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| matricia business solutions |
| iCare for Telecomm |
| Development & Configuration Requirements |
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| **Sever Calit** |
| **6/4/2010** |

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# Sales Module

The sales flows presented in this document referonly to B2B selling.

## Sales Territory Management

Organization of the Sales Territory of the telecom company can be configured as a hierarchical structure. There are 2 distinct branches of this structure:

* 1 branch that will manage „portfolio based” organization of Customers
* 1 branch that will manage „shared pool based” organization of Customers

An example of territory organization is listed bellow:

* National
  + Portfolio Based:
  + Region 1
    - Area 1
      * Account Manager 1
        + Customer AM1
        + Customer AM2
        + ...
      * Account Manager 2
      * ...
    - Area2
    - ...
  + Region2
  + ...
  + Shared Pool Based
  + Share Pool1
    - Customer SP1
    - Customer SP2
    - ...
  + Share Pool2
  + ...
  + Telesales Team1
    - Telesales Person1
      * Customer TS1
      * Customer TS2
      * ...
    - Telesales Person2
    - ...
  + Telesales Team2
  + ...

The structure presented above,will be configured in CRM through: Territories, Teams, Security Roles. These details are presented in the table bellow:

|  |  |  |
| --- | --- | --- |
| **Hierarchy Element** | **Type** | **Description** |
| National | Territory | Top level Territory. Will be a record in Territory entity with:   * Territory Level = National   Users assigned on this territory will have access to all information in CRM.  Such users can be National Sales Managers and will be configured as:   * Territory = <null> * Type = No Field Force   **Note: Access to information will be configured in Security Roles: National Sales Manager and Marketing Manager!** |
| Region 1 | Territory | Will be a record in Territory entity with following attributes:   * Territory Level = Region * Parent Territory = National   Users assigned on this territory will have access to all information assigned to Account Managers under current Region.  Such users can be Regional Managers and will be configured as:   * Territory = Region 1 * Type = Field Force |
| Area 1 | Territory | Will be a record in Territory entity with following attributes:   * Territory Level = Area * Parent Territory = Region 1   Users assigned on this territory will have access to all information assigned to Account Managers under current Area.  Such users can be Area Managers and will be configured as:   * Territory = Area 1 * Type = Field Force |
| Account Manager 1 | System User | Will be a record in System Users entity with following attributes:  System User:   * Territory = Area 1 * Type = **No Field Force** * Dealer Code = AM1BUC100   **Note: Access to information will be configured in Security Roles: Account Manager! Owner based access will be configured for this Role!**  Customers owned by Account Manager will be assigned to Territory: Area 1, so that they will be accessible to Area 1 manager and Region 1 manager. |
| Share Pool 1 | Team | Will be a record in Team entity.  Every Customer allocated to a „Shared Pool” will be automatically shared to that Team!  Every Customer allocated to „Shared Pool” will have following attributes:   * Territory = <null> * Owner = System / System Administrator   In this example Telesales Person 1 and Telesales Person 2 will be configured as members of Shared Pool 1 Team and will have access through CRM sharing functionality to all Customers in shared pool. |
| Telesales Team 1 | Territory | Will be a record in Territory entity with following attributes:   * Territory Level = Telesales Team * Parent Territory = National   Users assigned on this territory will have access to all information assigned to Telesales Persons under current Telesales Team.  Such users can be Telesales Managers and will be configured as:   * Territory = Telesales Team 1 * Type = Field Force * Team = Shared Pool 1   So, one Telesales Manager will have access also to:   * „shared pool” Customers through its Team membership. Territory fiels of Customers in „shared pool” = <null>! * „user owned” companies that are no longer part of the „shared pool” through territory filtering |
| Telesales Person | System User | Will be a record in System Users entity with following attributes:  System User:   * Territory = Telesales Team 1 * Type = **Non Field Force** * Dealer Code = TS1BUC100 * Team = Shared Pool 1   **Note: Access to information will be configured in Security Roles: Telesales! Owner based access will be configured for this Role!**  Customers owned by Telesales People will be assigned to Territory: Telesales Team 1, so that they will be accessible to Telesales Team 1 manager! |

As a review from a different point of view, a Customer company might be allocated to either:

|  |  |
| --- | --- |
| **Allocation** | **Description** |
| Account Manager | Customer   * Territory = Territory of Account Manager = Area Territory * Owner = Account Manager * No Sharing   Visible to:   * Owner Account Manager: Security Role, Owner Access Level * Area Manager of Account Manager: Territory Filtering * Regional Manager of Area Manager: Territory Filtering * National Sales Manager: Security Role, Organization Access Level * Marketing Manager: Security Role, Organization Access Level * System Administrator: Security Role, Organization Access Level |
| Telesales Person | Customer   * Territory = Territory of Telesales Person = Telesales Team * Owner = Telesales Person   Visible to:   * Owner Telesales Person: Security Role, Owner Access Level * Telesales Team Manager of Telesales Person: Territory Filtering * National Sales Manager: Security Role, Organization Access Level * Marketing Manager: Security Role, Organization Access Level * System Administrator: Security Role, Organization Access Level |
| Shared Pool | Customer   * Territory = <null> * Owner = System/System Administrator * Shared to Shared Pool Team members   Visible to:   * Telesales Persons: Shared Pool Team Membership * Telesales Team Manager of Telesales Person: Shared Pool Team Memberhsip * National Sales Manager: Security Role, Organization Access Level * Marketing Manager: Security Role, Organization Access Level * System Administrator: Security Role, Organization Access Level |

**Note: Technical solution from „territory filtering” will be similar to one used in iCare for Pharma project**

Different flows from iCare Pharma model will be applied to:

1. Merge leaf territory (Area)
2. Assign User user to leaf territory. Account Manager to Area

<TBD Andrei>

By default, the Sales Territory of a Telecom company will be organized in 3 levels:

* National
  + Region
    - Area

## Sales Force Management

This section details organization of Sales users. According to this organization one user will be able to access certain information and functionality.

