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Conversation Rules Templates Guide

Use Case—Contract Renewal

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Scenario

Mobile Operator X is the leading mobile phone services provider in their region. However, recently, more competitors have entered the market and are starting to take customers away. The reasons:

- Newer devices.
- Better pricing.
- Customer satisfaction.


The Conversation Manager Contract Renewal application can be used to mitigate loss of customers to these issues, as much as possible. The Mobile company has a new line of devices and special rate plans to existing customers that may churn. Implementing this application to recognize the customers that have:

- A contract end date of Y days/weeks/months away.
- A specific device.
- Eligibility for the new rate plans.

will enable a special group of agents skilled in "Customer Saves" to know who the customer is, what plan and device they have, know that they are close to contract end, and what offers they can provide to ensure continuity of service and revenue.

A standard set of rules comes with the solution and the Mobile operator needs to make only minimal changes to start using the solution immediately. Conversation Manager Reports show the number of customers identified as Contract Renewal candidates, the treatment provided, and the effectiveness of renewals.

Creating the Rule

| Contract Renewal | | | | | | | | |
|------------------|-----------------------------|------------|--------|--|--|--|--|---------------------------------------------------------------------------------------|
| Section | Expression | Parameters | | | | | | |
| When | Contract will expire within | 3 | months | | | | |  |
| Then | Request skill | Sales | | | | | |  |

Narrative

This is linear rule Contract Renewal.

When the "Contract end date will expire within 3 months" condition evaluates true, the customer is routed to the Customer Care skill group.

Technical Detail

In order to implement this use case, the customer will have to fetch their Contract End Date from their business's back-end database. They can do this using Orchestration Server via Composer's Database, Web Service and other blocks. The Contract End Date can be passed into the rules block in our pre-defined Fact called Contract. This enables the condition:

Contract end date is within "{time}" "{timePeriod}"