Solutions Sales AVPs | <input type="checkbox"/> EC Specialists |
| <input type="checkbox"/> System Designers | <input type="checkbox"/> Other: |

Non-sales titles eligible for the awards (i.e. CSAs, Service Technicians, etc.):

Describe or illustrate the award structure for eligible jobs. Will the award be structured as a "team award" to be split among the team, or will specific amounts be identified for each team member?

Awards "Trigger":

- Order:
- Installation:
- Referral:
- Other:

Explain:

Award Cap: Yes No If yes, describe cap:

Form Required: Yes No If yes, please attach.

Describe actions required by Sales to track:

SECTION 5: PRELIMINARY RESOURCE ASSESSMENT

COMPLETE ONLY FOR PRODUCT PACKAGE OFFERS THAT REQUIRE IRB REVIEW

This form communicates at a high level what resources are necessary for engaging this initiative—from participating as SMEs in building the Business Requirements, to working the project as a member of the project team. This is not an all-inclusive list. Identify the appropriate resources.

Resource	Yes/No	Resource Name if Known (i.e., John Doe)	Estimated Timeframe Resources to be Engaged (i.e., 1Q/2Q)
Architect/Database Architect			
Billing Consultant			
Business Development Analyst			
Configuration Management			
CRM Operations Management			
Developer			
Documentation Specialist			
End-to-End Project Management			
Financial Analyst		Ana Listopad	
Help/Service Desk Training Developer			
Interface Designer			
IT Project Management			
Life Cycle Management		Tonya Lauf	
Marketing Communications		Steve Scannell	
Marketing Planning		Tonya Lauf	
Marketing Project Manager			
Network – Wholesale (DSG)			
Network Engineer			
Operations Planning		Jeannette Napp	
Operations Project Management			
Process Engineer			
Product Development Manager			
QA/IL Engineer			
Quality Analyst			
Regulatory/Legal		Susan Callaghan, Kirven Gilbert, Graham Harden	
Sales Training Developer			
Strategic Pricing		Jennifer Crowe, Graham Harden	
Systems Administrator			
Systems Analyst			
Technical Lead			
Web Management			
Other: Offer Development		Caroline Morris	
Other:			
Other:			

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Offer Management Information:		
COU: Consumer	PSAP #:	Tracking #: 2004C00645
Requesting Mgr./Dir.: Angela Jones	Phone: 404-986-1019	I-Pager: power3
Offer Development Mgr.: Jeremy Duncan	Phone: 404-986-1096	I-Pager: jwduncan
Segment Manager:	Phone:	I-Pager:
Approving Director: AnnMarie Romano	Phone: 404-986-1096	I-Pager: aromoano
Offer/Promotion name: 1Q05-Cons-Reacquisition Line Connection Fee Waiver Extension? Yes If yes, please provide original P3 tracking ID: Offer Status: Final Document What is the final offer name, as it will appear in internal and external communications: Reacq Service Connection Waiver Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.		
SECTION 1: CONCEPT OVERVIEW		
		Section 1 Comments
1.1 Description of Offer:		
Describe Business Situation addressed by this offer: The service connection waiver for new acquisition or reacquisition customers purchasing BellSouth Complete Choice, BellSouth Preferred Pack, or BellSouth Basic Service and 2 features.		
Describe Offer Concept in detail: Waived line connection charge to reacquisition or winover customers who purchase BellSouth® Complete Choice plan BellSouth® PreferredPack plan or Basic Service and two features and who are currently not using BellSouth for local service in: AL, FL, GA, KY, LA, MS, NC, SC and TN from 12/26/2004 thru 12/26/2005		
Offer Criteria:		
1. Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned.		
2. The target customer for this promotion is a customer that switches service from either a facility based or reseller CLEC. This promotion is not valid for out of region customers who are new to BellSouth.		
3. Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines.		
4. Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address.		
5. The customer must switch their local service to BellSouth and purchase any one of the following: <ol style="list-style-type: none"> The BellSouth® Complete Choice® plan The BellSouth® PreferredPack Plan BellSouth® Basic Service and one (TN 2) custom calling (or touch star) local feature(s). 		
6. The customer must place the order on or before 12/26/05 AL, FL, GA, KY, LA, MS, NC, SC and TN		
7. Offer valid for only one (1) service line at the intended local service address.		
8. The customer must place their order through a BellSouth business office or outbound telemarketing vendor or alternate channels as indicated.		
9. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.		
10. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.		

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PROPRIETARY

Item 1-22: 000041

11. Offer may be combined with other offers for the same service at the same time..

1.2 Key Dates

Key Date and timeframe goals related to this project:

Start Date: 12/26/04 End Date: 12/26/05

CLEC Notice Filed (regulated products-must be posted on web a minimum of 45 days prior to the start of the promotion)

1.3 Request for:	Product(s)/Service(s) are (check all that apply):	Product Family:
Extension of existing program	Both regulated and non-regulated products	Voice

1.4 Identify all products and product owners involved in this offer. Check all product owners that apply and list products included in offer. (Please note that BBS is an agent and has no products or customers of its own.)

Product Owner Products Included in Offer (Include product code if available)

BST Products Included

Products Included:

Which entity/affiliate is funding this offer?

BST Funding Offer

The funding source is (Check all that apply):

1.5 Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

Former customers Non BellSouth customers	Consumer Segments: 1 to 3 4 to 6 7 to 9 Propensity to Buy:
---------------------------------------------	------------------------------------------------------------------------

1.6 Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply):

Customer Markets Key Imperatives

Key Imperative is Reacquisition

Other:

Explanation:

1.7 Objectives/Expected Results

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<p>Project and revenue objectives (check all that apply):</p> <p>Current Year Planned Retention Revenue:</p> <p>Current Year Planned Expenses:</p> <p>% in new revenue</p> <p>New Sales Leads</p>	<p>Current year Planned Booked Revenue:</p> <p># units to be added through promotion (current year)</p> <p>Expected Contract Revenue:</p> <p>Average Sales Cycle:</p> <p>Other:</p>
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Get Approvals Before Proceeding

SECTION 2: PLANNING & ANALYSIS

Section 2 Comments

2.1 Sales Channels

<p>BellSouth Business (Large Business)</p> <p>Other:</p>	<p>Small Business Services (SBS)</p> <p>Other:</p>	<p>Consumer Large Team</p> <p>Consumer 3rd Party Sales Channel</p> <p>Outbound Telemarketing Sales Channel</p> <p>Other:</p>
-----------------------------------------------------------------	-------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------

Impact of offer on Sales Channel: *(Complete this information in collaboration with Sales Operations contact)*

Does the sales channel have the capacity to execute the offer during the desired launch window? Yes

Will additional capacity be required to execute the offer? No If yes, what will the impact be?

