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BLAZING NEW TRAILS ON THE CRM FRONTIER





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Global Sales Rally

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William McKinney
Director, Solutions Management
January 31, 2001



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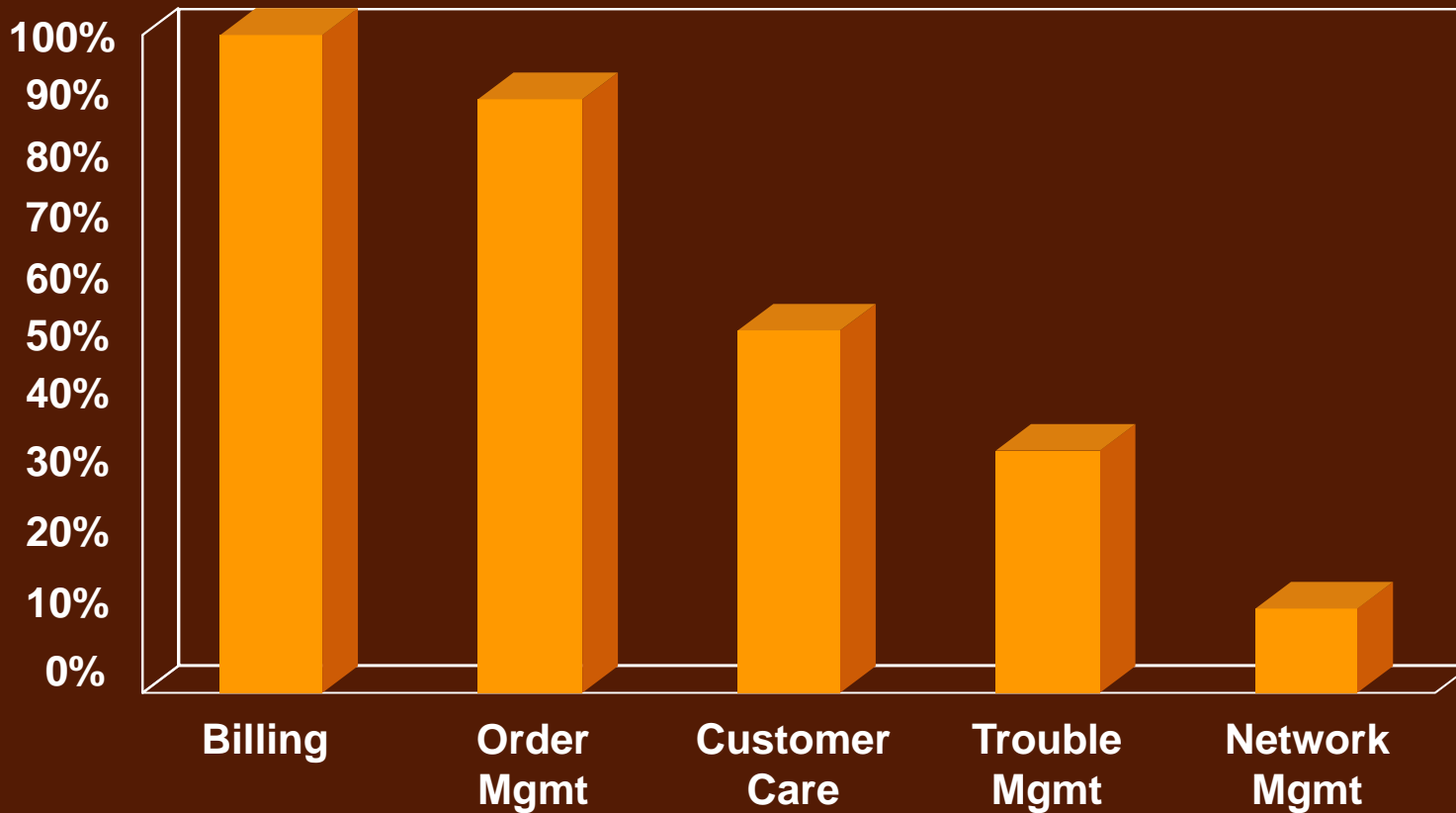
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Telecommunications Billing Strategy



