

# Business Analysis

## Introduction

### Business purpose

Dell Boomi is a business acquired by Dell in 2010 that specializes in providing software as a service and integration platform as a service to customers, as well as products related to API management, Master Data Management, and data preparation. It is a wholly-owned subsidiary of Dell Technologies, an American multinational technology company headquartered in Round Rock, Texas, formed because of the September 2016 merger of Dell and EMC Corporation. A part of the Boomi mission is to provide an intelligent, flexible, and scalable platform quickly and easily across companies and their businesses to transcend and manifest the way they connect across a variety of social and civic purposes.

As part of this project, I coordinated with the Dell Boomi Legal team to spot issues and consider potential problems that new software could relieve. While the great Dell Technologies legal team consist of thousands of legal professionals, Dell Boomi legal team consist of approximately ten full-time in-house legal counsels whose chief responsibilities include providing overall leadership and legal support to Dell Technologies in general, but mainly to Dell Boomi Inc, a rapidly growing supplier of a cloud integration platform. The legal team handles a substantial volume of sales, inbound and outbound licenses, compliance matters, any disputes, all legal issues pertinent to a worldwide cloud services business.

With all of this in mind, the proposed system to Dell Boomi's legal department will be able to save time by providing quick automated responses to frequently asked questions in-house for Dell Technologies. This, in turn, will increase customer satisfaction and attract new customers due to the legal's team response times and priority of current business endeavors.

### Business scope

Boomi iPaaS Solutions & Tools for Cloud-Connected Business;

Provide end-to-end capabilities including application integration, data quality governance, B2B/EDI network management, API management, and workflow automation. These strategies help any business worldwide improve connectivity, modernize, transform, and innovate. Businesses that are winning with Boomi are AMMEX, CEnet, American Express, Cornell University, Sky, and 12,000 more.

One key issue identified was that this legal department works within a budget and time constraints to resolve a wide range of problems to negotiate and close complicated transactions. Spending too much time answering important, although straightforward questions from the various departments and stakeholders outside of the legal group can take valuable time away from focusing on more complicated issues, particularly during the end of each fiscal quarter, when the business must focus on meeting revenue-generating goals. The proposed solution is to create an automated resolution "bot" that provides answers to commonly asked, straightforward and easily-answered questions in real-time, which will free up resources for legal department leaders to focus on more pressing – and more complicated – tasks. The goals are to develop an automated Q&A, available to various departments and stakeholders outside of legal, to reduce busywork, improve response times, create consistencies in answers and resolutions, advance customer interaction, and allocate resources to imperative deals.

### Assumptions:

- This software will only be used between Dell Technologies departments.
- Commonly asked questions will be gathered and set before the resolution bot is deployed. Those questions can be updated, and new questions added, periodically.
- The bot will not include out of the scope questions, including those that do not lend themselves to straightforward and consistent answers. Those more complex questions will continue to be fielded and handled by the legal department. (Note: If an answer is not needed at the moment, another feature could be added to accept new questions and responded to by the legal department and added as a new commonly asked question if it meets criteria.)
- The software will be built on current systems used by the department to ease the transition.
- This software will be managed and updated from time-to-time by the Dell Boomi legal team, and only be used internally as a resource between Dell Technologies departments. (This is a HUGE assumption as to what will occur if the program crashes, has bugs, invalid entries within the database, etc. {This is a topic to be talked about later}).
- Resolution "bot" will use machine learning to identify past questions and related questions to precisely choose the correct answer for the same questions written differently.

### Business overview

Dell Boomi Inc. has multiple internal divisions within its business domain such as operations department, head of product management, finance department, marketing department, research and development department, information security, legal department, and human resources. With my focus on the legal department is it common that external entities ranging from all other Dell Technologies business and current customers of Boomi inc communicate any legal issues pertaining to Dell Technologies.

### Definitions

Integration Platform as a Service (iPaaS) is a suite of cloud services enabling development, execution, and governance of integration flows connecting any combination of on-premises and cloud-based processes, services, applications, and data within individual or across multiple organizations.

