Requirement collecting

# Stakeholder relationship

## APJ SPP/ORP Team

Team’s role in COAT?

ORP team will responsible to upload raw data to COAT, consolidate and first round filter and validation for partner opportunities in ORP program.

What they will need input to COAT:?

COAT will be helping ORP team easily tracking & collect partner opportunity approval/ decline feedback from local team.

ORP team will share ORP validation rules, stakeholders list, ORP raw data to COAT.

What they will expect to get from COAT?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Role | Submit | Approval | Remarks |
| Joseph Liaw | ORP Administrator | Y, grant with admin right, not only upload and download data, but also have editable right for any approval process. |  | Joseph will be responsible for:   1. upload Raw Data to COAT 2. download local approval/decline feedback from COAT 3. Process ORP deal in SFDC 4. Process first round deal validation in Admin Webpage in COAT, needs to check if deal achieve min. deal size, if partner is qualified specialization partner, if “reseller” in Dist. ORP is non specialized partner, make selection on ORP type: SMB ORP, Solution ORP, Dist. ORP |
| Kelynn Wang老板 | Rebate Program Manager | Y, same as above |  | The same user right with Joseph |
|  |  |  |  |  |

**Sales Operation / ISO Admin**Team’s role in COAT:?  
Assign opportunity to Insides Sales & Channel Manager

What they will need input to COAT:?  
Select Insides Sales & Channel Manager base on customer information e.g. industry and location.  
Select Industry-2  
Select Province-2

What they will expect to get from COAT?  
Opportunity list view.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Role | Submit | Approval | Approval2 | Remarks |
| Sammy Jin | Sales Operation Specialist | Y |  |  | Assign Solution Specialization / Distribution Opportunities to Channel Manager base on industry/location  **Solution/dist. 渠道经理** |
| Vivian Wang(老板) | Sales Operation Sr. Manager | Y |  |  | Same with Sammy for backup purpose and supervision |
| Emily Gong  Iso admin | Inside Sales Admin.  Iso admin | Y |  |  | Assign **SMB** Opportunities to Inside Sales base on industry/ location **电话销售** |
| Winnie Fu（老板） | Inside Sales Manager | Y |  |  | Same with Emily for backup purpose and supervision |
|  |  |  |  |  |  |

## Inside Sales (Sample name)/Channel Sales (Same Name, please make clear the property of channel sales)

Role in COAT:?  
“Declined” or “Holding double check with sales/Partner” or “Approved”, must key in with comments. If "Approved" or "Holding-double check ", assign to Named Account Sales (Sales List), and cc copy to sales team leader (Sales Leader List)

What they will need input to COAT:?  
Validate opportunities with comments and assign to named account sales.

What they will expect to get from COAT?  
Able to tracking ORP deals status, able to search historical record for ORP deals. Able to assign ORP deals to sales via COAT instead manual emails.

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Role | Submit | Approval | Region1 | Remarks |
| Arthur Wang**总监** | Channel Director | Y |  | China | >40K ORP Deals **抄送** |
| Michael Wang | Channel Manager | Y |  | China |  |
| Ban Rui | Channel Manager | Y |  | China North Commercial |  |
| Julia Zhu | Channel Manager | Y |  | China LE&G & Telecom |  |
| YiFan Xu | Channel Manager | Y |  | China East |  |
| Johnny Wang | Channel Manager | Y |  | China South |  |
| Yang Wang | Channel Manager | Y |  | China West |  |

## Commercial Sales/Name Account Sales

Role in COAT:?  
**Accept or Not Accept** with Comments, Complete Question List

Question List:

1. 是否是我们的install base？
2. 是合作伙伴带给我们的新机会吗?
3. SFDC 里您已创建此项目信息了吗?
4. 此项目是否将会有该合作伙伴和最终用户签订合同?

\*\*\*\*\*问题列表可以 手工填入

回答以上问题 以后 选择回答 接受\不接受

如果< 40k usd 就结束了。

>40k 走总监流程。邮件。Complete.

What they will need input to COAT:?  
Update status of opportunity.  
>40K ,additional approval step 4, must final approved by Channel Director.

What they will expect to get from COAT?  
Opportunity list view

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

**Channel Director**Role in COAT:?  
Accept or Not Accept opportunity

What they will need input to COAT:?  
Update status of opportunity.

What they will expect to get from COAT?  
Opportunity list view

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

# SFDC workflow?

SFDC input:

Who input data into SFDC?  
Partner

What kind of information will be inputted into SFDC?  
Refer raw data file

Sample file and data  
Refer raw data file

SFDC output:

Who will need get data from SFDC?  
Joseph Liaw , APJ ORP Team

What kind of information will be collected from SFDC and updated into COAT?  
ORP Type

Sample file or data?  
Refer raw data file

SFDC relation with COAT?  
SFDC provided raw data for COAT

# COAT new case submit process

## Input:

Who will input new case into COAT?

