



# Process documentation

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# 1 97\_model

<i>Diagram Type</i>	Business Process Diagram (BPMN 2.0)
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<i>Diagram Link</i>	<a href="https://academic.signavio.com/p/editor?id=739a3dd0c27c4f92baa9cef95fe398fa">https://academic.signavio.com/p/editor?id=739a3dd0c27c4f92baa9cef95fe398fa</a>





Organization units: B2B sale and marketing (1st Phase) - Corporate Customer

### **needs assessment and order a new service request**

*Task*

*identifying the real demands of the organization aiming of defining a service request. It has its own sub-process but aiming of miniaturizing the project we ignore this.*

Organization units: B2B sale and marketing (1st Phase) - Corporate Customer

*Task type:* Manual

### **fill the online detailed forms**

*Task*

Organization units: B2B sale and marketing (1st Phase) - Corporate Customer

*Task type:* Manual

### **review new service orders**

*Task*

*registering/modifying the received new service request and turning it sale department for more actions*

Organization units: B2B sale and marketing (1st Phase) - corporate customer marketing department

Data objects: service request form on the website

*Task type:* Receive

### **register requested service order information**

*Task*

*Registering the request information into the CRM data base*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: prospective sale form on the CRM

*Task type:* Manual

### **1st negotiations with the customer**

*Task*

*addressing the service request realization and conducting first negotiations with the customer*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: negotiation reports form

*Is a call activity:* yes

### **register results of 1st negotiations**

*Task*

*registering the additional information as well as the results of first stage of negotiations in the CRM system*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: prospective sale form on the CRM

*Task type:* Manual

### **is the negotiation result positive?**

*Exclusive (XOR) Gateway*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

**register negotiations failure reasons**

*Task*

*Registering the reasons which led to negotiations failure in CRM system*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: negotiation reports, prospective sale form on the CRM

*Task type: Manual*

**define a certain sale profile**

*Task*

*defining a certain sale profile in CRM system under customer's name*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: certain sale profile in CRM

*Task type: Manual*

**Is the requested service something special?**

*Exclusive (XOR) Gateway*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

**define a special service**

*Task*

*defining a special service through the CRM system and filling in the form of special service before uploading them and turning the service request profile to the product development department*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: The form of special services

*Task type: Manual*

**Is the modified request feasible?**

*Exclusive (XOR) Gateway*

Organization units: B2B sale and marketing (1st Phase) - CFS Department

**announce the in-feasibility reasons**

*Task*

*Returning the service request profile to the sale department along with noting the reasons regarding not being able to conduct the service request*

Organization units: B2B sale and marketing (1st Phase) - CFS Department

Data objects: The form of special services

*Task type: Send*

**announce requested service order cancellation**

*Task*

*announcing the service request cancellation to the department of product development*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

*Task type: Send*

**announce service order feasibility results**

*Task**registering the positive response and returning the case to the sale department*

Organization units: B2B sale and marketing (1st Phase) - CFS Department

Data objects: The form of special services

*Task type:* Send**register proforma invoice***Task**registering/modifying the proforma invoice in CRM system and sending it to the sale manager aiming of getting the certain confirmation*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: CRM's proforma invoice

*Task type:* User**deliver proforma invoice to the customer***Task**sending the proforma invoice to the customer and its copy to the sale manager*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: proforma invoice

*Task type:* Send**Does the customer validate all?***Exclusive (XOR) Gateway*

Organization units: B2B sale and marketing (1st Phase) - Corporate Customer

**re-negotiating with the customer***Task**conducting the re-negotiating with the customer in order to dispose the service request final status*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

Data objects: negotiation reports form

*Is a call activity:* yes**Does the customer want to keep going with the company?***Exclusive (XOR) Gateway*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

**cancel the requested service order***Task**registering the reasons for which the service request is cancelled as well as updating the current status of the corporate customer in the CRM system*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

*Task type:* Manual**B2B sale (2nd Phase) process***Collapsed Subprocess*



Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

*Subprocess reference:* /model/69bb35b0ac504da9a86898cd60476eec (/model/69bb35b0ac504da9a86898cd60476eec)

### **1st phase of sale finishes**

*End Event*

Organization units: B2B sale and marketing (1st Phase) - cooperate sale department

## **Organization units**

### **B2B sale and marketing (1st Phase)**

*Pool*

*Process type:* NONE

### **CFS Department**

*Lane*

Organization unit: B2B sale and marketing (1st Phase)

### **cooperate sale department**

*Lane*

Organization unit: B2B sale and marketing (1st Phase)

### **Corporate Customer**

*Lane*

Organization unit: B2B sale and marketing (1st Phase)

### **corporate customer marketing department**

*Lane*

Organization unit: B2B sale and marketing (1st Phase)

## **Data / IT-Systems**

### **certain sale profile in CRM**

*Data Object*

### **CRM's proforma invoice**

*Data Object*

### **negotiation reports, prospective sale form on the CRM**

*Data Object*

### **negotiation reports form**

*Data Object*

### **negotiation reports form**

*Data Object*

### **proforma invoice**

*Data Object*

### **prospective sale form on the CRM**

*Data Object*





**prospective sale form on the CRM**

*Data Object*

**service request form on the website**

*Data Object*

**The form of special services**

*Data Object*

**The form of special services**

*Data Object*

**The form of special services**

*Data Object*