Software as a service (SaaS) is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted. It is sometimes referred to as "on-demand software." SaaS applications are also known as on-demand software and Web-based/Web-hosted software.

Dell Boomi's iPaaS solution allows businesses to achieve integration of data without big investment into skills or licensed middleware software. It is deployed on a multi-tenant, elastic cloud infrastructure. Typically, it is sold as a subscription model, with annual pricing. No new software is typically developed (instead, required connectors should already be available).

## Major stakeholders

Business Analyst: William Angola

Customers: 12,000+ With the likes of 23andMe, A10Networks, AMCAP, American Cancer Society, and American Express)

Software Engineers

CEO: Chris McNabb

Chief Operating Officer: Christopher Port

Chief Revenue Officer: William Corkery

Ed Macosky: Head of Product

Rajesh Raheja: Senior Vice President of R&D and Engineering

Mandy Dhaliwal: Chief Marketing Officer

Carolyn Koehn: Chief Financial Officer

Joe Brown: Chief Information Security Officer

Chief Legal Officer: Ron Zollman

Megan Jacobs: Human Resources Business Partner

Dell Technologies multitude of other departments contacting Boomi with a variety of questions and issues including business and legal risk and potential revenue (gained and/or exposure).

## References

Websites:

<https://boomi.com/vision/>

<https://boomi.com/customers/>

<https://resources.boomi.com/resources/briefs/get-to-know-boomi>

<https://en.wikipedia.org/wiki/Dell> (List of Acquired companies)

<https://boomi.com/company/events/>

<https://resources.boomi.com/resources/customer-stories>

<https://boomi.com/services/support/>

<https://boomi.com/company/leadership-team/>

<https://corporate.delltechnologies.com/en-us/about-us/who-we-are/code-of-conduct.htm>

People:

Edward McCarthy (leadership role and legal support for Dell Technologies)

## Business management requirements

### Business environment

Factors that may influence Boomi's legal department and the proposed system could be new laws and regulations that require updated standards to the systems common questions, a newly updated system pushing our proposed system out of scope, and a newly acquired market expanding to a different language prompting our proposed system to update translations of questions and answers. Current influences that improve the business as a whole are events displaying current customer success, case studies providing an in-depth examination of other customer's success, and customer retainment with a whopping 97%.

### Mission, goals, and objectives

The result of an automated response bot within the legal's team department is to provide consistent responses that convey up to date standards, less confusion throughout all departments wanting quick answers for common questions, reduce busywork, and increased revenue due to the legal team's responsiveness to new and closing deals.

### Business model

The goal of Dell Technologies' legal team and expertise spans litigation, commercial and corporate transactions, IP, employment, immigration, compliance, and regulatory matters. They manage legal business matters, advise on legal issues affecting the business, coordinate outside counsel, and reviewing legal data. Legal counsel is responsible for performing legal analysis and delivering legal advice and counseling to the stakeholders and departments globally. They perform legal research for business needs, draft, review, and/or negotiate legal agreements, and anticipate and guard against legal risks involving the global sales organization. The team overall accomplishes a lot of work to achieve the expected business mission, which is why the resolution "bot" can alleviate the tedious task and allow the legal team to focus.

Specifically, on each Dell Boomi legal counsel:

- Leads and develops strategic initiatives designed to enable the channel business
- Draft, review, and negotiate software sales and procurement agreements and other legal documents related to Dell's software
- Respond to internal and external legal inquiries, dealing directly with internal clients, including senior executives, as well as Dell suppliers and customers
- Perform legal analysis/research and recommend appropriate strategies to senior legal and business stakeholders
- Recommend changes to organizational policies/procedures involving legal issues
- Coordinate legal matters handled by outside counsel
- Manage departmental projects outside of primary practice areas

