



Telecom CDP Use Case Repository

Extracting Value From Your CDP
With Data-Driven Use Cases

Part Two



Foreword

'In today's hyper-connected world, the telecommunications industry finds itself at a critical crossroads. While connectivity has never been more essential, customer expectations have never been higher, or more dynamic. At the heart of this transformation lies data - how it's collected, unified, and most importantly, activated.

As the founder of a Martech agency partnering with the leading telcos globally, I've witnessed firsthand the power - and challenges - of leveraging customer data to drive intelligent, personalised experiences. Too often, legacy systems, data silos, and fragmented customer journeys hinder progress. And that's where Customer Data Platform technology comes in.

This whitepaper was created to demystify CDPs and showcase their practical, high-impact use cases specific to the telecom sector. From churn reduction and next best offer orchestration, through to omnichannel engagement and real-time personalisation, CDPs are redefining what's possible for telcos that are ready to evolve.

Our goal with this whitepaper is simple - to provide clarity, insight and inspiration. Whether you're in Marketing, IT or Customer Experience, the strategies shared here are designed to spark new ideas and show you what's achievable when technology and data strategy align.

Telcos aren't just service providers anymore, they are experience creators. And with the right data foundation, they can become the kind of brand that customer don't just need, but choose.

Thank you for taking the time to explore these use cases with us. I hope they serve as both a roadmap and catalyst for your next wave of innovation.'



Rajneesh Gautam - CEO, Dexata

Foreword

'At Tealium, we've had the privilege of working closely with some of the world's most ambitious telecom brands - helping them turn complex data challenges into tangible business outcomes. What we've learned is simple but powerful - when telecoms truly understand their customers, they don't just reduce churn - they unlock loyalty, relevance, and sustained growth.

The telecom industry generates a staggering amount of customer data every second - from billing systems and usage logs to mobile apps and support channels. But data without context or connection is just noise. A Customer Data Platform transforms that noise into a symphony of insight, enabling real-time personalisation, intelligent segmentation, and predictive engagement at scale.

This whitepaper highlights real-world use cases we've helped enable, and others we've seen emerge across the industry. It's more than a showcase of what CDPs *can* do - it's a call to action for telecom leaders to think bigger about *what's next*.

As Customer Success professionals, our role goes beyond implementation - we're partners in driving transformation. And what we've seen time and again is that the telcos who invest in cross-functional alignment, data strategy, and customer-centric thinking are the ones who see the fastest time to value.

We're thrilled to contribute to this collaborative effort with Dexata, and we hope it helps you envision what's possible for your organisation, and sparks ideas you can put into action today.'



Chris King - Senior Customer Success Director, Tealium

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Why Data-Driven Use Cases Are The Key To Unlocking Value

A Customer Data Platform (CDP) serves as the backbone of telecom businesses striving for personalised customer engagement, predictive analytics, and operational efficiency.

However, the **real value of a CDP** lies in how effectively it is utilised.

By implementing data-driven use cases, telecom companies can:

- **Turn insights into actions** that increase customer retention and revenue.
- **Drive operational efficiencies** by automating processes and reducing manual interventions.
- **Enhance customer experience** through real-time, omnichannel personalisation.

How use cases extract value from your CDP:

Each use case leverages CDP capabilities to address specific business objectives, such as:

1. **Boosting Churn Prevention** through AI-driven engagement strategies.
2. **Maximising ARPU** with targeted upsell and cross-sell campaigns.
3. **Improving Paid Media ROI** by suppressing unengaged users and enriching audience targeting.

Purpose of this Repository

The primary purpose of this repository is to serve as a comprehensive guide for telecom clients to unlock the full potential of their Tealium AudienceStream Customer Data Platform (CDP). It bridges the gap between theoretical CDP capabilities and practical implementation, ensuring that businesses can:

1 Transform Data into Actionable Use Cases

This repository empowers teams to translate raw customer data into targeted, impactful strategies, helping achieve business goals such as improving customer retention, driving revenue, and optimising operational efficiency.

2 Accelerate Decision-Making with Clear Frameworks

By following a consistent and structured approach, the repository simplifies the implementation of CDP use cases, reducing the time it takes to go from planning to execution.

3 Address Specific Telecom Objectives

Designed with the unique needs of telecom businesses in mind, the repository provides tailored solutions to common challenges such as churn reduction, ARPU maximisation, and paid media optimisation.

4 Foster Collaboration and Scalability

Whether for B2B partnerships or consumer-facing strategies, the use cases in this repository are designed to scale across different channels, teams, and industries, fostering collaboration and long-term adaptability.

Whether you are looking to improve customer retention, boost engagement, optimise paid media, or enhance B2B collaboration, this repository acts as your go-to reference for practical, real-world applications.

How to Use This Repository

Every use case in this repository follows a consistent framework, with clear objectives, KPIs, implementation steps, and audience segmentation outlined, making it easy to find relevant solutions for your specific needs.

Searching for a Use Case:

- **By KPI** (e.g., Churn Reduction, CLV, Conversion Rate, Engagement)
- **By Objective** (e.g., Retention, Monetisation, Cross-Sell/Upsell)
- **By Industry Focus** (e.g., B2C, B2B, Prepaid, Postpaid)
- **By Complexity** (Quick Wins vs. Advanced Use Cases)
- **By Data Strategy** (e.g., Predictive Analytics, Real-Time Personalisation)

Every use case follows the **6Ws Framework**, ensuring clarity, consistency, and ease of implementation.

