Service Sales Process

PHX013

Contents

Purpose

The purpose of this process is to ensure that a customer's requirement is accepted into the Service Sales procedure and processed and delivered correctly.

Scope

This process applies to all relevant Sales, SAM and Technical personnel.

Responsibility

It is the responsibility of the Sales, SAM and Technical personnel to ensure that all stages of the Service Sales process are followed correctly and that agreed contracted customer requirements are met.

Procedures

<u>Consultancy Orders</u>

Customers that require consultancy may contact Phoenix as result of previous software purchases or directly enquire regarding this service. In these instances, the contact is referred to a Business Development Manager (BDM) or Account Manager. The BDM or AM initiates a pre-sales meeting where required or the Customer's requirements will be discussed and agreed during the initial contact.

A further technical pre-sales meeting should be held with a Technical Consultant to scope the customer requirements in more details.

A proposal document or a statement of work is created using the information obtained from the pre-sales meeting and/or any discussions with the customer. The relevant document is forwarded to the customer and a purchase order follows where the customer agrees to its content.

On receipt of a customer purchase order number, an Oasis Sales Order is created with its own unique Sales Order Number and the order is placed on hold for approval by the service delivery/Project Management team.

An automatic email notification is sent to the service delivery/PM team to request approval. The service delivery team check that all relevant paperwork is attached to the sales order e.g. Proposal document, Purchase Order etc. Once checked, the order is marked as OK to release.

Larger consultancy orders require managing via PRINCE2 methodology and will be subject to a Project Initiation Meeting (PIM) with the customer and relevant Phoenix personnel. From the PIM a Project Initiation Document (PID) and Project Plan are produced. The project is then scheduled in to the Consultancy Team Outlook Calendar.

Smaller consultancy orders do not require a PIM or PID and can be scheduled into the Consultancy Team Outlook Calendar immediately. In these instances, a pre-work call will be scheduled with the relevant Consultant assigned to the work to make sure the customer is ready for the work to begin.

On the delivery of all consultancy work, the final invoice is sent out and requested by the PM via Oasis.

See Services Sales Process Flowchart

Service Desk Orders

Customers that require a Service Desk support contract may contact Phoenix as result of previous software purchases or directly enquire regarding this service. In these instances the contact is referred to a Business Development Manager (BDM) or Account Manager. The BDM or AM initiates a pre-sales meeting to discuss the customer's requirements.

A Service Desk Support Contract Proposal is created from the information obtained in the pre-sales meeting. This document is forwarded to the customer and a purchase order follows where the customer agrees to its content.

A support contract may either be a Volume Services Agreement or a Managed Service contract. The relevant contract will be proposed based on the customer individual requirements.

On receipt of a customer purchase order number an Oasis Sales Order is created with its own unique Sales Order Number and is placed on hold for approval by the service delivery/PM team. An automatic email notification is sent to the Service Delivery/PM team to request approval. The service delivery team check that all relevant paperwork is attached to the sales order e.g. Support Contract document, Purchase Order, Master Services Agreement etc. Once checked the order is marked OK to release. Once released the order is then transferred to Sage to await invoicing instructions.

The Oasis V4 module is updated with the agreed terms of the Support Contract.

The services administration personnel request the invoice to be raised via Oasis Sales. Invoicing normally takes place at the initiation of the Support Contract.

A standard Service Desk Support Contract may initiate further consultancy work which would be dealt with in the Consultancy Order procedure.

See Services Sales Process Flowchart

Software Asset Management Orders

Customers that require SAM services may contact Phoenix as a result of previous software purchases or directly enquire regarding this service. In these instances the contact is referred to a Business Development Executive. The BDE initiates a pre-sales meeting to discuss the customer's requirements. A Proposal and Statement of Work are created from the information obtained from the pre-sales meeting. This document is forwarded to the customer and a PO follows where the customer agrees to its content.

