

# **Frameworkx Standard**

## **Business Process Framework (eTOM)**

### **Tecnotree**

**TM Forum Frameworkx 19.0 Certification  
Business Process Framework (eTOM)**

**Self-Assessment Process Mapping Report  
DCLM 5.0.2 - Digital Customer Lifecycle Manager  
Version 3 Review Final  
September 2020**

**By Reference to: GB921 Addendum D - Release 19.0 - July 2019**

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## Process Decompositions & Descriptions

### 1.3. Customer Management Domain

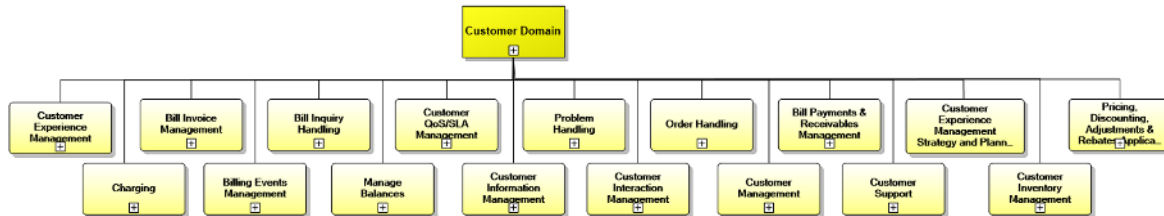


Figure 1 1.3. Customer Management Domain

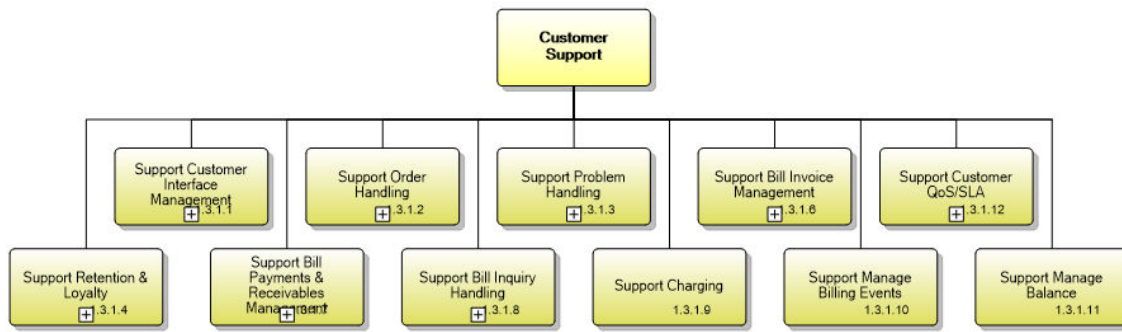


Figure 2 1.3.1 Customer Support & Readiness

#### Customer Support

**Process Identifier:** 1.3.1

#### Brief Description

Customer Support processes ensure the support capability is in place to allow the CRM Fulfillment, Assurance and Billing processes to operate effectively.

#### Extended Description

Customer Support processes ensure the support capability is in place to allow the Customer Fulfillment, Assurance and Billing processes to operate effectively.

The responsibilities of these processes include, but are not limited to:

- Provision of sales customer process infrastructure
- Policy support and decision support knowledge for customers and customer interactions (including billing activities)
- Maintaining inventories to support the customer data required by the FAB and CRM OS&R processes
- Monitoring and reporting on the capabilities and costs of the individual Customer FAB processes
- Longer-term trend analysis on customer FAB processes in order to establish the extent to which enterprise targets for these processes are being achieved and/or the need for the processes to be modified.

These processes support the operational introduction of new processes and infrastructure to support new

and/or enhanced customer management capabilities and are responsible for conducting operations readiness testing and acceptance. They develop the procedures for the specific Fulfillment, Assurance and Billing processes and keep them up to date. After successful testing, these processes accept the new or enhanced process capabilities and manage a full-scale introduction for general availability.

### Support Customer Interface Management

**Process Identifier:** 1.3.1.1

#### **Brief Description**

Ensure that all information, materials, systems and resources are available so that the Customer Interface Management processes can operate effectively, when a contact with a customer occurs.

#### **Extended Description**

The purpose of the Support Customer Interface Management processes is to ensure that there is capability (for example, information, materials, systems and resource) so that the Customer Interface Management processes can operate effectively when a contact with a customer occurs. Examples are information on how to handle unusual requests based on temporary situations, systems needed to accept and track customer contacts, requests for the provisioning of additional resources where it has been identified that current levels will impact on timely contact handling.

