Benefits for Operational Efficiency and Customer Satisfaction by Integrating Salesforce with BSS/OSS Infrastructure

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Abstract

Salesforce is a proven enablement platform used across many Cable Multi-Service Operator (MSO) organizations to manage Sales team processes and procedures. The adoption of the Salesforce Sales Cloud and Marketing Cloud platforms imply the desire for well-defined processes and metrics to support continual improvement of the organization.

Salesforce implementations often fall short of involving Billing and Operation Support Systems (BSS/OSS). Integrating Salesforce and the BSS/OSS are a must-solve challenge faced by MSOs and other Communications Service Providers (CSPs). Ignoring opportunities for integrating automation means companies jeopardize financial health by limiting the impact on necessary cost reductions, improvements of organizational inefficiencies, or stagnated revenue growth. When information from business-critical applications is not readily available to the enterprise's Salesforce platform, the immediate and downstream impacts cause internal ineffectiveness and a public-facing perception of incongruity and inefficiency.

- Sales Managers are impacted by not being able to work at their peak by creating effective targeting campaigns, identifying cross-sell and up-sell opportunities, and managing renewals.

- Account Executives and Sales Personnel are impacted daily by not having enough knowledge about customers, whether it is a first-time sale or managing/assisting an existing customer. They are unable to communicate with existing customers with a full understanding of that customer's past history and current needs. Sales users are unable to create accurately priced quotes based on available promotions, packages, and specific services. In a commercial customer scenario, account executives are not able to track and manage service orders effectively, limiting their ability to manage customer expectations and act as an advocate for both the customer and the MSO.

- Order Management and Entry Personnel are left to initiate a cycle of back-and-forth interactions with Sales to correct customer information, as well as work through

corrections to missing and invalid services (including pricing) and provisioning information. Often, this group of users is forced to manually enter an Order into the BSS/OSS based on specific knowledge of the service configuration and requirements. Whether copying information from Salesforce into the BSS/OSS or performing data entry from phone notes or paper forms, this process is a time-consuming duplication of effort, and an opportunity for data entry error. An integrated Salesforce solution creates a customer-facing image of efficient professionalism, while reducing costs to the organization.

Problem Definition

The Sales Process

A Sales organization already using the Sales Cloud and Marketing Cloud platforms may already be benefitting from a collaborative and metric-driven process for lead through opportunity management. However, without an integrated solution the organization may be missing valuable sales opportunities and incurring large costs at every step of the customer purchasing process.

Talking to the Right Customer and Telling the Right Story

In an ideal configuration, Sales Managers are building prospect lists/campaigns based on available products and promotions. They are doing this with accurate data regarding serviceability, survey feedback, and any additional existing customer data. Sales personnel and Account Executives build contracts and orders reflecting the specific promotions, bundles, and services modeled from the BSS/OSS systems' service catalog.

Additional customer information is gathered for establishing or updating the customer's account. Detailed information is gathered from the prospect to support requirements for configuring and provisioning services (e.g. telephony and circuits).

Without the visibility of BSS/OSS data, Sales people are less efficient by selling the wrong services to the wrong prospects, and are not able to adjust their selling strategies based on the known history with a customer. Effective day-to-day selling relies on knowing what each prospect can be sold:

- What is the serviceability of a specific location?
- ●What is the past service and customer history at the service location?
- Are there current and previous financial issues (Write-offs, collections status, long-term Accounts Receivable, possible fraudulent activity)?
- Are there recent customer service or billing issues (trouble tickets and work orders) to be aware of?
- ●For an existing customer, what are the active services or in-flight orders?

Availability of an MSO-aware Product Catalog Solution

An MSO demands more than a typical retail/CPG oriented business - its product catalog and offer presentation is more complex. Whether customized from off-the-shelf CPQ software or built in-house, any solution must be developed to accommodate MSO-specific complexities, which can include:

- ●Accommodating unique bundling, campaigns, promotion, and discounting structures
- ●Acquiring knowledge of inter-service/feature/add-on relationships and prerequisite rules
- ●Tying together other "implied" pre-requisite service codes to enable provisioning-controlled features, or accounting for order quota points
- ●Identifying when pricing and quantity for services can be overridden, either as stand-alone or bundled offerings
- ●Executing improved timing and technical details for synchronizing the CPQ/Catalog with biller (source of truth) data
- ●Understanding the customer's current services and features to be able to present upsell and cross-sell offers
- ●Creating distinction between information needed for Contract generation versus Order Entry
- ●Meeting individual market regulatory requirements

Incorporation of Existing Customer Service Information for MACD

Move, Add, Change, Disconnect (MACD) transactions are complex. A fully integrated solution must provide on-demand retrieval and display of the customer's existing services and relate those services to add-ons, changes or disconnects requested by the customer.

