



Project: BA-Driven Email Workflow Optimization & Escalation Mapping

Context: Handled supplier communications across 80 → 550+ self-billed vendors in a high-volume finance operations environment (2019–Present). Urgent need arose to triage, respond, and route ambiguous email queries with zero API support.



Problem Statement

- Suppliers sent email queries from multiple teams, departments and addresses without standardized references.
- Existing supplier portal supported only 2 fixed email addresses per supplier and lacked searchability.
- Internal teams struggled to trace which query came from which supplier, leading to:

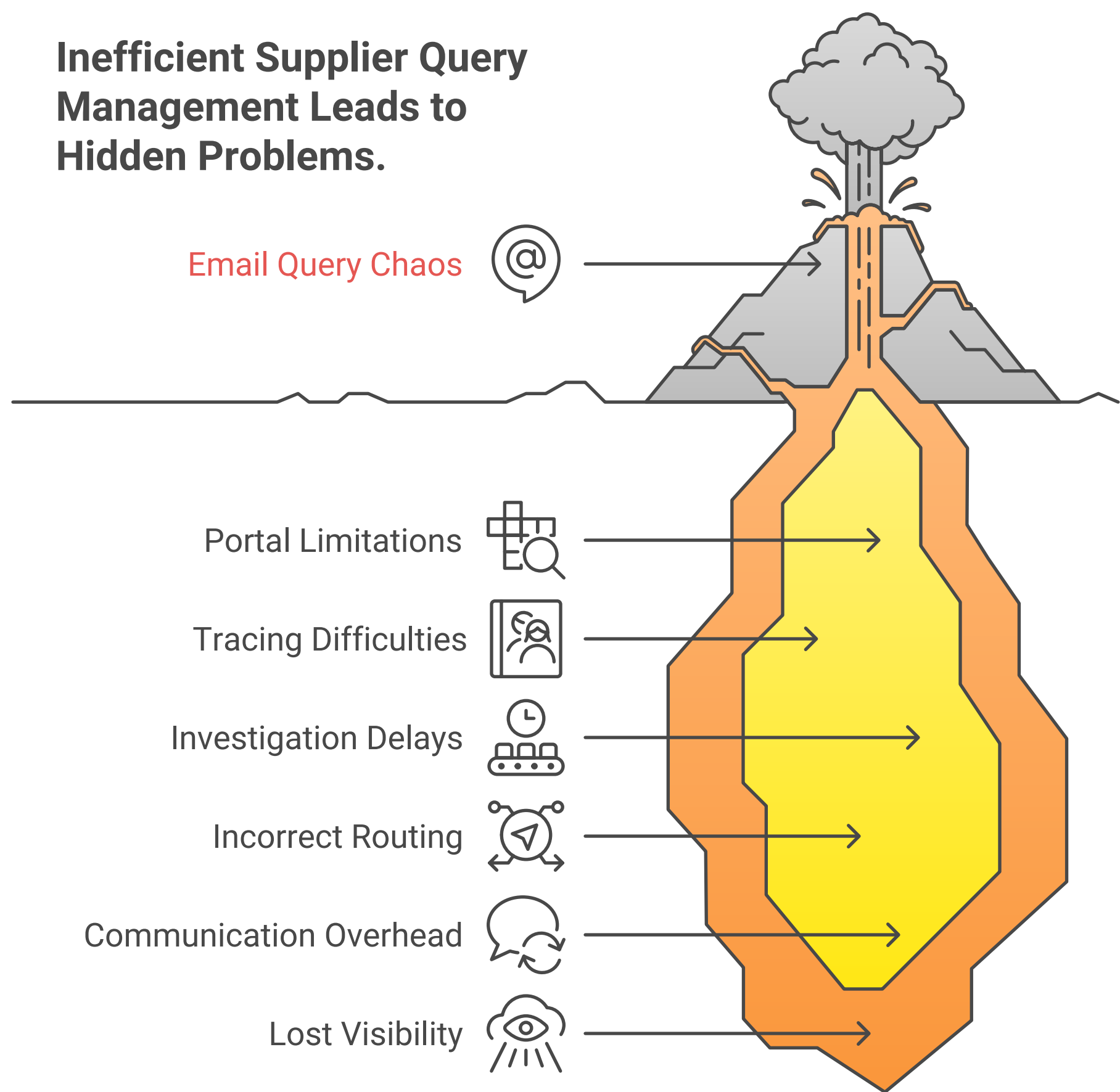
Investigation delays

Incorrect issue routing

Repeated back-and-forth communication

Lost visibility into query trends or root causes.