OSS Component Penetration



Source: Business Edge Solutions

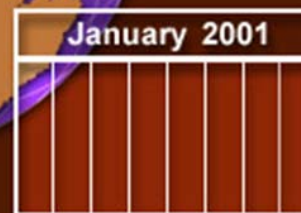
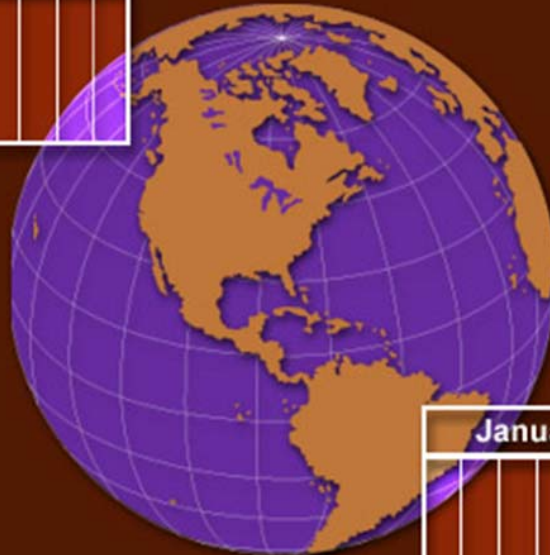


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The Changing Telecom Marketplace

- Mergers and Acquisitions
- Bill and Service Convergence
- New Technology Capabilities



- Deregulation
- Emerging Market Segments
- Competitive Pressure



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Areas of Revenue Loss



■ Order Entry
and Provisioning

■ Billing

■ Network
Operations

■ Sales and
Marketing

■ Other

Source: PricewaterhouseCoopers



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The Five Segments of Billing

**Billing
Service Bureau**

**CIC
Service Bureau**

**CC&B
Platform**

**CC&B
Consulting**

**CC&B
Integration**



Billing Competition

- Convergys
- Alltel
- EDS
- Amdocs
- Spectrum Telecorp
- Sema Group
- CSG Systems

Billing Service Bureau

- KPMG
- Anderson Consulting
- Pricewaterhouse Coopers
- Cap Gemini E & Y
- EDS
- Deloitte Consulting
- Sema Group

CC&B Consulting

CC&B Platform

- Convergys
- Portal
- Keanan (Lucent)
- LHS (Sema Group)
- Daleen
- CSG Systems
- Amdocs
- Saville Systems (ACD)

CIC Service Bureau

- Convergys

- KPMG
- Anderson Consulting
- Pricewaterhouse Coopers
- Cap Gemini E & Y
- EDS
- Deloitte Consulting
- IBM
- Telcordia

CC&B Integration

TeleTech Billing **SWOT**

Strengths

- Service Bureau Culture
- Strong CIC Presence
- Existing Telecom Clients
- Data Center Infrastructure

Weaknesses

- No Billing Experience
- No Billing IP or Process
- Not Viewed as Credible

Opportunities

- Margin Growth
- Increased “Stickiness”
- Top-line Growth
- Increased Multiple

Threats

- Risk of Current Accounts
- Investment w/o Return
- Loss of Focus
- Slow Adoption Rate