These processes are responsible for implementing generic and specific changes to customer interfaces. This support could be in updating agent scripts, IVR announcements, Web pages, etc. Customer Interface Support processes keep up to date all information concerning customers.

These processes undertake trend analysis on customer contacts, e.g. type, frequency, duration, outcome. AM

Digital Customer Lifecycle Management (DCLM) maintains a 360 degree view and pertinent information of an existing customer. Different personas use the application ranging from Customer Service Representatives, Sales/service agents, Account Managers, Back Office teams, Supervisors and Dealers. All the users have specific roles and rights to view customer information to make informed decision and have effective interaction within a stipulated timeline.

The information within the DCLM application is based on integration with multiple sources of data. DCLM maintains up to date information based on this for all customers. This is rendered based on the channel type and access capabilities provided to that channel.

[\[Tecnotree PD CIM\]](#)

### 1.3.3 Order Handling

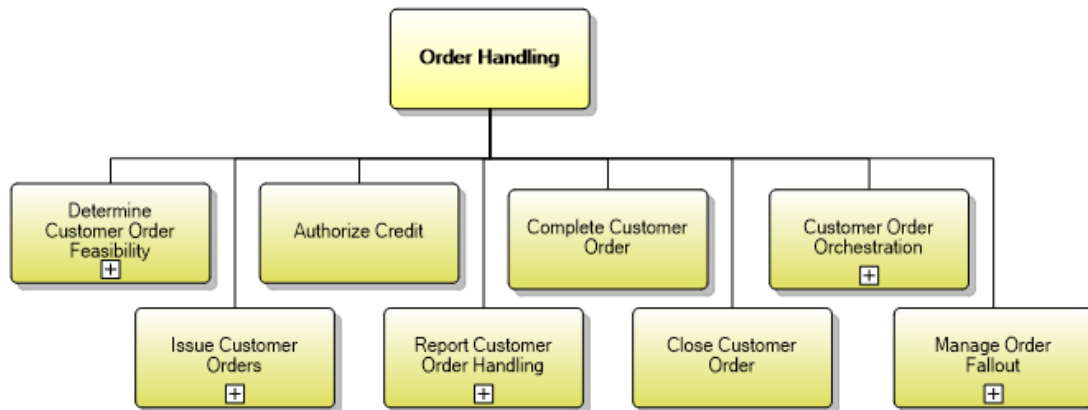


Figure 3 1.3.3 Order Handling

#### Order Handling

**Process Identifier:** 1.3.3

##### Brief Description

Responsible for accepting and issuing orders.

##### Extended Description

Order Handling processes are responsible for accepting and issuing orders. They deal with pre-order feasibility determination, credit authorization, order issuance, order status and tracking, customer update on order activities and customer notification on order completion. Responsibilities of the Order Handling processes include, but are not limited to:

- Issuing new customer orders, modifying open customer orders or canceling open customer orders;
- Verifying whether specific non-standard offerings sought by customers are feasible and supportable;
- Checking the credit worthiness of customers as part of the customer order process;
- Testing the completed offering to ensure it is working correctly;
- Updating of the Customer Inventory Database to reflect that the specific product offering has been allocated, modified or cancelled;
- Assigning and tracking customer provisioning activities;
- Managing customer provisioning jeopardy conditions
- Reporting progress on customer orders to customer and other processes.

#### Determine Customer Order Feasibility

**Process Identifier:** 1.3.3.1

##### Brief Description

Check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified to a customer.

**Extended Description**

The purpose of the Determine Customer Order Feasibility process is to check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified as part of the standard product offering process flow, to a customer.

These processes invoke requests to SM&O provisioning processes to determine the availability and supportability of product offerings to a customer.

These processes are also responsible for determining whether the offering can be supported by other CRM processes.

AM

DCLM's catalog driven order intake capability allows the DSP to launch new products and services with a reduced time to market. DCLM can integrate to the Catalog Manager to validate all the inputs required to create a valid order.

This is significant to reduce order fallouts later, especially when multiple channels are creating these orders.

The order intake process involves multiple steps and varies based on the product or offering selected. These steps determine the order feasibility process and the linked status of each step is updated against the customer's order.

