Business Process Automation

Vision (Small Project)

Version <1.2>

Revision History

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| --- | --- | --- | --- |
| **Date** | **Version** | **Description** | **Author** |
| 09/11/18 | 1.0 | Initial Vision Document | Matt Holston & Nick Gay |
| 10/1/18 | 1.1 | Updated Vision Document that includes additional features and assumptions to match Iteration 2 | Matt Holston & Nick Gay |
| 10/10/18 | 1.2 | Updated specified problems in Problem Statement.Updated product features to describe features of the product in better detail. | Matt Holston & Nick Gay |
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# Introduction

The purpose of this Vision Document is to collect, analyze, and define high-level needs and features of Sweet Karoline’s Cakes. It focuses on the capabilities needed by the stakeholders and the target users, and why these needs exist. The details of how Silver Soul fulfills these needs are detailed in the use-case and supplementary specifications.

## References

Referencing other vision documents from outside sources found online, as well as all the information thus far gathered in this class within our group. With additional information given by Karoline. Referenced Sweet Karoline’s Cakes’ Facebook page to see what could be added and improved upon, as well as her current layout of her menu and pricing.

# Positioning

## Problem Statement

|  |  |
| --- | --- |
| The problem of | Having an inefficient business model that is not maximizing the full capabilities of her business. Karoline is missing out on potential income and new clients by not having the most efficient business process and identity. The areas where she needs the most improvement to increase her business are: efficient order format, efficient payment process, organized sales management, efficient delivery system, and a strong brand identity. After improving these areas of her business, hopefully we’re able to solve the problem of losing potential income and new clientele. |
| Affects | This affects not only the business owner Karoline, but also her customers. |
| Tthe i The impact of which is | The impact is that the company is losing potential revenue for not having an efficient business system. Additionally, Karoline is missing out on potential clients with not having a strong social media presence. |
| A successful solution would be | If our recommendations are implemented with Karoline’s business, we can improve the overall efficiency of her operations. Implementing a system to manage and save her would benefit Karoline by having easy access and organization. As well as implementing an efficient payment and shipping system to minimize potential issues that could arise. This system would help minimize the time cycle of the business, which in turn would satisfy customers. Another impact would be increasing presence via social media. Strengthening Karoline’s social media presence would help her business get known and help bring in potential customers. |

## 

## Product Position Statement

|  |  |
| --- | --- |
| For | Sweet Karoline’s Cakes |
| Who | Needs an effective integrated system to manage past, present, and future orders. |
| Expression Engine CRM and Google Cloud | The Expression Engine CRM allows you to reuse content that you have created in the past without having to create it all over again. Also, changes can easily be made to the website, making maintaining the website less of a hassle for the owner.  Google Cloud allows for her data to be safely secured and backed up on the Cloud service which can accessible from any device she chooses to use. |
| Unlike | The current inefficient business processes used by Sweet Karoline’s Cakes. |
| Our product | Centralizes business activities, communication, and customer data. |

# Stakeholder and User Descriptions

## Stakeholder Summary

|  |  |  |
| --- | --- | --- |
| **Name** | **De Description** | **Responsibilities** |
| Project Manager / Self | The stakeholder, Karoline, leads production of Sweet Karoline’s Cakes. | Plans, manages and allocates resources, decides priorities, coordinates interactions with customers, and produces products. |
| Silver Soul | Currently working with Karoline to develop an improved business operating system. | Developing an efficient business operating system that would improve Karoline’s business. |

## User Summary

|  |  |  |  |
| --- | --- | --- | --- |
| **Name Name** | **Description** | **Responsibilities** | **Stakeholder** |
| Karoline | Business owner | Efficiently runs and maintains the business, Sweet Karoline’s Cakes | Self |
| Customers | Primary end user of the product | Buy Karoline’s products in order to keep her business running successfully. | Sweet Karoline’s Cakes |

## User Environment

1. At least 2 people are involved in completing the task, Karoline and the customer. This would only change if there was more than one customer on an order.
2. A task cycle would take however long it takes Karoline to complete an order.
   1. Depending on how large the order is would determine the time spent on the tasks.
   2. During a task cycle there would generally be 3 tasks: ordering, making/creating the order, and the customer receiving the order.
   3. This would not change unless she needed to order more supplies in order to create what the customer ordered.
3. The only other application she has in use currently is Facebook. You can message her from this platform, or her contact information is listed. On her page you can check out her:
   1. Pricing
   2. Flavors
   3. Reviews
   4. Photos and videos
   5. Posts