Will Sales channel training be required: No

Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be?

Will a sales incentive be used in conjunction with this offer? No

What are the the known operational risks associated with this offer?

What are your mitigation plans that address these risks?

2.2 Geographic Availability

<p>All States</p>	<p>Markets:</p> <p>Entire Region</p>
-------------------	-----------------------------------------

MSAs, cities, etc. Include a list of wire centers if applicable:

2.3 Billing

Provide the following information in collaboration with Billing Customer Account Manager

- What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM) Vickie Capuzzo
- What billing system will be used for this offer? CRIS
- Will CBR be used in billing of the promotion/offer for rewards? No If so:

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- Are there non-CBR rewards or discounts? No
- Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No
- Will there be changes to Bill Presentation (paper bill and electronic bill)? No
- Are Affiliate products or services included? No
- Are Term Agreements and/or rate stabilization involved? No
- Is this a bundled offer? No

Are there any billing issues associated with this program?

If not, provide status:

2.4 Legal

Name of the attorney: Kirven Gilbert

Date of CORT review and concurrence:

Attach a copy of any contract or letter of election affected by or associated with this program.

2.5 Parity Assurance

Indicate if available for resale:

With additional discount?

if yes, is there a parity issue that requires review by Parity Assurance PMO?

If yes, forward copy of P3 to Parity Assurance PMO parity.assurance@bellsouth.com for review and comments.

2.6 Eligibility Restrictions

(CSAs/SAs, SRFs, etc.):

- Does this offer exclude any type of product or customer? Yes
- If so, which ones specifically? see section one
- Can a customer qualify for this offer more than once? No
- Is there a maximum reward or discount that this customer can receive? Yes
- What time frame do the orders need to be placed in? see restrictions above
- Is there a minimum or maximum purchase required to receive this promotion? No
- If yes, minimum: maximum:
- Is there a minimum amount of time the customer must stay with BellSouth? No
- Is there any termination liability? Yes
- If yes, what is the termination liability?
- If yes, is it for the full amount, prorated for the time left on the contract?
- Are out of region customers eligible for this promotion? No
- Can this promotion be combined with any other offers? Yes
- If so, which ones?
- If this promotion cannot be combined with other offers, list which ones:

2.7 Measuring Effectiveness

How will results be measured and tracked? Be specific.

Which systems will be used? How will they be reported? MKIS

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:

TBD

How do you plan to track leads, sales and usage: MKIS

Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion?

TBD

When will the results be available? Initial: 1Q05 Final: 1Q06

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2.8 Operational Readiness Testing (ORT) <i>Engagement of ORT manager is required at beginning of Planning and Analysis</i>
<ul style="list-style-type: none"> Who is the primary contact to handle the coordination of activities supporting this offer/promo? (Name of person in Sales Operations, Channel Support and/or Customer Care) Jake Taylor
Get Approvals Before Proceeding
SECTION 3: DEVELOPMENT/IMPLEMENTATION
<small>Section 3 Comments</small>
3.1 Communication Marketing Brief - Marcom
3.1.1 Internal Audience
Who is the internal target audience (i.e. to whom are we talking)
Marketing Titles (list them): Other:
Based on the business issues you are facing, describe your Internal communications goals:
What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why: <ul style="list-style-type: none"> Perceptions: What is the business problem: What is the business solution:
Describe issues facing your product or service:
Other:
Primary message: What do we want the internal audience to understand and do:
For an externally directed project, how will you inform/educate internal audiences about it:
3.1.2 External Audience
If you need advertising/marketing communications, what is your goal:
Other:
Describe the business issues you are facing with your product or service: %

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List Partners:

Positioning Statement:

What are the customer's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the primary business problem:
- What is the primary business solution:

Primary message: What do we want the audience to understand and do:

Key Customer Benefit:

Why should the customer select BellSouth vs. another vendor; how is it different than competitors:

Tone (how you say what you say):

Other considerations: (execution considerations, special considerations, instructions)

Key features/takaways for customer:

What issues or roadblocks might the sales team encounter:

Product weaknesses/drawbacks:

Must customer purchase other services to make this offer work?

Incompatible with other products/services?

List and describe known issues and/or conflicts (Channel, Product, Regulatory):

List key competitors:

Has BellSouth Public Relations been engaged:

If yes, are they developing a press release or white paper:

For consistency, provide MarCom with the content you provided to the PR group:

3.1.3 Partner Information-External

If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:

If dollars are coming from vendors/partners, how much are they contributing?

Do you have a co-marketing agreement signed in addition to the business agreement?

3.1.4 Media Vehicle

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Other:
3.1.5 Delivery and Distribution Information
<p>Fill in all information that applies:</p> <ul style="list-style-type: none"> • External Direct Mail: source of mailing list and approximate quantity to be mailed: <ul style="list-style-type: none"> *The mail list must be provided according to timeline. • Bill Inserts: specific instructions required: • Internet or Intranet postings: what URLs (addresses) and other specific instructions: • Estimated # of mailing/email lists: • Source of lists: • If preliminary MKIS pull, how many can we market to?
3.1.6 Advertising/Legal Information
List any legal notes that must be included (e.g. tariff information, material terms and conditions):
Legal language/restrictions provided by Legal to be added to external deliverables:
What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):
Get Approvals Before Proceeding
SECTION 4: Launch
<small>Section 4 Comments</small>
<p>Date of PSAP final ruling: Date Operational Readiness Testing complete: Date of PDF approval: 11/04/2004 Regulatory filing complete: Date Offer Launched into channel(s): Launch Date Marcom: Launch Kit posted on website:</p>

