



# 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:

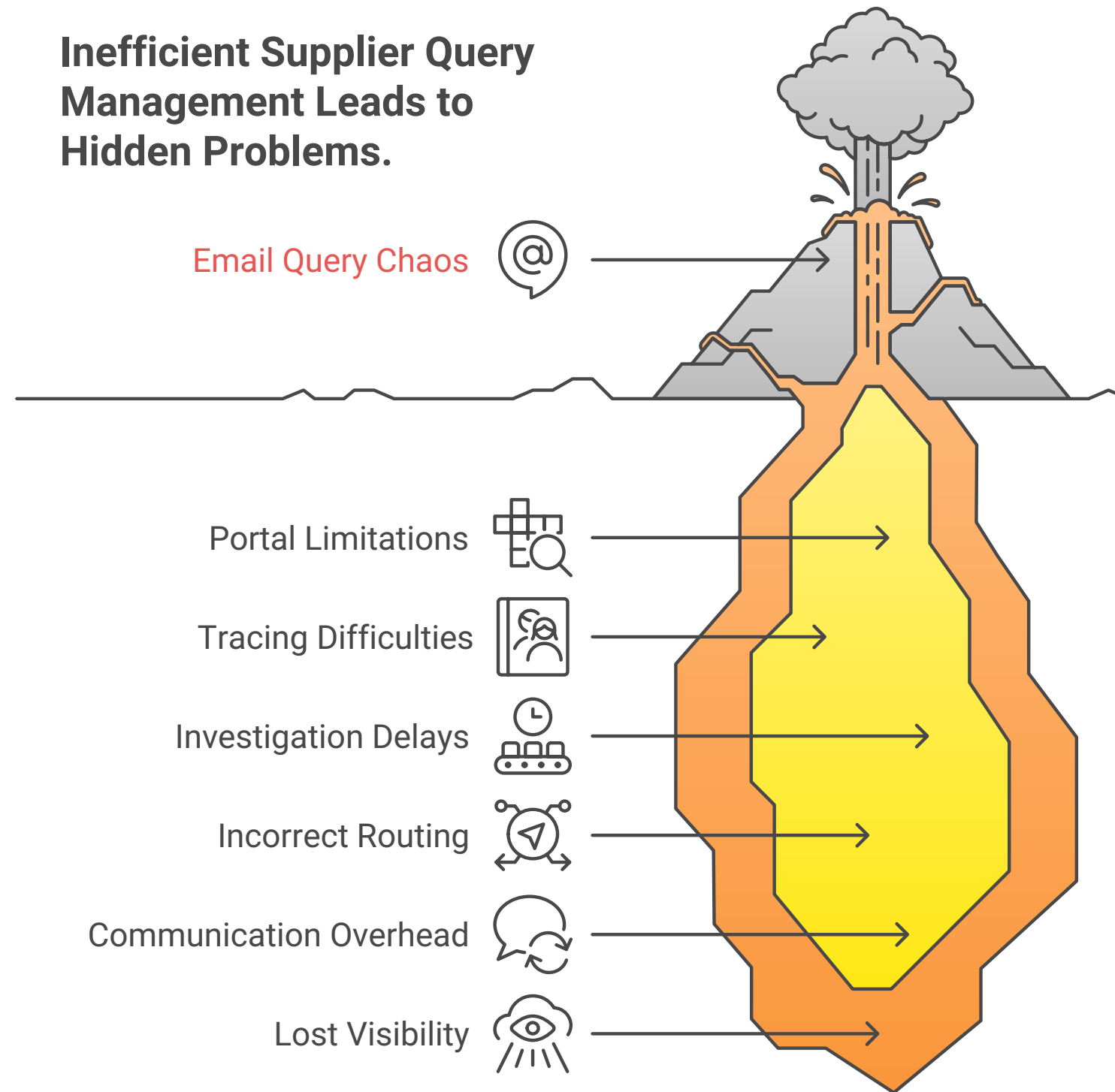
Investigation delays

Incorrect issue routing

Repeated back-and-forth communication

Lost visibility into query trends or root causes.