## Summary of Key Stakeholder or User Needs

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Problem**  **Need** | **Priority** | **Concerns** | **Current Solution** | **Proposed Solutions** | |
| Low Accessibility | High priority since she does not currently have a mobile platform, nor does she have any other social media platforms (excluding a sub-par Facebook page). Hi | Only one location and no website for potential or current customers to order from. | Uses a Facebook page to get her messages across to customers with contact information for the store. Very minimal information. | | Create a website with an ordering function so customers can see her products and order from the site. |
| Branding Identity | High priority as she does not have a central theme currently. | Does not have a central theme to build off of and advertise to current customers or to grow her potential audience range. | Current solution is to only use one platform and use that as the central theme. | | Create a central theme across all developing and current platforms. |
| Inefficient Accounting and Revenue Tracking | High priority since she doesn’t use a software to track accounting or revenue. | Manually keeps track of financials - prone to human error. | Manually keeping track of financials. | | Develop a built in database for her to keep track of all her financial records and transactions. |
| Inefficient Delivery | High priority since she doesn’t use a delivery service currently. | Doesn’t use a delivery service. | Currently doesn’t have a delivery system in place. | | Find a reliable outsourced delivery service for hire. |

## Alternatives and Competition

Building and developing a website where she can put all her information about herself, her business, and her products to showcase to her customers. She wants to create a back office portal for her to keep track of customer information and transactions within said website. Within the website she wants a way for customers to be able to order online and have an efficient delivery service.

# Product Overview

Once completed, the website will help centralize communication, keep track of sales and inventory, reduce time spent planning for orders, and ultimately increase revenue for Sweet Karoline’s Cakes. We also hope to implement various “good practice” business processes to make sure Sweet Karoline’s is getting the most out of the web. These include Customer Engagement – Links to Social Media, Testimonials/Photos of work, Contact us/About us page, Product Selection/Menu, Business Information (Hours/Address), and Online ordering. If done correctly, all of these practices should help lead to everything that is stated above.

## Product Perspective

This website will be used by customers of Sweet Karoline’s Cakes to place orders, obtain information about the business, communicate with the owner, and leave reviews. The various social media accounts for the business will also work in conjunction with the website to bring more exposure and more customers. Customers will use online ordering to make orders at Sweet Karoline’s. The owner will use the the About Us page to create a definitive business image and display information about the business, and the owner will use the inventory system to keep track of supplies and sales. Finally, the owner will have one centralized way to respond to the customers of Sweet Karoline’s Cakes.

## Assumptions and Dependencies

* We assume that Sweet Karoline’s Cakes will continue to update and maintain the website using the content management system
* We assume that Sweet Karoline’s Cakes will need 100GB of cloud storage to backup data when the actual amount could be much lower or higher
* We assume that Sweet Karoline’s Cakes will store professional and not personal data on the cloud
* We assume that Sweet Karoline’s Cakes will continually store inventory and sales data using the cloud based SQL
* We assume that including Sweet Karoline’s Cakes will continue to manage and update their social media accounts
* We assume that adding more information and links to social media accounts will automatically lead to increased exposure
* We assume that implementing an online ordering system will automatically lead to increases in revenue
* We assume that the website will reduce time spent working on customer interactions when they could actually increase
* We assume that Sweet Karoline’s Cakes spends about 10 hours working on cakes per week
* We assume that Sweet Karoline’s Cakes will be willing to accept the cost of the services, such as the content management system, the business processes that we recommend, and the extra time that will be required to maintain the website
* We assume that Karoline will utilize Quicken accounting software to manage her back office
* We assume Karoline will continue to pay for her web domain

# Product Features

The finished website will include many different features. These are things like a centralized homepage, an about page, a contact us page, and a page dedicated to showing off Sweet Karoline’s products. The website will also include multiple functional capabilities. These include a way for customers to place an order, leave a review, and make a payment. Lastly, the finished website will include a customer login and a admin login. The admin side will utilize accounting software to help Sweet Karoline’s manage supplies and finances. The website will also utilize third party software to function properly. These include:

1. **Expression Engine**

* Allows you to reuse content that you have created in the past without having to create it all over again
* Changes can easily be made to the website, making maintaining the website less of a hassle for the owner
* One time cost so it will be cost-effective in the long run
* Contains built in database and supports my-sql
* Contains built in webstore

**2. Google Drive Cloud Based Storage**

* Access business documents anywhere at any time
* Added security due to files being stored via the cloud
* Google Drive offers cheap storage so it is very cost-effective in the short run and the long run
* Google products have high compatibility, so there won’t be much trouble if other features need to be implemented in the future

**3. Paypal Payment system**

* Allows customer payments to go through paypal, so Karoline doesn’t have to deal with it
* A universal form of payment
* Supports a variety currencies
* Supports different credit/debit cards

**4. Avira Antivirus Software**

* Keeps business documents and confidential information safe from computer viruses and malware
* Offers different subscriptions at a reasonable price

**5. GoDaddy Web Domain**

* Web domain

**6. Quicken Accounting System**

* Categorizes all your personal, business or rental property transactions all in one place
* See how your business is doing any time with profit/loss projections and cash flow reports
* Helps maximize business deductions while simplifying your taxes

# Other Product Requirements

* Karoline will need to understand and be able to operate the CMS and the Google Cloud
* Karoline will need to understand how to add content and maintain her website
* Karoline will need to know how to use the Quicken Accounting Software
* Responsiveness is important for quick user requests or changes
* Virtual access and data entry should be encrypted for privacy concerns