### Information environment

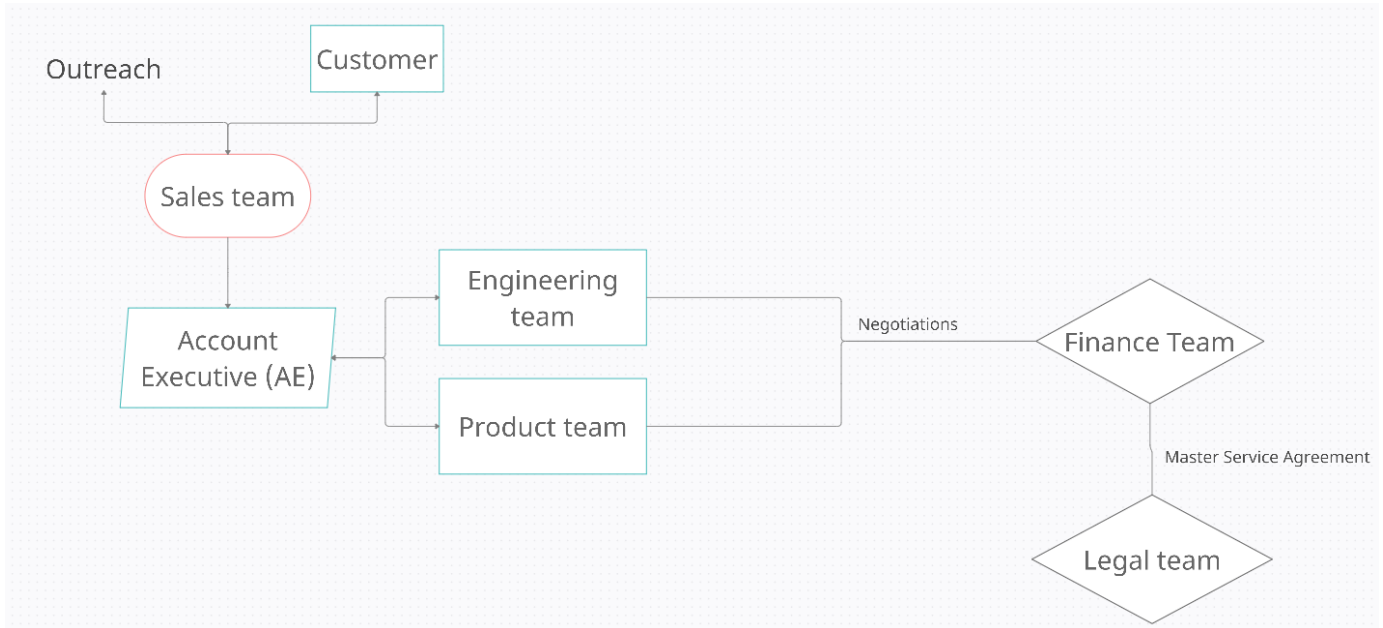
The overall strategy for the system will begin with the legal team setting a criteria/basis for commonly asked questions, create solutions for common questions that the whole team agrees on, these solutions are then transferred to the developers via documents that are used to update /create a database that the response bot will pull its information from. The long term system will consist of the legal department updating standards for changing questions, and the developer team correcting any bugs found within the system after deployment. (This is an assumption of the process that will be refined and expanded on once I get a better idea of how current interactions between different departments work).

