Trend System Scope

PHASE 1 – LEAD & RISK MANAGEMENT

Version 0.4

REFERENCES

TABLE OF CONTENT

VERSION CONTROL

Version	Date	Name	Version Description
V.0.1	29/06/2018	SICT Team	Draft version
V.0.2	01/07/2018	SICT Team	Lead part included
V.0.3	04/07/2018	SICT Team	Risk part included
V.0.4	17/07/2018	SICT Team	Comments updated
V.0.5	22/07/2018	SICT Team	Risk Updates for QS

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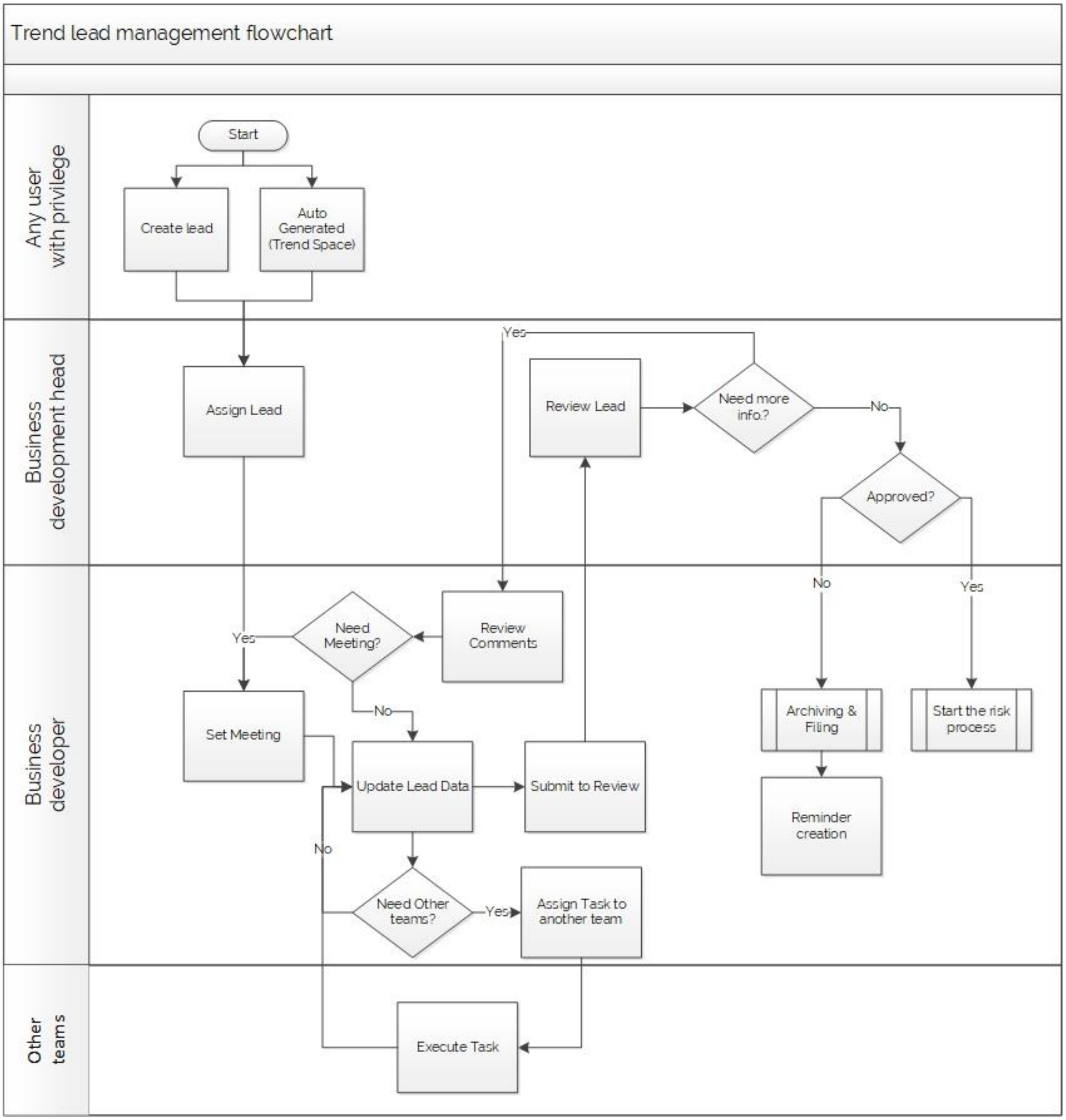
1. GLOSSARY