Without this capability, add-on services cannot be applied to the correct primary service and disconnecting of a service in whole (or as part of an upgrade/downgrade) cannot be reliably completed in the BSS/OSS platform.

From Sale to Order Fulfillment

Pre-Order Quality Assurance

When a sale is "Closed Won," key information about the customer and services selected must be present on the contract and order to be valid and ready for entry into the BSS/OSS.

Each sales channel (Residential, Small/Medium Business, and Enterprise) present increasing complexities and challenges. Residential services tend to be the least complex in service

configuration, but have high transaction volumes. Ensuring accurate and compliant account and service data during order capture is critical to successfully implementing an integration strategy.

Managing Business accounts are more complex due to the complexity of service offerings and flexibility around configurations and billing. Information related to statement configuration, account hierarchy for commercial accounts, valid billing/contact address and telephone information must be available. Maintaining as much control as possible over the quality of data is crucial. Additional checks and balances in manual reviews can help protect the data quality during order capture. Depending on the services ordered (especially voice products), specific feature and parameter data must accompany the order, often for each service code. This data must be captured and included with the order transaction provided to the BSS/OSS.

Failure to capture and enforce rules will result in increased order fallout, requiring intervention and downstream provisioning issues. Addressing these issues after occurrence increases the cost of sale, and may require renegotiation due to pricing, service changes, or other circumstances ultimately putting the sale in jeopardy.

Order Entry

Depending on the maturity of the product catalog and order capture tools, an order may need augmentation with additional services, based on the selected services and their complexity.

In many MSOs, the rules around the configuration may differ across markets, which are further exacerbated by multiple, different BSS/OSS systems (e.g. NetCracker ICOMS, CSG ACP, Amdocs DST) supporting those markets. It is frequently the responsibility of order entry personnel to fill these gaps based on institutional knowledge, adding time to process the order as well as the potential of additional points-of-failure.

When any of this data is not fully captured or captured inaccurately, the order must be returned to the sales team for correction which could threaten the sale. Manual updates to the order and provisioning data added directly to the underlying BSS/OSS system must be performed.

Complex Product Orders (Telephony/Circuit & Carrier Products/Managed Services)

While each major line of service offered by an MSO has its own set of nuances related to order entry, the most complex services involve the collection and integration of both service and provisioning data. Often this data involves a sequence of data captures from

the customer, sales, engineering, and other relevant personnel. Taking a single example, telephony services are often the cause of most challenges around data requirements, data validity, and service/feature compatibility. This includes:

- ●Porting telephone details
- Primary and additional directory listing data
- Feature/Service configuration data
- Regulatory data (e.g. E-911)
- Inclusion of other required services and equipment, like the supporting data-oriented EMTA services
- Trunk and Hunt Group configuration
- Call blocking, complex voicemail products' configuration

A fully captured order entered into the BSS/OSS moves through a lifecycle independently; it can be scheduled and rescheduled multiple times, split into separate work orders (or "jobs"), it may be cancelled or ultimately completed. A Sales-oriented user, especially those representing commercial customers, may be interested in monitoring these updates, but if the feedback loop from the BSS/OSS is not in place, interactions with the customer may be missed and valuable metrics may be lost or not easily reportable. Further, customer self-service and notifications will not be achievable.

Solution

A practical approach to overcoming this challenge involves a phased and iterative approach. These phases focus on:

- Facilitating the Sale - Providing the tools that marketing and sales teams need to optimally target prospects and existing customers

- Creating Robust Order Capture - Enabling the product catalog and CPQ solution, implementing an order data capture interface supporting high-volume and high revenue value products, working iteratively to support new products and services

- Architecting a Flexible Integration Platform - Developing an adaptable framework of processes to support order automation of captured orders' services and adding increased

Facilitating the Sale

Provide Key Prospect Data to the Sales Organization

Availability of timely and accurate data from BSS/OSS and other enterprise information systems (e.g. data warehouse and Business Intelligence systems) support the effectiveness

of an entire Sales team and improves sales cycle metrics. Providing integrations to support the continual synchronization and real-time data of the MSO's footprint and customer base within the Sales Cloud and Marketing Cloud limits wasted effort and costly inaccuracies throughout the sales and order cycles.