### Security Roles

Following Security Roles will be defined in the system:

|  |  |
| --- | --- |
| **Security Role** | **Description** |
| Account Manager | This security role will be used for users that follows „portfolio based” pattern for targeted Customers.  This Security Role will be configured with Owner Access Level for Customer entity and its 1:N related entities.  **Note: Access to Customer and all related entities used in iCare for Telecom MUST be provided in order to keep consistency of data.** |
| Telesales | This security role will be used for users that follows „portfolio based” pattern for targeted Customers.  This Security Role will be configured with Owner Access Level for Customer entity and its 1:N related entities.  **Note: Access to Customer and all related entities used in iCare for Telecom MUST be provided in order to keep consistency of data.** |
| Area Sales Manager | This security role will be used for users that are Area Managers or Telesales Team Managers.  This Security Role will be configured with Business Unit Access Level for Customer entity and its 1:N related entities.  **Note: Access to Customer and all related entities used in iCare for Telecom MUST be provided in order to keep consistency of data.** |
| Regional Sales Manager | This security role will be used for users that are Regional Managers.  This Security Role will be configured with Business Unit Access Level for Customer entity and its 1:N related entities.  **Note: Access to Customer and all related entities used in iCare for Telecom MUST be provided in order to keep consistency of data** |
| National Sales Manager | This security role will be used for users that are National Sales Managers.  This Security Role will be configured with Organization Access Level for Customer entity and its 1:N related entities. |
| Marketing Manager | This security role will be used for users that are National Sales Managers.  This Security Role will be configured with Organization Access Level for Customer entity and its 1:N related entities. |

### Users

A System User will be defined by following attributes:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Name | String | Display name of user |
| Email | String | Email of user |
| Dealer Code | String | Dealer Code.  Sales persons might be defined in other existing systems and most probable they are defined by such an information.  This information might serve as corresponding key to other existing systems like:   * Activation * Performance Bonusing * Company Allocation |
| Role | Picklist | Functional role of user:   * Account Manager * Telesales * Area Manager * Regional Manager * National Sales Manager * Marketing Manager * Sales Support * System Administrator   According to its role, a user will be included in specific Security Roles! |
| Type | Picklist | Possible values:   * Field Force * Non Field Force |
| Team | M:N Relationship | One user can be part of 0 or more Teams. Teams will be used for “shared pool” based mode.  Membership to a Team will give the user access to all companies in a “shared pool”. |

### Teams

Teams will be used to model “shared pool” approach of Customers. One Team will be created for each “shared pool” of Telecom Company.

### Development & Configuration

At Customer level Relationship Type field will have following values:

* Customer
* Competition Customer
* No Service

## Organization of Targeted Companies

Organization of companies that are targeted by telecom sales force can be:

1. Portfolio based.

Each sales person that follows this patternhas a relatively stable base of customers to manage. Such a sales person that manages a portfolio of customers is usually called: **“Account Manager”.** This organization of business flows applies mainly to **Retention** sales for large and medium customers.

Customer portfolio information is available only to responsible Account Manager and his managers! System will provide **mechanism to protect access to portfolio information.**

There are cases when sharing of information has to be done between users of iCare system. For example: one Account Manager might share one sales opportunity with a colleague or a team. System will provide **mechanism to share/un-share information** between system users in a controlled manner.

1. Shared Pool based

Customers that are targeted using this business patternare logically isolated in one or more “shared pools”. This type of organizing targeted companies applies mainly to:

* **Acquisitionsales**for all scales of customers
* **Retentionssales** for small customers.

Such a logical partition of customers is available to one or more specific sales teams. Each sales person can “reserve” one or more customers and perform sales activities on them. During the reservation period, the customer is no longer available to the “shared pool” but only to sales person who made the reservation.

As a rule of thumb: one customer will be always targeted only by a single sales person! Anyway, this may not be always the same person as the customer may be “promoted” to be targeted by different sales teams.

## Customer Management

Central point of any CRM/SFA system is the customer. Specific to telecom industry is that image of a customer company is made of information coming from existing system. Most of telecom companies are highly IT endowed as their services are provided and maintained through IT systems. Compared to other industries, a high rate of customer information is already produced by existing systems:

* Billing
* Loyalty
* Call Center
* Collection system

### Billing Hierarchy

Every telecom company have at least an installed a Billing System. Such a system computes the charges incurred by customers of the telecom company during a time period (monthly). Several concepts are used by billing system to represent customer and other related entities like: Subscribers, Accounts, Offers and so on. These will be explained bellow.

In telecom industry, **theCustomer** is the entity chargeable with the invoice (or invoices) that may contain subscription fees, cost of service usage, discounts, bonuses, extra charges and so on. As a basic rule, a **Customer** is a Company in the SFA/CRM system.

**The Subscriber** is the person who actually uses telecom services under a **Customer**. In B2B model, one **Customer** may have more than only one**Subscriber**. For example: “Company A” may have 10 employees and 5 of them are using mobile communication services from the telecom operator. In this example, for the telecom company there is “Customer A” that has 5 Subscribers

One person can be **Subscriber** under more than one **Customer**. For the telecom company instead, there are distinct Subscribers, even if is the same person.

Each **Subscriber** may use one or more telecom services packaged in **Offers**. Still a subscriber can be provided with services even if personally does not have an associated **Offer**. He may inherit service agreements (**Offers**) from a higher level in customer hierarchy (see bellow).

**Subscribers** of a **Customer** can be logically grouped in **Organizational Units**. These entities can be associated with specific **Offers** that apply to anyof its **Subscribers**.

Periodicallyincurred charges (subscription + usage) are consolidated in invoices at **Account** level. One **Customer** can have one or more **Accounts** associated. For each **Account** a distinct invoice will be generated.

