

Next-Gen Sales & Order Processing: Cutting-Edge UI & AI Driven Innovations

Client: VZ , June 2024

Project Timeline: 4 Months

No. of Consultants: 2 in US & 3 in IND | **Tools Used:** Figma for UX Design

Client Background:

Our client, a Fortune 500 company in the telecommunications sector, was engaged in selling a diverse range of wireline and wireless internet connectivity and network security services . These services were crucial for businesses ranging from small retail stores to large multinational corporations, including entities with extensive government contracts. As a provider of essential connectivity solutions, the client's product portfolio included high-speed internet access, VPN services, VOIP solutions, and customized network configurations tailored to specific business needs.

Overview of Business Problem

The systems used by client for sales, RFP response, and order processing was antiquated, cumbersome, decentralized and suffered from several critical issues:

- **Highly Decentralized Systems:** The use of multiple systems for handling different aspects of sales, RFP responses, and order processing led to a fragmented workflow. This decentralization resulted in disparate processes, creating gaps in information flow and increasing the need for communication between teams (sales, site operation, solutions architect). This situation often required multiple interactions to correct or verify information, further slowing down the process and introducing potential for errors.
- **Cumbersome User Interface (UI):** The UI was outdated and not user-friendly, making it difficult for sales team and solutions architects to navigate and operate efficiently. This complexity added unnecessary time to tasks that should have been straightforward, such as entering customer information, selecting service options, procuring site information, and managing orders.
- **Locked State Processes:** The existing systems were fraught with locked state processes where crucial operations such as quote generation and order processing were halted due to system constraints. These locked states created substantial bottlenecks in the workflow, leading to delays and inefficiencies that impacted subsequent operations and overall business responsiveness.

IMPACT

Impact on Users and Operations: The primary users affected by these system issues were the sales teams and solutions architects, who are the frontline workers in generating revenue for the company. Their ability to respond quickly to customer inquiries, manage customer relationships effectively, and ensure timely delivery of services was severely hampered by the system's limitations.

- **Sales Teams:** The ability to produce accurate quotes in a timely manner—a crucial first step in the sales process—was adversely affected. Delays at this stage could result in lost sales opportunities.
- **Solutions Architects:** Tasked with configuring tailored services for large clients, solutions architects had to depend on multiple systems and teams to procure information about sites, products and services before they could develop a system architecture for each client tailored to their needs. This barrier significantly impacted service delivery and client relationships.

Impact on Service Delivery and Customer Satisfaction: The inefficiencies were particularly pronounced when dealing with larger clients with complex needs, which required high availability and connectivity across multiple locations. The delays and errors in the existing system could significantly impact the overall service delivery:

- **Inefficient Sales and Order Management:** The inability to smoothly transition from sales quotes to order fulfillment was a major hindrance. Each RFP or order could involve cumbersome interactions across different systems to correct or verify information, which not only delayed the processes but also increased the likelihood of errors.
- **Increased Internal Communication Needs:** The lack of a unified system necessitated excessive internal communications to process orders and respond to RFPs. This inefficiency led to increased operational costs and reduced the ability of teams to respond swiftly to market demands.
- **Customer Relationships:** The delays and potential inaccuracies in handling orders and responses could jeopardize relationships with significant clients, directly affecting customer retention and the ability to secure new business in a competitive market.

The combined impact of these issues was a slow and error-prone system that hindered the client's ability to compete effectively in a fast-paced market, where speed and accuracy are critical to customer retention and satisfaction. This situation prompted the need for a complete overhaul of the system.

Creospan's Engagement

Recognizing the need for a specialized solution, this client approached Creospan. Our task was to overhaul the existing system by integrating modern user interfaces and AI-driven automation.

Our Approach:

1. **Holistic Analysis of Existing Workflows:** Before initiating any redesign or integration, our team conducted a thorough analysis of the current systems and workflows used by the client. This in-depth evaluation helped identify the specific bottlenecks, inefficiencies, and gaps in the existing processes.
2. **System Integration and Process Automation:** Recognizing the need to consolidate the multiple decentralized systems into a more unified platform, we focused on integrating these disparate systems. This integration aimed to facilitate smoother communication between sales, operations, and business teams, reducing the need for excessive internal communications and making the processes more efficient.
3. **UI Redesign and AI Integration:** With a clear understanding of the workflow inefficiencies, our team embarked on a complete redesign of the user interface. The new, modern UI was designed to be intuitive and user-friendly, significantly reducing the complexity and time required for daily tasks. Simultaneously, we integrated AI-driven functionalities that automated critical aspects of the sales, RFP response, and order management processes. These AI tools were designed to enhance accuracy, speed up service delivery, and reduce human error in repetitive tasks.
4. **Collaborative Development and Iterative Feedback:** Throughout the project, we maintained a close collaborative relationship with the client's internal teams. This collaboration allowed for continuous feedback and iterative refinements to the system, ensuring that the final product not only met but exceeded the operational and usability expectations of all stakeholders.

