Wine and Sunflowers Ltd

Hypothetical Scenario

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Artifacts:

- Actors and licences
- Data Model
- Sharing design
- Role hierarchy
- Salesforce application design
- Single Sign-On solution
- Integrations
- Project governance strategy
- Data governance strategy
- Mobile solutions architecture

Project Overview

Linda, CEO of Wine and Sunflowers, is at her wits' end.

All she wants to do is sell gift packages! Fans of Ladies Be Architects love their wine and sunflowers so much, they're flying off the shelves to over 100,000 customers worldwide! To make sure they don't lose that momentum, Linda accepts that the business needs to pull its socks up. Linda wants to open a conversation with the customer base. She would like to understand them better so that the company can continually improve its product catalogue.

Wine and Sunflowers Ltd operates in the USA, Australia, South Africa and the UK. The reliance on spreadsheets means each region is doing things differently and it affects the company's results. Linda would like to standardise operations across all regions, allowing for local regulatory variations where necessary and selling in local currencies.

Linda's leadership team has put out a Request for Proposal to several companies for a brand new system and you've got the joy of this RFP landing on **your** shoulders - lucky you!

Business Challenges

- Too many spreadsheets
- Customers have to make a website enquiry or call in to place an order
- Manual invoicing process that relies upon sales executives submitting timely order information
- Discrepancies between order and invoice amounts - leading to complaints
- Too many rogue discounts being applied
- Lack of visibility of complaints and delivery enquiries
- Sales executives selling into one another's clients
- No visibility of margin for each deal
- The IT department is spending too much time on password resets and has no time for rolling out enhancements
- Customers want to start tracking order status themselves

Actors

Within each region, the following users will come on board:

- **Sales Executives** - Responsible for following up on web enquiries and taking inbound calls with a prospect to understand and build up a potential order. They work solely on the phone and report to a regional sales director, who reports to the VP of Sales.

- **Sales Operations** - this team is responsible for raising client invoices based on the information supplied by the sales executives. The team covers all regions and reports to the Chief Operations Officer.

- **Product Development** - this team liaises with suppliers and adds new varieties of wine and sunflowers to the inventory. The team is also responsible for ensuring product information is accurate and kept up to date. This team reports to the VP of Product, who reports to the Chief Operations Officer.

- **Customer Service Agents** - this team addresses and resolves customer questions and problems. The team reports to a regional customer service director, who reports to the VP of Service. The VP of Service reports to the Chief Operations Officer.

- **Complaints Agents** - this specially-trained team addresses and resolves customer complaints. The team reports to a regional customer service director, who reports to the VP of Service.

Existing System Landscape

- **Enquiries** spreadsheet - this is a spreadsheet of enquiries downloaded from the company website. This will be replaced by the new system.

- **Master Orders** spreadsheet - lists all the orders with amounts that the Sales Ops team needs to create invoices for. It is full of bright, eye-watering colours that indicate the status of each order placed. This will be replaced by the new system.

- **Complaints** spreadsheet, maintained by the complaints team within the customer service department. This will be replaced by the new system.

- **Customer Service enquiries** spreadsheet. This will be replaced by the new system.

- **Inventory system** - used to track warehouse and supply chain operations. This is a cloud-based system and supports REST and SOAP web services. This will not be replaced. The inventory system is the system of record for stock levels.

- **Carrier portal** - used by the customer service team to track order fulfillment by Universal Parcels, Wine and Sunflowers' preferred delivery vendor. It supports RESTful integrations.

- **ERP system** - used for accounting, invoicing, order processing and purchase management. On premise, but can support web services. This will continue to be used because it is the system of record for Products and costs.

- **Company website** - displays products, company FAQs and includes two enquiry forms. One for sales orders, the other for customer service. This will also continue to be used.

Access Requirements

- With so many systems to log into, users are forgetting their passwords almost daily and the IT department has banned the use of password vaults for security reasons. They would like your recommendation of how to resolve this problem.

- Wine and Sunflowers Ltd would like to allow customers to register and login to a secure area of their website using their Facebook credentials, to save time. This should work on any device. They would like you to recommend a solution for this.

Proposed Business Processes

Sales Order Processing

- Customers who want to place a large order can do so by making an enquiry via the website (for these purposes, e-Commerce is out of scope).

- Enquiries are routed to sales executives based on their region and current workload

- Large order enquiries are distributed amongst Sales Executives based on a combination of their current workload and their region. Only the VP of sales may re-allocate customers.

- Sales management would like to make sure only orders with >20% gross margin are confirmed.

- There's a new rule that if any products are sold with more than a 10% discount, approval is required for the whole deal

Invoicing

- When an order is confirmed, the Sales Operations team would like to avoid having to key invoices and credits into their ERP system.

- Prices, discounts and quantities must be shown on the invoice

- All invoices must be made available in the customer portal and emailed to customers in the local language of the user

- Invoices that are raised then credited back before month end should not be included on the monthly invoice run.

- Invoices are processed starting the first working day of the month

Customer Service

- Customers should be able to log and classify their enquiry online. These may be submitted via the website portal, Facebook or Twitter. Enquiries will be routed to specific teams depending on their nature.

- The customer service team has a response SLA of 2 hours, unless the query has been submitted via social media (20 mins). The customer service managers would like to track performance against this SLA.

- Customers must be able to chat online with the Sales Operations and customer service teams

- Due to regulatory requirements, users must be able to see the current and previous owners and stages of a complaint

- The customer service team must be able to request customer refunds. These have to be approved by the Sales Operations team.

Customer Functions

- Customers would like to see their full order history to date

- They would like to be view the status of their order, including its delivery information

- Customers want to be able to view invoices online

- They would like to be able to ask their Sales Executive and Customer Service questions and report problems from within the company website

- They would like to be able to chat directly with either of the two functions listed above, depending on what the issue is

- Customers should be able to use Facebook or Google credentials to register and sign into the portal

Integration Requirements

- The new system will be the system of record for Customers, but the ERP system needs to know about new customers in real time so that it can allocate a customer ID. This ID is the reference number for customers to use when contacting Wine and Sunflowers Ltd.

- Invoices and credits must be posted to the ERP system for management accounting. This has to happen in time for the monthly invoicing run.

- New products are added to or retired from the ERP system daily

- Customer service teams need visibility of stock levels from within the new application

Sharing Requirements

- Within the sales organisation, Sales Executives can view the whole customer base for their region, but cannot edit any information about a customer that doesn't belong to them.

- Within the sales organisation, regional sales directors can change any customer or Order record within their region only. Sales Executives may only access their own Orders.

- Customer service teams need to be able to see all available information about a customer

- The Sales Operations team can change customer and order information for all the customers within their region

- Invoices cannot be seen by any sales executives. They can be viewed by regional sales directors.

Reporting Requirements

Let's help Linda out. She wants to see:

- The volume of orders per product across all regions

- The top ten selling products by region

- A breakdown of customer problems by enquiry type

- A list of open complaints with owners

- The VP of Sales is designing a new process - wants to look at levels of activity by day in the month, to understand how best to distribute sales activity

Other Project Requirements

- An e-Commerce solution is currently being evaluated and is outside the scope of this RFP

- Releases are permitted once a month; there is an annual change freeze for all systems throughout the month of December

- The business has a tendency to change its mind a lot on requirements. They would like you to recommend a suitable delivery approach.

- Due to the anticipated growth (and regular changes needed), Wine and Sunflowers is actively hiring for 3 development teams that will own this system going forward

- The management of duplicate customer records is a key requirement. There are multiple versions of the truth for customer records so they would like you to recommend a suitable solution for ensuring this customer data stays clean.