JTEKT

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# CPQ / CRM Kick-Off

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**Introduction**

Solution Scope

Delivery Approach

Team Roles and Responsibilities

Critical Success Factors and Communication

Next Steps

# Introduction

CPQ (Configure Price Quote)

TO MASTER AND STRUCTURE ALL PRODUCT LIFE IN A SAME TOOL

-Request for Quotation
-Developement phase
-Mass production
-After Sales

CPQ (Configure Price Quote)

TO MONITOR SALES ACTIVITY & DEVELOP SALES ANALYSIS

-Efficient reporting/dashboard
-Activity tracking (tooling, dvpt cost…)

CRM (Customer Relation Management)

UNIQUE CUSTOMER DATA BASIS

-For customer relationship
-Project management

**Uniform process for all Customers**

**Time saving as Administrative task automatized,**

**Information is centralised shared and capitalized**

**Up to date tool to make projection and simulation**

**Added value in structuration -> development of Sales Planning**

**- Automatic Sales performance extract**
**-Formal margin follow up**
**-Link and follow up from TMA to order**
**Lead to efficient reporting**
**(MSAP / MZK /BUDGET….**

**Daily relationship improved with Customers**
**Reactivity reinforced**

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# Companies involved

- In Mind Cloud
  - Software Solution Provider
  - Standard & Customization
  - Custom Software Extension
  - Document Requirements
- Itelligence
  - Project Management
  - Workshop Management
  - SAP Expertise
  - Intermediate between In Mind and JTEKT

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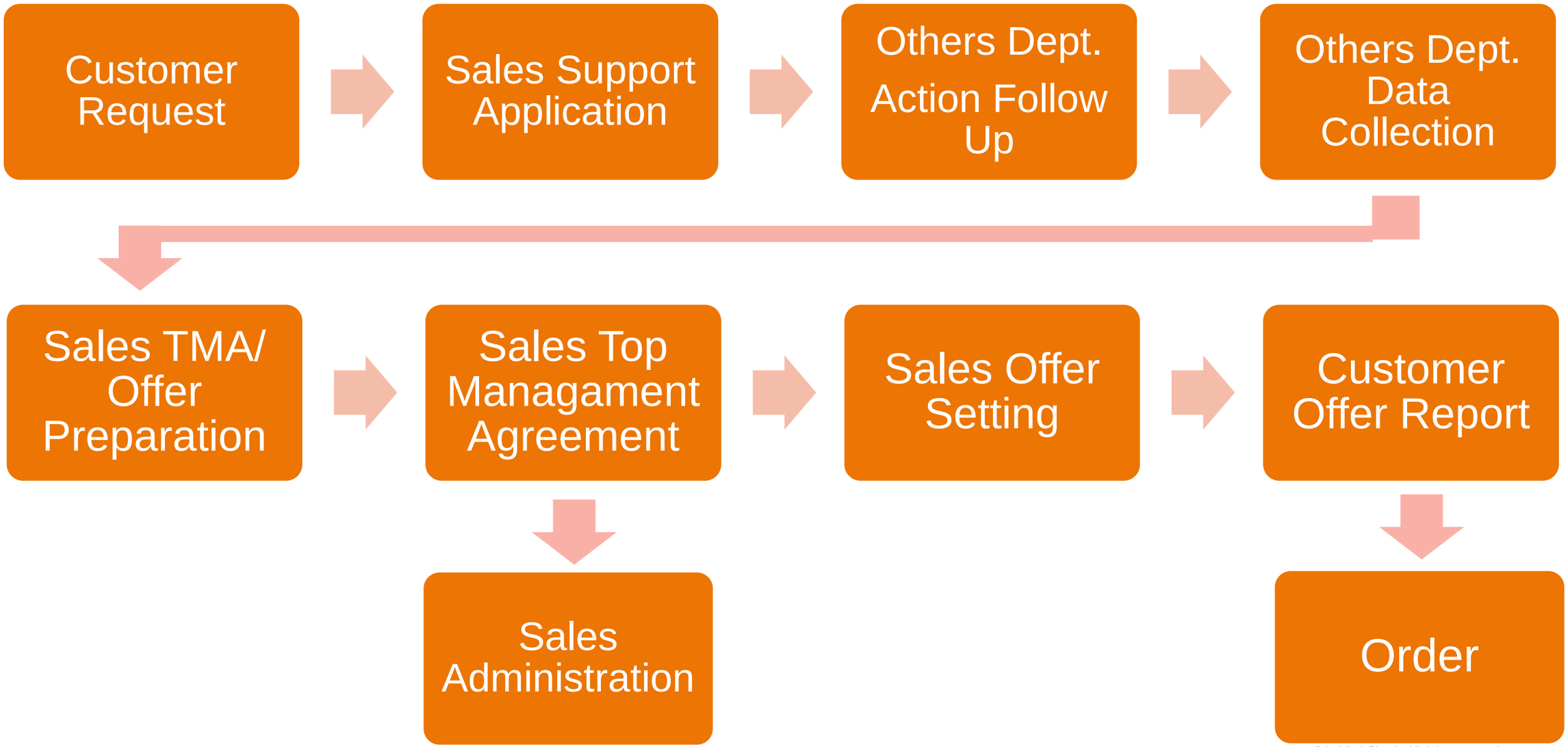
# Scope: Process View