In a robust Salesforce Sales Cloud and Marketing Cloud solution, existing customer and location/house data are continuously provided and updated. Management level users will use this data to create sophisticated and intelligent sales and marketing campaigns, targeting the latest promotions, bundles, and upgrades to new and existing customers. Sales users have immediate access to critical location/serviceability and customer information to immediately adjust their selling approach and strategy. Marketing users have access to marketable locations/homes along with a vast array of service, sales and customer data to drive targeted campaigns.

In a developed MSO organization, many of these services already exist in the middleware layer. These services need to be analyzed and potentially updated to ensure compatibility and process efficiencies.

There are cases where rich, complex services provided to the organization are syntactically complex or should be aggregated to optimize integration with the Salesforce platform. Other information should be considered for exposure to Salesforce (whether synchronized or on-demand) from the organization's data warehouse and Business Intelligence platforms.

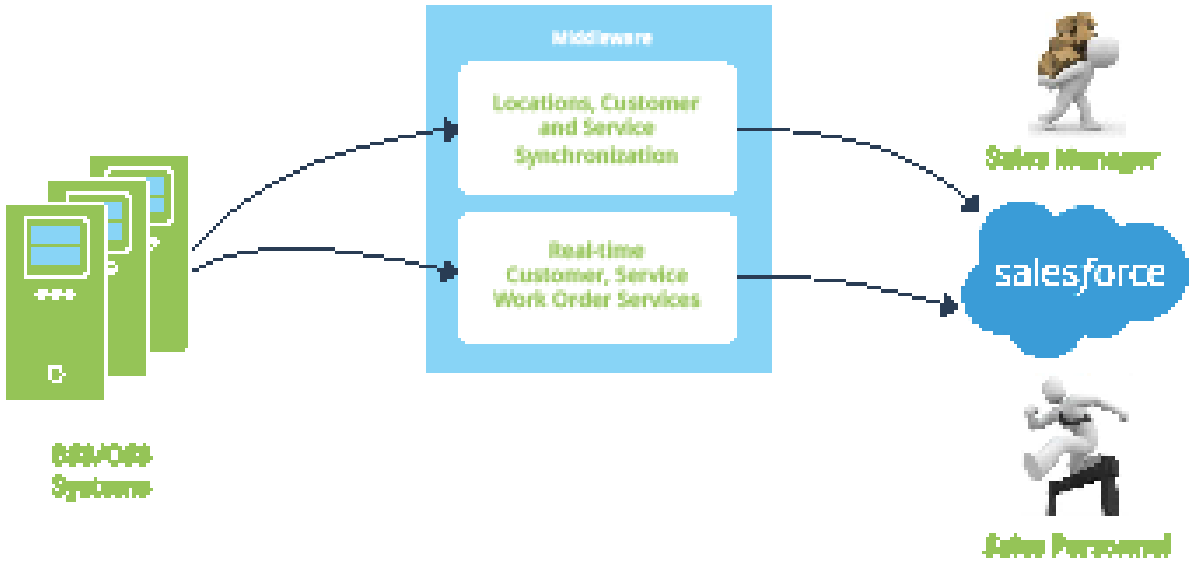

Figure 1: BSS/OSS Data Integration Supporting Sales

Creating Robust Order Capture

Provide a Robust Product Catalog and Order Capture Solution

The Product Catalog solution selected and implemented must address the particular needs of an MSO. The Product Catalog structure must facilitate a user's need to quickly locate valid bundles and products, ultimately resulting in a complete set of services ready for Order Entry.

This is achieved by combining data from the service catalog (directly available from the BSS/OSS), the product management data, and the configuration data (managed by Product and Marketing teams but supported by IT/Billing specialists). Business-configured data provides the structure of services, pricing constraints, and other service structure parameters without burdening Sales users with the underlying minutiae of related (and inferred) service codes in the user interface. IT and Billing specialists support the inclusion of services and configurations that exist for downstream provisioning and work order quota/point calculations for scheduling. The Salesperson or Customer does not need to be aware of these figures.

The mix of system-of-record information and separately managed business-provided data requires the development of a sound business and technical management change process to ensure ongoing accuracy and relevance of the product catalog.

Implementing Rules for Order Validation and Service Configuration

Rules for augmenting and validating orders need to be implemented. The rules ensure service prerequisites are met (implicitly or by instructing the user), valid services and discounts are bundled together within an order, and service configuration data is available for constructing the order/configuration into the BSS/OSS.