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Offer Management Information:		
COU: Consumer	PSAP #:	Tracking #: 2004C00645
Requesting Mgr./Dir.: Angela Jones	Phone: 404-986-1019	I-Pager: power3
Offer Development Mgr.: Jeremy Duncan	Phone: 404-986-1096	I-Pager: jwduncan
Segment Manager:	Phone:	I-Pager:
Approving Director: AnnMarie Romano	Phone: 404-986-1096	I-Pager: aromano
Offer/Promotion name: 1Q05-Cons-Reacquisition Line Connection Fee Waiver Extension? Yes If yes, please provide original P3 tracking ID: Offer Status: Final Document What is the final offer name, as it will appear in internal and external communications: Reacq Service Connection Waiver Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.		
SECTION 1: CONCEPT OVERVIEW		
		Section 1 Comments
1.1 Description of Offer:		
Describe Business Situation addressed by this offer:		
The service connection waiver for new acquisition or reacquisition customers purchasing BellSouth Complete Choice, BellSouth Preferred Pack, or BellSouth Basic Service and 2 features.		
Describe Offer Concept in detail:		
Waived line connection charge to reacquisition or winover customers who purchase BellSouth® Complete Choice plan BellSouth® PreferredPack plan or Basic Service and two features and who are currently not using BellSouth for local service in: AL, FL, GA, KY, LA, MS, NC, SC and TN from 12/26/2004 thru 12/26/2005		
Offer Criteria:		
1. Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned.		
2. The target customer for this promotion is a customer that switches service from either a facility based or reseller CLEC. This promotion is not valid for out of region customers who are new to BellSouth.		
3. Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines.		
4. Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address.		
5. The customer must switch their local service to BellSouth and purchase any one of the following:		
a. The BellSouth® Complete Choice® plan		
b. The BellSouth® PreferredPack Plan		
c. BellSouth® Basic Service and one (TN 2) custom calling (or touch star) local feature(s).		
6. The customer must place the order on or before 12/26/05 AL, FL, GA, KY, LA, MS, NC, SC and TN		
7. Offer valid for only one (1) service line at the intended local service address.		
8. The customer must place their order through a BellSouth business office or outbound telemarketing vendor or alternate channels as indicated.		
9. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.		
10. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.		

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11. Offer may be combined with other offers for the same service at the same time..

1.2 Key Dates

Key Date and timeframe goals related to this project:

Start Date: 12/26/04 End Date: 12/26/05

CLEC Notice Filed (regulated products-must be posted on web a minimum of 45 days prior to the start of the promotion)

1.3 Request for:

Product(s)/Service(s) are (check all that apply):

Product Family:

Extension of existing program

Both regulated and non-regulated products

Voice

1.4 Identify all products and product owners involved in this offer. Check all product owners that apply and list products included in offer. (Please note that BBS is an agent and has no products or customers of its own.)

Product Owner Products Included in Offer (Include product code if available)

BST Products Included

Products Included:

Which entity/affiliate is funding this offer?

BST Funding Offer

The funding source is (Check all that apply):

1.5 Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

Former customers
Non BellSouth customers

Consumer Segments:

1 to 3

4 to 6

7 to 9

Propensity to Buy:

1.6 Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply):

Customer Markets Key Imperatives

Key Imperative is Reacquisition

Other:

Explanation:

1.7 Objectives/Expected Results

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<p>Project and revenue objectives (check all that apply):</p> <p>Current Year Planned Retention Revenue:</p> <p>Current Year Planned Expenses:</p> <p>% in new revenue</p> <p>New Sales Leads</p>	<p>Current year Planned Booked Revenue:</p> <p># units to be added through promotion (current year)</p> <p>Expected Contract Revenue:</p> <p>Average Sales Cycle:</p> <p>Other:</p>
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SECTION 2: PLANNING & ANALYSIS

Section 2 Comments

2.1 Sales Channels

<p>BellSouth Business (Large Business)</p> <p>Other:</p>	<p>Small Business Services (SBS)</p> <p>Other:</p>	<p>Consumer Large Team</p> <p>Consumer 3rd Party Sales Channel</p> <p>Outbound Telemarketing Sales Channel</p> <p>Other:</p>
---------------------------------------------------------------------	-----------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------

Impact of offer on Sales Channel: *(Complete this information in collaboration with Sales Operations contact)*

Does the sales channel have the capacity to execute the offer during the desired launch window? Yes

Will additional capacity be required to execute the offer? No If yes, what will the impact be?

Will Sales channel training be required: No

Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be?

Will a sales incentive be used in conjunction with this offer? No

What are the the known operational risks associated with this offer?

What are your mitigation plans that address these risks?

2.2 Geographic Availability

<p>All States</p>	<p>Markets:</p> <p>Entire Region</p>
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MSAs, cities, etc. Include a list of wire centers if applicable:

2.3 Billing

Provide the following information in collaboration with Billing Customer Account Manager

- What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM) Vickie Capuzzo
- What billing system will be used for this offer? CRIS
- Will CBR be used in billing of the promotion/offer for rewards? No If so:

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- Are there non-CBR rewards or discounts? No
- Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No
- Will there be changes to Bill Presentation (paper bill and electronic bill)? No
- Are Affiliate products or services included? No
- Are Term Agreements and/or rate stabilization involved? No
- Is this a bundled offer? No

Are there any billing issues associated with this program?

If not, provide status:

2.4 Legal

Name of the attorney: Kirven Gilbert

Date of CORT review and concurrence:

Attach a copy of any contract or letter of election affected by or associated with this program.

2.5 Parity Assurance

Indicate if available for resale: With additional discount?

if yes, is there a parity issue that requires review by Parity Assurance PMO?

If yes, forward copy of P3 to Parity Assurance PMO parity.assurance@bellsouth.com for review and comments.

2.6 Eligibility Restrictions

(CSAs/SAs, SRFs, etc.):

- Does this offer exclude any type of product or customer? Yes
- If so, which ones specifically? see section one
- Can a customer qualify for this offer more than once? No
- Is there a maximum reward or discount that this customer can receive? Yes
- What time frame do the orders need to be placed in? see restrictions above
- Is there a minimum or maximum purchase required to receive this promotion? No
If yes, minimum: maximum:
- Is there a minimum amount of time the customer must stay with BellSouth? No
- Is there any termination liability? Yes
If yes, what is the termination liability?
If yes, is it for the full amount, prorated for the time left on the contract?
- Are out of region customers eligible for this promotion? No
- Can this promotion be combined with any other offers? Yes
If so, which ones?
If this promotion cannot be combined with other offers, list which ones:

2.7 Measuring Effectiveness

How will results be measured and tracked? Be specific.