[\[Tecnotree PD COF\]](#)

### 1.3.4 Customer Management

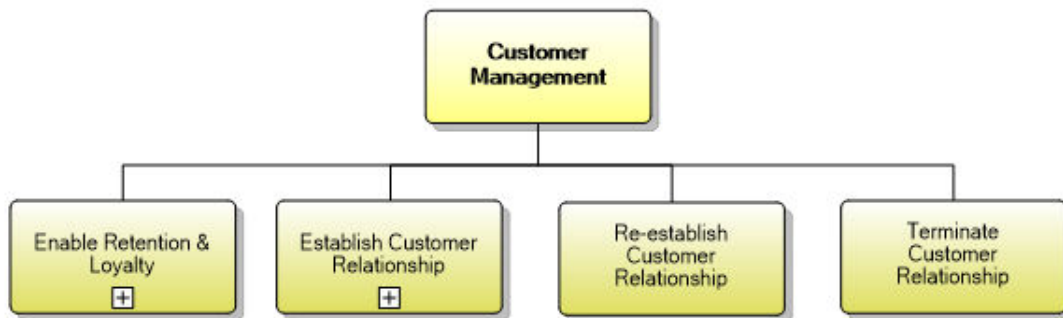


Figure 4 1.3.4 Customer Management

#### Customer Management

**Process Identifier:** 1.3.4

##### Brief Description

Manage the relationship of the Customer and the enterprise.

##### Extended Description

The purpose of this process is to manage the relationship of the Customer and the enterprise. This process may be triggered at very early stages of the customer lifecycle (for example, for leads and prospects which are potential customers) and until the termination of the customer relationship between the enterprise and the customer. This process is in charge of managing the customer relationship with the enterprise and of the customer profile. This process ensures that each customer gets a unique identity and that customer identities are not duplicated in the enterprise. This process is also in charge of evaluating the customer value, the customer risk (credit risk, fraud risk, influence risk, and churn risk) of validating the customer satisfaction. The customer data is managed by the Customer Information Management process.

#### Establish Customer Relationship

**Process Identifier:** 1.3.4.2

##### Brief Description

Verify the customer identity and manage the customer identity across the Enterprise.

##### Extended Description

The purpose of this process is to verify that the customer is who they claim they are, To ensure only one customer identity exists across the Enterprise, which can be referenced across the whole Enterprise and allows the customer to quickly and easily identify himself, to establish and verify the Identity and to issue a unique Identifier and Authentication information. Before establishing an identity for a new customer it is essential to check that the customer does not already have an Identity with the Enterprise.

This process is also used to 'clean-up' duplicates of customer identifying information that may exist within the organization. **AM**

A customer relationship is established at the very first stage where basic details are captured of a subscriber. A customer is created when the basic contact information are captured viz. name, contact (Email ID and/or Phone number).

Any product or service subsequently purchased is attached to this customer. Each customer is assigned a unique identity in the system, this ID is used to track the customer in the entire ecosystem including third party subscriptions. If it is a return customer then the ID is retrieved from the database along with the basic details required to proceed with the request. A duplicate check is carried out based on the information captured with basic parameters. This ensures that the customer doesn't have any duplicates in the DSP ecosystem.

[\[Tecnotree PD CM\]](#)

### Terminate Customer Relationship

**Process Identifier:** 1.3.4.4

#### **Brief Description**

Manage termination as appropriate

#### **Extended Description**

The customer relationship is terminated only if actually appropriate, the wishes of the customer are complied with where possible, records are kept in case the relationship with the customer is re-established, legal and ethical requirements for customer information are complied with. Significant customer life-stage events or business decisions by the Service Provider cause one or both parties to terminate the relationship. The need for complete termination of relationships needs to be differentiated from just terminating all services. The principles behind this include the Service Provider ending a relationship only if the customer ceases to exist, or the customer is fraudulent, the Enterprise decides that it no longer wishes to do business with the customer. All relevant parties are informed of the ended relationship. Other processes are triggered to dismantle the customer solution and servicing arrangements as necessary. **AM**

Termination of customer relationship can be due to various reasons. Losing a customer is always a disheartening aspect of a DSP subscriber relationship. Hence the system allows to retain the subscriber with various additional features. However a customer may terminate the relationship due to various aspects such as movement out of the place of service or due to lack of service relationship. DSP can also terminate a customer due to reasons such as fraudulent or malpractices of a subscriber, long term non-payment of dues or legal reasons.

During termination a service order is generated based on the unique customer identity and all relevant parties are notified of this order. Once the termination process is complete, the customer ID is put into terminated category with basic information only available for legal purposes.