On receipt of a Customer Purchase Order Number, an Oasis Sales Order is created with its own unique Sales Order Number and the order is then transferred to Sage to await invoicing instructions. This order goes on hold and the SAM Team review the order to ensure a signed contract has been uploaded to Oasis.

A Project Manager is assigned to the project and a PIM is conducted with a PID following this meeting, including a project plan. The agreed PID is signed by both parties.

The project is planned by the Project Manager and all relevant tasks and timescales are scheduled in accordingly. The project is then delivered to agreed timescales within the project plan.

Invoicing instructions are sent to the accounts personnel on the completion of agreed stages of the project.

See Services Sales Process Flowchart

Managed Service Orders

Customers that require a Managed Service may contact Phoenix as a result of previous SAM purchases or directly enquire regarding this service. In these instances the contact is referred to a Business Development Executive. The BDE initiates a pre-sales meeting to discuss the Customer's requirements. A Proposal and Statement of Work are created from the information obtained from the pre-sales meeting. This document is forwarded to the customer and a PO follows where the customer agrees to its content.

On receipt of a customer purchase order number, an Oasis Sales Order is created with its own unique Sales Order Number and the order is then transferred to Sage to await invoicing instructions. This order goes on hold and the SAM Team review the order to ensure a signed contract has been uploaded to Oasis.

The Managed Service team conduct a PIM and create the process document this is distributed by both parties.

The project is planned by the Managed Service team and all relevant tasks and timescales are scheduled in accordingly. The project is then delivered to agreed timescales within the SLA.

Invoicing instructions are sent to the Accounts personnel on the completion of agreed stages of the project.

Managed Service Orders

Customers that require a Managed Service contact Phoenix as a result of previous SAM purchases or directly enquire regarding this service. In these instances the contact is referred to a Business Development Executive. The BDE initiates a pre-sales meeting to discuss the customer's requirements. A Proposal document is created from the information obtained from the pre-sales meeting. This document is forwarded to the customer and a PO follows where the customer agrees to its content. On receipt of a customer purchase order number an Oasis Sales Order is created with its own unique Sales Order number and the order is then transferred to Sage to await invoicing instructions. An email is sent to the Service Orders Group by the BDE and sent to the Service Delivery Manager along with all relevant paperwork e.g. Proposal document, Purchase Order etc. The order details are also added to the Services spreadsheet to manage the project.

If it is an existing customer, a SLA, contract and SOW are completed and sent to the Managed Service team.

The Managed Service team conduct a PIM and create the Service Level Agreement (SLA). This is signed off by both parties.

The project is planned by the Managed Service team and all relevant tasks and timescales are scheduled in accordingly. The project is then delivered to agreed timescales within the SLA.