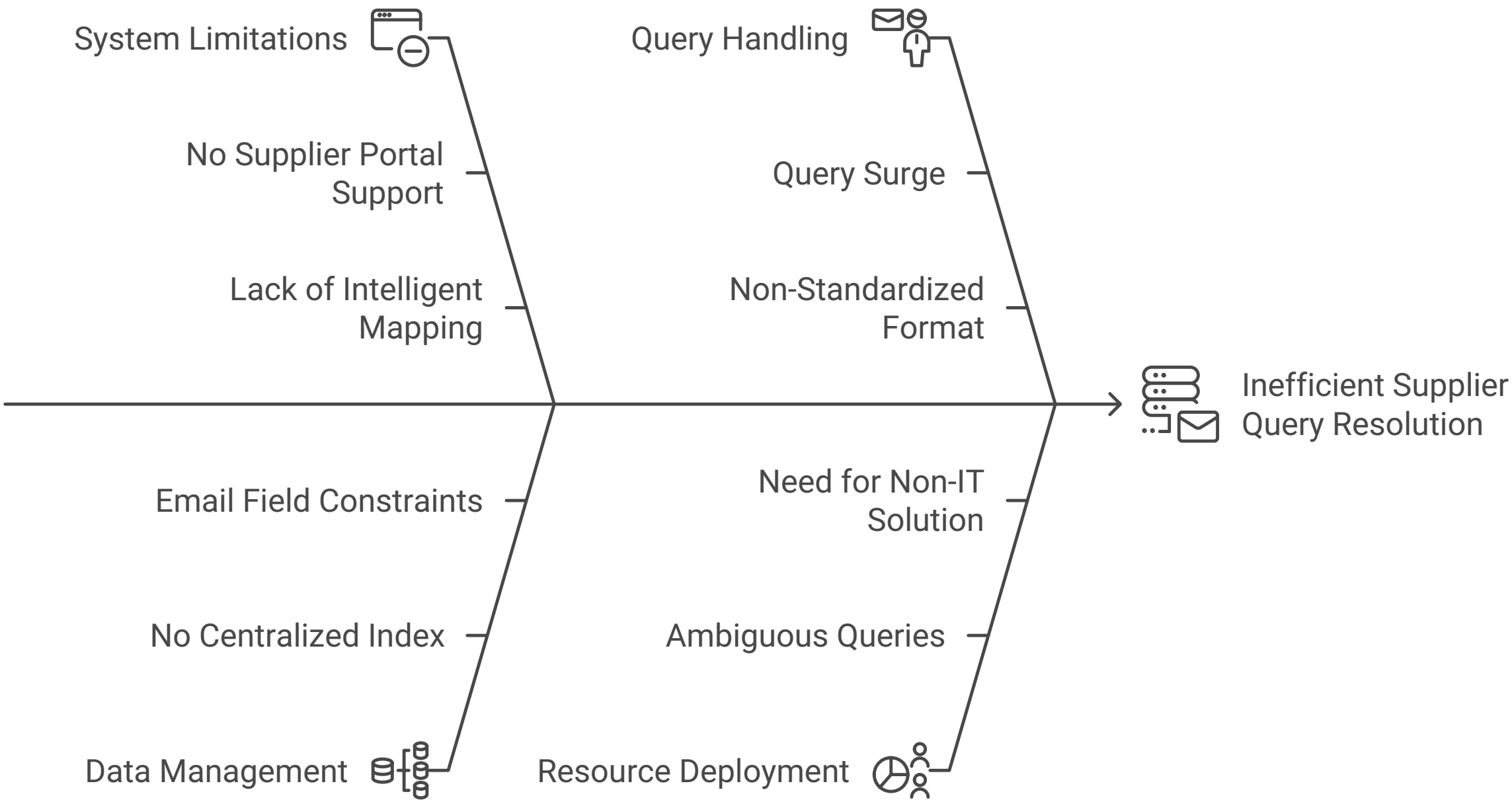
# Inefficient Supplier Query Management Leads to Hidden Problems.