[\[Tecnotree PD CM\]](#)



### 1.3.5 Customer Interaction Management

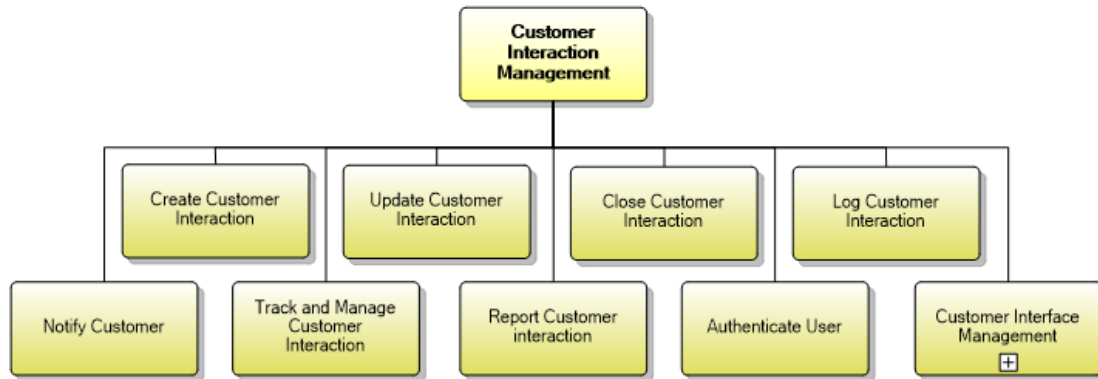


Figure 5 1.3.5 Customer Interaction Management

#### Customer Interaction Management

**Process Identifier:** 1.3.5

#### Brief Description

Manage interactions between the customer and the enterprise. Interactions can be triggered by the customer or by the enterprise

#### Extended Description

The purpose of this process is to manage interactions between the customer and the enterprise. Interactions can be triggered by the customer ( as a result of customer query or complaint) or by the enterprise( for example sending bills or other customer notifications.) All customer interactions are logged by the enterprise in order to provide a full track record of customer activity to the enterprise representatives. Customer interactions may be short lived ( such as in the case of a query that is answered immediately ) or may take long time to complete (such as in the case of complex orders or requests concerning back office intervention). When interactions are long the process is in charge of making sure the customer is notified in a timely manner about the progress of her request. Customer interaction history may be used by BI systems in order to gather information about customer profile and satisfaction. Customer interactions can span over multiple channels (such as: phone calls, web self-service and devices.) each party involved in the interaction has a role that mandates its credentials. For some interactions users may need to login/authenticate themselves in order to get the appropriate role.

### Create Customer Interaction

**Process Identifier:** 1.3.5.1

**Brief Description**

Create a record that logs the customer interaction.

**Extended Description**

The purpose of this process is to create a record that logs the customer interaction. The customer interaction can be initiated by the customer or by the enterprise. A

DCLM maintains all record history of the customer interaction initiated either by a customer or the service provider.

[Tecnotree\_PD\_CI]

### 1.3.6 Customer Information Management

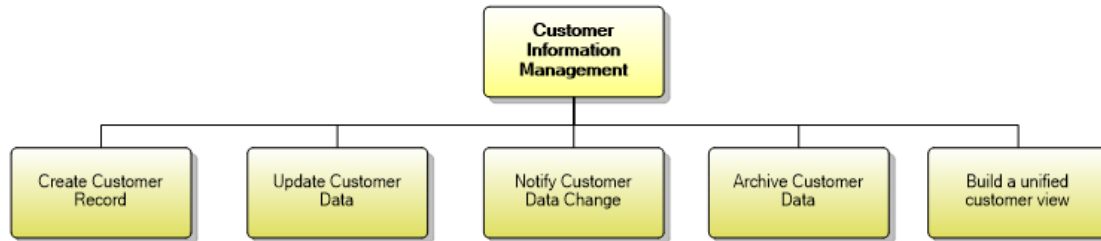


Figure 6 1.3.6 Customer Information Management

#### Customer Information Management

**Process Identifier:** 1.3.6

##### Brief Description

Manage customer information after customer contracts or associated service orders have been finalized and during the order completion phase. Ensure that any customer information required by other CRM processes is updated as part of the customer order completion.