Inefficient Supplier Query Management Leads to Hidden Problems.



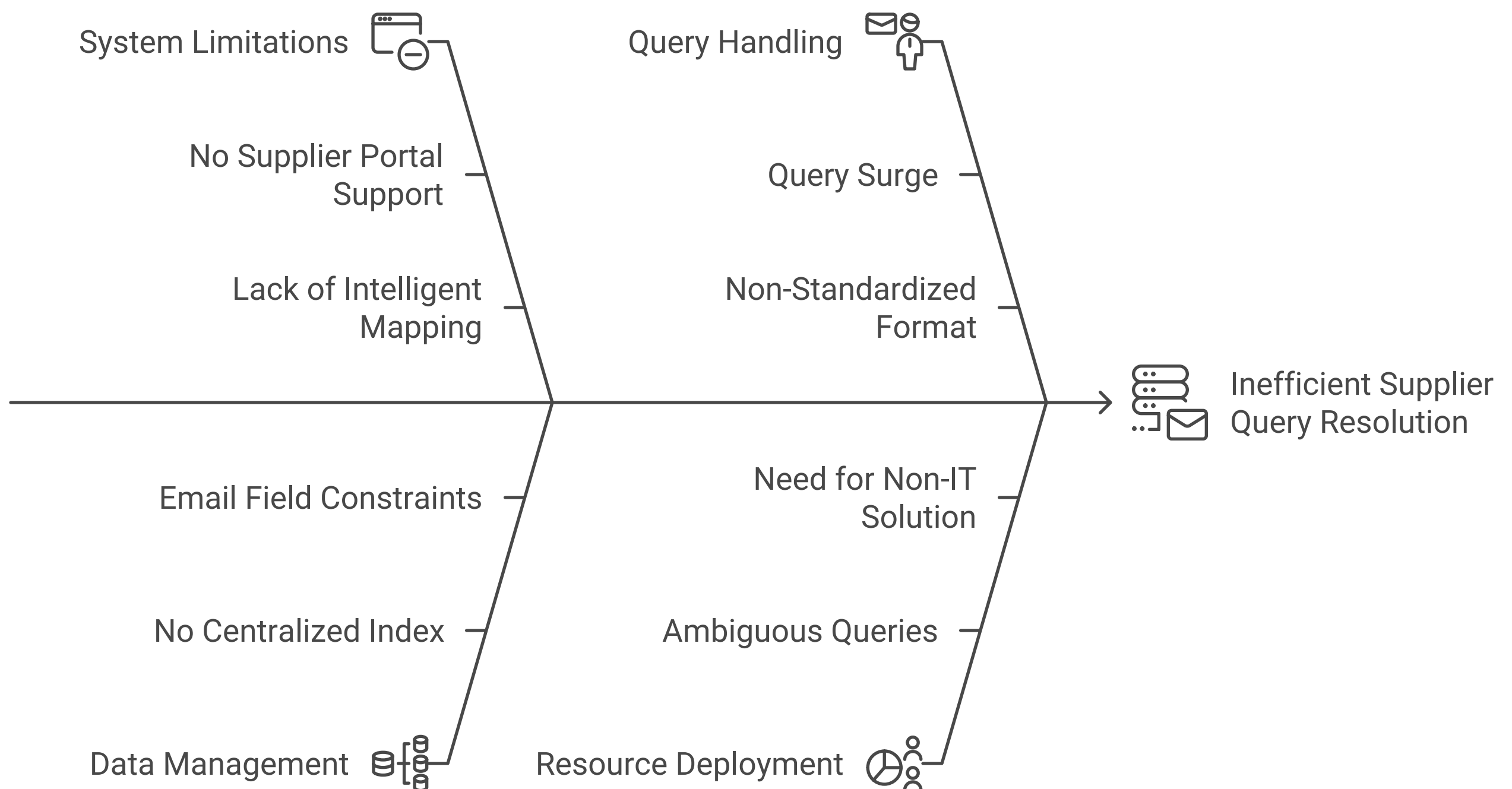
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Constraints