Joseph Liaw, APJ ORP Team

What kind of data will need to be filled for new case?

Refer the raw data file from SFDC.

### Category:

#### ORP type: (Who will decide what kind of ORP type, case assigner?)

Solution Specialization ORP

Distribution Specialization ORP

SMB Specialization ORP

All Specialization ORP

#### Deal ID:

This will need to get from SFDC.

C column of raw data

Partner Name: How to define partner name. How to avoid same company have different Name. Example: 中国移动通信公司，中移动，CMCC, China mobile. They all mean same company.

It’s a company name from raw data.  
S column in raw data

Opportunity Owner: Is this a company name? or this is person name of partner company.

It’s a personal name of partner company.  
T column in raw data

Contact information: phone number or mobile? Also just leave 100 word string. Can be filled with any information?

Has confirmed with Joseph, he will be able to add 3 new columns in raw data below.

|  |  |  |
| --- | --- | --- |
| **Opportunity Owner Email** | **Opportunity Owner: Phone** | **Opportunity Owner: Mobile Phone** |

End User Company: Company Name.

It’s a company name from raw data.  
F column

End User Company(English)  
G column

If G is not null, read G column  
else read F column

Country: CHN/JPN/KNR….. format? Or P.R.China /Japan/Korea/…… Please confirm your design.

Read from raw data.

#### Region:

China:

China North

China East

China South

China West

Taiwan

Hong Kong

Province: Will pre-define province information which can be selected after user selected Country information. Do you have a province list already?

Need to pre-define province information

What about city? No need for city info?  
No city info.

Industry: This column will leave blank for submitter to fill. If there is a list already, we can make it pre-define.

Need a dropdown list to select for Industry-2.

Industry -1 (From Raw Data)  
Industry-2 (Assign by Sammy/Emily)

Product Name: select. Need prepare a product list which can be used for selecting.

Read from raw data

#### Deal Size:

>40K, >15K, >5K, <3K

Any time or SFDC information need to be filled?

# Case assign process

Role and responsibility:

## SMB ORP assigned by Emily & Winnie: ISO Sales ,Solution & Dist. ORP assigned by Sammy from Sales Operation Team to Channel Managers , Auto Assignment Notification email sending to inside sales & Channel Manager

## Category:

#### Assign ORP type

Solution Specialization ORP  
 Distribution Specialization ORP  
 SMB Specialization ORP  
 All Specialization ORP

Assign to ???? How to do with this part. (Name list?)  
Joseph select ORP type in Raw Data Validation Page

CAM(CAM list. Is this same as about Assign to item?)

# Approval process

Who will be approver?

Sales Operation / ISO Admin

Insides Sales / Channel Manager

Sales Team

Channel Director

Approval workflow:

**Joseph input opportunity to COAT.**Joseph will make first round deal validation base on “Min. Deal Size”, “Specialization Partner List”, “If reseller in Dist. ORP deal is non-specialized reseller”, Joseph will make first round judgment click “Validated” or “Declined”, if click “Validated”, Joseph will make select ion on ORP type among “SMB ORP”, “Dist. ORP”, “Solution ORP” in Raw Data Validation Page.

Sales Operation / ISO Admin:  
1. SMB ORP assigned by Emily & Winnie: ISO Sales , needs to make selection on “Province-2” and “Industry-2” , and then, assign to inside sales, auto assignment notification email sending to Inside sales.

2. Solution & Dist. ORP assigned by Sammy to Channel Sales, Sammy needs to make selection on “Province-2” and “Industry-2” , and then, Auto Assignment Notification email sending to Channel Manager.

**Insides Sales / Channel Manager:**“Declined” or “Holding-double check with sales/Partner” or “Approved” with comments. If "Approved" or "Holding-double check ", assign to Named Account Sales (Sales List), Auto Assignment Notification email sending to name account sales and cc copy to sales leader.

**Sales Team:**Accept or Not Accept with Comments, Complete Question List , notification email send to CAM/ISO and cc copy Sales Team Leader and himself.

**Channel Director:**>40K ,additional approval step 4, must final approved by Channel Director.

Detailed workflow information, please refer the attached “ORP Workflow draft details as of Dec. 20, 2011”.

# Output

**Who can get output information?**

Sales Operation / ISO Admin

Insides Sales / Channel Manager

Sales Team

Channel Director

APJ ORP Team

**What kind of output is needed?**

Excel file, Detailed workflow information, please refer the attached “ORP Workflow draft details as of Dec. 20, 2011”.

# Searching function

ORP Type  
China Region  
COAT Status  
SFDC Status  
CAM Name  
Sales Name  
Deal ID  
Customer Name (fuzzy search)  
Period

# UI

## English UI

Yes

## Supported Browser

IE7,IE8 and IE9

# Working environment network

Inside the Symantec domain, Can’t access from external internet.