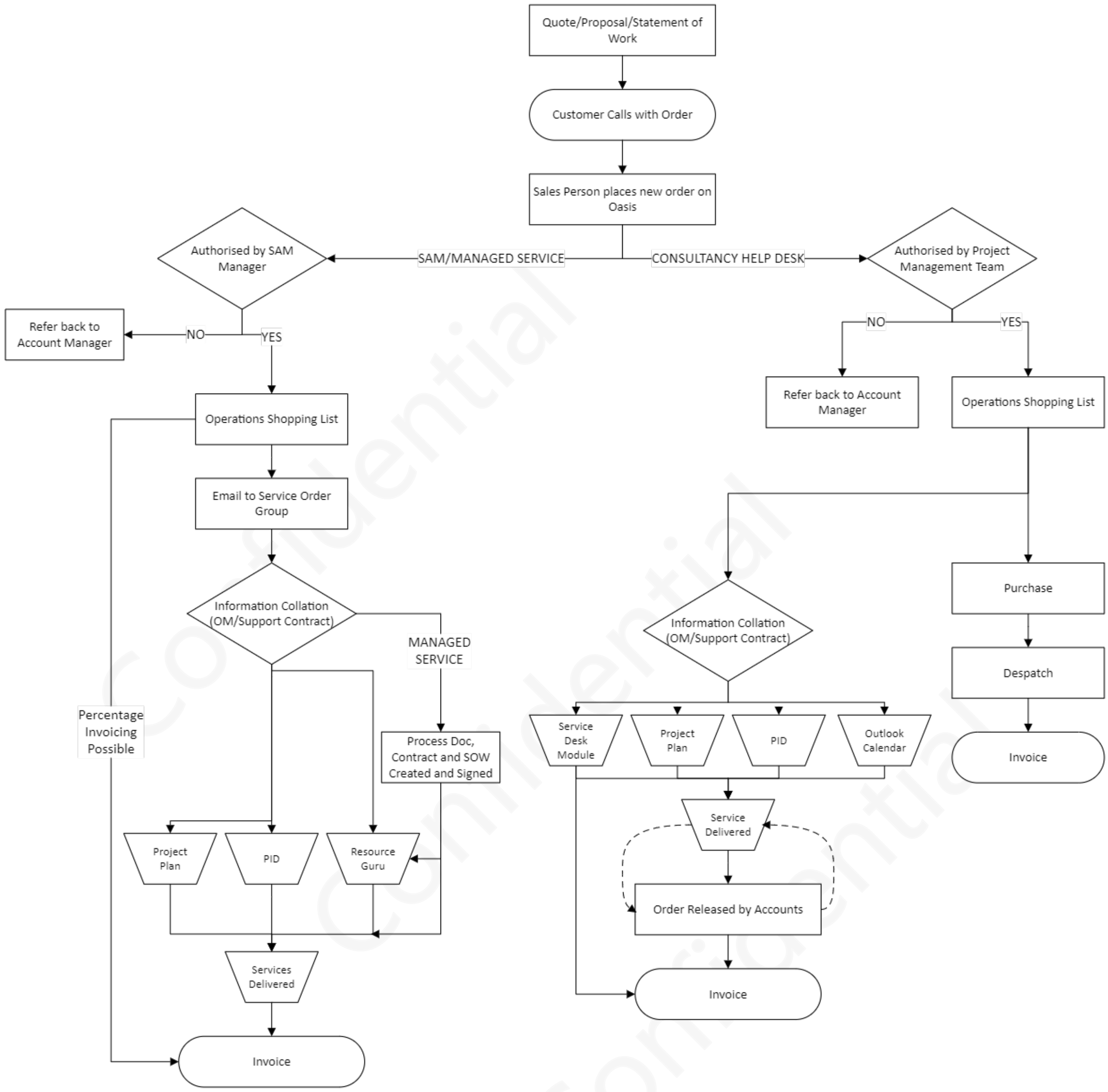
Invoicing instructions are sent to the accounts personnel on the completion of agreed stages of the project.

Traceability

From this point, a customer's order request can be traced on either a Quote Number (if relevant), Sales Order Number, Customer Purchase Order number or Phoenix Purchase Order number.

See Services Sales Process Flowchart

Services Sales Process Flowchart



Version Control

Author	Version	Date	Description
QMS	1.0	01/05/2016	Original Document
QMS	1.0	30/12/2017	Annual review – no changes
QMS	1.0	30/12/2018	Annual review – no changes
QMS	1.0	05/12/2019	Annual review – no changes
QMS	1.0	11/11/2020	Annual review – no changes
Natalie Cliff	2.0	22/11/2021	Amendments following annual review
Natalie Cliff	3.0	25/11/2022	Amendments following annual review

Document Approval

Name	Version	Date	Position
Sam Mudd	1.0	01/05/2016	Managing Director
Sam Mudd	1.0	30/12/2017	Managing Director
Sam Mudd	1.0	30/12/2018	Managing Director
Sam Mudd	1.0	05/12/2019	Managing Director
Sam Mudd	1.0	11/11/2020	Managing Director
Sam Mudd	2.0	22/11/2021	Managing Director
Clare Metcalfe	3.0	25/11/2022	Operations Director

Signed: *Clare Metcalfe* Clare Metcalfe, Operations Director

Dated: 25/11/2022