- No built-in supplier portal support for query matching (email field constraints, no intelligent mapping)
- No centralized index of email→supplier relationships
- Query surge with no standardized format
- Ambiguous queries required 3–5 touchpoints to resolve
- Needed non-IT-intensive solution deployable by BAs

Analyzing Supplier Query Resolution Challenges

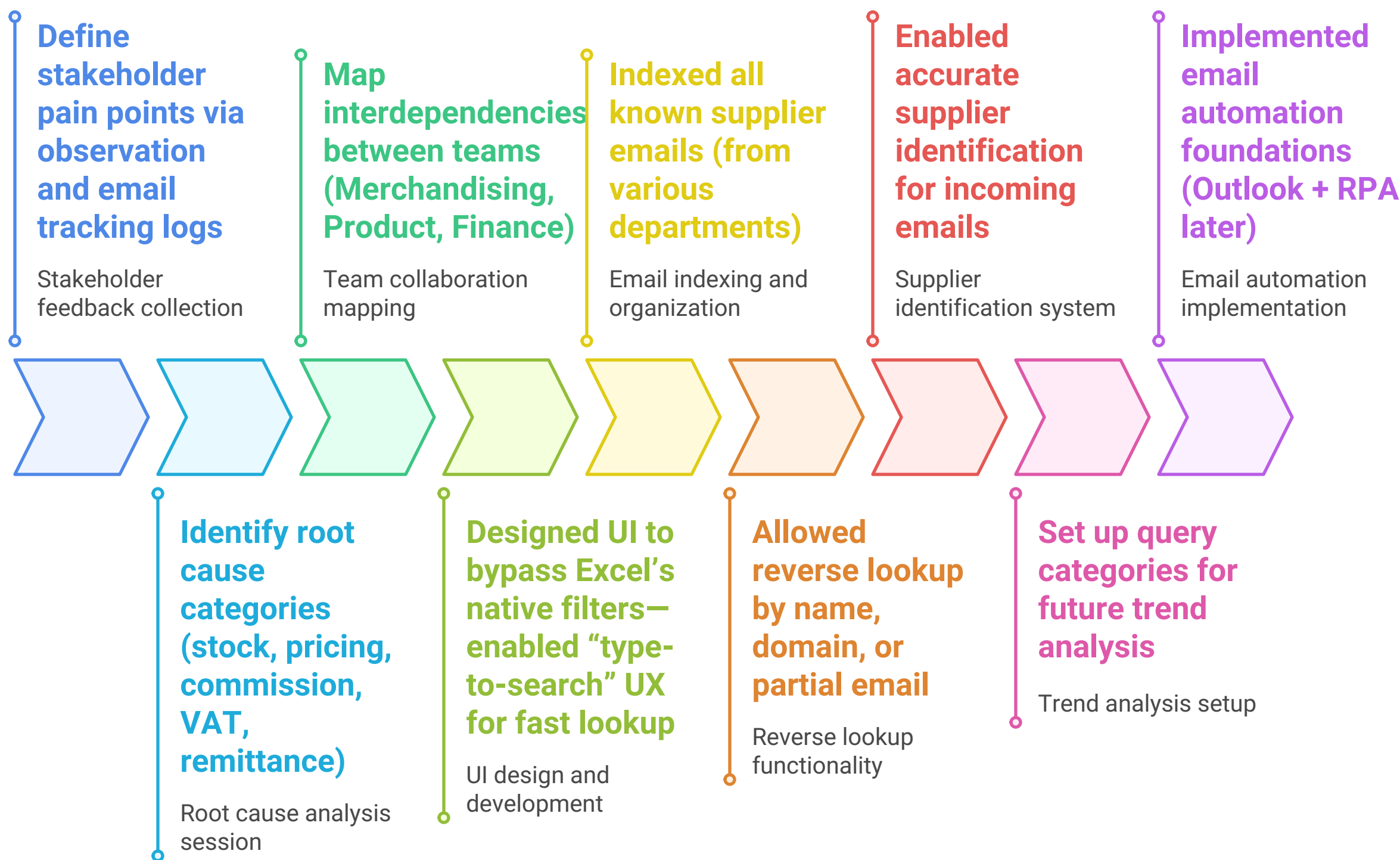


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Approach

- Applied **Business Analysis techniques** to:
 - Define stakeholder pain points via observation and email tracking logs
 - Identify root cause categories (stock, pricing, commission, VAT, remittance)
 - Map interdependencies between teams (Merchandising, Product, Finance)
 - Designed UI to bypass Excel's native filters—enabled “type-to-search” UX for fast lookup.
 - Indexed all known supplier emails (from various departments)
 - Allowed reverse lookup by name, domain, or partial email.
 - Enabled accurate supplier identification for incoming emails
 - Set up query categories for future trend analysis
 - Implemented **email automation foundations** (Outlook + RPA later)