A real-world example is a telephony service use case where attributes on a per-telephone line (or range) must be configured. Each telephone line will require data based on add-on services and features:

- Yellow Pages Information
- Hunt Group Configuration (Group ID, Hunting Type, and Sequences)
- Line Features & Inbound/Outbound Calling Options
- Directory Listing (Primary and Additional Listings)
- Trunk & PBX Configuration Information

This data must be captured and ultimately find its way into the BSS/OSS; often these become additional service and/or feature code values within an ICOMS-based order, or Service Parameters within a CSG ACP-based solution.

Incorporate Existing Customer Services into the Order Capture Solution

A complete solution supporting Move-Add-Change-Disconnect (MACD) transactions leverages the same or similar services integrated for presenting prospect data. These services are used to inject biller-specific identifiers for the customer's current services in a manner that can be targeted for add-ons/upgrades/downgrades and disconnects by the order capture process.

The order capture interface must be designed to effectively present existing service data and provide an intuitive means for internal users to identify services subject to change and capture the relevant updates.

Architecting a Flexible Integration Platform

Service and configuration data collected as part of the Order Capture process must be aggregated with additional Opportunity and Account information for entry into the BSS/OSS platform. Developing a technical strategy that supports initial high value/volume services, that simultaneously allows for the addition of new services and markets as a part of an iterative process, allows addressing the most important business concerns immediately and continuous improvement over time.

The diagram below shows the high-level steps and inbound/outbound flow of data that need to be considered architecturally for major parts of the process:

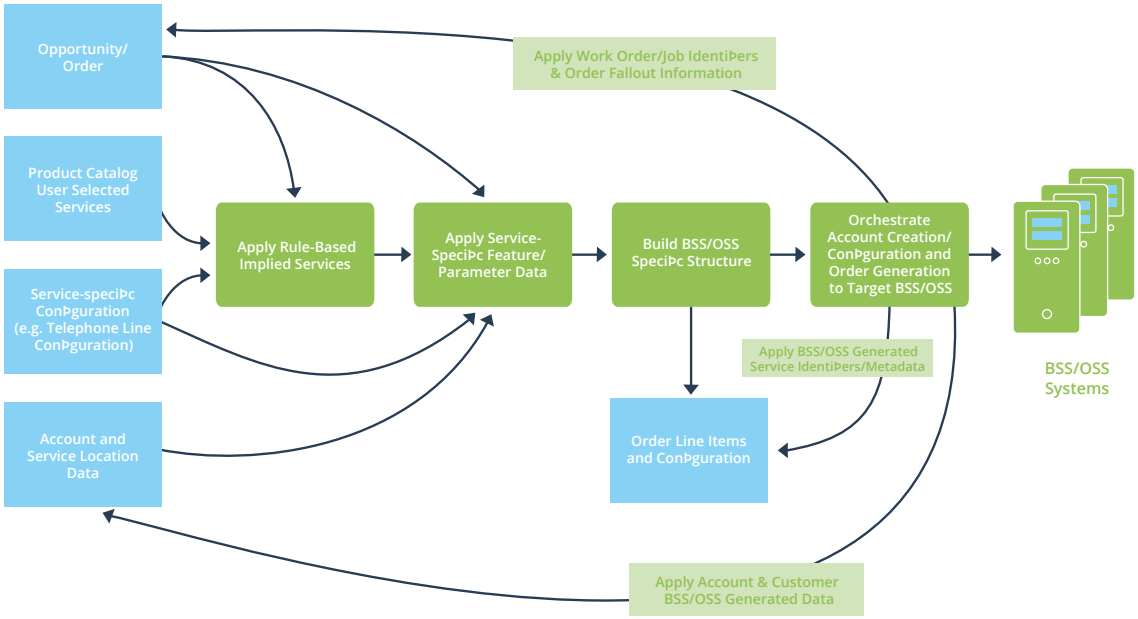

Figure 2: Data flows during Order Entry Automation

Separate Order Capture from BSS/OSS Order Representation

It is not uncommon for an MSO to incorporate several BSS/OSS systems, both from the same vendor and different vendors. This may be due to acquisition and de-centralized management of markets.

When presented with this situation, use of the product catalog and the Order Capture interface used by Sales and related support personnel should remain consistent, which will allow for the order data generated to be represented uniformly in Salesforce.

When the order is ready for integration with the BSS/OSS layer, the structure of the captured order data (service codes and related configuration data) will be re-structured and augmented based on the target BSS/OSS. The augmentations may be based on varying BSS/OSS version, vendor, or other market-driven rules.

Build a Feedback Loop between BSS/OSS and Salesforce

Generating an Order and related information in the BSS/OSS is only one part of process for tying Salesforce and BSS/OSS systems together. The second part is ensuring the right information is updated back to Salesforce during the order integration process with the BSS/OSS.