Term	Definition
EMT	Escalation Management Team
SA	Sales Admin (Role that can be assigned to everyone) to be able to create a lead
BDH	Business Development Head
BD	Business Developer
DH	Design Head
TL	Team Lead
DH	Designers Head
PM	Project Manager
QS	Cost Control
OT	Other Team (any team inside Trend)
User Activities	Actions needed to be taken by user to proceed in the process/workflow such as filling documents or submitting forms.
System Notifications	System generated actions such as notifications and escalations
Forms / Pages	Web Page with a specific view that have its own components and functionalities. Example in online email we have forms like: login screen, Mail List, Mail Preview, Reply to Email, Compose mail…etc

2. LEAD MANAGEMENT PROCESS

2.1. PROCESS DETAILS

FLOWCHART DIGRAM



USER ACTIVITIES

Activities	Owner	Description
Create Lead	SA	Open new lead from to enter required information and attachments
Assign Lead	BDH	Assign the created lead to BD
Set Meeting	BD	BD to set meeting action which will notify BDH of the meeting status (meeting reserved, not reserved, cancelled)
Update Lead Data	BD	Edit lead entered data by the person with required privilege
Assign Task (another team)	BD	If the BD needs to get some sort of support from other teams inside Trend, BD can create a task and assign it to someone to help him, then once it is finished he will get notified
Execute Task	OT	Other team take assigned task and make the required action, update the task, and confirm once it is finished to send back to BD
Submit to Review	BD	After review and meeting feedback entry BD can submit the lead to be reviewed
Review Lead	BDH	Open all lead collected info. For evaluation and review
Review Comments	BD	When the BDH return the lead for clarification or more info needed, BD review the comments to understand what is needed and what are the requirements
Take Decision	BDH	Decide either to approve lead as a risk job or send to filing

SYSTEM ACTIVITIES AND NOTIFICATIONS

Item	Type	Sent to	Description
Auto Generate Lead	Action	BDH	External creation of leads (such as Trend Space) which will create a lead based on information coming from the source. Automation based on System Integration with data source.
Lead Creation	Notification	BDH	Notification of a newly created lead
Assignment Delay	Notification	BDH	Notification that there is a lead created and not assigned although “Assign time threshold” duration passed. “Assign time threshold” is set from the system configuration
“Set Meeting” Delay	Notification	BD	Notification that a lead assigned to her/him is not set to meeting yet, although “Set lead meeting time threshold” duration passed. “Set lead meeting time threshold” is set from the system configuration
“Set Meeting” Delay Escalation	Notification	BD EMT	Escalation Notification that a lead assigned to her/him is not set to meeting yet, although “Set lead meeting time escalation threshold” duration passed. “Set lead meeting time escalation threshold” is set from the system configuration.
Meeting Overdue Escalation	Notification	BD	Notification that they didn’t update the meeting status to done, although the Meeting Date has passed already
Meeting Overdue	Notification	BD EMT	Escalation Notification that they didn’t update the meeting status to done, although the Meeting Date has passed already, and reminder is sent with no updates
Lead Submitted to Review	Notification	BDH	Notification that the BD submitted the Lead sending to BDH for review
More info Required	Notification	BD	Notification that the Lead request sent back to BD for more info. required