Invoices are generated periodically and in most of the cases this is done on a monthly basis. The day when the invoice is generated is called **Bill Cycle** day. Each Customer has a bill date when invoices are generated for all of its **Accounts**.

A complete hierarchy is presented below:

* Customer
  + Account1
    - Subscriber1
      * Service1
      * Service2
      * …
    - Subscriber2
      * Service1
      * …
    - Organizational Unit1
      * Offer1
      * Offer2
      * …
      * Subscriber11
      * Subscriber12
      * …
  + Account2
    - …

System will model this billing hierarchy and also provide function to automatically integrate this information.

Besides this relatively static structure of a Customer other information categories coming from existing systems will be integrated in iCare system:

* Invoice information. Related to Accounts. This type of information will be historically stored in iCare system for a configurable number of bill cycles
* Service Usage information. Detailed at Subscriber level or consolidated at Customer level. This type of information will be historically stored in iCare system for a configurable number of bill cycles. Information like: minutes in home network, minutes in roaming,
* Loyalty points information. Usually this information is related to value of invoices so will be related to Accounts
* Collection Actions. Actions performed by telecom company to collect the overdue amounts. For example such actions might be: reminder SMS / email, reminder phone calls, law suite

### Development & Configuration

Following information will define a Company and its related information:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Name | String | Company name |
| Fiscal Code | String | Fiscal Code of company. Unique in the system.  If there are subsidiaries of the same parent company and they have the same fiscal code, a suffix will be appended. For example:   * Parent company: R102020, * Subsidiary1: R102020.1 * Subsidiary2: R102020.2 * …   When creating a new company in CRM, the system will check for existing Fiscal Code. If same fiscal code already exists in the system, user will be prompted a dialog.   1. If user chooses No, another fiscal code have to be entered 2. If user chooses Yes, fiscal code will be generated as specified above. <RXXXX>.<N+1>. N being las suffix of the same fiscal code.   For Customer companies, this information will be imported from the Billing system and same rule will be applied. A new suffix for Fiscal Code will be automatically appended.  Verification of Fiscal Code existence will be done in “On Save” event of the form.  Suffix generation will be done in plug-in because companies with the same fiscal code may come from import of leads and Billing System. |
| Account Manager | Lookup | Reference to System User entity.  If company will be part of a portfolio this field will be the Account Manager of that portfolio  If company will be part of a “shared pool”, this field will be a team member of that “shared pool”  If company will be allocated to a partner, this field will be the System User associated to that partner company/contact  If company will be allocated to partner “opportunity pool”this field will be System Administrator |
| Holding | Lookup | Reference to Holding entity.  When this information is updated and the Account Manager of Holding is not Account Manager of company, a share will be automatically on the company to the Account Manager of holding so that, he will have access to this company! |
| Territory | Lookup | Reference to Territory entity.  If company will be part of a portfolio this field will be the Account Manager’s territory  If company will be part of a “shared pool”, this field will be “Shared Pool” territory  If company will be allocated to a partner, this field will be “Partner” territory  If company will be allocated to partner “opportunity pool”this field will be “Partner” territory |
| Created by Partner Contact | Lookup | Reference to Contact entity  Will completed when a company is created by a partner with current user logged in Portal who creates the company |
| Created by Partner Company | Lookup | Reference to Company entity  Will completed when a company is created by a partner with **current user’s company** logged in Portal who creates the company |
| Owned by Partner Contact | Lookup | Reference to Contact entity  Will be completed when a company is allocated **directly** to a partner contact |
| Owned by Partner Company | Lookup | Reference to Contact entity  Will completed when a company is allocated to a partner with the Partner company |
| Customer Relationship | Picklist | Indicates the relationship of “customer or not” of the company. Possible values:   * Customer. Company is customer of telecom operator. * Competition Customer. Company is customer of other telecom operator * New. Company that does not use any service provided by Telecom Company |
| Partner Relationship | Picklist | Indicates the partnership relation of the company with the Telecom Company. Possible values:   * Reseller * Supplier * Network Service * Others   Such a company can be in the same time Customer of Telecom Company.  For Reseller companies, specific functionality will be developed and configured in iCare system. Contact persons of such companies will have specific access to iCare system and will be able to use sales information and also create sales information.  This functionality will be described in Partner Portal chapter. |
| CustomerID | String | Unique identifier of company. This is the most important information to “link” existing systems of a Telecom Company.  If the company is already customer of Telecom Company, this ID will be first generated **outside CRM**, most probable in Activation System/Billing System. Such a company will be integrated in CRM either:   * at initial import when deploying CRM * imported through an interface between CRM and Activation/Billing system   If the company is not a Telecom Company customer, then this value will be **generated in CRM.** Therangevalue of Customer IDs generated in CRM will be totally distinct from range of values generated in Activation/Billing systems.  **System will provide parameters that will specify the template and range of values for CustomerIDs generated in CRM.**Suc**h** a company might be created in CRM through:   * initial import of prospect Companies * manually created by CRM users * automatically created through Lead Import |
| Segment | Picklist | Main categorization of companies in CRM: customers or not! Can differ from one Telecom Company to another but all of them will use such a major segmentation of companies. Main criteria to split companies might be:   * company turnover * value of services used in last X months * membership of a small company to a large holding   For existing customers, the segment will be allocated **outside CRM**  For other companies like competition customers and new companies, the segment will be **allocated in CRM.** Criteria to allocate segment to a non-Customer value will be:   1. Company’s Turnover 2. If company is member of a holding, Holding turnover will be evaluated   This will be done through a Workflow/Plugin configured in CRM that will be triggered when company is first created or when following information is changing:   * Turnover * Holding   Possible values:   * Large Account * GBM (General Business Market) * SMB (Small Medium Business) |
| Address | String | Address of company. If company is customer, address from the Billing system will be integrated |
| Address2 | String | Address of company. If company is customer, address from the Billing system will be integrated |
| Phone | String | Main phone number of company. If company is customer, address from the Billing system will be integrated |
| Fax | String | Main fax number of company. If company is customer, address from the Billing system will be integrated |
| Email | String | Main email address of company. If company is customer, address from the Billing system will be integrated |
| Account Manager | Lookup | Reference to System User entity.  Sales person that manages direct relationship with the company.  For Customers that have a “portfolio based” approach, such information will be integrated from Billing System. The information that will come from Billing System and link the User will be “Dealer Code”. |
| Number of employees | Integer | Number of employees of the company |
| Turnover (EUR) | Double | Annual turnover of the company.  This value will be used to segment companies that are not Customers! |
| Competition Products | M:N Relationship | Relationship to Competitor Product entity.  In this relationship will be placed products supplied by other TelecomCompanies. |
| Field | Picklist | Main Business field of the company |
| Churn Risk Indicator | Double | Churn Probability.  Probability of that customer to give up current services. |
| Strengths | Memo | Part of SWOT analysis |
| Weaknesses | Memo | Part of SWOT analysis |
| Opportunities | Memo | Part of SWOT analysis |
| Threats | Memo | Part of SWOT analysis |
| Overall Attitude | Picklist | Overall attitude related to Telecom Company:   * Excellent * Positive * Neutral * Negative * No Opinion |
| Telecom Services Attitude | Picklist | Attitude related to Telecom Services used from Telecom Company:   * Excellent * Positive * Neutral * Negative * No Opinion |
| Price Attitude | Picklist | Attitude related to Price of services used from Telecom Company:   * Excellent * Positive * Neutral * Negative * No Opinion |
| Customer Relationship Attitude | Picklist | Attitude related to Customer Relationship activities (Call Center, Case Management, Service Management) of Telecom Company:   * Excellent * Positive * Neutral * Negative * No Opinion |
| Company Ownership | Picklist | Possible values:   * Public * Private |
| **Customer Specific information**  Information that define a Customer company will be stored in a new entity: “Customer Billing”. Information in this entity will be imported from the Billing System and will have following fields | | |
| Contract Start Date | Date |  |
| Contract End Date | Date |  |
| Contract Titular Name | String |  |
| Dealer Code | String | Dealer Code of Sales agent who is managing the Customer. Based on this field a company will be assigned to a certain Account Manager (System User) |
| Bill Cycle | Integer | Day of month when the invoice/invoices are generated |
| Last Collection Action | String | Last collection action. Can be:   * SMS, Phone, Somation,… |
| Number of Payment Agreements Kept | Integer | Number of payments made in due time after a collection actions. Computed from beginning of the year.  Will be imported from the Billing System |
| Number of Payment Agreements Made | Integer | Number of payments agreements made after collection actions. Computed from beginning of the year.  Will be imported from the Billing System |
|  |  |  |