Accounting for order fallout and enabling a business process for working with order failures must also be addressed. The solution must have a way for recording BSS/OSS errors and warnings, while assisting the business with finding resolutions.

Immediate Post-Order Updates

Following the successful creation of an order and related data, a fully integrated solution is expected to apply BSS/OSS generated data back to Salesforce. This not only provides a visual confirmation to Salesforce users of the success of their order, but also sets up the overall solution to receive continual updates about the order. These updates may provide supplements to in-flight orders, execute scheduling (including splitting and/or job creation), and cancellations. Minimal data expected to flow back to Salesforce includes:

- Generated Account/Customer Identifiers (including business hierarchy when applicable)
- Work Order and Job Identifiers
- Per Service Code BSS/OSS Identifiers
- Assigned/Updated Telephone & Circuit Provision Information

Order Status Updates from BSS/OSS

A separate process to update order data and status from the BSS/OSS systems provides a

window into the progress of an order to a Salesforce user, as well as enabling additional configurable workflow and notification processes within Salesforce.

Enabling an orchestrated process to update order data from the biller can be created as a simple batch-oriented process or a slightly more complex event-driven process assuming the enterprise infrastructure supports it.

In a batch-oriented approach, "open" orders (non-cancelled, non-completed) are retrieved from Salesforce. Using the order identifier the BSS/OSS service is available to retrieve order status and details are used to retrieve the order and update data in Salesforce.

The event-driven scenario incorporates a real-time (or near-real-time) approach by building or leveraging a publication-subscription model for exchanging data. A mechanism for updates to orders in real-time is developed. A notification with basic identifier information (or even complete order data) is published to a queue being listened to by a process dedicated to updating Salesforce.

Even when order entry is not fully automated, the introduction of automated order updates can provide immediate value to Sales personnel directly, as well as capturing reportable metrics within Salesforce. This places responsibility on Order Entry/Management personnel to update Salesforce with order-specific identifiers. If these users are already part of the Salesforce community, they may already be making relevant status and stage updates to the Opportunity and Order-related records in Salesforce.

Handling Order Fallout

No system is perfect, and an order integration solution contains a significant number of functional processes, data, and technical systems working in concert to be successful.
Order fallout can be grouped into four basic categories:

- Orders contain intentionally unsupported services and order scenarios
- Orders are created, but contain some information that cannot be automated to the BSS/OSS
- Orders are created, but non-critical errors occur needing BSS/OSS adjustments
- Orders cannot be entered in any form into the BSS/OSS due to critical errors

Intentionally Unsupported Services and Order Scenarios

A functioning system delivering high business value may not need to support every specific service offered. The MSO may make a conscious decision to not fully automate every available product line based on metrics like:

- ●The volume of orders for the product line

- ● Complexity to capture order data and automate
- ● Associated revenue impact
- ● And maturity of all processes related to order capture and fulfillment

While full order integration support may not be initially implemented, with the right architectural components in place, lower cost features like order capture support and enabling order status feedback can still be provided to support end users.

Salesforce and an Order Automation solution can still support these scenarios by directing these "out-of-automation-scope" orders to the right users via workflow and business processes for downstream processing. Consistent metrics around every order, whether automated or not, will be captured within Salesforce.

Orders are created, but contain some information that cannot be automated to the BSS/OSS

There may be cases where data configured with an Order cannot be provided to the BSS/OSS, due to limitations in API functionality or in scenarios where the data is not fully captured in Salesforce. In this case, the vast majority of data and complexities of the Order are entered into the BSS/OSS. The value of automation is still realized by saving time and effort of manual entry. The automation solution recognizes the gap in data and provides explicit messaging back to Salesforce so that manual intervention can be completed as a configurable workflow.

Orders are created, but non-critical errors occur needing BSS/OSS adjustments

In the overall orchestration of creating and updating Customer and Order data in the BSS/OSS, some business-deemed "non-essential" transactions may fail. As with the "missing data" scenario, these transactions may be minor adjustments to data, or processes that are easily resolved through manual adjustments. It becomes the responsibility of the automation system to report these issues and provide a means in the Salesforce platform for notifying and enforcing the workflow of these updates to the BSS/OSS.

Orders cannot be entered in any form into the BSS/OSS due to critical errors

The most severe cases, where an Account cannot be created or an Order cannot be automated, will require special treatment. After ensuring that the order is manually entered properly into the BSS/OSS, the root cause of failure must be determined and analyzed to evaluate where corrections can be made immediately or in a future release.