The 6Ws Framework for Use Cases

To maintain clarity, consistency, and usability, each use case is structured around the 6Ws Framework – an intuitive model that ensures all critical aspects of a use case are covered:

1

WHY: The Purpose

Defines the **core business objective** of the use case.

- What **problem** does this solve?
- What is the **expected business impact**?
- Which **KPIs** will measure success?

Example: Reduce churn by offering personalised data usage alerts.

2

WHO: The Target Audience

Identifies **which customer segments** benefit from the use case.

- Who are the **ideal recipients** of this strategy?
- Should the use case **target high-value customers, new users, or at-risk customers**?
- Are there any **exclusions** (e.g., customers who opted out)?

Example: Target prepaid customers who frequently exceed their data limit.

3

WHAT: The Solution

Defines **what is being implemented** and **what deliverables** the use case provides.

- What **personalised experience, campaign, or alert** is being delivered?
- What **data sources** enable this use case?
- What are the **expected customer interactions**?

Example: Trigger real-time notifications when a customer is approaching their data cap and offer an upsell for a data pack.

4

WHEN: The Timing

Outlines **when** the use case should be triggered.

- Is it **real-time**, **scheduled**, or **event-driven**?
- Are there specific **milestones** or **thresholds** that trigger the execution?

Example: Send an alert when a customer reaches 90% of their data plan usage.

5

WHERE: The Delivery Channels

Defines the **communication channels** through which the experience is delivered.

- Should the customer be **notified via SMS, push notification, or email**?
- Should **paid media campaigns** be activated?
- Should the interaction happen in-store, via call centres, or on self-service platforms?

Example: Deliver an alert via WhatsApp and SMS to ensure high visibility.

6

HOW: The Implementation

Outlines **technical and operational steps** required to activate the use case.

- What **data integrations** are needed?
- What **automation and segmentation** are required?
- What **privacy or compliance considerations** should be addressed?

Examples:

1. **Data Integration:** Ingest CRM and usage data.
2. **Segmentation:** Identify prepaid users with low balances.
3. **Automation:** Configure a rule to trigger alerts in real-time.
4. **Omnichannel Messaging:** Deliver messages via SMS and WhatsApp.

Exploring The Use Cases

The use cases in this repository are grouped into five categories, enabling telecom teams to easily navigate and select relevant solutions based on KPIs, objectives, data strategies, complexity, or industry focus.

By KPI (Key Performance Indicator)

CDP use cases grouped by measurable business impact.

KPI	Relevant Use Cases
Churn Reduction	<ul style="list-style-type: none">• Churn Prevention: Re-Engage Inactive Customers with Timely Alerts and Exclusive Offers• Smart Usage Alerts: Proactive Engagement to Reduce Churn & Drive Revenue
Customer Lifetime Value (CLV) Growth	<ul style="list-style-type: none">• Upsell to Existing Customers: Maximising Customer Lifetime Value Through Targeted Offers• Cross-Selling & Bundling: Encouraging Product Adoption Through Personalised Recommendations
Engagement Rates	<ul style="list-style-type: none">• Unlock Maximum Engagement: Reconnect with Users on Their Preferred Digital Channels
Paid Media Efficiency	<ul style="list-style-type: none">• Suppression of Low-Intent or Unengaged Users• Achieving High Match Rates: Maximising Match Rates on Google, Meta, TikTok, and Adobe

By Business Objective

CDP use cases grouped by strategic goals.

Objective	Relevant Use Cases
Retention & Loyalty	<ul style="list-style-type: none">• Churn Prevention: Re-Engage Inactive Customers with Timely Alerts and Exclusive Offers• Loyalty Programme Integration: Cross-Brand Loyalty & Co-Marketing Strategies
Upselling & Cross-Selling	<ul style="list-style-type: none">• Upsell to Existing Customers: Maximising Customer Lifetime Value Through Targeted Offers• Cross-Selling & Bundling: Encouraging Product Adoption Through Personalised Recommendations
Paid Media Optimisation	<ul style="list-style-type: none">• Base Marketing in Paid Media: Building Enriched Customer Audiences for Paid Ads• Suppression of Converted Customers to Optimise Ad Spend

By Data Strategy

CDP use cases grouped by data-driven approaches.

Data Strategy	Relevant Use Cases
Real-Time Engagement	<ul style="list-style-type: none">Real-Time Usage Alerts & Personalised Offers: Driving Engagement & Retention
Omnichannel Personalisation	<ul style="list-style-type: none">Personalise Offline Channels: Bridging Digital and In-Store ExperiencesOmnichannel Customer Support: Seamless Brand Experiences Across Support Channels
AI-Driven Insights	<ul style="list-style-type: none">Utilise Sentiment Analysis: Call Centre Prioritisation Using AI-Driven Sentiment Analysis

By Complexity & Effort

Helping teams prioritise implementation based on effort vs. impact.

Complexity	Relevant Use Cases
Quick Wins (Low Effort, High Impact)	<ul style="list-style-type: none">Excluding Existing Customers from Acquisition Campaigns
Mid-Level Strategies	<ul style="list-style-type: none">Performance Marketing in Paid Media: Targeting High-Intent Users Via Paid Campaigns
Advanced Use Cases	<ul style="list-style-type: none">Unified Voices, Seamless Experiences: Ensuring Consistent Messaging Across Every Channel

By Industry Focus

Use cases customised for different telecom business models.