## Business operational requirements

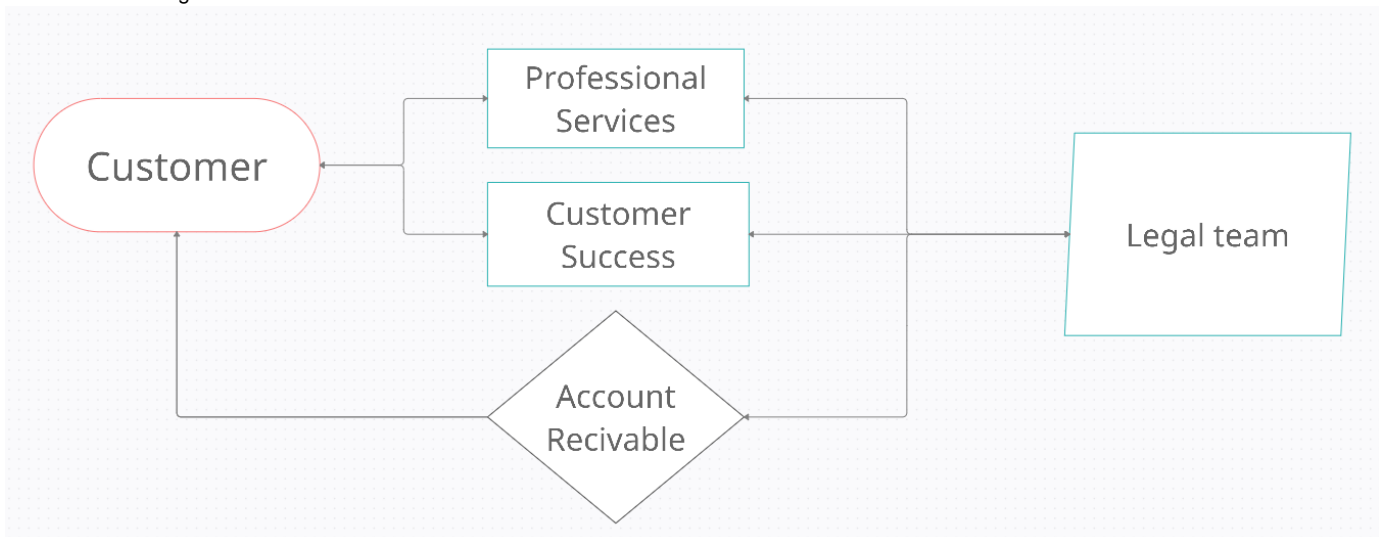
### Business processes

Boomi's business process has a good amount of iterative processes to satisfy customer needs and requirements. A typical software sale would begin with the sales team setting up an Account Executive (AE) with a potential customer, that AE would work with Boomi's product and engineering team and the customer to find the right products and services that will work for the customer. This leads to negotiation about pricing and the finance team will get involved if a customer requests unique billing or payment terms that need internal approval. The legal team may get involved if it's a large deal and the customer request substantive edits or revision to the sales document (These are considered Master Service Agreement) and then pending other request or needs the customer has, the product and engineering team gets involved for approvals. Once the deal is signed, the professional services team helps the customer get started using their services, and the "Customer Success" team stays involved to make sure the customer is happy and engaged with making the most out of these services. The Accounts Receivable team might get involved if customers fail to make payments. Throughout all of this, the legal team remains available and engaged for a variety of issues where they spot legal risks or provide advice on the current outgoing sales side. Our proposed system will assist the whole process as multiple departments will be able to obtain quick answers to commonly asked legal questions.

The sequence of activities visualized:



Once the deal is signed:



### Business operational policies and rules

Dell Technologies is a company made up of more than 150,000 people, located in over 180 locations around the world. The Dell Technologies Code of Conduct, "How We Win," provides guidance on how Dell carries out applicable laws in the countries in which they work and serve. Ultimately, they all adhere to one global standard: win with integrity!.

Values -

Our values, and the behaviors that drive them, are the daily expectations for how we **work** with each other.

- **Customers:** We believe our customer relationships are the ultimate differentiator and the foundation for our success.
- **Winning Together:** We believe in and value our people. We perform better, are smarter, and have more fun working as a team than as individuals.
- **Innovation:** We believe our ability to innovate and cultivate breakthrough thinking is our engine for growth, success, and progress.
- **Results:** We believe in being accountable to an exceptional standard of excellence and performance.
- **Integrity:** We believe integrity must always govern our fierce desire to win.

Principles -

Our principles are the bold choices we make to **lead** our team, our business, and our industry.