Which systems will be used? How will they be reported? MKIS

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:

TBD

How do you plan to track leads, sales and usage: MKIS

Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion?

TBD

When will the results be available? Initial: 1Q05 Final: 1Q06

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2.8 Operational Readiness Testing (ORT)
Engagement of ORT manager is required at beginning of Planning and Analysis

- Who is the primary contact to handle the coordination of activities supporting this offer/promo? (Name of person in Sales Operations, Channel Support and/or Customer Care) Jake Taylor

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SECTION 3: DEVELOPMENT/IMPLEMENTATION

Section 3 Comments

3.1 Communication Marketing Brief - Marcom

3.1.1 Internal Audience

Who is the internal target audience (i.e. to whom are we talking)

Marketing Titles (list them):
Other:

Based on the business issues you are facing, describe your internal communications goals:

What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the business problem:
- What is the business solution:

Describe issues facing your product or service:

Other:

Primary message: What do we want the internal audience to understand and do:

For an externally directed project, how will you inform/educate internal audiences about it:

3.1.2 External Audience

If you need advertising/marketing communications, what is your goal:

Other:

Describe the business issues you are facing with your product or service:
%

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List Partners:
Positioning Statement:
What are the customer's perceptions (positive or negative) regarding the products and the market in general and why:
<ul style="list-style-type: none"> • Perceptions: • What is the primary business problem: • What is the primary business solution:
Primary message: What do we want the audience to understand and do:
Key Customer Benefit:
Why should the customer select BellSouth vs. another vendor; how is it different than competitors:
Tone (how you say what you say):
Other considerations: (execution considerations, special considerations, instructions)
Key features/takaways for customer:
What issues or roadblocks might the sales team encounter:
Product weaknesses/drawbacks:
Must customer purchase other services to make this offer work?
Incompatible with other products/services?
List and describe known issues and/or conflicts (Channel, Product, Regulatory):
List key competitors:
Has BellSouth Public Relations been engaged:
If yes, are they developing a press release or white paper:
For consistency, provide MarCom with the content you provided to the PR group:
3.1.3 Partner Information-External
If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:
If dollars are coming from vendors/partners, how much are they contributing?
Do you have a co-marketing agreement signed in addition to the business agreement?
3.1.4 Media Vehicle

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Other:
3.1.5 Delivery and Distribution Information
Fill in all information that applies: <ul style="list-style-type: none"> • External Direct Mail: source of mailing list and approximate quantity to be mailed: <ul style="list-style-type: none"> *The mail list must be provided according to timeline. • Bill Inserts: specific instructions required: • Internet or Intranet postings: what URLs (addresses) and other specific instructions: • Estimated # of mailing/email lists: • Source of lists: • If preliminary MKIS pull, how many can we market to?
3.1.6 Advertising/Legal Information
List any legal notes that must be included (e.g. tariff information, material terms and conditions):
Legal language/restrictions provided by Legal to be added to external deliverables:
What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):
Get Approvals Before Proceeding
SECTION 4: Launch
<small>Section 4 Comments</small>
Date of PSAP final ruling: Date Operational Readiness Testing complete: Date of PDF approval: 11/04/2004 Regulatory filing complete: Date Offer Launched into channel(s): Launch Date Marcom: Launch Kit posted on website:

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Offer Management Information:		
Market Segment: Consumer	PSAP #: 000000	Tracking #: 2005C00943
P3 prepared by: Felton Turner	Phone: 404-986-1076	I-Pager: FeltonTurner
Offer/Promotion Owner: Angela Jones	Phone: 404-986-1019	I-Pager: power3
Approving Director: Jodi Keeter	Phone: 404-986-1153	I-Pager: jkeeter
Tariff SME: Vickie Milne	Phone: 404-829-7468	I-Pager: vmilne
Finance Manager :	Phone:	I-Pager:
Offer/Promotion name: 4Q05-Cons-Reacquisition Line Connect Fee Waiver Extension		
Extension? Yes		
If yes, please provide original P3 tracking ID: 2004C00645		
What is the offer name that will appear in external/regulatory communications:		
Reacq Service Connection Waiver		
Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.		
SECTION 1: CONCEPT OVERVIEW		
1.1 Description of Offer		
		Section 1 Comments
<p>1.1.1 Describe Business Situation addressed by this offer. (Include a description of the external target audience, i.e. is the promotion intended for new customers, former customers, current customers, non-BellSouth customers, etc?) The service connection waiver for new acquisition or reacquisition customers purchasing BellSouth Complete Choice, BellSouth Preferred Pack, or BellSouth Basic Service and 2 features.</p> <p>1.1.2 Overview (Provide a high-level summary of the offer.) The Line Connection Charge will be waived for reacquisition or winover customers who purchase BellSouth® Complete Choice plan, BellSouth® PreferredPack plan, BellSouth® 2 Pack Plan or Basic Service and two features, and who are not currently with BellSouth® for local service.</p> <p>1.1.3 Promotion Specifics (Describe the offer concept in detail. Include all products that will be involved in this offer/promotion/bundle) Waived line connection charge to reacquisition or winover customers who purchase BellSouth® Complete Choice plan BellSouth® PreferredPack plan, Bellsouth® 2 Pack Plan or Basic Service and two features and who are currently not using BellSouth for local service in: AL, FL, GA, KY, LA, MS, NC, SC and TN from 12/27/2005 thru 12/31/2006</p> <p>1.1.4 Restrictions/Eligibility Requirements Offer Criteria: 1.Customer must either not currently have local service with BellSouth or not have service with BellSouth on one or more of their existing lines, including the line on which the service qualifying for this promotion will be provisioned. 2.The target customer for this promotion is a customer that switches service from either a facility based or reseller CLEC. This promotion is not valid for out of region customers who are new to BellSouth. 3.Customer must have local service or equivalent (wireless in lieu of wire-line) at the same local service address on one or more of their existing lines. 4.Customer must request service at the same address and in the same name, unless customer is planning an imminent move from one address in BellSouth territory to another address in BellSouth territory within 30 days of responding to the offer. In the case of an imminent move, the BellSouth rep can offer the customer the promotion and place the order at the new address. 5.The customer must switch their local service to BellSouth and purchase any one of the following: a. The BellSouth® Complete Choice® plan b. The BellSouth® PreferredPack Plan c. The BellSouth® 2 Pack Plan d. BellSouth® Basic Service and two custom calling or touch star) local feature(s). 6.The customer must place the order on or before 12/31/06 AL, FL, GA, KY, LA, MS, NC, SC and TN 7.Offer valid for only one (1) service line at the intended local service address. 8.The customer must place their order through a BellSouth business office or outbound telemarketing vendor or alternate channels as indicated.</p>		

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- 9. BellSouth reserves the right to discontinue or modify this promotion at any time without notice.
- 10. Customer must have the eligible services on their new service order (N) in order to receive the promotional offer.
- 11. Offer may be combined with other offers for the same service at the same time..