### Invoice and Usage

This information will be stored in a 1:Nrelated entity to Company, called Customer Usage. Usage will be stored in CRM only for last 6 months.

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| Customer ID | String | Customer ID |
| Last invoice value | Double |  |
| Last invoice date | Date |  |
| Monthly fees | Double | Amount of monthly fees |
| Late payment fees | Double |  |
| Other taxes | Double | Amount |
| Allowance | Double | Amount |
| National Usage amount | Double |  |
| National Usage discount | Double | Amount |
| Roaming Usage amount | Double | Amount |
| Roaming Usage discount | Double | Amount |
| Special Services amount | Double |  |
| In Net amount | Double | Amount of services used in own telecom network. For example calls: Romtelecom – Romtelecom |
| Destination Network1 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network2 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network3 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network4 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network5 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Special Numbers Amount | Double | Amount of services to Special Numbers. For example: donations, games,… |
| In Net Minutes Outgoing | Double | Number of minutes of calls made in same network |
| In Net Miutes Incoming | Double | Number of minutes of calls received from the same network |
| Out Net Minutes Incoming | Double | Number of minutes of calls made to other networks |
| Out Net Minutes Outgoing | Double | Number of minutes of calls received from other networks |
| Destination Network1 Incominig minutes | Double | Number of minutes of calls towards destination 1. |
| Destination Network1 Outgoing minutes | Double | Number of minutes of calls from destination 1. |
| Destination Network2 Incominig minutes | Double | Number of minutes of calls towards destination 2. |
| Destination Network2 Incominig minutes | Double | Number of minutes of calls from destination 2. |
| Destination Network3 Incominig minutes | Double | Number of minutes of calls towards destination 3. |
| Destination Network3 Incominig minutes | Double | Number of minutes of calls from destination 3. |
| Destination Network4 Incominig minutes | Double | Number of minutes of calls towards destination 4. |
| Destination Network4 Incominig minutes | Double | Number of minutes of calls from destination 4. |
| Destination Network5 Incominig minutes | Double | Number of minutes of calls towards destination 5. |
| Destination Network5Incominig minutes | Double | Number of minutes of calls from destination 5. |
| Total minutes Special Numbers | Double | Number of minutes towards special numbers |
|  |  |  |

### Black List

This information will be stored in a 1:N related entity to Company, called Black List.

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| Customer ID | String | Customer ID |
| Collector | String | Person who is responsible of collecting overdue amounts |
| Invoice Number | String | Invoice number that is overdue |
| Invoice Date | Date |  |
| Invoice Amount | Double | Entire amount of invoice |
| Remaining Amount | Double | Remaining not payed amount |
| Overdue days | Integer | Number of overdue days |
|  |  |  |

### Invoicing Entity

Each Customer may have one or more Invoicing entities. Such an Invoicing entity will aggregate usage for certain subscribers. One invoice will be generated for each Invoicing Entity. This entity will also contain Loyalty Points information, because Loyalty points are awarded on invoice basis.