## !! 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

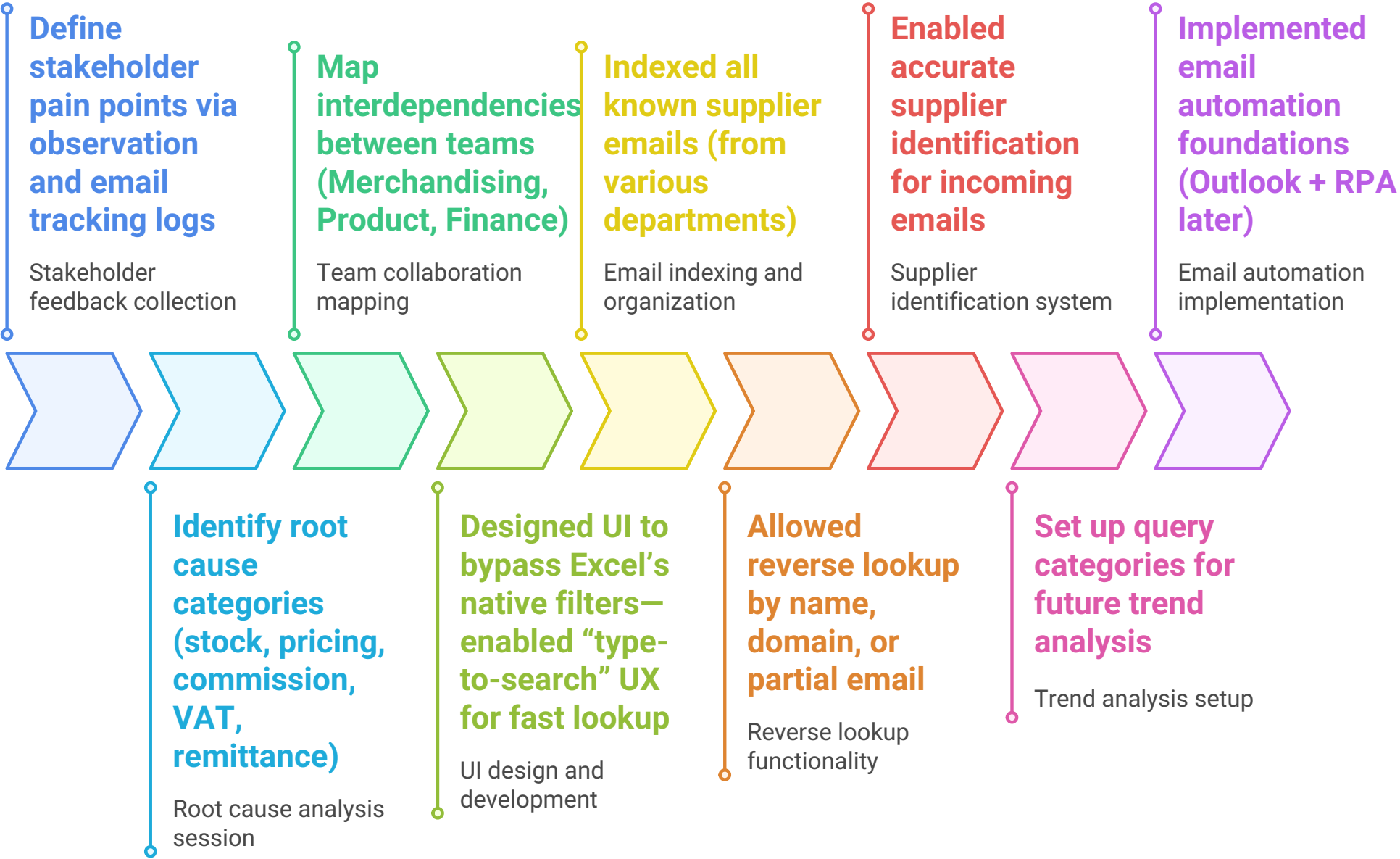




## Approach

- 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





## 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

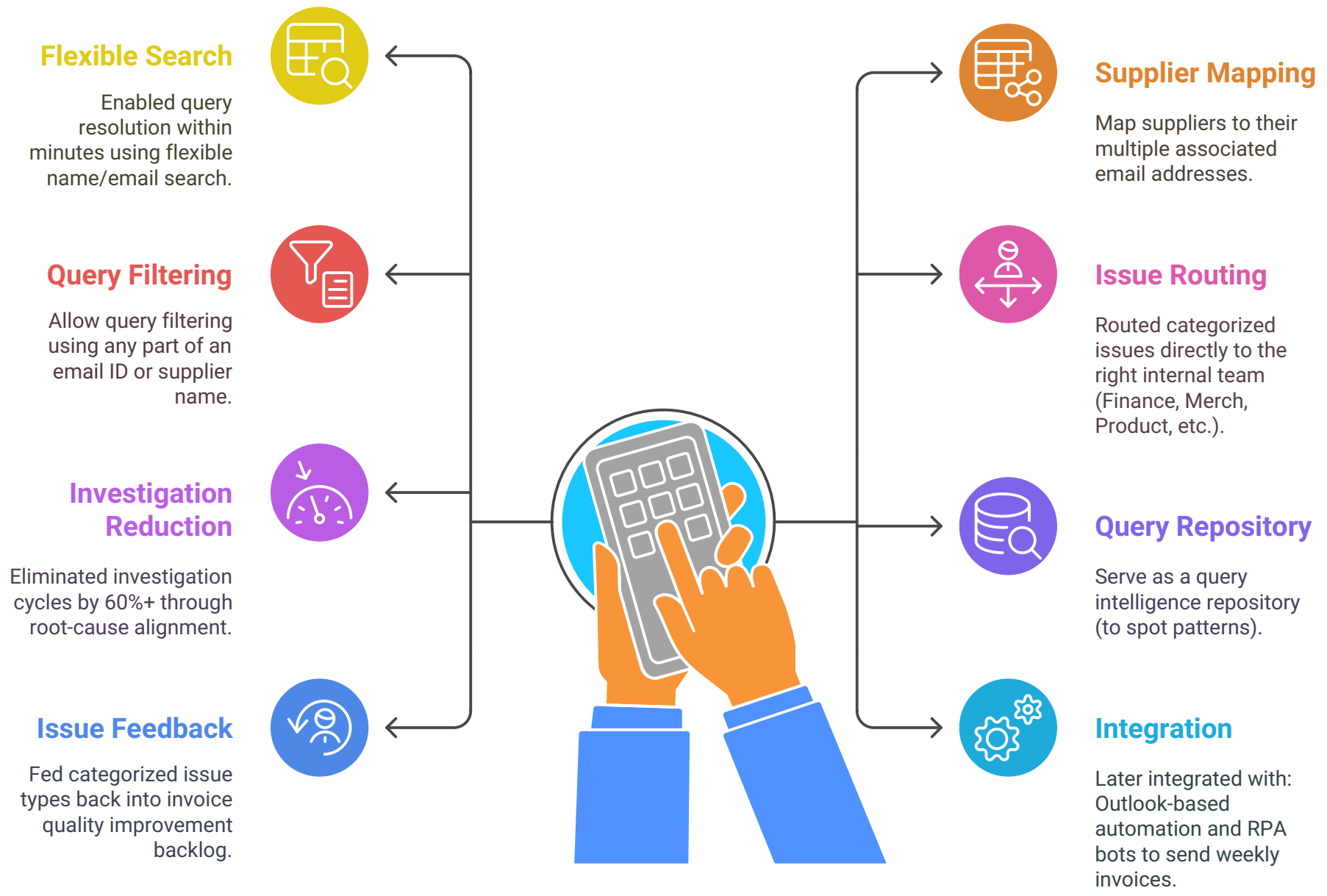


| Weekly Invoice Dispatch | Automated via Outlook/RPA using this distribution list



| Supplier Trends | Identified recurring issue patterns for future BA/DA initiatives

# Solution Overview







## 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

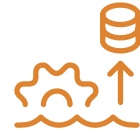
- Excel VBA (Auto-filter + Lookup logic)
- Outlook VBA for Email Automation
- RPA (Integration with distribution list)
- Business Analysis: Stakeholder Segmentation, Query Categorization Frameworks, Requirement Mapping, Escalation Mapping, Root Cause Analysis

# Lessons Learned



## Operational Ambiguity

Solving communication problems with low-code tooling and empathy.



## VBA Leverage

VBA and distribution logic provide leverage with escalation paths.



## Building Reusability

Building reusability upfront saves dozens of hours weekly.



## Supplier Query Data

Structured supplier query data provides insights into data QA.

# Email Workflow Optimization and Escalation Mapping