1.2 Key Dates

Key Date and timeframe goals related to this project:

Start Date: 12/27/2005 End Date: 12/31/2006

If the benefit period extends beyond the End Date specified above, is the benefit period greater than 90 days? No

1.3 BST Regulation

Does every option/variation of this promotion include or create a bundle consisting of a BST regulated product/service in combination with a non-regulated product/service provided by BST, a BS affiliate or a non-affiliated third party? No

Does any option/variation of this promotion waive or reduce a regulated BST rate/charge? Yes

Is the promotion of regulated BST products/services provided solely via Cash-Back methodology? No

1.4 Parity Assurance

This promotion must be available for resale and the wholesale discount must apply to BST regulated products/services. Because this promotion is available for resale with a wholesale discount, a CLEC Notice must be posted on a website 45 days prior to the start of the promotion.

Is there a parity issue that requires review by Parity Assurance PMO? No

If yes, forward copy of P3 to Parity Assurance PMO mailto:Dan.Fancher@bellsouth.com for review and comments.

Will this offer be available to customers served by both the Interconnection and Carrier Services organization and retail business organizations (Small Business Services and/or BellSouth Business)? No

If yes, forward copy of P3 to Kristy.Seagle@bellsouth.com in ICS for review and comments.

1.5 Product Owners

Owners of Product(s)/Service(s) that are included in this offer/promotion:

BST Regulated

1.6 Promotion Funding

Indicate the entity/affiliate(s) that is/are funding this offer . Check all that apply:

BST Regulated

1.7 Objectives/Expected Results

Current year objectives for this promotion:

New Units/subs added through this promotion N/A

Notes/Comments/Assumptions:

This waiver is usually coupled with bundle offerings.

SECTION 2: PLANNING & ANALYSIS

Section 2. Comments

2.1 Sales Channels

BellSouth Business (Large Business)	Small Business Services (SBS)	Consumer Large Team Consumer 3rd Party Sales Channel Outbound Telemarketing Sales Channel
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Impact of offer on Sales Channel: (Complete this information in collaboration with Sales Operations contact)

Does the sales channel have the capacity to execute the offer during the desired launch window? Yes

Will additional capacity be required to execute the offer? No If yes, what will the impact be?

Will Sales channel training be required: No If yes, how will training be delivered

Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be?

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Will a sales incentive be used in conjunction with this offer? No
What are the the known operational risks associated with this offer? None
What are your mitigation plans that address these risks?None

Consumer only: All offers/promotions must be reviewed by the Operations Change Review Board (OCRB). The template to request OCRB review is found at : <http://consumer.bst.bls.com/changerequest.asp>

2.2 Geographic Availability

All States	Markets: Entire Region
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MSAs, cities, etc. Include a list of wire centers if applicable:

2.3 Billing

Provide the following information in collaboration with Billing Customer Account Manager

- What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM) Vickie Capuzzo
- What billing system will be used for this offer? CRIS
- Will CBR be used in billing of the promotion/offer for rewards? No If so:
 - Are there non-CBR rewards or discounts? No
 - Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No
 - Will there be changes to Bill Presentation (paper bill and electronic bill)? No
 - Are Affiliate products or services included? No
 - Are Term Agreements and/or rate stabilization involved? No
 - Is this a bundled offer? No

Are there any billing issues associated with this program?

2.4 Legal

Name of the attorney: Kirven Gilbert

Date of CORT review and concurrence:

Attach a copy of any contract or letter of election affected by or associated with this program.

2.5 PSAP requirements

All offers/promotions involving BST product must obtain a final PSAP ruling prior to launch. Click on the following link to access the PSAP ruling request form: <http://apsap.bls.com/>. Upon completion of the PSAP request form, enter the PSAP request # at the top of Section 1 of this P3 Form.

Guidelines for updating PSAP rulings for Offer Extensions:

The PSAP Ruling Policy on offer extensions is: Once an original ruling has been issued, a simple extension of time (with NO OTHER CHANGES) does not require a new PSAP Ruling. ANY change to the original offer requires that a new PSAP ruling request be filed.

2.6 Measuring Effectiveness

How will results be measured and tracked? Be specific.
Which systems will be used? How will they be reported? CIT

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:
Angela Jones

How do you plan to track leads, sales and usage: CIT
Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion?
Angela Jones

When will the results be available?initial: 1Q06 Final: 1Q07

SECTION 3: Launch

Section 3 Comments

Date of PSAP final ruling:
Date CLEC notice posted:
Date Operational Readiness Testing complete:

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Date of PDF approval: 11/04/2004
Regulatory filing complete:
Date Offer Launched into channel(s): 12/26/04
Launch Date Marcom:
Launch Kit posted on website:
Date of Executive Review Board approval:
Date of POP approval:

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Offer Management Information:		
COU: Consumer	PSAP #:	Tracking #: 2004C00643
Requesting Mgr./Dir.: AnnMarie Romano	Phone: 404-986-1096	I-Pager: aromano
Offer Development Mgr.: Monique Vidoli	Phone: 404-986-1081	I-Pager: mvidoli1
Segment Manager:	Phone:	I-Pager:
Approving Director: AnnMarie Romano	Phone: 404-986-1096	I-Pager: aromano
Offer/Promotion name: 1Q05-Cons-Secondary Service Charge Waiver Extension? Yes		
If yes, please provide original P3 tracking ID: 2004C00465		
Offer Status: Launched		
What is the final offer name, as it will appear in internal and external communications: Secondary Service Charge Waiver		
Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.		
SECTION 1: CONCEPT OVERVIEW		
		Section 1 Comments
1.1 Description of Offer:		
Describe Business Situation addressed by this offer:		
Promotional offer that allows customers to change their feature choices with no additional charges for doing so.		
Describe Offer Concept in detail:		
Proposed Promotion		
BellSouth plans to offer a residential Secondary Service Charge waiver promotion beginning:		
In Georgia: December 5, 2004 through December 31, 2005.		
In AL/FL/LA/MS/NC/SC: January 1, 2005 - December 31, 2005		
Promotion Specifics:		
The Secondary Service Charge will be waived when residential customers add or change one or more of the following services/features to their existing service using RightTouch®, the BellSouth web site, the BellSouth residential business office or a BellSouth authorized telemarketing agent:		
<ul style="list-style-type: none"> · Rotary Line Service · TouchStar® Service · Custom Calling Services · Prestige® Communications Package · Customized Code Restrictions · Designer Listings · Message Waiting Indication · RingMaster® Service · MemoryCall® Service/BellSouth® Voice Mail Service · Privacy Director® Service · Voice Mail Companion Services Package · PreferredPack® Plan 		
1.2 Key Dates		
Key Date and timeframe goals related to this project:		
Start Date: 12/05/2004 End Date: 12/31/2005		
CLEC Notice Filed (regulated products-must be posted on web a minimum of 45 days prior to the start of the promotion)		
1.3 Request for:	Product(s)/Service(s) are (check all that apply):	Product Family:
Extension of existing program	Regulated products/services	Voice
1.4 Identify all products and product owners involved in this offer. Check all product owners that apply and list products included in offer. (Please note that BBS is an agent and has no products or customers of its own.)		

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Product Owner Products Included in Offer (Include product code if available)
 BST Products Included Secondary Service Charges

Products Included:

Which entity/affiliate is funding this offer?
 BST Funding Offer

The funding source is (Check all that apply):

1.5 Target Customers/Segments

Description and profile of external target audience, i.e. to whom we are talking:

Current customers New customers	Consumer Segments: 7 to 9 Propensity to Buy: Complete Choice
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1.6 Business Priority/Key Imperatives

Indicate how the program fits into the business priorities for Customer Markets and provide a brief explanation of how it supports the overall strategy (check all that apply):

Customer Markets Key Imperatives

Lead with Service

Other: Explanation:

1.7 Objectives/Expected Results

Project and revenue objectives (check all that apply): Current Year Planned Retention Revenue: Current Year Planned Expenses: % in new revenue New Sales Leads	Current year Planned Booked Revenue: # units to be added through promotion (current year) Expected Contract Revenue: Average Sales Cycle: Other:
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Get Approvals Before Proceeding

SECTION 2: PLANNING & ANALYSIS

Section 2 Comments

2.1 Sales Channels

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BellSouth Business (Large Business) Other:	Small Business Services (SBS) Other:	Consumer Large Team EStore Sales Channel Consumer 3rd Party Sales Channel Outbound Telemarketing Sales Channel Other:
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Impact of offer on Sales Channel: *(Complete this information in collaboration with Sales Operations contact)*
 Does the sales channel have the capacity to execute the offer during the desired launch window? Yes
 Will additional capacity be required to execute the offer? No If yes, what will the impact be?
 Will Sales channel training be required: No
 Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be?
 Will a sales incentive be used in conjunction with this offer? No
 What are the the known operational risks associated with this offer? N/A
 What are your mitigation plans that address these risks?

2.2 Geographic Availability

All States	Markets: Entire Region
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MSAs, cities, etc. Include a list of wire centers if applicable:

2.3 Billing

Provide the following information in collaboration with Billing Customer Account Manager

- What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM)
- What billing system will be used for this offer? CRIS
- Will CBR be used in billing of the promotion/offer for rewards? No If so:

- Are there non-CBR rewards or discounts? No
- Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No
- Will there be changes to Bill Presentation (paper bill and electronic bill)? No
- Are Affiliate products or services included? No
- Are Term Agreements and/or rate stabilization involved? No
- Is this a bundled offer? No

Are there any billing issues associated with this program?
 If not, provide status: N/A

2.4 Legal

Name of the attorney: Kirven Gilbert

Date of CORT review and concurrence:

Attach a copy of any contract or letter of election affected by or associated with this program.

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2.5 Parity Assurance

Indicate if available for resale: Yes With additional discount? No
 if yes, is there a parity issue that requires review by Parity Assurance PMO? No
 If yes, forward copy of P3 to Parity Assurance PMO parity.assurance@bellsouth.com for review and comments.

2.6 Eligibility Restrictions

(CSAs/SAs, SRFs, etc.):

- Does this offer exclude any type of product or customer? No
- If so, which ones specifically?
- Can a customer qualify for this offer more than once? Yes
- Is there a maximum reward or discount that this customer can receive? No
- What time frame do the orders need to be placed in? Orders must be placed on or before December 31, 2005.
- Is there a minimum or maximum purchase required to receive this promotion? No
 If yes, minimum: maximum:
- Is there a minimum amount of time the customer must stay with BellSouth? No
- Is there any termination liability? No
 If yes, what is the termination liability?
 If yes, is it for the full amount, prorated for the time left on the contract?
- Are out of region customers eligible for this promotion? No
- Can this promotion be combined with any other offers? Yes
 If so, which ones? Can be combined with any offer. No current limitation.
 If this promotion cannot be combined with other offers, list which ones: N/A

2.7 Measuring Effectiveness

How will results be measured and tracked? Be specific.
 System codes

Which systems will be used? How will they be reported? MKIS

Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points:
 No formal tracking.

How do you plan to track leads, sales and usage: Not tracking formally
 Ability to track and report results is required for all lead generation campaigns.

Who is responsible for analysis of tracking data to determine the effectiveness of a promotion?
 Finance

When will the results be available? Initial: Final:

2.8 Operational Readiness Testing (ORT)

Engagement of ORT manager is required at beginning of Planning and Analysis

- Who is the primary contact to handle the coordination of activities supporting this offer/promo? (Name of person in Sales Operations, Channel Support and/or Customer Care) Mark Fogus

Get Approvals Before Proceeding

SECTION 3: DEVELOPMENT/IMPLEMENTATION

Section 3 Comments

3.1 Communication Marketing Brief - Marcom

3.1.1 Internal Audience

Who is the internal target audience (i.e. to whom are we talking)

Sales Support

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Sales Specialists

Marketing Titles (list them):
Other:

Based on the business issues you are facing, describe your Internal communications goals:

Employee awareness program

What are the internal audience's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the business problem:
- What is the business solution:

Describe issues facing your product or service:

Other:

Primary message: What do we want the internal audience to understand and do: Want audience to know that the secondary service charge waiver is being extended and remains BAU.