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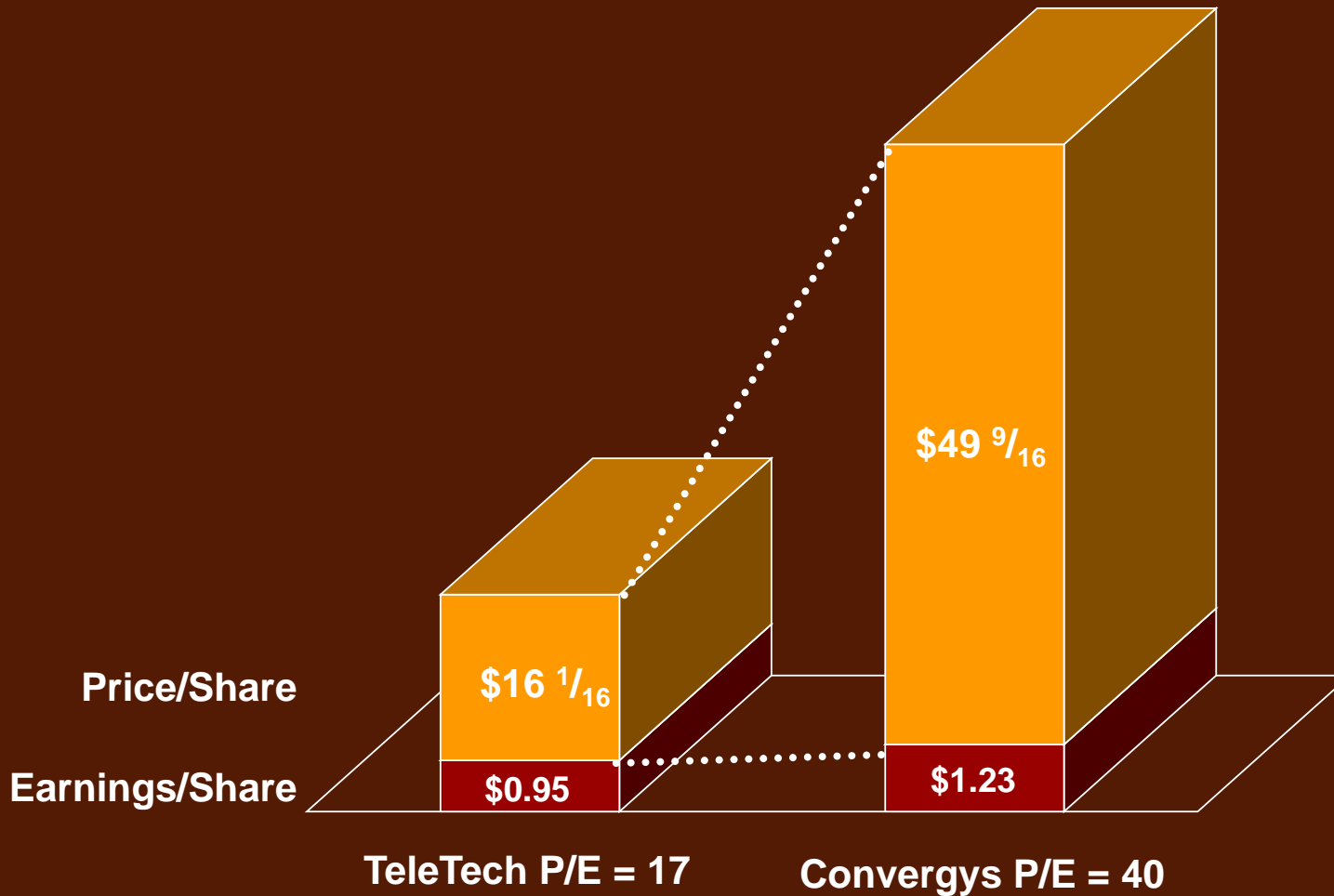
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Multiple Enhancement Closing Price 01/24/01



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TeleTech's Billing Strategy



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TeleTech's Billing Strategy

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Near-term Strategy

Rationale

- Quickly Go to Market
- Build Credibility
- Create New CC Opportunities

Deliverables

- Alliance Management
- Concept Collateral
- Engagement Process



Long-term Billing Target Markets

	NA	AP	EU	LA
Wireline				
Local				
Long Distance				
Dedicated Services	☑	☑	☑	
IP Services		☑	☑	
Wireless				
Mobile Telephony				
Mobile Prepaid	☑	☑	☑	☑
Paging				
Satellite				
Wireless Data / IP	☑	☑		☑
Wireless Local Loop	☑			☑
Cable				
Video				
Internet		☑		☑
Voice				