##### Extended Description

The purpose of this process is to record and maintain customer information in the CSP in order to:

- Support day to day operation of CSP
- Enable SP to provide best customer experience
- Support customer segmentation for successful marketing campaign
- Support analytical systems such as churn and fraud

When the customer information is not needed any more by the online systems (according to CSP policies and regulation) this process is in charge of archiving the information (if accepted to the customer)

#### Create Customer Record

**Process Identifier:** 1.3.6.1

##### Brief Description

Create a new customer record in the customer inventory.

##### Extended Description

The purpose of this process is to create a new customer record in the customer inventory. This process follows the processes in Establish Customer Relationship that make sure that a single record is created for each customer, and it persists the customer data in the customer inventory. **AM**

Digital Customer Lifecycle Manager (DCLM) enables personalization of every customer's experience by providing a consistent message across all channels and creation of a single view of each customer with information from all customer touchpoints.

A customer is an individual or an enterprise that demonstrates an intent to purchase or purchases any product or service of the DSP. Each customer is assigned a unique identity in the system.

[\[Tecnotree PD CINFO\]](#)

### Update Customer Data

**Process Identifier:** 1.3.6.2

#### **Brief Description**

Update the customer data in the customer inventory.

#### **Extended Description**

The purpose of this process is to update the customer data in the customer inventory. This can happen as a result of direct notification from the customer, as a result of information gathered as part of other processes (such as selling and order handling) or as a result of back office processes (such as customer data cleansing).

#### **AM**

Customer information is updated in DCLM based on service request initiated either by the customer themselves or from DSP. Every type of the request has a workflow associated with it, determining the systems that needs to be updated of the change and notifies the customer and customer's account manager.

[\[Tecnotree PD CINFO\]](#)

### Notify Customer Data Change

**Process Identifier:** 1.3.6.3

**Brief Description**

Notify other processes that customer data has been changed

**Extended Description**

The purpose of this process is notify other processes that customer data has been changed. Other processes (mostly long-lived processes) might need to know about such changes in order to adapt to such changes. In addition some processes which gather the data for centralized systems (such as Data Warehouse or Master Data Management) should be notified about such changes. **A**

DCLM customer order management process works on predefined workflows which ensures to notify the customer data information change to other applications. The applications are updated based on the policies defined by the DSP and on the agreed process of change. The process is completely automated and requires no manual intervention.

[\[Tecnotree PD CINFO\]](#)

### Archive Customer Data

**Process Identifier:** 1.3.6.4

#### **Brief Description**

Archive the customer data.

#### **Extended Description**

The purpose of this process is to archive and clean up customer data when it is no longer needed as part of the customer inventory. The information is archived according to the CSP policies and the local regulations. In most cases customer information is not deleted unless this is specifically required by the customer. A

DCLM maintains the historic data of a customer till the time the customer exists in the system or is in active or suspended stage. On termination, based on the policies of the DSP, DCLM archives the customer data after informing the respective systems in the workflow. This process is completely automated and works on a defined workflow within the DSP ecosystem.

[\[Tecnotree PD CINFO\]](#)

**Build a unified customer view****Process Identifier:** 1.3.6.5**Brief Description**

Create a single customer record from the information stored in multiple systems and present a single, most updated record of the customer information.

**Extended Description**

The purpose of this process is to create a single customer record from the information stored in multiple systems and present a single, most updated record of the customer information. This process invokes business rules in order to reconcile the customer data in a single accurate record. This process may be activated immediately upon any update of customer data or may be invoked on request to retrieve the customer data. This process may replicate data from other systems or calculate the unified record on the fly without persisting any customer data. **AM**

DCLM enables a unified convergent view of a customer and the related information across service lines. It provides a 360 Degree view of the customer including the history of interactions and service requests raised by the customer. 360 Degree view also supports viewing the customer hierarchy. Authorized application users have access to customer information set that is aggregated, maintained, and managed.

[\[Tecnotree PD CINFO\]](#)

## Referenced Supporting Evidence

[Tecnotree\_PD\_CIM] - Tecnotree\_PD\_SupportCustomerInterfaceManagement\_v.1.0.docx

[Tecnotree\_PD\_COF] - Tecnotree\_PD\_DetermineCustomerOrderFeasibility\_v.0.2.docx

[Tecnotree\_PD\_CM] - Tecnotree\_PD\_CustomerManagement\_v.0.1.docx

[Tecnotree\_PD\_CI] - Tecnotree\_PD\_CustomerInteractionManagement\_v.0.1.docx

[Tecnotree\_PD\_CINFO] - Tecnotree\_PD\_CustomerInformationManagement\_v.0.1.docx