For an externally directed project, how will you inform/educate internal audiences about it:

3.1.2 External Audience

If you need advertising/marketing communications, what is your goal:

Other:

Describe the business issues you are facing with your product or service:
%

List Partners:

Positioning Statement:

What are the customer's perceptions (positive or negative) regarding the products and the market in general and why:

- Perceptions:
- What is the primary business problem:
- What is the primary business solution:

Primary message: What do we want the audience to understand and do:

Key Customer Benefit:

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Why should the customer select BellSouth vs. another vendor; how is it different than competitors:
Tone (how you say what you say):
Other considerations: (execution considerations, special considerations, instructions)
Key features/takaways for customer:
What issues or roadblocks might the sales team encounter:
Product weaknesses/drawbacks:
Must customer purchase other services to make this offer work?
Incompatible with other products/services?
List and describe known issues and/or conflicts (Channel, Product, Regulatory):
List key competitors:
Has BellSouth Public Relations been engaged: If yes, are they developing a press release or white paper:
For consistency, provide MarCom with the content you provided to the PR group:
3.1.3 Partner Information-External
If this project requires involvement with vendors/partners external to BellSouth, who is partner and what is their role:
If dollars are coming from vendors/partners, how much are they contributing?
Do you have a co-marketing agreement signed in addition to the business agreement?
3.1.4 Media Vehicle
Other:
3.1.5 Delivery and Distribution Information
Fill in all information that applies:
<ul style="list-style-type: none"> • External Direct Mail: source of mailing list and approximate quantity to be mailed: <li style="margin-left: 20px;">*The mail list must be provided according to timeline. • Bill Inserts: specific instructions required: • Internet or Intranet postings: what URLs (addresses) and other specific instructions: • Estimated # of mailing/email lists: • Source of lists: • If preliminary MKIS pull, how many can we market to?
3.1.6 Advertising/Legal Information

List any legal notes that must be included (e.g. tariff information, material terms and conditions):
Legal language/restrictions provided by Legal to be added to external deliverables:
What are the legally trademarked names for the products involved (e.g. BellSouth® Frame Relay Service):
Get Approvals Before Proceeding
SECTION 4: Launch
<small>Section 4 Comments</small>
Date of PSAP final ruling: Date Operational Readiness Testing complete: Date of PDF approval: 11/04/2004 Regulatory filing complete: Date Offer Launched into channel(s): 12/05/2004 Launch Date Marcom: Launch Kit posted on website:

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Offer Management Information:		
Market Segment: Consumer	PSAP #: N/A	Tracking #: 2005C00994
P3 prepared by: Felton Turner	Phone: 404-986-1076	I-Pager: feltonturner
Offer/Promotion Owner: Felton Turner	Phone: 404-986-1076	I-Pager: feltonturner
Approving Director: Jodi Keeter	Phone: 404 986 1153	I-Pager: jkeeter
Tariff SME: Vickie Miine	Phone: (404) 829-7468	I-Pager: vmilne
Finance Manager :	Phone:	I-Pager:
Offer/Promotion name: 1Q06-Cons-Secondary Service Charge Waiver		
Extension? Yes		
If yes, please provide original P3 tracking ID: 2004C00465		
What is the offer name that will appear in external/regulatory communications:		
Secondary Service Charge Waiver		
Note: This field must be completed on the final P3 submitted to Strategic Pricing Promotions Manager. It must be a name that meets BellSouth Intellectual Property approval. Click here for guidance on name approvals.		
SECTION 1: CONCEPT OVERVIEW		
1.1 Description of Offer		
		Section 1 Comments
1.1.1 Describe Business Situation addressed by this offer. (Include a description of the external target audience, i.e. is the promotion intended for new customers, former customers, current customers, non-BellSouth customers, etc?) Promotional offer that allows customers to change their feature choices with no additional charges for doing so.		
Proposed Promotion BellSouth plans to offer a residential Secondary Service Charge waiver promotion beginning:		
In AL/FL/GA/LA/MS/NC/SC: January 1, 2006 - December 31, 2006		
1.1.2 Overview (Provide a high-level summary of the offer.) The Secondary Service Charge will be waived for residential subscribers who add or change certain services/features.		
1.1.3 Promotion Specifics (Describe the offer concept in detail. Include all products that will be involved in this offer/promotion/bundle) Proposed Promotion BellSouth plans to offer a residential Secondary Service Charge waiver promotion beginning:		
In AL/FL/LA/MS/NC/SC/GA: January 1, 2006 - December 31, 2006		
Promotion Specifics: The Secondary Service Charge will be waived when residential customers add or change one or more of the following services/features to their existing service using RightTouch®, the BellSouth web site, the BellSouth residential business office or a BellSouth authorized telemarketing agent:		
<ul style="list-style-type: none"> · Rotary Line Service · TouchStar® Service · Custom Calling Services · Prestige® Communications Package · Customized Code Restrictions · Designer Listings · Message Waiting Indication · RingMaster® Service · MemoryCall® Service/BellSouth® Voice Mail Service · Privacy Director® Service · Voice Mail Companion Services Package 		
1.1.4 Restrictions/Eligibility Requirements N/A		
1.2 Key Dates		
Key Date and timeframe goals related to this project: Start Date: 01/01/2006 End Date: 12/31/2006 If the benefit period extends beyond the End Date specified above, is the benefit period greater than 90 days? No		
1.3 BST Regulation		
Does every option/variation of this promotion include or create a bundle consisting of a BST regulated product/service in		

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PROPRIETARY

Item 1-22: 000066

combination with a non-regulated product/service provided by BST, a BS affiliate or a non-affiliated third party? No
 Does any option/variation of this promotion waive or reduce a regulated BST rate/charge? No
 Is the promotion of regulated BST products/services provided solely via Cash-Back methodology? No

1.4 Parity Assurance

This promotion must be available for resale and the wholesale discount must apply to BST regulated products/services. Because this promotion is available for resale with a wholesale discount, a CLEC Notice must be posted on a website 45 days prior to the start of the promotion.

Is there a parity issue that requires review by Parity Assurance PMO? No
 If yes, forward copy of P3 to Parity Assurance PMO <mailto:Dan.Fancher@bellsouth.com> for review and comments.