Industry Focus	Relevant Use Cases
B2C Mobile Operators	<ul style="list-style-type: none">Churn Prevention: Re-Engage Inactive Customers with Timely Alerts and Exclusive OffersSmart Usage Alerts: Proactive Engagement to Reduce Churn & Drive Revenue
B2B Partnerships	<ul style="list-style-type: none">B2B: Partner Data Sharing with Enterprises: Secure and Compliant Data-Sharing Frameworks

Use Case Library

A comprehensive library of use cases detailing objectives, KPIs, implementation steps, and audience segmentation, enabling easy discovery and implementation of solutions to maximise CDP value.

Every use case follows the **6Ws Framework**, ensuring clarity, consistency, and ease of implementation.

Offline & Omnichannel Personalisation

Creating Seamless Experiences Across Online and Offline Channels.

Personalise Offline Channels

Bridging Digital and In-Store Experiences

Overview

Delivering a personalized experience in telecom extends beyond digital platforms to offline channels like retail stores and service centers, which are essential for customer engagement. By leveraging customer data, telecom providers can offer tailored support, location-based offers, and efficient, customized service, particularly for high-value customers and loyalty members. This approach bridges the gap between online and offline interactions, ensuring a seamless omnichannel journey that enhances satisfaction, builds loyalty, and maximizes the value of offline touchpoints.

Scenarios

REAL WORLD APPLICATIONS

- **Personalised Store Visits:** Deliver tailored product suggestions and support based on a customer's history and preferences.
- **Targeted Upselling (during store visits):** Offer relevant upgrades or add-ons at the point of interaction.
- **Geo-Targeted Promotions:** Engage nearby customers with location-specific deals and invitations to visit stores.
- **Interactive Kiosks:** Provide self-service options and personalised recommendations, bridging online insights with physical outlets.
- **Proactive Support:** Address potential issues or needs in-store before they escalate, increasing satisfaction.
- **Cross-Channel Integration:** Maintain a unified customer journey, linking digital data with face-to-face interactions for consistency.

When: The Timing

TRIGGERS

- During store visits
- Proximity triggers
- Specific events (e.g., new product launches, festive seasons).

Where: The Delivery Channels

CHANNELS

- Physical retail stores
- Kiosks
- Pop-up events
- Service centres

Why: The Objective

- **Personalised Offline Interactions:** Enhance customer satisfaction, drive loyalty, and increase revenue through personalised offline interactions.
- **Address Customer Pain Points More Effectively:** Use omnichannel customer data to address pain points more effectively.

Who: Target Audience

EXISTING CUSTOMERS:

- Customers with a history of offline engagement or proximity to retail locations.

EXCLUSIONS:

- Customers who have opted out of specific alerts.
- Users whose contact information is invalid or outdated.

AUDIENCE SIZE MEASUREMENT:

- **Active Customers:** Total number of customers interacting with offline channels.
- **Proximity-Based Audience:** Number of customers within a specified radius of physical locations.
- **Loyalty Base:** Total loyalty program members eligible for in-store perks.
- **High-Value Segment:** Percentage of customers contributing significant revenue offline.

What: The Solution

- **Personalised customer service** in all offline stores and kiosks.
- **Proactive pain point resolution** by using omnichannel customer data.

DATA SOURCES

- **CRM Systems:** Centralise customer profiles and history for personalised in-store experiences.
- **POS Systems:** Track transactions to enable real-time offers and recommendations.
- **Call Center Logs:** Use past support interactions to tailor offline assistance.
- **Behavioural Data:** Combine online and offline activities to optimise in-person engagements.
- **Survey Tools:** Collect customer feedback to refine services and interactions.
- **Geolocation Data:** Target promotions and store triggers based on customer locations.

Personalise Offline Channels

Bridging Digital and In-Store Experiences

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Integration of Online and Offline Channels:** Synchronise data and interactions to ensure a seamless customer journey across physical and digital touchpoints.
- **Consent Management:** Comply with data privacy regulations and respect user preferences regarding data usage and communication.
- **Location Intelligence:** Utilise geolocation insights to deliver relevant, proximity-based offers and optimise offline engagements.
- **Feedback Mechanisms:** Gather and analyse customer input to continually refine offline experiences and services.

PROCESS

1. **Data Centralisation:** Use centralised data to inform offline strategies.
2. **Data Insights Integration:** Integrate digital insights into offline tools.
3. **Staff Empowerment:** Empower staff with actionable customer intelligence.

Omnichannel Customer Support

Seamless Brand Experiences Across Support Channels

Overview

Omnichannel customer support creates seamless, personalized experiences across touchpoints by integrating CRM data and ensuring visibility into interactions, boosting satisfaction, loyalty, and revenue.

Scenarios

REAL WORLD APPLICATIONS

- **In-Store Assistance:** Equip associates with real-time customer data on mobile devices.
- **Call Centres:** Provide agents with unified profiles and interaction history.
- **Chatbots:** Use CRM data for effective responses and seamless handoffs.
- **Direct Mail:** Send highly personalised messages to customer mailboxes.
- **Email and SMS:** Support offline efforts with timely digital communication.

When: The Timing

TRIGGERS

- **Real-Time:** Personalise in-store or call centre interactions based on live customer insights.
- **Event-Based:** Engage customers during local events, holidays, or anniversaries.
- **Periodic:** Send regular updates, such as loyalty program status or personalised offers.