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# Example

- Global story: « Change of connector supplier on current Clio production, part reference N°690000001 » With a part price decrease in 2 steps on current part price 100€ based on contract N°1000 index0:
  - First step: partial price down
  - Second step: after test cost depreciation second price down

| Clio annual production volume | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| January | February | March | April | May | June | July | August | September | October | November | December |
| 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 | 2000 |

**1. Account Management opportunity**

- Internal cost + technical description upload : -1€
- Quotation proposal setup:
  - Technical application: 01/06/2016
  - Price down at 01/02/2016: -0.2€
  - Test cost from 01/12/2016: 4 000€ depreciated on part price with 10% financial fees depreciated on 14 000parts=-0.25€

CM

**2. Quote creation and Product Selection**

- Margin threadshold: 50%
- List price calculation

**3. Approval Workflow**

- Price down Approval
- Technical Approvals

Approval Process

**4. Proposal and Contract Management**

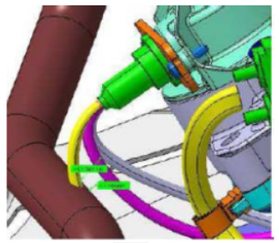
- Quotation production with technical proposal
- Contract review
- Contract Generation

**5. Opportunity Closure**

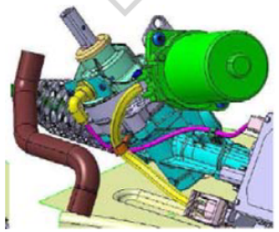
- Order N°1000 index1 revision upload from Web portail
- Order VS offer check & Validation
- Reporting synthesis of account of price evoluation on the year and export it

Price upload in SAP

Before



After





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# Phase 1 : CRM & CPQ Sales process

| Tasks for Implementation Project | | May 2017 | June 2017 | July 2017 | August 2017 | September 2017 | October 2017 |
|---|---|---|---|---|---|---|---|
| # | Task | | | | | | |
| 1 | **Project Kick-off (Phase 1)** | 9 | | | | | |
| 2 | Blue Printing workshop (onsite) & preparation | | 29/5 – 12/6 | | | | |
| 3 | Product model creation for Price management | | | | | | |
| 4 | Initial System Setup and ERP connection | | | | | | |
| 5 | **Providing Initial System with basic customizing** | | | | | | |
| 6 | Additional Development and Implementation | | | | | | |
| 7 | System customization (creation of user, roles, etc.) | | | | | | |
| 8 | **QA System Access** | | | | | | |
| 9 | End User Training, | | | | | | |
| 10 | Test and stabilization | | | | | | |
| 11 | **Providing Prod.System & Go-Live** | | | | | | |
| 12 | After-Go-Live-support, prep. **Phase 2** (following 4 weeks) | | | | | | |

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# Phase 2 : CPQ Sales Administration

| Tasks for Implementation Project | | October 2017 | November 2017 | December 2017 | January 2018 | February 2018 | March 2017 |
|---|---|---|---|---|---|---|---|
| # | Task | | | | | | |
| 1 | After Go-Live Phase 1 | | | | | | |
| 2 | **Project Kick-off (Phase 2)** | | | | | | |
| 3 | Blue Printing workshop (onsite) & preparation | | | | | | |
| 4 | Model creation for Sales Administration | | | | | | |
| 5 | Additional Development and Implementation | | | | | | |
| 6 | **Create Reports (Excel, PDF, inside the system)** | | | | | | |
| 7 | **Update QA System** | | | | | | |
| 8 | End User Training | | | | | | |
| 9 | Test and stabilization | | | | | | |
| 10 | **Providing Prod.System & Go-Live** | | | | | | |
| 11 | After Go-Live Phase 2 | | | | | | |

