Process Design Challenge

Goals of Exercise

This is a quick design challenge to prime a conversation / whiteboard session around investigating, designing and implementing an improved business process. The goal is not to create a perfectly accurate solution, but to explore the kinds of issues that come up in the process overall.

Please note concerns, assumptions, information needed and so on, as you describe your process of solving the problem. Keep the solution to a few pages, including any written explanation, diagrams etc.

Existing Business Issues

The RMA process is not currently modeled or recorded in the ERP application. This makes customer service data, COGS and Inventory counts more difficult to track.

The support team needs to overhaul the current process which is a combination of Google Sheets and Journal Entries into the ERP.

The process in simple terms involves:
- Determining Warranty Status
- Authorizing a Return
- Shipping it to the RMA Center
- Inspecting Incoming Products
- Refurbishing Damaged Products
- Charging the Customer for Out of Warranty Repairs
- Shipping Repaired Printer to Customer

Expected Outputs

1) Design a solution which will account for Product Inventory, collect COGS for refurbished product, and communicate shipments to the Refurb Center.
2) Create a quick introduction of how this process will change for the support team who is used to working with Google Sheets only. This solution will need to be communicate to Logistics, Finance and Support respectively.
3) Also consider how to ensure the process is adhered to. What reports might be run to keep an eye on the process and its possible calibration to reality?

System As-Is

ERP - Easy to download and upload CSV records. Has a module for Return authorizations (not used yet). Currently captures Orders, Payments, Fulfillments to Customers, and Printer Serials Fulfilled.

Google Sheets - Has manually collected data for Return Authorization Requests, Serials of Printers in process of being repaired, repaired components used in each Printer and the date of Printer receipt/re-shipment.