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| CustomerID | String | Unique identifier of the customer |
| Invoicing ID | String | Unique identifier of Invoincing entity as defined in the Billing System |
| Status | Picklist | Possible values:   * Open * Closed |
| Invoice Address | String | Invoicing address. Each invoiceof a Customer can be sent to a different address |
| Invocing Responsible | String | Name of person from Customer who is responsible for invoice |
| **Loyalty Points Balances Information**  **May beupdated from a distinct file!** | | |
| Loyalty Points Balance Date | Date | Date of balance for Loyalty Points |
| Balance | Integer | Number of loyalty points |
| Status of Account | Picklist | Indicates if Invoicing Entity is eligible to accumulate Loyalty points. Possible values:   * Active * Excluded |
| Imature End Date | Date |  |
| Points Devices | Integer | Number of Loyalty Points spent on buying devices |
| Points Minutes | Integer | Number of Loyalty Points spent on buying minutes of telecom services |
| Points Monthly Fee | Integer | Number of Loyalty points spent on deduction of monthly fee |
| Points Ajustments | Integer | Number of Loyalty points spent on increasing discounts |
| **Financial Balances**  **May be updated from a distinct file!** | | |
| 00 days Balance | Money |  |
| 30 days Balance | Money |  |
| 60 days Balance | Money |  |
| 90 days Balance | Money |  |
| Financial Balance Date | Date | Date of balance of financial information |
|  |  |  |
|  |  |  |

### Subscriber Entity

One Subscriber will be defined by the following information:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| CustomerID | String | Unique identifier of the customer |
| Subscriber ID | String | Unique identifier of Subscriber as defined in the Billing System |
| Primary Resource Type | Picklist | Is the category of telecom services that a subscriber primarily uses. Possible values:   * Voice * Internet * CATV * …   **One Subscriber might use more than one service but always will be a primary service. Other services used will be detailed in Subscriber Offer entity.** |
| Primary Resource Name | String | Name of resource. For example: Fixed Telephony, Internet,… |
| Primary Resource Values (MSISDN,) | String | In case of telephony, is the phone number assigned to Subscriber.  In case of Internet, might be the MAC address assigned  In case of CATV might be ID of DVR device |
| Status | Picklist | Status of Subscriber:   * Active * Inactive * Cancelled |
| Status Date | Date | Date of last status |
| Disconnect reason | String | Applies only of Cancelled Subscribers. Will be filled in with the reason of disconnection |
| OU ID | String | ID of Organizational Unit where the Subscriber belongs, as defined in the Billing System |
| Organizational Unit | Lookup | Reference to Organizational Unit entity |
| Subscriber Agent Code | String | Dealer Code of sales person who activated the subscriber |
| Subscriber Contract End Date | Date |  |
| Subscriber Representaive First Name Last Name | String | Name of subscriber |
| Real Begin Date | Date | Date when Subscriber started using the services |
| Activation Date | Date | Date when Subscriber was activated in the Billing System |
| **Subscriber Usage Information** | | |
| In Net Minutes Outgoing | Integer |  |
| In Net Miutes Incoming |  |  |
| Out Net Minutes Incoming |  |  |
| Out Net Minutes Outgoing |  |  |
| Destination Network1 Incominig minutes |  |  |
| Destination Network1 Outgoing minutes |  |  |
| Destination Network2 Incominig minutes |  |  |
| Destination Network2 Incominig minutes |  |  |
| Destination Network3 Incominig minutes |  |  |
| Destination Network3 Incominig minutes |  |  |
| Destination Network4 Incominig minutes |  |  |
| Destination Network4 Incominig minutes |  |  |
| Destination Network5 Incominig minutes |  |  |
| Destination Network5Incominig minutes |  |  |
| Total minutes Special Numbers |  |  |
|  |  |  |

### Telecom Services Offers

Contains telecom services and offers used by Subscriber or applied to Organizational Units

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| CustomerID | String | Unique identifier of the customer |
| Subscriber ID | String | Unique identifier of Subscriber as defined in the Billing System |
| Subscriber | Lookup | Reference to Subscriber entity |
| Organizational Unit ID | String | ID of organizational Unit, as defined in the Billing System |
| Organizational Unit | Lookup | Reference to Organizational Unit entity |
| Offer ID | String | ID of offer as defined in Billing System |
| Service | Lookup | Reference to Product entity.  Telecom service used by Subscriber |
| Offer Name | String | Name of offer applied to telecom service.  Multiple offers may exist on the same Subscriber.  For example.   1. Base offer 5 EUR montly fee 2. Additional offer 2 EUR, 1000 free minutes 3. … |
| Start Date | Date | Start Date of offer |
| End Date | Date | End Date of offer |
| Offer Type | Picklist | Possible values:   * Price Plan (Base Offer) * Additional (Additional Offer) |

### Organizational Unit

This entity serves as grouping of subscribers to apply group offers on them. For example 1000 minutes included that can be consumed by all Subscribers under this Organizational Unit.

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Company | Lookup | Reference to company entity |
| CustomerID | String | Unique identifier of the customer |
| Organizational Unit ID | String | ID of organizational Unit, as defined in the Billing System |
| Organizational Unit | Lookup | Reference to Organizational Unit entity |
| Name | String | Name of Organizational Unit |

### Customer Hierarchy

The Billing Hierarchy models relationships only between entities that are already customers.

Customer Hierarchy instead can be extended to a “Holding like” structure. There might existparent child relationships between customers and companies that are not already a customer. For example:

Holding1

* Company1 (Customer)
* Company2 (Customer)
* Company3 (not Customer)
* …

There is a need to consolidate invoice and usage information at holding level to have a more consistent image of this group of companies. For example, a holding can have in its structure small companies. These small companies, treated distinctly will be “qualified” maybe to a lower segment and perhaps targeted by Telesales teams. If this company is analyzed through its holding membership perspective, it will be perhaps qualified to an upper segment and targeted accordingly.