Major System Components

An Order Automation solution is a woven fabric of business processes and technical

components. There are systems and business processes working together to fulfill various responsibilities - from user interface to ultimately delivering provisioned services to a customer.

Specific responsibilities and functions could be delegated to one or many different components of the system.

Implementation of service and data validation provides a case where responsibility for reporting data and configuration issues with a given transaction could be spread across multiple layers of the solution. Basic service-to-service relationships may be stored in both the product catalog and BSS/OSS. Detailed service configuration compatibility rules may be maintained in provisioning and switch management tools/processes. While this may be initially acceptable, a potentially more desirable solution is to evolve the enterprise rules within a single or fewer layers, closer to the user's Order Entry process.

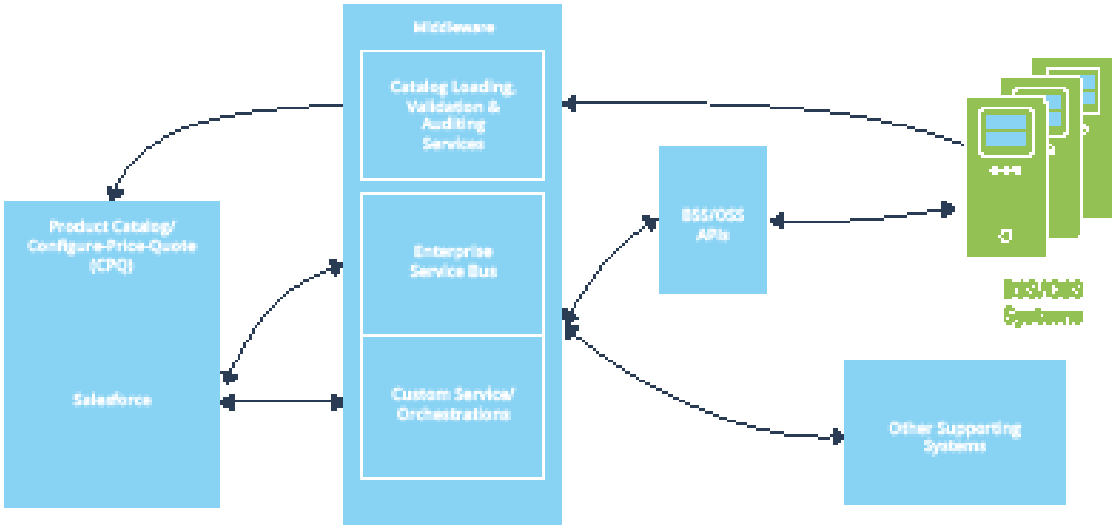

Figure 3: Major Order Automation System Components

Product Catalog/Configure-Price-Quote (CPQ)

Regardless of whether the Product Catalog or CPQ system is modified from an off-the-shelf solution or is custom-developed in the Salesforce platform, the right business and technical decisions must be made to support the complex MSO domain.

Incorporating the Product Catalog/CPQ solution into Salesforce

The complex business processes, product structures, and workflow rules within a typical MSO requires sound design decisions and implementation planning. When incorporating an off-the-shelf catalog/CPQ solution, a complete implementation plan will account

for integrating or rebuilding user interface components, incorporating product and business rules, as well as integrating workflow processes to match the MSO's needs.

Maintaining the Product Catalog

The product catalog will be constantly changing, and a complete solution must account for flexible means to make updates - both automated and user-driven. The business and technical processes for billing service changes (often, but not always driven by product owners and marketing) must be documented and well-understood, taking into account ownership of products and services, frequency of changes, and how updates are proliferated throughout the organization. Support for ensuring updates occur in Salesforce must be defined, whether manual or fully automated.

Based on these findings, a complete solution will build and document the tools needed to be implemented for auditing and validating the product catalog data.

Salesforce Platform Enablement

Enabling an Order Automation solution within Salesforce, regardless of using Sales Cloud or the standard Force.com platform, will be comprised of major Salesforce enablement features:

- Visual Workflow – Provides guided selling and tools to assist Sales and Order management work through the Opportunity and Order, requiring limited custom code
- Traditional Salesforce Workflow and Actions – Used to orchestrate basic business processes and time-oriented actions by updating Opportunities and Order entities, ultimately updating key data and force routing to appropriate users and automated processes
- ListViews and Queue setup – Used to manage portions of the business process – the Opportunity-to-Order flow
- Validation rules – Simple validation of key Opportunity and Order data points
- Custom Visualforce, Components, and Classes – Complex order data capture components, validation, and Order preparation
- Lightning Connect and Components - Enables real-time data access from enterprise sources without the need for synchronization and middleware. Lightning components provide a standardized framework for providing unified desktop & mobile platform solutions within Salesforce
- Inbound and Outbound Web Services – Provides Salesforce with the ability to retrieve key data affecting the Opportunity and Order (e.g. detailed serviceability, address parsing, account and order status data), as well as updates to Salesforce from external platforms (e.g. complex or event-driven status updates from the BSS/OSS)