Item	Type	Sent to	Description
Update Data Delay	Notification	BD	Notification that a lead more information/data is not filled and lead is not resubmitted again, although “Update Lead data threshold” duration passed. “Update Lead data threshold” is set from the system configuration
Update Data Delay Escalation	Notification	BD EMT	Escalation Notification that a lead more information/data is not filled and lead is not resubmitted again, although “Update Lead data Escalation threshold” duration passed. “Update Lead data Escalation threshold” is set from the system configuration
Assigned Task	Notification	OT	Notification that there is a task assigned related to a certain lead to a user to execute
Assigned Task Delay	Notification	OT	Notification that task assigned related is not closed, although “Task threshold” duration passed. “Task threshold” is set from the system configuration related to due date of task
Assigned Task Delay Escalation	Notification	OT EMT	Notification that task assigned related is not closed, although “Task Escalation threshold” duration passed. “Task Escalation threshold” is set from the system configuration
Lead Archived	Notification	BDH	Notification that lead is rejected & send for Filing
Lead Accepted	Notification	BDH	Notification that lead is accepted & send for Risk

2.2. FORMS DETAILS

MAIN FORMS

ID	Form	Description
1	Lead List	Screen contain all running leads with filters and actions
2	New Lead	To create new lead form
3	Edit Lead	Edit & update current lead info.
4	Lead Profile	Lead info. form
5	Client Details	Section of the lead identify all required client details
6	Set Meeting	Add meeting information to the system including date, time and attendees and send invitation to all of them
7	Meeting Feedback	Section of the lead to identify meeting results & notes
8	Leads Dashboard	See overview about all lead statistics and information
9	Assigned Task	Assign task to another team inside Trend, setting the required action and expected date for this action
10	Execute Task	See the task required, accept, set date to finish, add data, upload files, save updates, and submit back to requester

