Global Adventure Tours Hypothetical Scenario

Section 1 - Hypothetical Scenario Instructions

Candidate Prep Time: 120 minutes

Presentation Time: 45 minutes

Solution should cover:

- Actors and license choices
- System Landscape
- Role Hierarchy
- Data Model
- LDV
- App Design (Declarative and Programmatic Solutions)
- Integrations
- SSO
- Sharing Design
- Governance (if applicable)

Section 2 - Hypothetical Scenario

Project Overview

Global Adventure Tours (GAT) are a fledgling company that specializes in booking and organizing adventure-based tours with boutique operators and guides for adventure-seekers across the world. GAT operates in different geographies (Australasia, Asia, Europe, Africa, Middle East, North America and Latin America). GAT's mission is to match the thrill-seeking needs of adventurers across the world with boutique operators that provides these services.

On average, GAT works with approximately 500 different tour operators worldwide, each of which employ approximately 20 staff. They are anticipating over 300K adventurers registering on the new application within the first year. GAT's tour operators each manage on average 20 different tours that can be scheduled 10 times a year and expect 50 registrants per tour.

They receive thousands of proposals a year requesting GAT represent them on their website and GAT vets both tour operators and the adventure tours that they propose. Tour operators will also use the proposed portal to create tour schedules. Once completed, adventurers can book and pay for tours and be supported by tour guides.

Currently, regional offices manage tour operators and schedules in the existing Tour Management System (TMS) system, but as it's currently end-of-life and no longer supported by its vendor, new processes are enabled via spreadsheets. Given its rapid growth, GAT would like to use Salesforce.com and other applicable technology to automate and enhance their processes.

The following types of employees will use the system:

- Tour Operator Coordinators (TOC) - work in regional offices and manage the relationship with tour operators and approve any new tour operators that wish to be managed by GAT.
- Adventure Specialists (AS) - work in local cities and vet tour proposals received by tour operators,

work with them to schedule and allocate tour guides to tours. A special group of Adventure Specialists manage tours that are considered high risk.

- Service Coordinators (SC) - occasionally adventurers need to seek assistance if they get into trouble. These coordinators work with local authorities and officials to facilitate that assistance. SCs operate globally.
- GAT Regional Managers (RM) - oversee the activities of ASs and TOCs.

GAT will need to provide access to the new system for Tour Operators to manage their tours and schedules.

GAT would also like to provide access to local tour guides who are scheduled on adventures to help provide guidance to adventure-seekers in answering questions on their proposed adventure. Tour guides work independently of tour operators.

As GAT operates globally, any new sites, pages, correspondence, etc. will need to be in the local language of the user. Each region currently has distinct business processes but GAT will aim to standardize their processes as part of this project.

GAT plans to expand its operations to include non-adventure type tours and plans to do this via acquisition.

Current Systems

Tour Management System

GAT currently uses a .NET tour management system that managers tour bookings. The system is antiquated and does not provide modern, social features necessary in today's cut-throat tour business. As a result, GAT needs to perform the management of tour operators and tour approval in spreadsheets. In addition, integration is via EDI-based technologies and is not reliable.

Service Pro

GAT uses a cloud-based application to manage availability and dispatch of their Service Coordinators. Today, any issues raised by adventurers must be manually created in this application and then delay the dispatch of these coordinators in urgent situations. This application supports HTTP based services.

PaymentForce

GAT uses an in-house, on-premise gateway system to process credit card payments. In addition, it stores account information to allow adventurers to safely store their credit card information for future transactions. GAT is not able to store credit card information in cloud-systems due to strict PCI compliance requirements.

Tour Operator systems

Many of the tour operators have their own applications to manage tour bookings. These tour operators have arrangements to integrate tour information between GAT's systems and theirs. Many tour operators complain that integration with GAT's systems are often unreliable and slow and require specialist knowledge to integrate.

Salesforce Sales Cloud

Some regional offices currently use Sales Cloud to manage their interactions with Tour Operators. GAT would like a recommendation on whether to consolidate these instances or not.