Functional requirements play an obvious role in determining the best use of Salesforce technology, but organizational and system requirements affect the best choices for realizing various parts of the solution:

- Configuration versus coding – Flexibility, maintainability, and efficiency
- Technical efficiency and optimization for complex or high-volume processing
- Use of standard versus custom objects

Middleware

Middleware is a generic term for a combination of a robust Enterprise Service Bus, BPEL, or a simpler service enablement platform. The key responsibilities for the middleware platform include:

- Providing Salesforce compatible (SOAP/REST) on-demand services for retrieving and updating BSS/OSS and business systems data directly, or via enterprise-built services
- Providing Salesforce compatible services for retrieving dependent information from non-BSS/OSS systems, for example, detailed serviceability and porting/ LERG information
- Orchestrating the process for Order Entry to target BSS/OSS systems based on the order captured in Salesforce
- Orchestrating the process for updating order and provisioning statuses from the BSS/OSS
- Providing governance and metrics related to leveraged internal and vendor managed services

BSS/OSS Services

Retrieving and updating data from the BSS/OSS systems in use requires access to the available interfaces exposed by those systems. The scope of automation and the capabilities of those specific interfaces may require the use of both new and legacy application interfaces.

The functional and data requirements for any Sales order automation solution requires analysis against the BSS/OSS interfaces to determine what gaps exist, and how to mitigate. Successful mitigation strategies include:

- Requesting the vendor to enhance the interfaces available to support the functionality or data needs
- Deferring the functionality or data point at the cost of manual effort to resolve the specific gap while still realizing the overall benefits of the solution
- Directly accessing data (in a vendor approved manner) from underlying data stores, or enterprise-owned data warehouse/marts

One example is NetCracker's ICOMS system; most automation functions are available using the latest ICAPI web service technology, but more specific transactions and data remain only available via the XML-over-HTTP Macro/Inline functions provided by the ICOMS Connection Manager and API Gateway. In practice, a fully developed solution may use a combination of the ICAPI and legacy API – and along the way working with NetCracker to enhance the interfaces to support required functionality.

Other business process or complex product requirements require additional interfaces to be considered and incorporated into automation:

- Telephone Inventory Management
- Network Inventory Management
- GIS, Serviceability, and Plant Management
- Industry Data Interfaces (e.g. Neustar Porting services)

Business Benefits

Robust automation capabilities enables an MSO organization to capture a variety of tangible and measurable benefits in terms of revenue uplift, cost savings, and improved customer relationship metrics. Some of the key benefits by functional area include:

- Sales Intelligence
  - Improved Opportunity win rates - Combine historical biller and prospecting to create effective and targeted sales offers and campaigns to both new and existing customers
  - Faster access to location serviceability information and streamlines administrative and physical survey processes
  - Improved visibility into available services, which means Sales will effectively target new business opportunities at new or existing locations

- Product Catalog and Configure-Price-Quote
  - Re-use and/or establishment of an enterprise-standard, cross-channel service and product catalog
  - Enable customer profiling and implementation of cross-sell/up-sell opportunities
  - Provides a structured sale capture tool resulting in automation-ready orders
  - Enables sales user to quickly craft targeted and alternative quotes and contracts to specific customers

- Order Automation
  - Pushing orders into BSS/OSS system eliminates time-consuming and error-prone manual order entry activity

- Accurate, timely data decreases the number of rejected orders, resulting in less rework for Sales and Order Management specialists
- Less time spent correcting rejected orders allows Order Management Specialists to focus on more complex, high value orders
- Sales experience from a customer's perspective is faster and better tailored to their needs

- Customer Relationship
  - Enable sales to create a stronger relationship with existing customers (especially business customers) by providing a smoother sale-to-provision process
  - Provides a self-service platform for sales and service, tied directly with accurate BSS/OSS data and transactions, ultimately reducing call center service costs

Acumen Solutions has delivered successful Salesforce-based solutions to large enterprise businesses, significantly impacting their bottom lines. For example, Acumen Solutions helped deliver a solution for work order updates and automation of commercial installations saving $5.7 million annually for one client. This solution impacted 1,200 users across the Sales and Order Management organizations in an immediately positive way at a sixth of the cost.