Streamlining Business Processes with Technology



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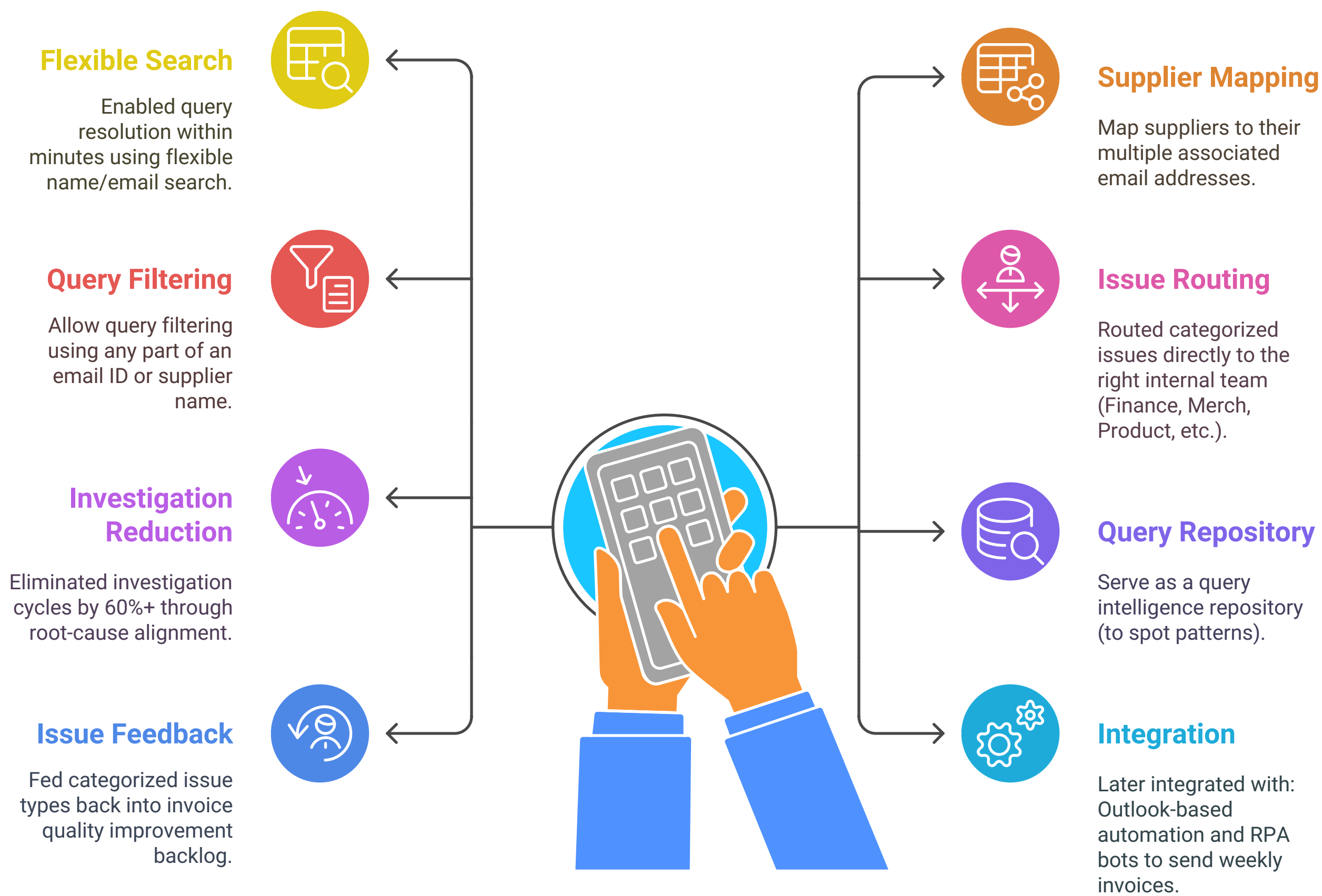
Solution Overview