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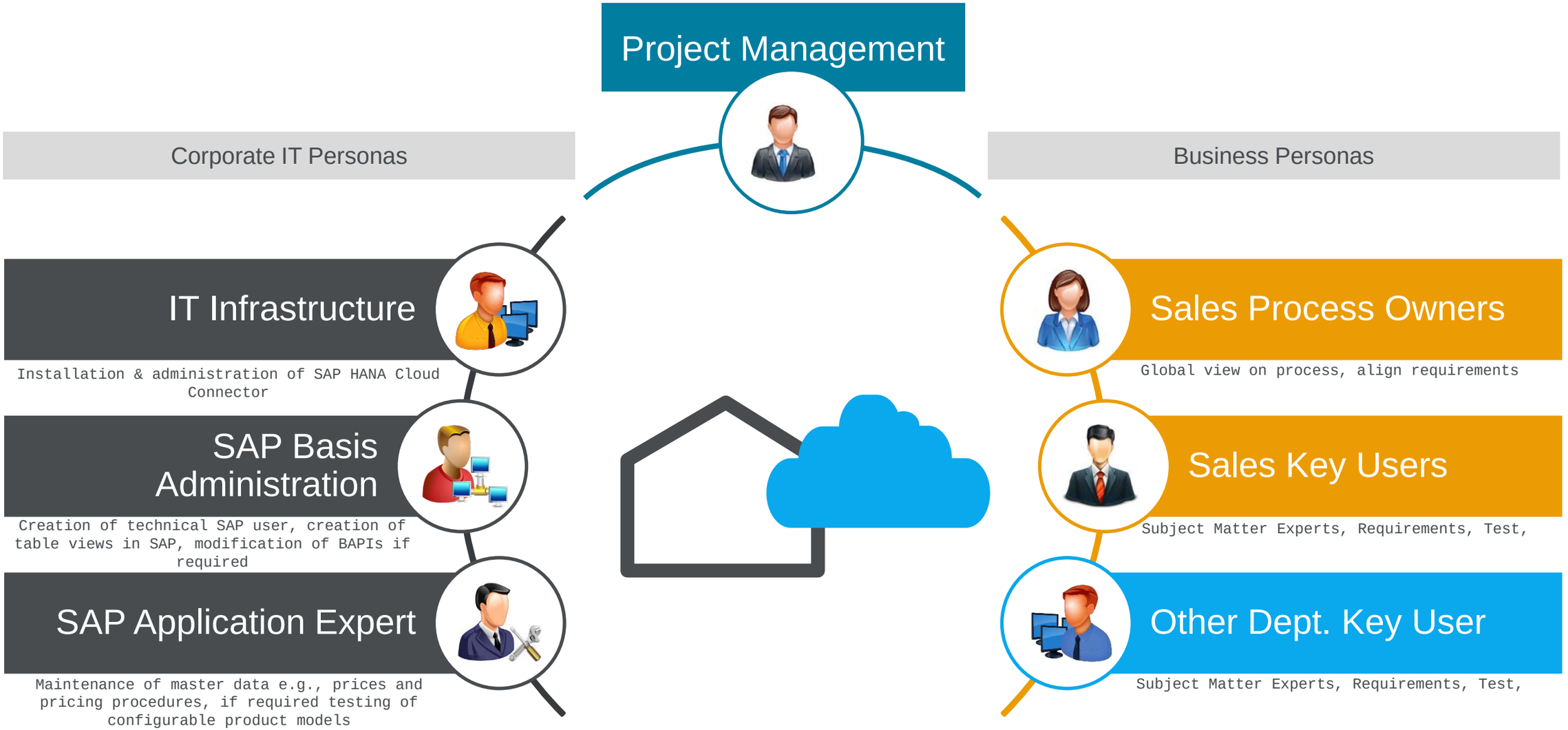
# Personas and Tasks

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# Project Team

## Steering Commitee

**JTEKT**
V. Clapeau
PO. Vittet
N. Plataret
C. Dalix
X. Gerber

**In Mind**
F. Brauer
D. Bhardwaj

**Itelligence**
G. Duprez

## Project-Mgmt & Sales Process Owners

**JTEKT**
C. Dalix
C. Cuppi

**In Mind**
F. Brauer

**itelligence**
G. Duprez

### Sales Department

G. Seror (RNPO)
P. Gautier (BMW)
C. Tiao (DAI / VW)
C. Mensah (PSA)
M. Grumelart (PSA)
T. Nakano (Toyota)
N. Yamashita (Toyota)

### IT Department

C. Bertrand
Y. Carrel
F. Fort

### Cost Planning

S. Roi

### Accounting

C. Lefresne

### Cost Control

T. Bourderioux

### Engineering

D. Pantale
A. Sarzier

**In Mind**

D. Bhardwaj - A. Peukert - Z. Cheng – J. Mudrinic – P. Martinez

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# Key users (spec & testing)

- Assist the consultant/team lead in all aspects of the project according to description from consultant/team lead
- Key users are to share all their knowledge about as-is processes and desired to-be processes
- After go live for the key users :
    - Day-to-day support to end users
    - Review incidents and resolve where possible
    - Escalate incidents to a consultant when relevant
    - Monitor the individual end users
- In case of changes to the system after go live, the key users are responsible for testing before moving customizing to production
- Key users can also be trainer(s). Will be nominated later