Where: The Delivery Channels

CHANNELS

- **In-Store:** Provide associates with real-time customer data on tablets or mobile.
- **Call Centres:** Equip agents with unified profiles and interaction history.
- **Chatbots:** Use CRM data for responses and seamless handoffs to agents.
- **Direct Mail:** Send personalised messages to customer mailboxes.
- **Email and SMS:** Support offline efforts with timely digital updates.

Why: The Objective

- **Eliminate inefficient ad spend** on customers who no longer need the promoted service.
- **Enhance ROAS** by ensuring only relevant audiences receive acquisition and upgrade offers.
- **Reduce ad fatigue** and **improve customer experience** by avoiding redundant promotions.

Who: Target Audience

EXISTING CUSTOMERS

- Customers who **interact across multiple channels** (e.g., in-store, online, chatbot, and call centre).
- **High-value** or **loyalty program members**. Customers with recent or frequent purchases.

EXCLUSIONS

- Customers who have opted out of personalisation or certain communication channels.
- Users with incomplete or outdated contact information.

AUDIENCE SIZE MEASUREMENT

Assess the total number of customers actively engaging across channels to gauge personalisation impact.

What: The Solution

- **Unified customer profiles** integrating CRM and behavioural data.
- **Personalised content** and **support** tailored to individual preferences.
- **Consistent messaging** across offline and online channels.
- **Cross-channel synchronisation** of customer interactions.

DATA SOURCES

- **CRM Data:** Customer purchase history, preferences, and contact details.
- **Point-of-Sale Data:** In-store purchase behaviours and preferences.
- **Support Interaction Data:** Call centre logs, chatbot transcripts, and customer service interactions.

Omnichannel Customer Support

Seamless Brand Experiences Across Support Channels

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Data Integration:** Unify CRM, point-of-sale, chatbot, and support interaction data into a single customer view.
- **Technology Enablement:** Equip offline channels with tools to access and act on customer insights.
- **Privacy Compliance:** Ensure adherence to GDPR, CCPA, and other relevant data privacy regulations.
- **Cross-Channel Visibility:** Ensure that all customer-facing teams can access interaction histories across channels.

PROCESS

1. **Customer Data Integration:** Combine CRM, chatbot, and offline interaction data into a centralised system.
2. **Profile Enrichment:** Use purchase history, preferences, and interaction data to create detailed customer profiles.
3. **Channel Personalisation:** Customise interactions across in-store, call centres, chatbots, and direct mail.
4. **Cross-Channel Synchronisation:** Enable systems to share interaction histories, ensuring smooth handoffs between channels.
5. **Continuous Optimisation:** Collect feedback from all channels to refine personalisation strategies.

Unified Voices, Seamless Experiences

Ensuring Consistent Messaging Across Every Channel

Overview

In a multi-channel communication environment, consistency in messaging ensures that users receive a unified brand message regardless of the platform. It eliminates confusion, reinforces brand identity, and improves customer trust. Inconsistent messaging can lead to user frustration, misunderstandings, or diminished brand loyalty. Ensuring consistent communication involves harmonising content, tone, and timing across all channels while tailoring delivery to suit the unique characteristics of each medium.

Scenarios

REAL WORLD APPLICATIONS

- **Promotional Offer Notifications:** Broadcast deals and discounts uniformly across various platforms.
- **Consistent Campaign Launch:** Align messaging in every channel for a unified product or service rollout.
- **Loyalty Programme Engagement:** Deliver synchronised rewards and updates to loyalty members across touchpoints.

When: The Timing

TRIGGERS

- **Every touchpoint:** At every touchpoint of the customer journey (awareness, engagement, purchase, support, retention)

Where: The Delivery Channels

CHANNELS

Across all communication platforms, including:

- Email
- SMS
- Mobile app: Personalised push notifications
- Website: Banners and pop-ups for news and offers
- Social media
- Call centres

Why: The Objective

- Eliminate confusion
- Enhance brand trust
- Improve customer satisfaction, and drive engagement.

Who: Target Audience

KEY SEGMENTS:

- High-Engagement Customers
- New Customers
- Loyalty Program Members
- Potential Churners

EXCLUSIONS:

- Customers who have opted out of specific alerts.
- Users whose contact information is invalid or outdated.

AUDIENCE SIZE MEASUREMENT:

- **Total Customer Base:** All active users across channels.
- **Multichannel Users:** Customers engaging with more than one communication channel.
- **High-Priority Segments:** Subset of customers with high-value transactions or frequent interactions.
- **Churn-Prone Segments:** Percentage of users with declining engagement or usage patterns.

What: The Solution

- Ensure that **messaging** across all channels is **consistent**, engaging, and aligned with customer preferences and company branding.

DATA SOURCES

- **CRM:** Consolidate customer details to drive personalised, consistent messaging.
- **Digital Channels Data:** Gather insights from online interactions to create cohesive multi-channel experiences.
- **Call Centre Data:** Utilise call logs and feedback for targeted improvements and message refinement.
- **Usage Data:** Understand how customers interact with services to tailor content delivery.

Unified Voices, Seamless Experiences

Ensuring Consistent Messaging Across Every Channel

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Standardised Content Guidelines:** Maintain a uniform messaging framework across all platforms.
- **Roaming Usage Data:** Track user activity beyond home networks to deliver relevant communications.
- **Location Data:** Pinpoint user locations for timely, region-specific updates and offers.
- **Channel Reachability:** Ensure each communication channel can reliably connect with the intended audience.
- **Engagement Rates:** Measure campaign performance to refine targeting and timing.
- **Calls per Customer:** Monitor and manage call volumes per user to optimise resource allocation.