MAIN FORM ACTIONS

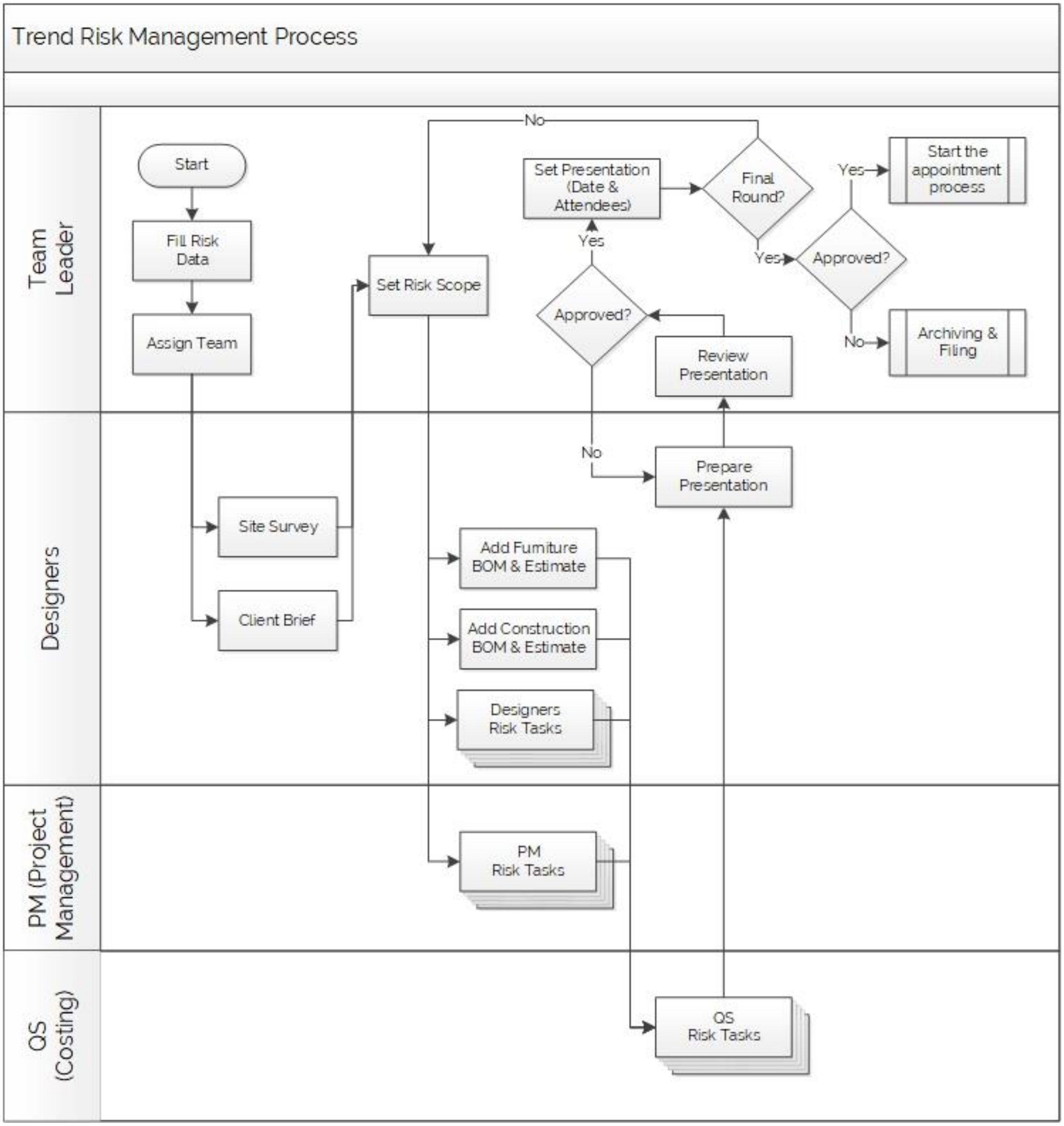
ID	Form	Ref.	Actions	Description
1	Lead List	1.1	Create New Lead	Create new lead
		1.2	Open Lead Profile	Open existing lead from
		1.3	Search Leads	Search for lead by keyword
		1.4	Sort Leads	Sort ascending\descending
		1.5	Export List	Export list of leads as excel sheet
2	New Lead	2.1	Fill in Data	Lead data entry
3	Edit Lead	3.1	Edit Lead Data	Allow to edit lead data fields
4	Lead Profile	4.1	Open Edit Lead	Show & Edit profile data
		4.2	Upload documents	Select and upload documents
		4.3	Set reminder (importance)	Mark lead to be reminded
		4.4	Set meeting	Define new meeting and its associated time & attendees
		4.5	Add/Edit Meeting Feedback	Meeting result\feedback can be added and edited
		4.6	Add/Edit Client Data	Add lead client data in the lead
		4.7	Change Lead Status	Change status (Approved, Archived…)
5	Client Details	5.1	Add/Edit Client Details	
6	Set Meeting	6.1	Create Lead Meeting	Assign time & attendees to meeting
7	Meeting Feedback	7.1	Add/Edit Meeting Feedback Details	Allow to enter feedback text & attach documents
8	Leads Dashboard	8.1	Shows Leads Analytics	List all charts & graphs about lead performance
		8.2	Filter Dashboards	Filter by date

ID	Form	Ref.	Actions	Description
9	Assigned Task	9.1	Define Task	Define task details as well as the criticality and all related information
		9.2	Assign Task	Set team and date required to finish the task
10	Execute Task	10.1	Update Task Data	Add information, upload files and save updates
		10.2	Close Task	Close task to be closed and sent back to requester

3. RISK PROCESS

3.1. PROCESS DETAILS

FLOWCHART DIGRAM



USER ACTIVITIES

Activities	Owner	Description
Fill Risk	TL	Fill all information related to Risk job
Assign Team	TL	Assign the designers to Risk job
Site Survey	Designers	Fill site survey form
Client Brief	Designers	Fill client brief form
Set Risk Scope	TL	Select and assign tasks to different teams
Create Presentation	Designers	Create the presentation and add versions to the tasks in the Risk job
Build Furniture BOM Estimate	Designers	Build furniture list with cost
Build Design BOM Estimate	Designers	Build design list components with cost
Risk Task "n"	Assigned	Risk task update and change status
Review Presentation	TL	Review the presentation before the meeting with the customer to ensure comments are fixed and ready for presentation
Set Presentation	TL	Set Presentation meeting data and time and attendees list
Round Review	TL	Review if this is the last round, or new tasks and updated data needed
Take Decision	TL	Decide if the Risk will be moved to appointment or will be moved to filing