- **Relationships:** We know that strong relationships bring not only great business success but great personal fulfillment.
- **Drive:** We cultivate ambition, energy, and grit in ourselves and in others, but bound our ambition with a strong desire to do the right thing.
- **Judgment:** We rely on facts, we are agile and change direction when it's the right thing to do.
- **Vision:** We carefully define success and are relentless about communicating that vision in terms that are simple and compelling.
- **Optimism:** We are optimistic about our people, their potential, and the future while balancing it with the realities and challenges we face.
- **Humility:** We recognize we are not always right and not always the smartest person in the room, and we know our successes are shared.
- **Selflessness:** We care about the effect our leadership has on our people. We invest in them, develop them, and help them achieve their aspirations.

More can be found in <https://corporate.delltechnologies.com/en-us/about-us/who-we-are/code-of-conduct.htm>.

## Business operational constraints

All businesses have a collection of constraints that must be dealt with, in the case of Boomi's legal department these operational constraints stem from time, money, knowledge of users, risk tolerance (evaluation of investments, projects), internet connectivity especially during a pandemic, and limited resources due to the number of legal counsels. These constraints are inflated when nearing deadlines, but no matter what the circumstances are operational control is above all.

## Business operational modes

As a sales company, Boomi's legal team may become extremely busy meeting quarterly sales nearing deadlines, but they must guarantee a safety net for the finance department by informing whether negotiations are safe no matter what the circumstance is. Upholding an operational control is most important when they are most busy, remember the one global standard: win with Integrity! In the case of unexpected situations such as power outages, natural disasters, or illnesses the legal team may be capable of handling workloads as most if not all the legal department works remotely. This provides safety to the company as all the legal departments may not be affected at once and business can continue in extreme conditions. Potential methods during these unexpected situations may be having a personal hotspot and portable charger for internet access and under the most extreme conditions of a natural disaster relocation to an external facility temporarily to continue business operation.

## Business operational quality

The business operational quality does not depend on the legal department, their main objective is to inform whether the negotiations are safe no matter what the circumstances are. Operational control is the most important task the legal team must uphold to sustain a reliable and safe business operation.

## Business structure

The organizational structure of departments relevant to the system will begin with the legal team at the top, then the finance team, international sales team, operations officer, and the rest of Boomi's inc departments and Dell Technologies. There will not be a need to align system functions to these structures to support future changes unless other departments would want to implement this type of resolution "bot" within their own department.

## Preliminary operational concept of the proposed system

### Preliminary operational concept

#### operational policies and constraints;

Policies -

[DBO-1] **Appointment** - Sales team sets up an Account Executive (AE) with a potential customer.

[DBO-2] **Development** - The appointed AE would work with Boomi's product and engineering team and the customer to find the right products and services that will work for the customer.

[DBO-3] **Transaction** - Negotiations about pricing begin and the finance team will get involved if a customer requests unique billing or payment terms that need internal approval.

[DBO-4] **Top-class** - The legal team may get involved if it's a large deal and the customer request substantive edits or revision to the sales document (These are considered Master Service Agreement) and then pending other request or needs the customer has, the product and engineering team gets involved for approvals.

[DBO-5] **Engagement** - Once the deal is signed, the professional services team helps the customer get started using their services, and the "Customer Success" team stays involved to make sure the customer is happy and engaged with making the most out of these services.

[DBO-6] **Accountability** - The Accounts Receivable team might get involved if customers fail to make payments.

[DBO-7] **Consistency** - The legal team remains available and engaged for a variety of issues where they spot legal risks or provide advice on the current outgoing sales side.

Constraints -

[DBO-8] Time - When are deadlines concluding.

[DBO-9] Money - Is more money needed for changes in scope and features.

[DBO-11] Risk Tolerance - Can the project take the risk of another investment.

[DBO-12] Internet connectivity - Will all users have access to the system.

[DBO-13] Quarterly deadlines - Who will manage the system in closing deadlines.