System will provide mechanisms to consolidate information at holding level.

System will provide ways to analyze a company through its holding membership perspective.

Holding entity will be defined by following attributes

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Name | String | Company name |
| Account Manager | Lookup | Reference to System User entity.  Account Manager of Holding |
| Address | String | Address of holding headquarters |
| Phone | String | Main phone number of holding |
| Fax | String | Main fax number of holding |
| Email | String | Main email address of holding |
| Account Manager | Lookup | Reference to System User entity.  Sales person that manages direct relationship with the holding. |
| Number of employees | Integer | Number of employees of the company |
| Strengths | Memo | Part of SWOT analysis |
| Weaknesses | Memo | Part of SWOT analysis |
| Opportunities | Memo | Part of SWOT analysis |
| Threats | Memo | Part of SWOT analysis |

A report will be developed at Holding level that will aggregate some information from all companies in that Holding.:

From Company entity following information will be aggregated in the report:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Number of employees | Integer | Number of employees of the company |
| Turnover (EUR) | Double | Annual turnover of the company.  This value will be used to segment companies that are not Customers! |

From Customer Usage entity, following information will be aggregated in the report, **only for the last invoice** of each Company in the Holding

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Monthly fees | Double | Amount of monthly fees |
| Late payment fees | Double |  |
| Other taxes | Double | Amount |
| Allowance | Double | Amount |
| National Usage amount | Double |  |
| National Usage discount | Double | Amount |
| Roaming Usage amount | Double | Amount |
| Roaming Usage discount | Double | Amount |
| Special Services amount | Double |  |
| In Net amount | Double | Amount of services used in own telecom network. For example calls: Romtelecom – Romtelecom |
| Destination Network1 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network2 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network3 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network4 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Destination Network5 amount | Double | Amount of services to antoher telecom operator’s netowork. For example: calls Romtelecom – Vodafone |
| Special Numbers Amount | Double | Amount of services to Special Numbers. For example: donations, games,… |
| In Net Minutes Outgoing | Double | Number of minutes of calls made in same network |
| In Net Miutes Incoming | Double | Number of minutes of calls received from the same network |
| Out Net Minutes Incoming | Double | Number of minutes of calls made to other networks |
| Out Net Minutes Outgoing | Double | Number of minutes of calls received from other networks |
| Destination Network1 Incominig minutes | Double | Number of minutes of calls towards destination 1. |
| Destination Network1 Outgoing minutes | Double | Number of minutes of calls from destination 1. |
| Destination Network2 Incominig minutes | Double | Number of minutes of calls towards destination 2. |
| Destination Network2 Incominig minutes | Double | Number of minutes of calls from destination 2. |
| Destination Network3 Incominig minutes | Double | Number of minutes of calls towards destination 3. |
| Destination Network3 Incominig minutes | Double | Number of minutes of calls from destination 3. |
| Destination Network4 Incominig minutes | Double | Number of minutes of calls towards destination 4. |
| Destination Network4 Incominig minutes | Double | Number of minutes of calls from destination 4. |
| Destination Network5 Incominig minutes | Double | Number of minutes of calls towards destination 5. |
| Destination Network5Incominig minutes | Double | Number of minutes of calls from destination 5. |
| Total minutes Special Numbers | Double | Number of minutes towards special numbers |
|  |  |  |

### Customer Segmentation

Segment is the main attribute that differentiate customers. This is the main split of customers for a telecom company. These criteria might be for example:

* Size
  + Large
  + Medium
  + Small
* Average Invoice value over last six month (SAI)
  + > 500 EUR
  + 200 – 500 EUR
  + < 200 EUR

According to current segment, a company will be allocated either towards Direct Sales or Telesales teams. Then further criteria will be applied:

Direct Sales

* If company not yet customer, then will be allocated to Direct Sales Acquisition
* If company is customer, then will be allocated to Direct Sales Retention

For Direct Sales also geographical criteria will be applied and company will be part of an Account Manager portfolio.

Telesales

* If not yet a customer, then will be allocated to either Telesales Acquisition or a shared pool area
* If already a customer, then will be allocated to either Telesales Retention or a shared pool area

Segmentation rules are defined and computed outside a CRM/SFA system. Segment information will usually be generated in other systems. System will provide ways to integrate segment information and allocate customer to appropriate sales channel.

### Company Allocation

This is the process of assigning a company and its related information to a system user or to a “shared pool”. This operation can be performed either:

* Manually by users with administrative role
* Automatically when qualifying company to a new segment

Company Allocation functionality will perform following actions:

1. Allocation to a “shared pool”
   1. Company and 1:N related records will be updated Territory = “Shared Pool”, Owner = 1st user of that Shared Pool team
   2. A share will be created to Company. **1:N relationships will be configured to cascade share and unshared operations, if possible!**
2. Allocation to Account Manager
   1. Company and 1:N related records will be updated Territory = Account Manager’s Territory, Owner = Account Manager
   2. If company was in a shared pool, unshared will be also performed

Related to Company Allocation function following functionality will be developed:

1. Self Allocation. Telesales users will be able to take company from “shared pool” and assign to themselves
2. Release to Shared Pool. Telesales users will be able to release an owned company to theirs associated “shared pool”

<TBD Andrei>

Following related information will be updated in a “Company Allocation” process:

* Invoicing Entity
* Customer Usage
* Subscriber
* Services Offers
* Organizational Unit
* Black List
* Opportunity
* Activity
* Contact.

## Contact Management

Most of contact persons might be initially created from Billing System. Still such systems do not have enough functionality to represent complex relationship information as a SFA/CRM system. So, the typical life cycle of a contact person will be:

1. creation in Billing System
2. automatically created in iCare through interfaces with Billing System
3. enrich complex relationships in iCare

### Contact Hierarchy

Different hierarchies may be modeled between contact persons:

* formal hierarchy: employee <-> manager
* informal hierarchy: influenced by <-> influencer

System will model these types of relationships between contacts.

