

Project – A Process Supporting Helpdesk and Sales at a Mobile Company

@Enterprise

(15 points)



TreeMobile is a mobile carrier company offering cellular connectivity, which has, among the others, employees working either as helpdesk or in the sales department. For sales department positions, there are junior and senior employees; for helpdesk positions, all are generic employees.

When a helpdesk employee receives a call from a customer, he has to fill in a form (customer name, customer phone number, current plan, current amount paid, reason for the call, and optional notes are the MINIMUM information that have to be in the form – see comment at the end of the sheet). The reason for the call can be either a request for cheaper plan, or a request for better plan. Existing plans are “CheapAndMeh”, “YourAveragePlan”, “BillionaireUnlimited”, and “Custom”.

If the customer’s current plan is “CheapAndMeh” and the request is for a cheaper plan, the helpdesk can directly tell the customer that there is no such an option and close the call; a note is written by the helpdesk employee and it is subsequently forwarded to the sales junior to read. The sales junior may add an additional note, which is then read by the helpdesk employee for future reference. Nothing else is done afterwards.

If the customer’s current plan is “BillionaireUnlimited” and the request is for a better plan, the request is forwarded to a senior sales to handle. The senior creates a custom plan proposal for the customer, also with a new price, and communicates it to the customer. Independently on whether the offer is accepted or rejected, the outcome is communicated to the helpdesk. If the offer is accepted, however, the new conditions are communicated to the helpdesk as well. The helpdesk finally contacts the customer to ask for a feedback, writes it in a note, and closes the case.

In all other cases, the request is forwarded to the junior sales, who prepares an offer draft. The draft may include a new plan and a new price, no matter what the request from the customer was. The draft is then forwarded to the sales senior for evaluation. The senior may change the price, but not the plan as proposed in the draft. The new price can never be higher than 100,00EUR. After the senior potential edits, the information goes back to the junior sales, who contacts the customer asking for approval (the junior cannot make any other change) and forwards the outcome and, if needed, the new data, to the helpdesk (like in the case described above). The helpdesk finally contacts the customer to ask for a feedback, writes it in a note, and closes the case.

Assignment:

- Design a BPMN collaboration diagram for the given process.
- Implement the workflow for TreeMobile in @enterprise.
 - Make sure that the current form processor only has access to the fields that are relevant to him/her (e.g., junior sales is not allowed to change senior's choices, etc.).
 - Make sure that mandatory fields/radio buttons etc. have to be filled in/selected by setting the fields accordingly (e.g. senior has to mark the offer as approved/declined, etc.).
 - Make sure that the decision cannot be altered, once it was taken by a junior or a senior of the sales department!
 - Make sure that you are able to correctly run the process under all possible circumstances by testing all possible paths!
- Before the deadline, upload in Moodle a PDF file that includes the BPMN diagram, a screenshot of the process diagram from your implementation in @enterprise, and a brief report with explanation of your design and implementation choices (around 2 pages for explanations). You may include additional screenshots to support your explanation, e.g. of forms. If you make any assumptions, state them clearly along with the reasons why you made them.

Software: You can download the @enterprise demo and obtain an evaluation license from <http://www.groiss.com>. You have to do a free registration first.

Additional documentation is available at <https://www.groiss.com/en/customer-portal/documentation/>.

Suggestions:

These are people who are known to be working at TreeMobile in the following positions:

- Beatrix Kiddo, Generic Helpdesk employee
- Marty McFly, Generic Helpdesk employee
- Faye Wong, Junior Sales department employee
- Marcus Brody, Junior Sales department employee
- Mia Wallace, Senior Sales department employee
- Gil Pender, Senior Sales department employee

Take this list as a first group of users to add to your @enterprise installation for testing the correct execution of your process, but feel free to add more.

The process description above states that the form includes customer name, customer number, reason for the request, ...: this is just a minimal set of information, which may or may not be complete. Try to imagine whether this set of information is sufficient for the purpose of this process in a realistic situation, and add more fields to the form if you think they would be meaningful. Provide justification for your choice in the report.

Think carefully about which data types are the most suitable for the various form elements before implementing!

Final suggestion: do not start working on the project the last week before the deadline!