#### **description of the proposed system;**

The proposed system is to create an automated resolution "bot" for Dell Boomi legal department that provides answers to commonly asked questions in real-time, which will free up resources for the legal department leaders to focus on more pressing- and more complicated - tasks.

#### **modes of system operation;**

The proposed system will have two different modes of operation: Standard, which will sustain access capacity throughout all of Dell Boomi business at about 70% to support regular business operations, and Loaded, which will sustain full access capacity throughout all of Dell Boomi business to support nearing quarterly deadlines.

#### **user classes and other involved personnel; and**

Personnel involved with the proposed system will be the legal department, developers, software engineers, and each department under the scope of Dell Boomi's business trying to access the system. I.e. Any stakeholders.

#### **support environment.**

The proposed system contents will be updated by the legal department and sustained by developers/software engineers assigned to the project.

### **Preliminary operational scenarios**

[DBOU-1] Users - Users will have to enter credentials to enter the website/app, once signed in the response "bot" will prompt the user to enter a question. This could have two responses one with the answer for the questions or information on how to contact the legal team as the question is not common criteria. The user will be able to enter more than one question once their previous question has been responded to.

[DBOU-2] Operators - The legal team will support the answer feed to a specific question with direct access to the database or another system that will allow change of information within the database without having to access it directly.

[DBOU-3] Maintainers - The developers/software engineers will have access to the complete software allowing for updates and fixes. They will accept bug reports and potential updates needed to improve the website/app.

## **Other preliminary life-cycle concepts**

### **Preliminary acquisition concept**

The system solution will begin by eliciting requirements from users. Ex: What do they expect from the system once it's in their hands (how do they expect the resolution "bot" page to look like, what type of questions will they ask {this will most likely be done with the legal department}).

Next, communicate with the developers/software engineers to understand what software requirements are needed to come up with the system solution. Ex: Will questions/answers be stored in a database? how are we going to restrict system access to only dell Boomi personnel? Could we use Boomi's cloud-integrated platform to expand the capacity of the resolution "bot" question/answer pool instead of using a database?

### **Preliminary deployment concept**

The system will be deployed onto a private network/website that all of Dell Boomi inc departments will have access to. This will likely need to be approved by the IT department at Dell to assure security. Currently, most questions to the legal department are received via phone, email, and internal messaging (Skype and Microsoft teams) meaning that throughout the development process users who currently contact the legal department will need to be informed about the upcoming system and notified constantly about the change that will occur once the system is deployed.

### **Preliminary support concept**

Once the system is deployed the support system will be dependent on the legal department will provide operational support by updating any answers given by the response "bot" when changes to standards occur. Engineering support and maintenance support will most likely be up to the software engineers who developed the system to accept bug reports and fix any current issues with the system. Training support may be in the form of a video within the page of the response "bot" to provide new users information about how the bot functions and where to find help if the bot can't respond.

### **Preliminary retirement concept**

This system will be a long term solution for the legal department to allocate more time to more pressing - and more complicated- tasks until a new solution presents itself or the bot if the bot is inconsistent with its responses. Once the system does become retired all of the information saved within the database/cloud will need to be deleted to avoid unknown leaks of information to the general public.

## **Project Constraints**

- [1] Time - When are deadlines concluding.
- [2] Money - Is more money needed for changes in scope and features.
- [3] Risk Tolerance - Can the project take the risk of another investment into a new feature.
- [4] Internet connectivity - Will all users have access to the system.
- [5] Quarterly deadlines - Who will manage the system in closing deadlines.
- [6] Knowledge of users - Will the users have trouble using the proposed system.
- [7] Project sprints - What are the deadlines for certain goals of the system.
- [8] Regulations - Changes in certain legal questions.
- [9] Security - Will system information be safe within a database/cloud.
- [10] Limited Resources - How many will be working on the development of the software.

## **Appendix**

### **Acronyms and abbreviations**

DBOU - Dell Boomi Use

DBO - Dell Boomi

iPaaS - Integration Platform as a Service

SaaS - Software as a service