## Pipeline Management

Sales Process is organized in split in several pipeline stages. An Opportunity may pass through different stages from its creation to its fulfillment. Ex of pipeline stages

* Qualified. Opportunity is created and Business Pain and Need is completed.
* Coached. There is a Contact person that can decisively influence outcome of the opportunity.
* Closed.
* Lost
* Cancelled

Several validations may be enforced when moving an Opportunity through the pipeline.

## Activity Management

Activities will be mainly related to:

* Customers
* Contacts
* Opportunities

Activities can be:

* Appointment
* Task
* Email
* Administrative
  + Travel
  + Holiday
  + Reporting

Activities will be created:

* Directly into the system
* Imported from Outlook
* Imported from other systems

Also activities of type Appointment and Task created in iCare can be synchronized with MS Outlook.

# Marketing Module

## Lead Import

System will provide mechanism to import leads from text files coming from different sources. System will provide an error logging system when importing the leads.

Import files will have the same structure and the import process will populate several system entities:

* Company
* Lead
* Contact

Optionally, when importing the leads qualification can be applied. In this way a lead can be automatically allocated to proper sales force team.

System will provide functionality to configure qualification rules for lead import. For example: a lead to a non-customer company that have a sales potential of 1000 EUR monthly will be allocated to Direct Sales Acquisition Team. A lead that have a sales potential of 50 EUR monthly will be allocated to a “shared pool” and can be then targeted by Telesales teams.

### Development & Configuration

For Lead import, standard functionality of Dynamics CRM will be used.

Automatic Qualification and Allocation of Leads will be done on a project basis.

# Partner Management

The telecom operator can close sales contracts for its services either directly or through a network of partner companies. Partners of telecom operator can be granted access in iCare system to a more efficient sales process.

Following benefits can be provided by a sales system that is shared with the partner:

* Channel conflict is reduced due to sharing of basic customer information. One partner might easily find out if customer is already targeted by master telecom company or another partner
* Once granted access to a customer, partner can benefit of information coming from internal systems of telecom operator: billing , loyalty, financial info. This will lead to a clearer image on that customer.
* Partner also will benefit from communication history with the customer, past opportunities and their outcome
* Telecom company will have a centralized and accurate picture of the entire sales pipeline: internal and partner and can build accurate forecasts.
* Telecom company can provide support to partner in specific cases and increase probability of the desired opportunity outcome
* Telecom operator ensures that its network partners respects the same pipeline process and validations

There are 2 distinct scenarios to grant access to partners into the CRM/SFA system:

1. Direct access to iCare system. Partner will be provisioned with user in iCare system and specific access to information and functionality will be configured.
2. Access via a web portal. Partner will access iCare system via a web portal. Specific access to information and functionality will be configured only for this web portal.

Differences between these 2 approaches:

* Using an web portal will increase administrative workload
* Web portal might have a totally different structure, content and appearance than iCare standard client

### Development & Configuration

Standard Partner Portal will be used as a platform to give Resellers access in CRM system. Based on this platform, several functionalities will added to extend standard functionality.

Following functionality will be available at user level in Partner Portal access:

1. Automatically setup of ownership fields
2. Editing information will be displayed based on Saved Queries in CRM
3. Display of related information to a Company

Following functionality will be available in CRM to users with Sales Support role:

1. Bulk Allocation of Opportunities to Partner
2. Bulk Deallocationof Opportunities from Partner
3. Bulk setting of winning Opportunity bidings

<TBD Ana>

<TBD Alina>

# Mobile Access

Direct Sales teams can benefit from mobile access of information during their field activities.

Following scenarios may be useful when providing mobile access:

* Create contact on mobile devices
* Plan appointment on mobile devices
* Query certain sales information on mobile devices when not in office

Information on mobile devices like Contact, Tasks and Appointments can be synchronized from iCare system via Outlook.

Other information needed on mobile devices can be queried through IE web browser installed on the device.

**Note: Connection to home iCare system is required for mobile access of information that is not of type: Contact, Task or Appointment.**

# Industry Challenges

## Large volume of data

Due to its large number of customers and its service based business model, telecomm industry companies handle large volume of information directly related to Sales activity but especially information related to service usage, invoices, loyalty points, activations and deactivations of subscribers, subscriptions to new services….

Care should be considered when designing flows that imply operations over information categories with large amount of data.

Following general recommendations might help:

* Avoid any unnecessary updates on large entities.
* Avoid any display of information from large entities without proper filtering! Use as much as possible indexed fields for filtering.
* Avoid running management reports against production database. Distinct reporting environment should be created.

## Integration with other systems

Another key issue of such a solution in Telecom industry is integration with other existing systems. Most of telecom companies may have in place different enterprise systems that can interact with a CRM/SFA system:

* billing
* data warehouse
* ERP / financial.
* collection
* loyalty points.

Different integration scenarios might be needed to be developed:

* real-time
  + database level
  + application level
* batch
  + database level
  + export batch files
    - CSV
    - XML
    - Fixed width

Also might be necessary to be developed different mechanisms to access data sources of information:

* Direct Database access
* FTP/SFTP
* Network File share

An error handling mechanism and error logging might be necessary to be developed. This mechanism might be different for each interface with external system.

### Development & Configuration

Automatic import of data from other systems will be done from CSV files. The import process will be done in 2 major steps:

1. Upload of source CSV file into a buffer CRM entity

This step will be done using CRM standard Import Requests.