- Enabled query resolution within minutes using flexible name/email search
- Map suppliers to their multiple associated email addresses
- Allow query filtering using any part of an email ID or supplier name
- Routed categorized issues directly to the right internal team (Finance, Merch, Product, etc.)
- Eliminated investigation cycles by 60%+ through root-cause alignment
- Serve as a **query intelligence repository** (to spot patterns)
- Fed categorized issue types back into invoice quality improvement backlog
- Later integrated with: Outlook-based automation and RPA bots to send weekly invoices

Business Impact

Impact Area	Results
Query Resolution Time	Reduced from hours to minutes
Back-and-Forth Emails	Minimized through accurate identification
Root Cause Analysis	Enabled proactive issue classification
Team Collaboration	Streamlined across finance, merchandising, and
Weekly Invoice Dispatch	Automated via Outlook/RPA using this distribution list
Supplier Trends	Identified recurring issue patterns for future BA/DA initiatives

Solution Overview



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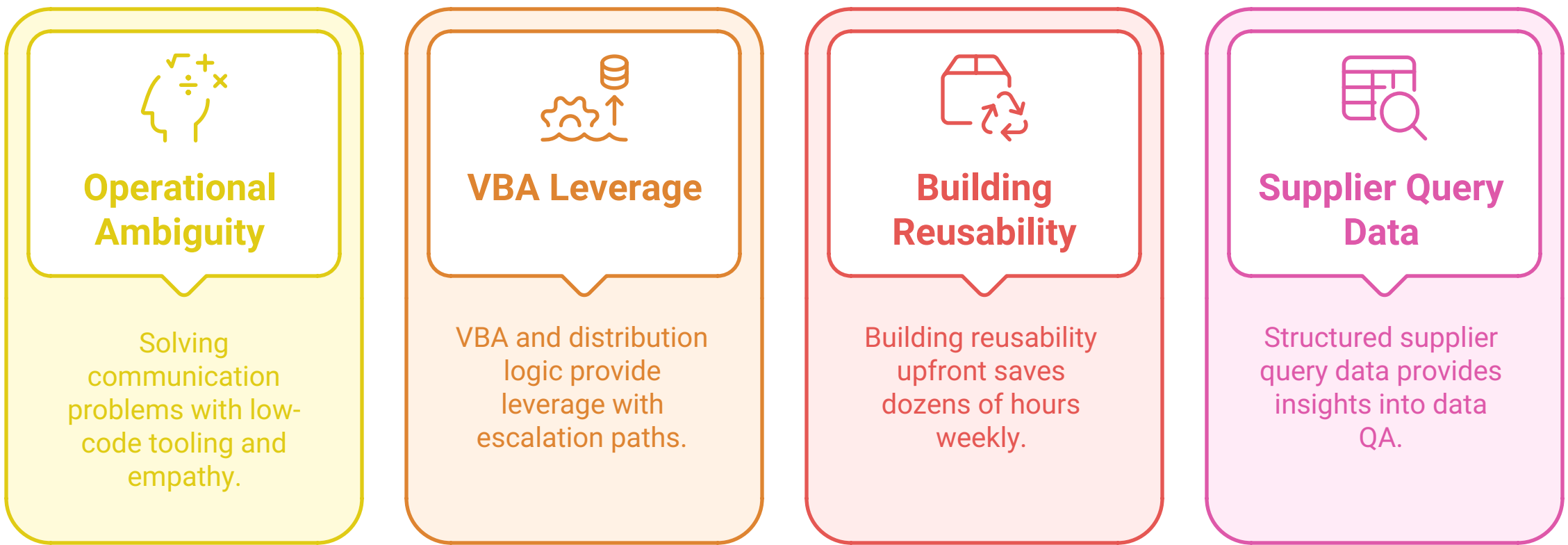
Lessons Learned

- Operational ambiguity can solve chaotic communication problems with low-code BA tooling + empathy for user workflows
- VBA + distribution logic can deliver massive leverage when paired with escalation paths and mapping in mind.
- Building reusability upfront saved dozens of hours weekly.
- Supplier query data, when structured, becomes a lens for systemic data QA and service-level trends