PROCESS

1. **Deliver Uniform Messaging:** Use centralised data, standardised content guidelines, and omnichannel tools to ensure consistent communication across all platforms. Align messaging tone, timing, and branding to maintain a unified customer experience.
2. **Monitor and Optimise:** Continuously gather customer feedback and performance metrics, such as engagement rates and campaign success, to refine communication strategies. Adjust delivery based on insights to enhance relevance and effectiveness.

Streamline Call Centre Operations

Optimising Call Centre Resources with Data-Driven Insights

Overview

Efficient call centre management prioritises high-value customers while directing low-value queries to digital channels. Leveraging customer insights enables faster resolutions, improving satisfaction and operational efficiency, while boosting ARPU and profitability.

Scenarios

REAL WORLD APPLICATIONS

- **In-Store Assistance:** Equip associates with real-time customer data on mobile devices.
- **Call Centres:** Provide agents with unified profiles and interaction history.
- **Chatbots:** Use CRM data for effective responses and seamless handoffs.
- **Direct Mail:** Send highly personalised messages to customer mailboxes.
- **Email and SMS:** Support offline efforts with timely digital communication.

When: The Timing

TRIGGERS

- **High Call Volumes:** During peak operational hours or periods of heavy call traffic.
- **Customer Segments:** When categorising customers by ARPU or service requirements.

Where: The Delivery Channels

CHANNELS

- **Call centres:** Call centres for critical, high-value interactions.
- **Digital platforms:** Digital platforms (chatbots, FAQs) for routine or low-priority queries.

Why: The Objective

- **Enhance efficiency, reduce costs, and improve** customer satisfaction.
- **Minimise resolution time and increase ARPU** by focusing on high-value interactions.

Who: Target Audience

- Existing customers
- Prospects

EXCLUSIONS

- Customers who have opted out of specific alerts.
- Users whose contact information is invalid or outdated.

AUDIENCE SIZE MEASUREMENT

- **High-Value Customers:** Number of premium plan subscribers or customers generating top 20% of ARPU.
- **Low-Value Customers:** Total users with basic plans or infrequent service usage.
- **Operational Segments:** Customers frequently calling the support centre vs. those primarily using digital channels.
- **Behavioural Patterns:** Users with unresolved queries requiring escalation. Customers with a history of dissatisfaction (low CSAT or NPS).

What: The Solution

- **Optimise channel usage** to balance cost-efficiency and customer satisfaction.

DATA SOURCES

- **CRM:** Consolidate customer information, including usage, history, and preferences, for personalised service.
- **Digital Channels Data:** Monitor interactions on chatbots, websites, and apps to optimise self-service and reduce call centre load.
- **Feedback Systems:** Gather insights from surveys and reviews to refine support processes and address pain points.

Streamline Call Centre Operations

Optimising Call Centre Resources with Data-Driven Insights

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following:

- **Channel Reachability:** Ensure customers can be reached through their preferred communication methods for seamless support.
- **Engagement Rates:** Track and analyse user interactions to pinpoint the most effective outreach strategies.

PROCESS

1. **Provide Agents with Detailed Customer Data:** Equip call centre agents with comprehensive customer profiles, including usage history, preferences, and prior interactions. This enables quick issue resolution and personalised service for high-value customers.
2. **Automate Routine Tasks:** Use chatbots, self-service portals, and automated workflows to handle low-priority queries, reducing agent workload. This allows agents to focus on complex, high-value interactions that require human intervention.

Upsell & Monetisation Strategies

Unlocking Revenue Potential with Targeted Offers and Bundles.

Upsell to Existing Customers

Maximising Customer Lifetime Value Through Targeted Offers

Overview

The telecom industry boosts customer value through strategic upselling, using data and predictive analytics to offer personalised, relevant recommendations. This enhances satisfaction and drives revenue growth.

Scenarios

REAL WORLD APPLICATIONS

- **Mobile Customers Adopting Fixed Services:** A high-data-usage customer receives a tailored offer to add a home broadband connection.
- **Upselling Premium Data Plans:** A customer consistently nearing their data cap is offered an unlimited plan upgrade.
- **Selling IoT Solutions to Broadband Customers:** A customer with fixed broadband is offered smart home products like connected thermostats or security systems.
- **Bundled Offers:** A customer with mobile and fixed services is offered a discounted family plan or additional devices.
- **Cross-Selling Entertainment Services:** A high-value customer is encouraged to add a streaming bundle to their existing plan (like TV/Cable or Home Internet).
- **Device Protection Plans:** Offer protection plans for high-end devices or wearables purchased by customers.

When: The Timing

TRIGGERS

- Customers nearing data limits
- After a new purchase or product added to cart.

Where: The Delivery Channels

CHANNELS

- **Digital Channels:** Email, SMS, app notifications, and website pop-ups for personalised offers.
- **Offline Channels:** Retail stores and call centres equipped to provide upsell offers.
- **Self-Service Portals:** Account management dashboards highlighting relevant upgrades.
- **IoT Platforms:** Direct upselling opportunities for customers managing connected devices.