SYSTEM ACTIVITIES AND NOTIFICATIONS

Notification	Type	Sent to	Description
New risk job	Notification	TL	Notification to the TL to be informed that there is a new Risk job create from an approved lead
Risk team assignment notification	Notification	Team	All the team assigned will received notification that they are assigned to this Risk job and will have access to the Risk job to see allowed details
Assignment Delay	Notification	TL	Notification that Risk job team assignment is delayed, although “Team assignment threshold” duration passed. “Team assignment threshold” is set from the system configuration
Assignment Delay Escalation	Notification	TL EMT	Escalation Notification that Risk job team assignment is delayed, although “Team assignment escalation threshold” duration passed. “Team assignment escalation threshold” is set from the system configuration
Survey Reminder	Notification	Designer	Notification that Risk job Survey is delayed, although “Survey threshold” duration passed. “Survey threshold” is set from the system configuration
Survey Delay Escalation	Notification	Designer EMT	Escalation Notification that Risk job Survey is delayed, although “Survey escalation threshold” duration passed. “Survey escalation threshold” is set from the system configuration
Client Brief Reminder	Notification	Designer	Notification that Risk job Client Brief is delayed, although “Client Brief threshold” duration passed. “Client Brief threshold” is set from the system configuration
Client Delay Escalation	Notification	Designer EMT	Escalation Notification that Risk job Client Brief is delayed, although “Client Brief escalation threshold” duration passed. “Client Brief escalation threshold” is set from the system configuration

Notification	Type	Sent to	Description
Risk Task Assigned	Notification	Owner	Notification that there is a task assigned related to a creation task was created and assigned to this user
Risk Task Delay	Notification	Owner	Notification that Risk job Task is delayed, although "Risk Task threshold" duration passed. "Risk Task threshold" is set from the system configuration
Risk Task Delay Escalation	Notification	Owner EMT	Escalation Notification that Risk job Task is delayed, although "Risk Task escalation threshold" duration passed. "Risk Task escalation threshold" is set from the system configuration
Risk Task Finished	Notification	TL	Notification to the TL that the task assigned to one of the users is finished to review and collect data
Presentation Needs Update Notification	Notification	Designer	Notification that TL send comments on the presentation so it should be updated and resubmitted
Presentation Needs Update Delay	Notification	Designer	Notification that updating Presentation is delayed, although expected duration passed.
Presentation Needs Update Delay Escalation	Notification	Designer EMT	Escalation Notification that updating Presentation is delayed, although "Presentation Updates escalation threshold" duration passed. "Presentation Updates escalation threshold" is set from the system configuration
Schedule Presentation Reminder	Notification	TL	Notification that all tasks are done and presentation schedule should be created
Schedule Presentation Delay	Notification	TL	Notification that Scheduling Risk Presentation is delayed, although "Scheduling Risk Presentation threshold" duration passed. "Risk Task threshold" is set from the system configuration

Notification	Type	Sent to	Description
Schedule Presentation Delay Escalation	Notification	TL EMT	Escalation Notification that Scheduling Risk Presentation is delayed, although “Scheduling Risk Presentation escalation threshold” duration passed. “Scheduling Risk Presentation escalation threshold” is set from the system configuration
Presentation Update Reminder	Notification	TL	Notification that the presentation feedback and updates are not updated after the presentation is done is delayed, although “Update Presentation Feedback threshold” duration passed. “Update Presentation Feedback threshold” is set from the system configuration
Presentation Update Reminder Escalation	Notification	TL EMT	Escalation Notification that the presentation feedback and updates are not updated after the presentation is done is delayed, although “Update Presentation Feedback escalation threshold” duration passed. “Update Presentation Feedback escalation threshold” is set from the system configuration
Risk Approved	Notification	TL EMT	Notification that the Risk Job is approved and moved to the next stage (appointment)
Risk Archived	Notification	TL EMT	Notification that the Risk Job is rejected and moved to the filing (archived)