& Tech Used

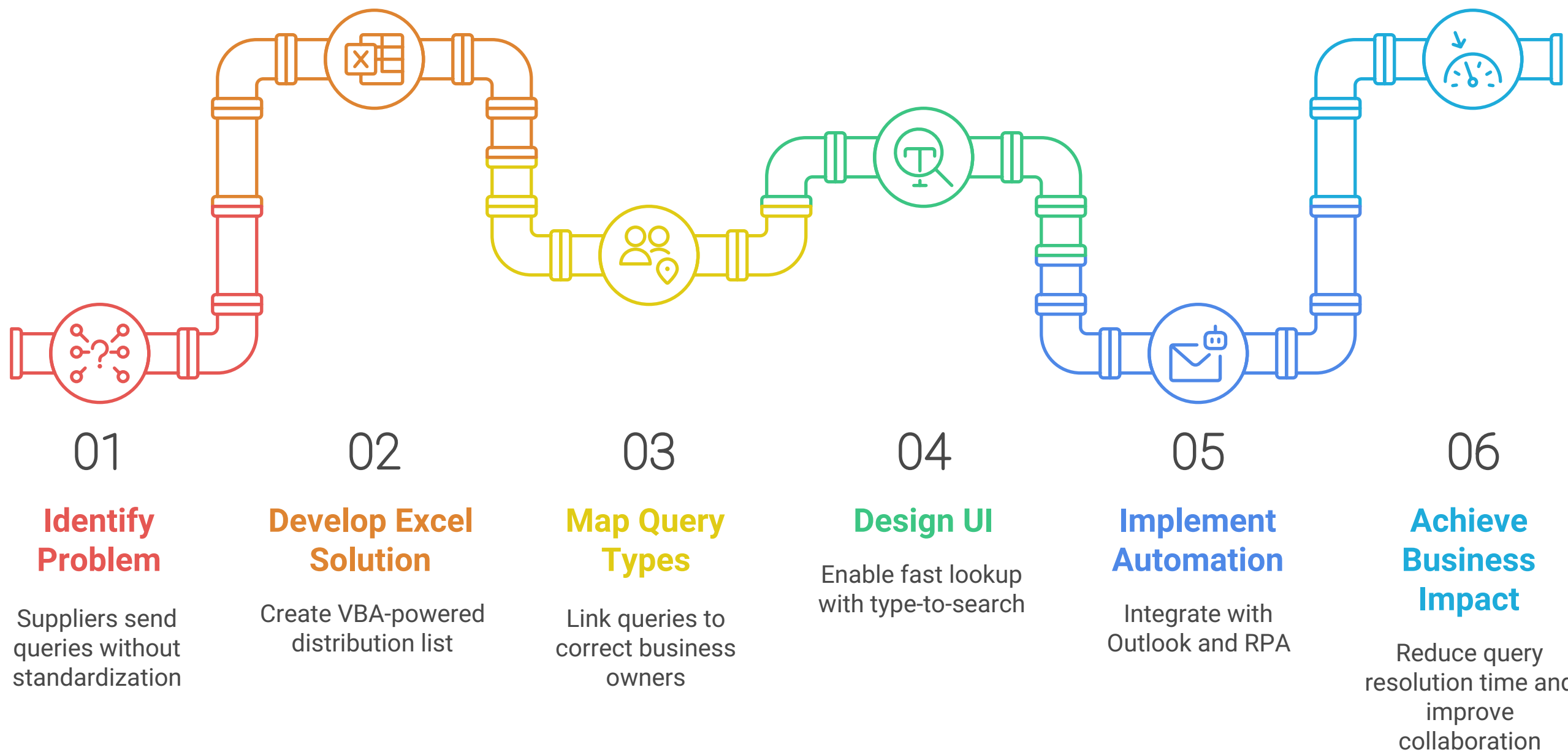
- Excel VBA [Auto-filter + Lookup logic]
- Outlook VBA for Email Automation
- RPA [Integration with distribution list]
- Business Analysis: Stakeholder Segmentation, Query Categorization Frameworks, Requirement Mapping, Escalation Mapping, Root Cause Analysis

Lessons Learned



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Email Workflow Optimization and Escalation Mapping



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