Why: The Objective

- Maximise customer lifetime value (CLV)
- Improve ARPU
- Enhance customer satisfaction

Who: Target Audience

KEY SEGMENTS:

- Existing customers segmented by current holdings, usage patterns, and upsell potential.

EXCLUSIONS:

- Customers who have opted out of specific alerts.
- Users whose contact information is invalid or outdated.

AUDIENCE SIZE MEASUREMENT:

- **Core Product Users:** All mobile and fixed broadband customers.
- **Loyalty Members:** Customers already part of loyalty or subscription programs.
- **IoT-Adopters:** Subset of customers showing interest in IoT or smart home solutions.

What: The Solution

- Upsell core telecom products, complementary services, or peripheral offerings like IoT solutions.

DATA SOURCES

- **CRM:** Customer profiles and purchase histories to identify upsell opportunities.
- **Digital Channels Data:** Interactions and behaviours across online platforms for targeted upsell triggers.
- **Billing and Usage Data:** Payment history and service consumption patterns, indicating when users may need upgrades.
- **Campaign Performance Data:** Insights from past marketing initiatives to refine offer targeting and effectiveness.
- **IoT Platforms:** Connected device usage and smart home data, enabling precise peripheral and adjacency recommendations.

Upsell to Existing Customers

Maximising Customer Lifetime Value Through Targeted Offers

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Customer Data Integration:** Unified customer profiles combining all data sources.
- **Next Best Offer (NBO) Engine:** AI-driven systems to generate personalised recommendations based on customer behaviour and holdings.
- **Product Portfolio:** Comprehensive catalogue of upsell products, including core and peripheral offerings.
- **Training for Sales Teams:** Equip call centre agents and in-store staff with tools and insights to deliver targeted upsell pitches.
- **Compliance Frameworks:** Adherence to data privacy regulations to ensure customer trust.
- **Feedback Collection Mechanisms:** Systems to capture customer responses to offers for continuous refinement.

PROCESS

1. **Utilise NBO Engines:** AI-driven tools analyse customer data to deliver personalised, timely recommendations.
2. **Create Personalised Campaigns:** Tailor offers and messaging based on customer behaviour, preferences, and triggers.
3. **Integrate Customer Data:** Consolidate data from CRM, IoT, and analytics for accurate, real-time insights.
4. **Refine Offers:** Track performance metrics and feedback to optimise recommendations and campaigns.
5. **Ensure Compliance:** Adhere to privacy regulations to maintain customer trust.
6. **Support Teams:** Equip staff with tools and training to communicate upsell value effectively.

Cross-Selling & Bundling

Encouraging Product Adoption Through Personalised Recommendations

Overview

Telecom providers can boost revenue and CLV by using CDP insights to offer contextual cross-sells and bundles based on customer preferences and usage. AI-driven strategies deliver relevant offers, enhancing engagement, reducing churn, and optimising marketing spend.

Scenarios

REAL WORLD APPLICATIONS

- **Mobile Data & Voice Bundles:** High-data users get discounted voice-call add-ons.
- **Prepaid to Postpaid Offers:** Frequent prepaid rechargers receive personalised postpaid plan suggestions.
- **Device & Plan Bundles:** 5G smartphone buyers get exclusive 5G data plan offers.
- **Family Plan Recommendations:** Users with multiple SIMs are encouraged to switch to a family plan.
- **International Roaming Upsells:** Frequent travellers get real-time roaming pack offers upon landing abroad.
- **OTT & Streaming Add-Ons:** Unlimited data plan buyers receive discounted OTT subscriptions (e.g., Netflix, Disney+).

When: The Timing

TRIGGERS

- **Real-time triggers:** When a customer reaches 90% of their data limit → Offer a data top-up bundle.
- **Event-driven:** When a user lands in a foreign country → Send a roaming pack offer.
- **Periodic:** Monthly or quarterly recommendations based on customer engagement and spending patterns.

Where: The Delivery Channels

CHANNELS

- In-App & Self-Service Portals
- Push Notifications & SMS
- WhatsApp & Email
- Retail & Customer Support Teams

Why: The Objective

- **Increase revenue per user (ARPU)** through highly targeted upsells and cross-sells.
- **Improve customer retention** by offering better-value bundles instead of standalone services.
- **Enhance personalisation** with AI-driven recommendations based on customer usage behaviour.
- **Optimise marketing ROI** by delivering the right offer to the right customer at the right time.

Who: Target Audience

- **Prepaid users with high recharge frequency:** Offer postpaid plans with better benefits.
- **Data-heavy users:** Suggest unlimited data bundles or speed upgrades.
- **Customers nearing contract renewal:** Recommend device upgrades or exclusive retention bundles.
- **Roaming travellers:** Suggest discounted roaming packs when they travel abroad.

EXCLUSIONS

- Customers who **opted out of upsell promotions**.
- Low-spending or dormant subscribers **unlikely to adopt premium offers**.

What: The Solution

- **AI-driven cross-sell engine** recommends the best product bundles and add-ons for each customer.
- **Real-time segmentation** ensures that customers receive only the most relevant offers.
- **Omnichannel delivery strategy** pushes personalised promotions via SMS, push, WhatsApp, and in-app notifications.

DATA SOURCES

- **Usage Data:** Tracks voice, data, SMS usage to identify ideal upsell moments.
- **CRM Data:** Stores purchase history, previous add-ons, and customer lifetime value (CLV).
- **CDP Insights:** Unifies customer data from multiple touchpoints to create a 360-degree user profile.