The import process will be triggered by a Windows Service application that will poll periodically to verify if any import was scheduled for that time. Schedule information of recurring imports will be defined in a CRM entity with the following structure:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
| Name | String | Name of the scheduled task |
| Import Frequency | Picklist | Once, Daily, Weekly, Monthly; Recurrent rule for the import |
| Import Start Time | DateTime | Time of day when the import will start |
| Import Day | Picklist | When Import Frequency equals Week a drop down with days of the week shall be available for selection |
| Operation after import | Picklist | Specifies what to do with the template files, once the import is completed; Delete, Archive |
| Archive Location | String | The path to the archive location; shall be visible only if Operation after import equals Archive |

1. Insert or Update of data from buffer entity to production CRM entity.

Integration of data into production tables will be done as specified in a configuration table. This configuration table has following structure:

|  |  |  |
| --- | --- | --- |
| **Attribute** | **Type** | **Description** |
|  |  |  |

<TBD Andrei>

## Duplicates management

There are several scenarios that lead to creation of duplicate information in such a system:

1. User entry. Users can enter twice the same company or different users with different visibility can enter information of the same company or contact in the system.
2. Lead import. Lead import process can generate duplicate records for Companies and Contacts either
   1. Duplicates existing in the same import data set
   2. Initial record existing in iCare and duplicate record coming from import data set
3. Activation of a prospect Customer. Customer was initially created in iCare system. Activation of a customer is regularly done directly in the Billing System and NOT through a SFA/CRM system. After creation of the customer in Billing System it will be automatically integrated by iCare as a new customer. But a prospect company already existed in iCare!

Precise unique identification keys for Companies and Contacts have to be setup from the initial design of the system. These keys must be also common to other existing systems of telecomm company.

Still, de-duplication rules have to be also configured to ensure accuracy of information.

## Channel conflict

Channel conflict defines as the targeting of a customer trough a sales channel (sales team) that is already targeted by another team. For example:

* an Acquisition Team is targeting a company that become already a customer and have to be targeted by a Retention team.
* a Telesales team is targeting a company that is also targeted by a Direct Sales team

The system should avoid conflicting targeting of the same customer by enforcing business rules through automatic validations.

### Development & Configuration

General Search functionality will be developed and will be accessible both from:

* CRM
* Partner Portal.

This functionality will allow every user to query entire Company for a minimal set of information.

Query will be done using wildcards on either:

* Fiscal Code
* Name

Query will return a maximum number of records as specified in parameter: generalsearchmaxrecno. This parameter will be defined in Parameter entity.

Query will return a set of configurable columns as defined in a specially created Saved Query. For example a typical result set might be:

* Name
* Fiscal Code
* Account Manager
* Account Manager Phone ( only if possible)
* Account Manager Email (only if possible)
* Partner Contact Owner
* Partner Contact Owner Phone (only if possible)
* Partner Contact Owner Email (only if possible)
* Partner Company Owner

Even if the user that performs the query does not have access to all companies in CRM, the query MUST run on all companies in CRM!

# User Experience

## Sales Manager Flows

1. Analyses individual team member activity and performance through reports
   1. sales activity
   2. pipeline status
   3. actual performance vs target
2. Analyses overall sales territory:
   1. sales activity
   2. pipeline status
   3. actual performancevs target

## Direct Sales Flows

### Acquisition Sales Person

1. Query system database for companies that are not already customers
2. Create companies in iCare, that are not already customers
3. Query system database for contacts related directly or indirectly to an acquisition prospect
4. Create new contact persons
5. Plan visits to potential customers
   1. through regular iCare client
   2. through MS Outlook. Can be later synchronized to iCare system.
   3. through Calendar of mobile device. Can be later synchronized to Outlook and then to Outlook system
6. Record Call feedback
7. Plan Follow-up calls
8. Create Opportunities directly in iCare system
9. Convert received emails into Opportunities
10. Works on Opportunities and updates sales info and status
11. Share contacts, companies and opportunities with other users
12. Run personal performance reports: sales pipeline, activity report
13. Plan administrative tasks: travel, reporting, holiday

### Retention (Account Manager) Sales Person

Works on its company portfolio.

1. Query its own company portfolio
2. Create companies in iCare, that are not already customers but are part of a holding is made of mostly customer companies
3. Query system database for contacts related directly or indirectly to an existing customer
4. Create new contact persons for existing customers
5. Plan visits to customers. Account management activities or upsell.
   1. through regular iCare client
   2. through MS Outlook. Can be later synchronized to iCare system.
   3. through Calendar of mobile device. Can be later synchronized to Outlook and then to Outlook system
6. Record Call feedback
7. Plan Follow-up calls
8. Create Opportunities directly in iCare
9. Convert received emails into Opportunities
10. Works on Opportunities and updates sales info and status
11. Share contacts, companies and opportunities with other users
12. Run personal performance reports: sales pipeline, activity report
13. Plan administrative tasks: travel, reporting, holiday

## Telesales Flows

1. Queries system database for accounts related to an acquisition prospect
2. Queries system database for contacts related to contact
3. Plan phone calls to potential/existing customersthrough regular iCare client
4. Plan Follow-up phone calls
5. Record phone call feedback
6. Convert phone call activity into Opportunity
7. Create Opportunities directly in iCare system
8. Convert emails received into Opportunities
9. Works on open Opportunities and updates sales info and status
10. Run personal performance reports: sales pipeline, activity report
11. Plans administrative tasks: travel, reporting, holiday

## Sales Support Flows

1. Lead Import. Perform and monitor Lead import.
2. Customer Allocation. Allocates one-by-one or bulk companies from “shared-pools” to specific users
3. Customer Deallocation. Releases “reservation” of companies from specific users and sends them back to “shared-pool” area
4. Administrative reports.

## Marketing Flows

1. Run analysis reports against iCare database. Analysis based on segment/region/industry of:
   1. Lead conversion into Opportunities rate
   2. Successful Opportunity outcome rate
   3. Unsuccessful Opportunity outcome rate
      1. Detailed on Lost Sale reasons