3.2. FORMS DETAILS

MAIN FORMS

ID	Form	Description
1	Risk Job List	List of all Risks that the user have access to
2	Edit Risk Job	Open risk job to edit its details
3	Risk Job Profile	Open risk job to read and see all related data, tasks and updates
4	Site Survey	Site Survey form containing all details related to site survey (have edit and ready only views)
5	Client Brief	Client Brief form containing all details related to client (have edit and ready only views)
6	Furniture Estimate	For to fill Furniture needed to create the estimate with the ability to export the final list
7	Design Estimate	For to fill design components needed to create the estimate with the ability to export the final list
8	Risk Scope	Form to select all tasks needed in the risk and assign to different team and co-workers to execute and submit
9	Set Presentation Meeting	Form to set the presentation date and attendees
10	Presentation Feedback	Form to set the presentation feedback after the presentation is done
11	Risk Task	Update task created under the Risk scope and assigned to the user, can have comments or files to be uploaded
12	Risk Presentation	Form to prepare and upload all presentation to a specific risk job

MAIN FORM ACTIONS

ID	Form	Actions		Description
1	Risk List	1.1	Assign Risk Job	Assign risk job to designers
		1.2	Open Risk Job Profile	Show risk profile info. and related options
		1.3	Search Risk Job	Search and filter Risk list
		1.4	Open Edit Risk Job	Open Edit form for risk job info for the current stage.
		1.5	Sort Risk Jobs	Allow to sort based on different columns
		1.6	Export Risk Jobs List	Export list of risk jobs list
		1.7	Change Risk Status	Change status based on decision
2	Edit Risk Job	2.1	Edit Risk Data	Current stage risk job allowed fields will be available to be edited
3	Risk Job Profile	3.1	Open Edit Risk Job	Show and allow to change risk job allowed data
		3.2	Upload Risk Job Proposal	To complete and lock entered data by risk team
		3.3	Print Risk Job	Print out the risk job form
		3.4	Open Risk Scope	Open form to select tasks needed in the risk
		3.5	Open Site Survey	Open Site Survey form to fill/review site survey details
		3.6	Open Client Brief	Open Client Brief form to fill/review client details
		3.7	Open Furniture Estimate	Open Furniture form to select furniture needed in the Risk Job

ID	Form	Actions		Description
		3.8	Design Estimate	Open Design Details form to select components needed in the Risk Job
		3.9	Open Set Presentation Meeting	Open form to set the data and attendees of the presentation
		3.10	Open Presentation Feedback	Open form to fill feedback and results of the presentation
		3.11	Open Task	Open any risk task to review/update
		3.12	Change Status	Change risk status either to filling or approved
4	Site Survey	4.1	Fill Site Survey data	Form to fill survey data
5	Client Brief	5.1	Fill Client Brief data	Form to fill client information
6	Furniture Estimate	6.1	Select Furniture	Form to select Furniture from list
7	Design Estimate	7.1	Select Design Components	Form to select components from list
8	Risk Scope	8.1	Create Risk Tasks	Add tasks related to Risk job and assign it
9	Set Presentation Meeting	9.1	Set Presentation Meeting	Put presentation details, date and attendees (including comments and attachments)
10	Presentation Feedback	10.1	Fill Presentation Feedback	Add presentation feedback including comments and attachments
11	Risk Task	11.1	Update Risk Task Data	Adding data to task
		11.2	Upload Risk Task Attachment	Upload attachment to task
		11.3	Change Risk Status	Submit back to risk TL
12	Risk Presentation	12.1	Upload Presentation	Add different versions of presentation to the risk job

ID	Form	Actions		Description
		12.2	Add Comments	Add comments to the presentation to the risk job