Cross-Selling & Bundling

Encouraging Product Adoption Through Personalised Recommendations

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Customer Data Integration:** Create unified customer profiles by consolidating data from usage history, CRM systems, and partner platforms.
- **Next Best Offer (NBO) Engine:** Deploy AI-driven systems to generate personalised recommendations based on customer behaviour and preferences.
- **Product Portfolio:** Develop a comprehensive catalogue of upsell and cross-sell products, including core services, add-ons, and complementary offerings.
- **Training for Sales Teams:** Equip in-store staff and call centre agents with tools, insights, and training to deliver effective cross-sell pitches.
- **Compliance Frameworks:** Ensure adherence to data privacy regulations to maintain trust and protect customer information.
- **Feedback Collection Mechanisms:** Implement systems to gather customer responses to offers, enabling continuous optimisation and refinement of cross-sell strategies.

PROCESS

1. **Data Integration:** Connect usage data, CRM insights, and partner services into a CDP-powered recommendation engine.
2. **Segmentation & Personalisation:** Identify high-potential cross-sell opportunities based on real-time behaviour and predictive analytics.
3. **Omnichannel Activation:**
 - Deliver offers via SMS, push notifications, WhatsApp, and in-store recommendations.
 - Enable instant activation of upsell offers via mobile apps and self-service portals.
4. **Performance Tracking & Optimisation:**
 - Measure conversion rates, bundle adoption rates, and incremental ARPU growth.
 - Refine recommendations using machine learning models that adapt to customer behaviour.

B2B & Partner Collaboration

Driving Growth Through Data Sharing and Strategic Partnerships.

B2B: Partner Data Sharing with Enterprises

Secure and Compliant Data-Sharing Frameworks

Overview

Enterprises collaborating with multiple partners often struggle with fragmented customer insights, making it difficult to deliver seamless and personalised experiences. By leveraging a Customer Data Platform (CDP) like Tealium AudienceStream, businesses can securely share enriched customer profiles with partners, enabling better targeting, personalisation, and operational efficiency.

Scenarios

REAL WORLD APPLICATIONS

- **Co-Branded Campaigns:** Share customer insights with partners to create tailored joint promotions.
- **Loyalty Programme Integration:** Enable seamless cross-brand loyalty point accumulation and redemptions.
- **B2B Account-Based Marketing (ABM):** Share engagement insights with enterprise sales teams for personalised outreach.
- **Personalised Partner Offers:** Enable partners to deliver hyper-relevant offers based on shared data.
- **Fraud Detection & Risk Management:** Collaborate with partners to detect anomalies and prevent fraud.
- **Operational Efficiency:** Streamline supply chain and fulfilment operations through shared customer demand insights.

When: The Timing

TRIGGERS

- **Real-time Data Sharing:** occurs in real-time or at scheduled intervals, depending on use case requirements.
- Triggers include customer sign-ups, loyalty redemptions, engagement spikes, and purchase milestones.

Where: The Delivery Channels

CHANNELS

- **Secure APIs & Data Connectors:** CDP integrations with partner systems.
- **Marketing Automation Platforms:** for personalised outreach.
- **CRM & Sales Platforms:** for ABM and B2B sales enablement.
- **Loyalty & Rewards Systems:** for seamless programme integrations.

Why: The Objective

- **Enhance Customer Experience:** Deliver consistent and personalised experiences across partner ecosystems.
- **Optimise Marketing Efforts:** Enable partners to target the right audiences with relevant offers.
- **Ensure Compliance & Security:** Establish secure and governed data-sharing mechanisms.
- **Improve Partner Collaboration:** Facilitate seamless data exchange between businesses.

Who: Target Audience

B2B ENTERPRISES & PARTNERS:

- Large telecom enterprises with multiple business partners
- Brands participating in co-marketing initiatives.
- Businesses running account-based marketing (ABM) strategies.

EXCLUSIONS:

- Partners who do not meet compliance or security standards.
- Businesses without proper data governance measures.

AUDIENCE SIZE MEASUREMENT:

- Ensure data sharing is governed, secure, and consent-based to maintain compliance and trust.

What: The Solution

- **Secure data-sharing pipelines** between enterprises and partners.
- **Real-time customer profile updates** for improved targeting.
- **Automated segmentation** for co-marketing campaigns and personalised engagement.

DATA SOURCES

- **First-Party Data:** Enterprise CRM, purchase history, website interactions.
- **Partner Data:** Loyalty programmes, transactional history, service usage.
- **Consent Management Systems:** Ensuring compliance with data-sharing policies (e.g., GDPR, CCPA).

B2B: Partner Data Sharing with Enterprises

Secure and Compliant Data-Sharing Frameworks

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Data Governance Framework:** Establish policies for secure, compliant data sharing.
- **Partner Integration Readiness:** Ensure partners can receive and process shared data effectively.
- **Consent & Privacy Controls:** Implement opt-in mechanisms for data sharing.

PROCESS

1. **Data Unification:** Ingest, clean, and unify first-party customer data within the CDP.
2. **Partner Segmentation:** Identify key segments for data sharing and collaboration.
3. **Real-Time Sync:** Enable secure, governed data sharing via API integrations.
4. **Measurement & Optimisation:** Monitor engagement, track ROI, and refine data-sharing strategies.