Will this offer be available to customers served by both the Interconnection and Carrier Services organization and retail business organizations (Small Business Services and/or BellSouth Business)? No
 If yes, forward copy of P3 to Kristy.Seagle@bellsouth.com in ICS for review and comments.

1.5 Product Owners

Owners of Product(s)/Service(s) that are included in this offer/promotion:

BST Regulated

1.6 Promotion Funding

Indicate the entity/affiliate(s) that is/are funding this offer. Check all that apply:

BST Regulated

1.7 Objectives/Expected Results

Current year objectives for this promotion:
 # New Units/subs added through this promotion N/A

Notes/Comments/Assumptions:

SECTION 2: PLANNING & ANALYSIS

Section 2 Comments

2.1 Sales Channels

BellSouth Business
 (Large Business)

Small Business Services (SBS)

Consumer
 Large Team
 EStore Sales Channel
 Consumer 3rd Party Sales Channel
 Outbound Telemarketing Sales Channel

Impact of offer on Sales Channel: (Complete this information in collaboration with Sales Operations contact)

Does the sales channel have the capacity to execute the offer during the desired launch window? Yes

Will additional capacity be required to execute the offer? No If yes, what will the impact be?

Will Sales channel training be required: No If yes, how will training be delivered

Daily communication Bulletin board

Will the offer require changes to automated sales systems and tools? No If yes, what will the impact be?

Will a sales incentive be used in conjunction with this offer? No

What are the the known operational risks associated with this offer? N/A

What are your mitigation plans that address these risks?N/A

Consumer only: All offers/promotions must be reviewed by the Operations Change Review Board (OCRB). The template to request OCRB review is found at : <http://consumer.bst.bls.com/changerequest.asp>

2.2 Geographic Availability

Alabama
 Georgia
 Florida
 Louisiana
 Mississippi

Markets:
 Entire Region

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North Carolina South Carolina
MSAs, cities, etc. Include a list of wire centers if applicable:
2.3 Billing
<p>Provide the following information in collaboration with Billing Customer Account Manager</p> <ul style="list-style-type: none"> • What is the name of Billing Solution Analyst for this offer? (to be entered by Billing CAM) Vickie Capuzzo • What billing system will be used for this offer? CRIS • Will CBR be used in billing of the promotion/offer for rewards? No If so: • Are there non-CBR rewards or discounts? No • Will there be new FIDS and/or USOCS or changes to existing FIDS and/or USOCS? No • Will there be changes to Bill Presentation (paper bill and electronic bill)? No • Are Affiliate products or services included? No • Are Term Agreements and/or rate stabilization involved? No • Is this a bundled offer? No <p>Are there any billing issues associated with this program? If not, provide status: N/A</p>
2.4 Legal
Name of the attorney: Kirven Gilbert
Date of GORT review and concurrence: Attach a copy of any contract or letter of election affected by or associated with this program.
2.5 PSAP requirements
All offers/promotions involving BST product must obtain a final PSAP ruling prior to launch. Click on the following link to access the PSAP ruling request form: http://epsap.blis.com/ . Upon completion of the PSAP request form, enter the PSAP request # at the top of Section 1 of this P3 Form.
<p>Guidelines for updating PSAP rulings for Offer Extensions: The PSAP Ruling Policy on offer extensions is: Once an original ruling has been issued, a simple extension of time (with NO OTHER CHANGES) does not require a new PSAP Ruling. ANY change to the original offer requires that a new PSAP ruling request be filed.</p>
2.6 Measuring Effectiveness
How will results be measured and tracked? Be specific. System codes
Which systems will be used? How will they be reported? MKIS
Who is responsible for tracking? Identify specific roles of each party involved and the hand-off points: No formal tracking.
How do you plan to track leads, sales and usage: Not tracking formally Ability to track and report results is required for all lead generation campaigns.
Who is responsible for analysis of tracking data to determine the effectiveness of a promotion? Finance
When will the results be available? Initial: 00/00/0000 Final: 00/00/0000
SECTION 3: Launch
Section 3 Comments
Date of PSAP final ruling: Date CLEC notice posted: Date Operational Readiness Testing complete: Date of PDF approval: 11/04/2004 Regulatory filing complete: Date Offer Launched into channel(s): 12/05/2004 Launch Date Marcom: Launch kit posted on website: Date of Executive Review Board approval: Date of POP approval:

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Records Management

Add Box			
Vendor Box Number: <input type="text" value="0056931331"/>			
Box Description			
State: <input type="text" value="FL"/>	Responsibility Code (RC): <input type="text" value="H09"/>	Department Code: <input type="text" value="BST Svc Provisioning"/>	SME Name: <input type="text"/>
Record Series Number: <input type="text" value="04-0223"/> <input type="button" value="Find"/> <input type="button" value="View List"/>	Box Description 1: <input type="text" value="State Commission Filings - Docket-Specific"/>	Box Description 2 / Range: <input type="text" value="030869-TP"/>	
Box Begin Date (MM/DD/YYYY): <input type="text" value="8/1/2003"/>	Box End Date (MM/DD/YYYY): <input type="text" value="12/30/2004"/>	Destruction Date (MM/DD/YYYY): <input type="text" value="12/31/2024"/> <input type="button" value="Calculate"/>	Suspension: <input type="text" value="**NONE"/>
File Description(s)			
File Begin Date (MM/DD/YYYY): <input type="text" value="8/9/2007"/>	File End Date (MM/DD/YYYY): <input type="text"/>	File Title (30 characters max): <input type="text" value="testimony"/>	File Title Continued or File Range: <input type="text"/>
<input type="button" value="Print & Save"/>			

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8-9-07

Records Management

Add Box				
Vendor Box Number: <input type="text" value="0056931331"/>				
Box Description				
State: <input type="text" value="FL"/>	Responsibility Code (RC): <input type="text" value="H09"/>	Department Code: <input type="text" value="BST Svc Provisioning"/>	SME Name: <input type="text"/>	
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File Description(s)				
File Begin Date (MM/DD/YYYY): <input type="text" value="8/9/2007"/>	File End Date (MM/DD/YYYY): <input type="text"/>	File Title (30 characters max): <input type="text" value="testimony"/>	File Title Continued or File Range (30 characters max): <input type="text"/>	<input type="button" value="Add File"/>
<input type="button" value="Print & Save"/>		<input type="button" value="Cancel"/>		

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