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# Critical Success Factors

## Factors of success for a joint successful project

| | |
|---|---|
| **Goal orientation** | • The goals of the projects are the guidelines of all actions |
| **Priority & Commitment** | • The attainment of milestones (target date and agreed quality) is the top priority<br>• Appointed dates are obligatory and agreed services are to be performed on time |
| **Team & Making progress** | • Based on your knowledge of requirements and our experience, together we will develop the best solution for your company |
| **Sustainability** | • Workshops are to be prepared well and begin / end on time<br>• The results are summarised, are made available for the team members and are obligatory |
| **KIS – Principle** | • ”Keep it simple”: In the beginning simple solutions are implemented, which then can be increased in complexity later |
| **Basic implementation** | • The standard functions are the basis, which will be adapted on your requirements. There will be no modifications. |

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# Proposed Blue Print Workshops

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# Day 1- 3 : 29-05-2017 to 31-05-2017

**Introducing Discussion**

- Introduction + short demo
- Align project structure across account teams

**2 - 3 Groups from Sales (each one day)**

- Discuss Requirements Sales Process end-to-end
  - Requirements for general process
  - Specifics for different phases (LOI, development, pre-serial, serial)
- Align vocabulary used in CPQ
- Special topic: Applications of volume-based changes, depreciation
- Special topic: Approval Processes & Validation
- Special topic: Document Outputs
- Summary

**Sales Department**

G. Seror (RNPO)
P. Gautier (BMW)
C. Tiao (DAI / VW)
C. Mensah (PSA)
M. Grumelart (PSA)
T. Nakano (Toyota)
N. Yamashita (Toyota)

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# Day 4: 01-06-2017

## Summary Preparation for Different Groups

## Introduction Session for Cost Planning & Control, Engineering, Accounting

### Cost Planning & Price Application Process

- Discuss as-is and to-be process
- JASON
- Price Change Application & Compliance
- Outlook on sales administration

**Accounting**

C. Lefresne

**Cost Planning**

S. Roi

**Cost Control**

T. Bourderioux

### Engineering Inputs

- Prototype
- Technical Documentation

**Engineering**

D. Pantale
A. Sarzier

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# Day 5: 02-06-2017

**IT Department & In Mind Development**

- Infrastructure & Integration
- Export/ Import ERP (prices)
- Special Topics, e.g. Part-Material Mapping

**Sales Process Summary from Different Groups**

- Summary of commonalities
- Discussion and Conclusion

**Wrap-Up / Next Steps**

**IT Department**

C. Bertrand
Y. Carrel
F. Fort

**Sales Department**

G. Seror (RNPO)
P. Gautier (BMW)
C. Tiao (DAI / VW)
C. Mensah (PSA)
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T. Nakano (Toyota)
N. Yamashita (Toyota)

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# Q&A

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# Steering Committee (monthly)

- Overall responsibility for the whole project
- Approve project management plan
- Make project infrastructure available (project location)
- Approve changes to the project scope
- Provide active sponsorship for the project
- Approve and ensure resource allocation
- Authorise the project team to make decisions
- Approve and implement required organisational changes
- Approve, release and follow-up the project budget
- Continuously check and approve project progress
- Handling of escalated decisions, issues and change requests
- Approve completion of the project

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# Project Committee (weekly)

- Monitoring tasks in progress, deliverables, action plans and associated resources.
- Checking that the approach and procedures specified in the PQP are properly applied
- Operational management of the project.
- Budget monitoring, planning, resources
- Pre-validation of deliverables
- Identification of bottlenecks / Sticking points , their solution or their transfer
- Preparation of steering committees and synchronization of IT projects

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# Project Manager

- Control the scope of the project
- Plan and control all major project deliverables
- Identify and monitor risks
- Plan and control the project budget
- Plan and control the project duration and milestones
- Plan and manage the internal and external resources
- Plan and manage quality activities in the project
- Plan and execute communication activities
- Follow up on issues, decisions and change requests
- Travel management (hotel, flights, dinner etc.)

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# BPO : Sales process owner

- The Sales process owner is the person with responsibility for own business perimeter
- If changes to the current business processes are needed, the Sales process owner is the driver of such changes
- Must have a global view of processes in order to avoid sub-optimisation locally
- Shall push for use of global processes whenever possible instead of local variants
- Conceptual process design and decisions on request from the project teams
- Eventual escalation to Project Management when decisions cannot be taken without broader participation
- Ensure that the critical decisions get the needed buy in from the business units

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# Consultant (In Mind)

- Collect data and information
- Invite/ conduct meetings with representatives from the business when needed
- Ensure the quality of master data within own area and coordination of master data towards other groups in the project
- Customize, prototype and develop
- Create specifications for development
- Plan and conduct workshops
- Work out manuals and documentation
- Carry out tests
- Train key/end users
- Follow-up and report to project management
- Hyper care activities after go live

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