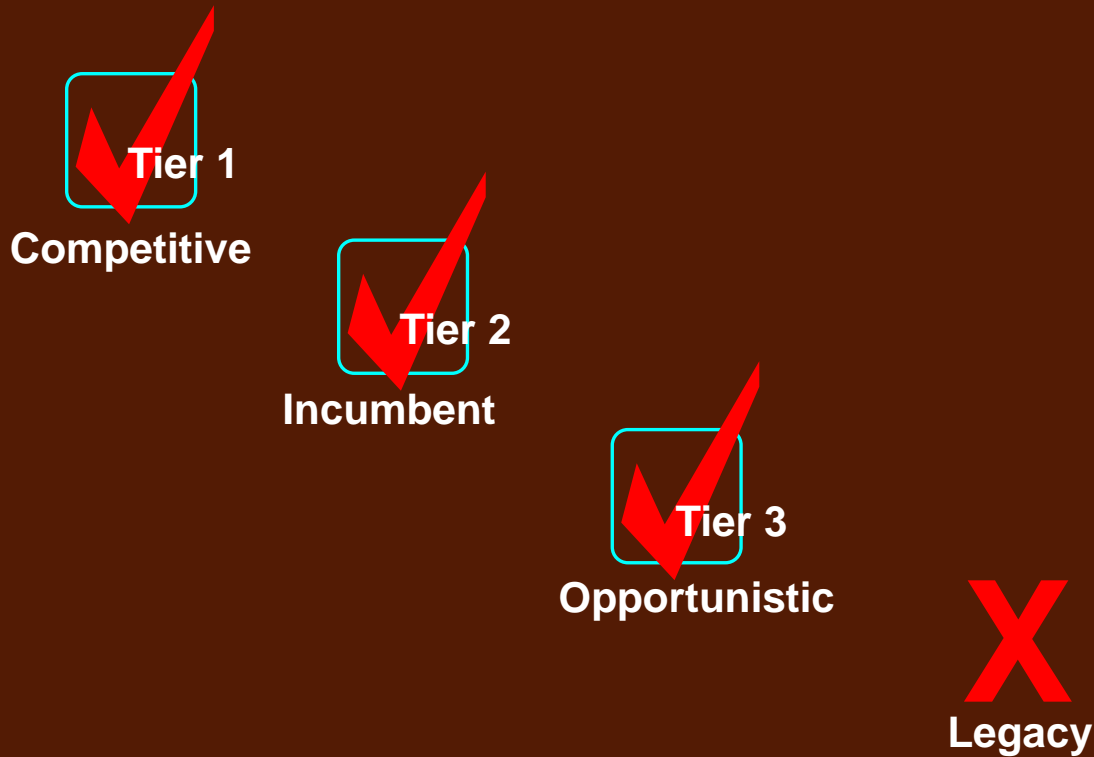
☑=Primary Market ☑=Secondary Market



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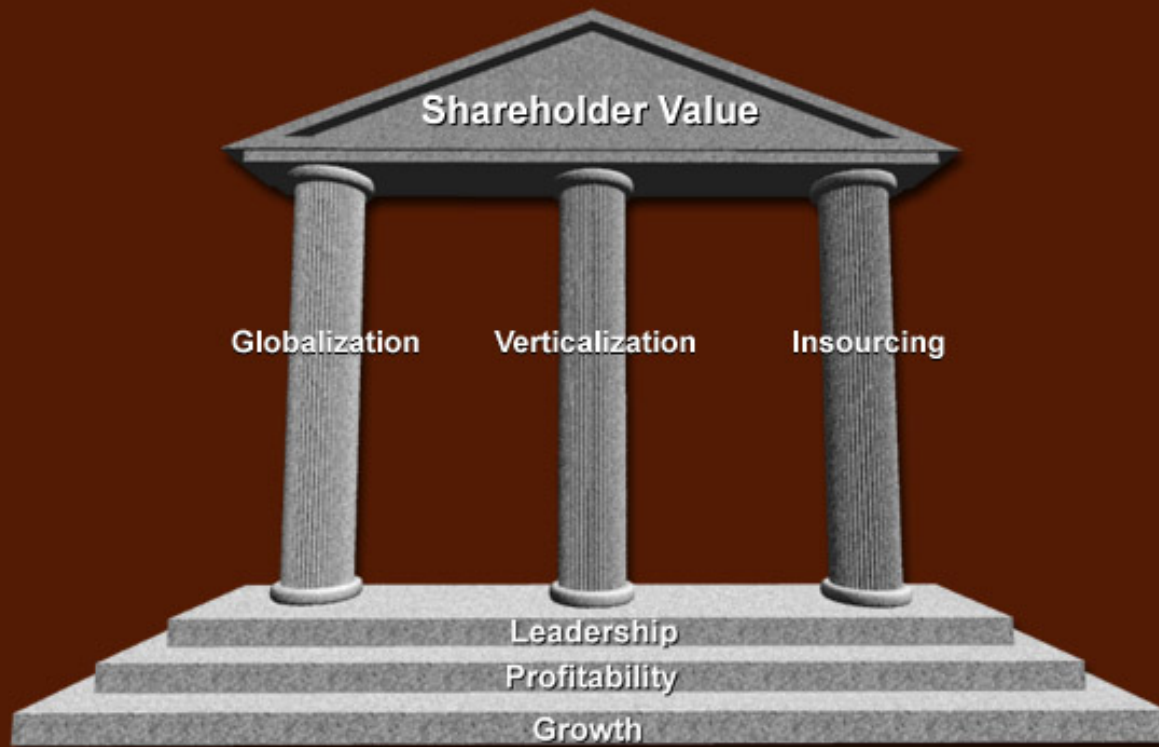
Long-term Billing Target Customers



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Billing and TeleTech's Strategy



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Questions and Answers