Loyalty Programme Integration

Cross-Brand Loyalty & Co-Marketing Strategies

Overview

Telecom providers often collaborate with partner brands to offer cross-brand loyalty programmes, enhancing customer retention and increasing engagement. By integrating loyalty points, rewards, and exclusive co-branded promotions, telecom companies can drive repeat business, strengthen partnerships, and provide more value to customers.

Scenarios

REAL WORLD APPLICATIONS

- **Mobile Data & Retail Loyalty Points:** Points on data recharges, redeemable at partner brands.
- **Exclusive Partner Rewards:** Enjoy perks like discounted movie tickets, free coffee, or travel vouchers based on loyalty status.
- **Tiered VIP Programmes:** Gold & Platinum members receive benefits like lounge access, shopping cashback, or priority support.
- **Cross-Brand Campaigns:** Collaborate with banks, airlines, or OTT platforms for joint promotions (e.g., free streaming for premium users).
- **Credit Card Partnerships:** Co-branded telecom credit cards offer double rewards on bill payments and recharges.

When: The Timing

TRIGGERS

- **Real-time:** When a customer reaches a milestone (e.g., VIP tier upgrade, high-value transaction).
- **Scheduled:** Monthly or quarterly personalised reward offers.
- **Trigger-Based:** When a customer engages with a partner brand, unlocking exclusive benefits.

Where: The Delivery Channels

CHANNELS

- Mobile Apps & Self-Service Portals
- Push Notifications & SMS
- WhatsApp & Email
- Retail & Partner POS Systems

Why: The Objective

- **Enhance customer retention** through exclusive rewards and incentives.
- **Encourage cross-brand engagement** to increase customer spending.
- **Strengthen partnerships** with retail, finance, and entertainment brands.
- **Boost ARPU (Average Revenue Per User)** by incentivising higher-tier plans and recharges.

Who: Target Audience

LOYALTY MEMBERS & HIGH-VALUE CUSTOMERS

- Postpaid users subscribed to **premium plans**.
- Prepaid customers with **high recharge frequency**.
- Users engaging frequently with **partner brands**.

CO-MARKETING AUDIENCE

- Customers eligible for **banking or retail loyalty programmes**.
- Frequent travellers, online shoppers, or entertainment subscribers.

EXCLUSIONS

- Customers **opted out of loyalty rewards**.
- Inactive or dormant subscribers **with no transactions in the last 6 months**.

What: The Solution

- **Real-time loyalty integration** between telecom, retail, and financial partners.
- **Dynamic segmentation** to offer personalised rewards.
- **AI-driven offer recommendations** based on customer spending habits and engagement levels.
- **Seamless redemption process** via mobile apps, SMS, and partner platforms.

DATA SOURCES

- **CDP Data:** Customer segmentation, purchase history, engagement scores.
- **CRM Data:** Loyalty membership status, billing, and subscription data.
- **Partner Data:** Transaction data from banks, airlines, and retailers.

Loyalty Programme Integration

Cross-Brand Loyalty & Co-Marketing Strategies

How: The Implementation

PREREQUISITES

To implement this solution effectively, ensure the following prerequisites are in place:

- **Data Integration:** Sync telecom, retail, and financial partner data into unified customer profiles.
- **Partner Collaboration:** Establish agreements with brands for co-branded rewards and data sharing.
- **Compliance:** Ensure data privacy and regulatory adherence for customer data sharing.
- **AI & Analytics:** AI to analyse spending habits and suggest personalised rewards.
- **Reward Catalogue:** Offer tiered and diverse rewards across retail, entertainment, and travel.
- **Omnichannel Platforms:** Enable seamless redemption via apps, SMS, websites, and POS systems.
- **Performance Tracking:** Monitor redemption rates, engagement, and ROI to optimise strategies.

PROCESS

1. **Data Integration:** Sync telecom, financial, and retail partner data into a unified customer profile within the CDP.
2. **Segmentation & Targeting:**
 - Identify loyalty members, high-value customers, and frequent spenders.
 - Apply AI-driven predictive analytics to suggest personalised partner rewards.
3. **Omnichannel Activation:**
 - Trigger push notifications, SMS, and email offers at the right engagement points.
 - Enable seamless redemption via mobile apps or partner checkout systems.
4. **Performance Tracking & Optimisation:**
 - Monitor redemption rates, engagement metrics, and revenue impact.
 - Refine offer targeting based on past interactions and customer preferences.



About Dexata

Dexata specialises in unlocking the full potential of your Martech stack. Our mission is to help businesses maximise the value of their Martech investments. We bridge the gap between underutilised tools and high-impact outcomes, ensuring your Martech stack aligns with your business objectives, driving ROI and delivering personalised, data-driven customer experiences.

As your trusted Martech value partner, we combine expert-driven strategies, innovative solutions, and data-powered insights to optimise your marketing technologies and drive measurable business results.

For more information, visit www.dexata.co.

About Tealium

Tealium helps companies collect, govern, and enrich their customer data in real-time to power AI initiatives and delight customers in the moments that matter. Tealium's turnkey integration ecosystem supports more than 1,300 built-in connections from the world's most prominent technology experts.

Tealium's solutions include a real-time customer data platform (CDP) with intelligent AI data streaming, tag management, and an API hub. Tealium's data collection, management, and activation capabilities enable enterprises to accelerate operating performance, enhance customer experiences, drive better outcomes, and support global data compliance. More than 850 leading businesses globally trust Tealium to power their customer data strategies.

For more information, visit www.tealium.com.