Report Summary: Procure Cloud Support Software Business Process

Description of business/ company:

Our project is focused on studying a business process for a cloud software company that sells different software products like Customer Relationship Management, Caller Management, Chat Management, Helpdesk Management software etc. This software is used by the company's customers to manage interactions with their own customers like the chat feature incorporated into the customer's website to facilitate a real-time customers-agent communication and complaint resolution, inbound and outbound calls to/from customers etc.

Business Process:

Our business process is the Procurement process of a Cloud Support software. We have termed the process: "Procure Cloud Support Software" process. In this project, our goal is to review the current processes undertaken within the company offering these various cloud support software for sales, and what the processes of their customers' journey look like, the sequence of activities that make up these processes, its impact on the resources deployed by the company to complete the customer software procurement process, and how we plan to improve the process described in our documented "To-be" process to achieve the desired results both for the customers and the company stakeholders. For the customers, the new process guarantees a smooth customer cloud software procurement journey/experience, while for the company and its stakeholders, a reduction in the sales effort/man-hours spent on customers software procurement, an improved number of customers per region, improved sales conversion rate, total revenue etc.

Why the process is a business process:

We consider the Procure Cloud Support Software process a business process because as described below, the process (for every single unit of flow through the process) contains a cascade of interrelated events that is initiated by a trigger event, and a final expected outcome that can be measured and counted (i.e procure software), with several actors coming together at different times to render value for the customer of the process (I.e other companies that buy any of the support software products of the company like customer relationship management - CRM, chat, caller software etc.) and other stakeholders.

Trigger Event:

The process is triggered by the "Select Product" stage. This is the stage where a customer that signs up and/or login into the company website makes the decision on what type of the products on offer by the company he or she is interested in (after the customer's account has been

authenticated by the system), by making that choice or action on the company website. The trigger event sparks up, or commit other inter-related sequence of tasks that make up the whole process as described below in the following order

- Generate Quote: The actor (sales team) gets customer's product requirement details from the trigger phase, and generates a quote to be forwarded to the customer, but the generated quote is first approved or rejected by the next actor (accounts) in the process
- Create Service Order: Upon approval of the above by the accounts team, the next actor (systems) converts the approved quote to a service order.
- Display Price: Next task is that the approved price for which a service order has been generated is displayed to the actor: customer, who either accepts or rejects the price offer.
- Payment: Accepting the price offer for the selected software leads to the next task of adding offer/product to cart and making payment by the same actor: customer
- Generate Invoice: Upon payment by the customer, the actor: Billings confirms payment and generates invoice for the customer
- Acknowledge order/purchase: The customer acknowledges the invoice generated by the billings, confirms S/he can access purchased cloud customer software, and the purchase process is certified complete.

As-Is process:

Under the current (As-is) software procurement process of the company, the sales team usually go after random businesses, market the software products to these companies, and encourage them to explore the free trial version of these support software for 21 days. Upon completion of 21 days free trial, sales team spend couple of time going after the companies that completed the free trial phase, working with finance to make and revise quotes for potential customers with the goal of converting them to a paying customer by making a paid procurement/subscription action for the previously tried software. The problem with this approach is that a lot of sales and other internal staff effort is spent on free-trial customers that don't become actual paying customer

Improving current process: "To-be"

Under the "To-be" process, our business process is changing from having sales and other actors of the process spend time to make different quotes and discounts in order to woo a random customer to convert to a paying or subscription-based customer after their free-trial period lapse, to a procurement process where bulk of sales time is spent going after customers that have registered an account on the company website, and selected a product by themselves (the trigger process). This way, sales and other business actors' activities are pulled towards customers that

show some interest by registering an account and selecting one of the many product options organically.

Information needed from Database:

From the database, we want to be able to capture the following report and visibility into the process:

- Customers that registered an account and selected a cloud software product type by themselves, grouped by their region. This way, we can tell the region with most customers
- The highest and lowest discount offered for each cloud software product offered by the company
- The sales with highest conversion ratio
- How much revenue is region is generating per employee working in the region
- Customer's data that gives total customers by product and region, and product by region