Proposed Business Processes

Tour Operator Management

- When tour operators wish to register their business with GAT, they need to download a PDF form and enter their details, including name, address and types of adventures. This form is scanned and sent to the Tour Operator Coordinator (TOC), along with supporting information. This process needs to be streamlined and enhanced.
- A TOC needs to be assigned to the request based on their region on a round-robin basis.
- GAT would like to capture supporting documentation, including certificates and references against the registration. These files are typically less than 10MB in size.
- GAT would like the TOC's to be able to collaborate with each other on the registration request.
- Today, the TOC verifies these documentation and uses a macro-based spreadsheet to determine the level of approval that is required. A registration score is calculated based on factors such as (i) operator size & revenue (ii) risk level of tours (iii) number of injuries and fatalities. This process also needs to be automated.
- If the resulting score is greater than 50, then:
  - A local Adventure Specialist (AS) needs to be notified to perform a local visit to the tour operator to verify their risk level. If the tour operator is deemed particularly risky, only an AS that is skilled to verify high risk operators and has capacity is assigned to follow-up.
  - The assigned AS sends an email to the tour operator requesting a visit. This email should include the name of the AS and proposed date of the visit.
  - Upon review, the AS can choose to approve or cancel the registration request and can do this on the mobile device
- If the score is less than 50 or has completed follow-up by the AS, the TOC then verifies the documentation and submits this to the RM for approval.
- Once approved, the TOC then onboards the tour operator:
  - The tour operator's details will be automatically copied from the registration request, including both the company and key contact details
  - The system should create a letter in the local language of the tour operator, welcoming them to a business relationship with GAT and providing details of their assigned TOC
  - The tour operator and its contacts are setup as a creditor in the PaymentForce system. The Creditor Id from PaymentForce will be marked on the tour operator record.

Tour Proposal and Scheduling

- Approved tour operators will request a proposed tour request and a set of tour dates into the new application:
  - Proposed tours go through a process of proposal and negotiation before final acceptance
  - The tour operator can specify maximum capacity and a 12 month schedule of dates
  - Any AS for the region can review the proposed tour and their schedule. GAT would like a user-friendly method for tour guides to review and update the status for multiple tour requests at once.
  - The proposed system should automatically check that tour guides are not double-booked.
  - Create a pre-formatted PDF that displays the tour and schedule information.
- Once the AS has completed their review:
  - The creditor's account is debited in PaymentForce with an amount that is set by regionally.
  - If the account is successfully debited, the published tour and schedule data is automatically created and made available for sale. Success or failure should be presented to the AS immediately.

- An email notification is sent to the tour operator with both the tour details and its schedules
- The tour operator can mark the tour to auto renew each year, in which case, a new set of tour dates will be automatically created. This should also debit the creditor's account in PaymentForce and update the Tour Operator's systems. The renewal or update to the tour operator's systems should not occur if the debit is not successful.

Adventurer Requests

- A potential adventurer should be able to view and search for published tours and view their schedules on a browser and mobile device.
    - The user can filter on the type of adventure, risk level and location that they desire
    - The search should display a user-friendly, global map of the tours that are upcoming
    - In addition, the adventurer can request that the system suggest tours to them based on the types and number of tours that they have booked on in the past 5 years.
- The adventurer can then make a booking for a particular tour date:
    - The system should accept payment either using new account information or account information stored in PaymentForce. The user should be able to elect to save payment information for future transactions. The booking should not be accepted if the payment is not accepted.
    - The system should prevent bookings if the capacity for the scheduled tour is exceeded.
- In addition, tour operators can make bookings in their own systems and this should update GAT's systems to reflect current capacity in the schedule.
- If the adventurer has booked on a high risk tour and has a medical condition, the system will require that the adventure electronically sign a waiver acknowledging the potential risk to their life and limb.

Adventurer Support

- Once adventures have confirmed and are ready to embark on their journey, they are supported by the tour guide assigned to those particular tour dates
    - The adventure can post questions and get responses from the public or from tour guides and adventure specialists
    - Adventurers can post their photos and make comments against the tour for others to view.
- At times, adventurers will get into trouble and require assistance and will need to request this via their mobile device
    - A pool of Service Coordinators are assigned based on region and nature of the request and they can choose to work on the request. The SC will be notified via an email with a link to the request once assigned.
    - If an SC does not accept the request in 1 day, the RM is notified via email.
        - With critical priority cases, the SC must be reminded every 4 hours until they accept the case
    - Certain adventurers with medical conditions will require higher response levels:
        - Requests raised by adventurers without medical conditions have a 14 day window for case resolution
        - Those with medical conditions have a only a 5 day window for resolution
    - Updates to the request need to be integrated to the field dispatch system in real time
    - GAT also wants adventurers to be able to chat with the service coordinators who specialize in specific types of request.
- GAT calculates the number of assistance requests that are the fault of the tour operator. If more than 10 occur in a given year, the risk level of the operator is upgraded. This is downgraded in the next year if less than 3 assistance requests occur.