Our Solution

Part I: Modernized UI Interface

The transformation of the user interface was aimed at simplifying and streamlining the operations for sales and solutions architects. This modernization process covered several key areas:

Interface Design and Functionality

- **Modern Drag and Drop Interface:** We implemented an intuitive drag and drop functionality that allows users to easily create and adjust service configurations. This feature is especially beneficial for complex configurations involving multiple products and services across different locations.
- **Pre-Populated Forms with Predictive Analytics:** Forms for entering customer and location details are pre-populated based on existing customer data, utilizing predictive analytics to suggest values which speed up the data entry process and reduce errors.
- **Integrated Mapping and Address Validation:** A crucial feature added was the integration of a mapping tool that allows users to validate the physical addresses of service locations. This tool interfaces with client's diverse systems to ensure accuracy in service deployment and is critical for setting up services like secure IP and VoIP across multiple sites.

Process Integration and Streamlining

- **Unified Frontend for Multiple Business Systems:** The new UI consolidates several legacy systems into a single platform, allowing for management of quotes, customer orders, and service configurations without the need to switch between different systems.
- **Color-Coded Configuration Links:** To enhance usability, the interface uses color codes to link customer locations with their respective service configurations clearly. This visual cue helps users quickly understand the setup across different locations, reducing the cognitive load and potential for errors.
- **Non-linear Workflow Adaptability:** The system design allows for a non-linear progression of tasks, meaning that users can input or modify information in the system without being blocked by incomplete sections. This is particularly useful in scenarios where certain data might not be available upfront.

Part II: AI-Enabled Chat Functionality for RFP Automation

To add efficiency to the RFP response process and eliminate bottlenecks, we introduced an AI-enabled chatbot fully trained on client's products and services. This approach represents a significant advancement in automating and optimizing how large-scale requests for proposals will be handled by our client.

AI-Assisted Configuration and Quotation

- **RFP Reading and Analysis:** The AI chatbot can analyze RFP documents uploaded to the system and extract key requirements automatically. This capability reduces the manual effort required to understand and respond to complex RFPs.
- **Automated Response Generation:** Based on the analysis, the AI suggests responses that align with the RFP's requirements. These suggestions include not only textual responses but also proposed network designs and product configurations.
- **Interactive Verification and Customization:** Users can interact with the AI through a chat interface to refine and verify the suggestions. This includes checking the feasibility of proposed solutions at specific locations, indicated by color-coded status icons on a digital map.

Modern User Interface for AI Interaction

- **Seamless Integration with Existing Tools:** The AI functionalities are integrated within the same UI that can be used by multiple teams to collaborate on a single quote or an order for a customer, ensuring that users have a consistent experience whether they are working manually or assisted by AI.
- **Dynamic Interaction Screens:** The AI-enabled chatbot is designed to adapt interaction screens in real-time, responding to the specific content of an RFP and user inputs. This dynamic capability allows for the automatic generation of visual representations, such as maps and network topology diagrams, which are essential for understanding and planning complex service deployments.
- **Multi-Phase Interaction Flow:** The AI guides users through a structured process from initial RFP analysis to final quote preparation, mirroring traditional sales workflows but with greater speed and accuracy.

Benefits

- **Accelerated Sales Cycle:** The integration of AI functionalities with a modernized UI significantly shortened the sales cycle by 22% and elevated service delivery, streamlining the entire sales process.
- **Enhanced Service Reliability & Customer Satisfaction:** AI-driven automation improved the accuracy of service configurations and order processing by 15% in the first 3 months, leading to fewer errors and higher reliability in service delivery, which in turn elevated customer satisfaction scores.
- **Operational Scalability:** The solutions architecture team can now manage a significantly higher volume of requests and process them efficiently, thanks to the AI-enabled system architecture. This enhancement allows the business to scale its services effectively, meeting increased demand without compromising on quality or speed.