Solution Approach/Methodology

A broad-reaching effort involving many business units and technology components is a major organizational effort, but breaking down the functional processes of the system and performing a thoughtful analysis of business' needs mitigate the risks of implementation.

The First Step –

Develop Basic Sales Tools and Expose BSS/OSS Data to the Salesforce Solution

The foundation of the solution is providing the data and essential tools to the Sales team.

BSS/OSS core data related to customers and the location footprint are imported into Salesforce, while the process for maintaining the data is implemented. The accompanying real-time services to retrieve additional customer and service details are delivered to the middleware platform and integrated into the Salesforce platform and developed business processes.

The addressing of these functional needs establishes the essential technology standards and components on which the complete order automation solution will grow. From a data perspective, Sales users will be able to use (and provide for downstream Order Management) accurate location, customer, and service information.

The Second Step –

Develop the Basic Order Feedback Process

Before a full automated order entry solution is in place, implementation of the order status feedback loop provides benefit to both Sales and Order Management users within Salesforce. The systematic update of Order data into Salesforce can close the order cycle for Sales and kickoff post-order activities managed by Salesforce workflow.

The Third Step –

Develop Automation for High Volume and Basic Transactions

Following or in parallel with the first two steps of implementation, planning and developing the Order Automation solution to accommodate the most frequently processed services, as well as those whose structures and associated data are the most simple.

The division of scope may include decisions like including only new customer installations, service additions, and disconnects – deferring more complex upgrades/downgrades and move ordering scenarios to a later phase. Other complex products based on involved systems, complexity or volume of data, or accompanying workflow may also warrant delaying.

The work completed as part of this step will establish the essential Product Catalog and the processes for maintaining it. The Order processing and fallout workflow across business units will be defined and rolled out to the user community.

The completion of these steps results in a dramatic change and measurable benefits to the MSO. Order rejection cycles and callbacks to customers will be drastically reduced, order-to-install intervals decreased, and overall order accuracy improved.

Continual Iterations –

Incorporate Prioritized Advanced Services

Following the successful deployment of the base Product Catalog and Automation system, incremental releases of the solution can focus on the support of more complex transactions (Moves, Upgrade/Downgrades) and complex service offerings. The business case and prioritization should dictate a release schedule.

These updates to the solution include adding improvements Product Catalog attributes and modeling and user-interface enhancements based on feedback and new requirements to support order data capture.

Summary

Using Salesforce without fully leveraging existing Billing and Operational Support Systems causes major inefficiencies, costing money, time, and effort across business areas. Everyday money is wasted on long sales cycles, revenue is lost by frustrated customers cancelling sales, and time is ineffectively used by downstream personnel to provision customer services.

A practical, business value-based approach first delivers major savings and efficiencies and long-term incremental benefits. There is a logical approach to realize immediate benefit and build a foundation to continually grow. Building the integrated services into existing Sales processes establishes a proven and stable business process and technology foundation to enable effective Sales.

Incorporating a Product Catalog/CPQ, Order Capture, and automated Order Entry brings efficiency to the Order Management and downstream users, and ultimately customers. Orders will consistently contain correct and complete service configurations and be provisioned with minimal assistance from Order Management personnel. Customer contracts will be accurate, sales will not be jeopardized, and complications for Order Entry will diminish.

Ongoing phases will extend the platform to support increasingly complex products and services, formerly time-consuming in their sales, configuration, and order entry processes.
Acumen Solutions is a leading service provider to MSO and CSP organizations. We have developed Salesforce platform solutions for the MSO industry for the past 10 years, providing integration services described in this whitepaper and beyond. Acumen Solutions helped eight of the top 10 leading MSOs deploy and evolve Salesforce into an effective sales and service tool.

Using established methodology, proven technology, and a business-conscious approach, Acumen Solutions can help your company realize the powerful benefit and cost savings of the Salesforce cloud solution.

The combination of a repeatable methodology, deep MSO business process expertise, and technical experience integrating Saleforce and BSS/OSS platforms makes Acumen Solutions a unique leader and obvious choice for bringing a proven solution to these challenges.

Clients choose Acumen Solutions for one reason: our experience delivers success. Our teams of strategists, subject matter experts, and engineers solve problems that can't be fixed by technology alone. We are a Salesforce Global Strategic Partner with exceptional customer satisfaction ratings in the Fortune 500 and public sector. Engage with us at www.acumensolutions.com or follow us on Twitter @AcumenSolutions.