- GAT would like to track feedback and performance of Service Coordinators in the new system.

Data Migration Requirements

- GAT would like to import details of active tour operators, their upcoming schedules and registrations from the existing tour management system. The new system will be the system of record for tour operators, schedules and registrations.
- Data in existing systems have a large number of duplicates and data is entered in an inconsistent manner.
- GAT is a 24/7 operation and requires minimal downtime during cutover. It is expected extracting and cleansing data from the existing system may take up to a week.

Accessibility Requirements

- GAT's staff require single-sign on based on their internal Active Directory system. Staff must also be automatically provisioned and de-provisioned into the new application.
- Tour Operator's credentials are stored in LDAP and also require SSO.
- GAT would like to ensure seamless SSO using the Service Coordinator's credentials in the new system to Service Pro.
- Customers should be able to register and sign-on to the new application using their Facebook, Twitter or Google+ credentials. Customers should also not be required to re-enter their credentials on the mobile application.
- TOCs can only view and edit registration requests and tour operators that have been created for their region
- Tour Operators are only able to manage the draft tours and schedules that they are responsible for. Tour Operators have an office manager who can view data for all the staff at the tour operator.
- Draft tours and their schedules are only visible to the AS by region. Published tours and their schedules are visible to all users.
- Internal users can view all adventurers and their tour bookings.
- Only the TOC can view and edit the number fatalities/injuries for a tour operator.
- ASs can view all tour operator registration requests in their region that require follow-up, except those that are noted as high-risk, in which case, only ASs trained to manage high risk tours in that region can view them.
- Adventurers can only view their own contact information, tour bookings and assistance requests that they have made themselves.
- Tour guides can only view the details of tour operators 6 months prior to the scheduled tours
- SCs and their managers should only be able to view the adventurer assistance request assigned to that SC.

Reporting Requirements

- Adventurers need to be able to view a history of their travel for the past 2 years
- TOCs require dashboard and reports of travel schedules and bookings for the past 2 years
- Tour Operators require a report of their upcoming tours and schedules and bookings
- Office Managers of tour operators require a report of their staff's draft tours and their schedules
- GAT management require a dashboard showing a summary of travel booking trends for the past 7 years

Other Requirements

- GAT runs its IT in 2 divisions - internal facing (employee) applications and external facing (customer) applications. Both the divisions are headed by respective CIO. There is also a shared services group which supports Security and PMO. Any customer facing applications also require approval from Marketing and Legal.
- Due to ripple impact of the changes, GAT mandates that major changes to its application are restricted to only once a quarter. Only Sev-1 and high priority Sev-2 defects are allowed as exceptions to this mandate.
- There are separate teams for managing critical fixes vs new development. In the last quarterly release of Tour Management System, some of the Sev-1 fixes regressed during deployment of a quarterly release and has caused GAT to re-evaluate their environment and config management. GAT is seeking advice on how to manage this effectively.
- Paymentforce is a critical system for GAT and the changes to it goes through rigorous testing which itself takes multiple weeks. Even changes to any integration points in Paymentforce goes through the same testing cycles.
- GAT has recently experience 2 varying outages on their website and are in the process of defining standard SLAs for all business functions. CIO (customer) has requested that Salesforce be part of this process too.
- Due to hiring restrictions in the past, GAT relies heavily on individual contractors and System integrators. SI has not been able to control the constant churn of resources that has led to high risk/bad deliverables. GAT wants to change this approach and is open to suggestions to improve self sufficiency.
- Priority for CIO is to standardize the global processes and he wants to ensure that business leaders have actually signed off on these new processes before the team implements them.
- US drives a big revenue stream for GAT and IT, under pressure from US Regional Manager had to deliver US based requirements over other regions. This has caused frictions and escalations in the past.
- Global Adventure would like you to recommend the following:
  - Identify significant risks impacting the project
  - An appropriate methodology to manage the development of the project and ensures traceability throughout the project lifecycle
  - A test methodology for the project that mitigates significant technical risk
  - Project and technical governance functions to manage change and mitigate risk
  - A deployment, release and environment strategy that includes recommendations on environments, source control and deployment techniques