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Comverse ONE 3.7.7

Level 2 Process: 1.1.1.4 Selling

Version 1

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Comverse authors: David Policar

Self-Assessment Process Mapping Report

making your network smarter

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About Comverse

Comverse is the world's leading provider of software and systems enabling value-added services for voice, messaging, mobile Internet and mobile advertising; converged billing and active customer management; and IP communications. Comverse's extensive customer base spans more than 125 countries and covers over 450 communication service providers serving more than two billion subscribers. The company's innovative product portfolio enables communication service providers to unleash the value of the network for their customers by making their networks smarter.

For more information on our products and services, visit our website at: www.comverse.com or contact us at: information@comverse.com

200 Quannapowitt Parkway Wakefield, MA 01880 USA

1 L2: 1.1.1.4 Selling

Responsible for managing prospective customers, for qualifying and educating customers, and matching customer expectations

Selling processes are responsible for managing prospective customers, for the qualification and education of the customer and for matching customer expectations to the enterprise's products and services and ability to deliver. These processes also manage the response to customer RFPs.

***Note:** Just to avoid potential confusion, we note explicitly here that this mapping document relates to how service providers can use the Comverse ONE product to implement Selling business processes when interacting with their own customers, **not** how Comverse interacts with service providers as customers.*

1.1 L3: 1.1.1.4.1 - Manage Prospect

Match assigned leads with the most appropriate products and ensure that these prospects are handled appropriately

The purpose of this process is to match assigned leads with the most appropriate products and ensure that these prospects are handled appropriately. These prospects represent a "pipeline" of potential sales, each of which is expressed in terms of the probability of successful sales closure and an estimate of the total attainable revenue. The needs of each potential prospect are analyzed. Based on these needs, potential solutions are identified from the service provider's product portfolio. Each prospect is tracked through these processes and the outcome (win or loss) of each prospect is reported. Prospects are assigned to the appropriate sales channel.

1.1.1 L4: 1.1.1.4.1.1 Analyze Prospect Needs– Mapping Details

Process Identifier: 1.1.1.4.1.1

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.1.1 Analyze Prospect Needs
Brief Description Analyze the needs of each potential prospect

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Analyze the needs of each potential prospect [AM]

The Sales Force Automation components within Comverse ONE start the prospect evaluation process by loading prospect data into the Sales and Service database, either manually or automatically by importing data files (e.g., contact lists purchased from other providers). Prospects are then automatically routed to agents based on configured mappings, as described for 1.1.1.4.1.3 below.

These configured mappings reflect the agents best suited to address the prospect's needs based on an automated initial analysis of prospect attributes such as size, geographical area, and industry.

More detailed subsequent analysis of prospect needs is performed manually by the sales agent, and the results of that analysis are stored along with the prospect data itself.

See the following flows for more information:

- ***Error! Reference source not found.***
- ***Error! Reference source not found.***
- ***Error! Reference source not found.***

Optional

Not used for this process element

Interactions

Not used for this process element

1.1.2 L4: 1.1.1.4.1.2 Identify Potential Solutions – Mapping Details

Process Identifier: 1.1.1.4.1.2

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.4.1.2 Identify Potential Solutions

Brief Description

Identify potential solutions from the service provider's product portfolio against prospect needs.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Identify potential solutions from the service provider's product portfolio against prospect needs. [AM]

When an Offer is configured with the Comverse ONE Product Catalog, its availability within the Sales system is defined at the same time (see ***Error! Reference source not found.****). This controls the automatic propagation of such Product Catalog Offers to the Sales system and their mapping to Products within that system (see* ***Error! Reference source not found.*** *and* ***Error! Reference source not found.****).*

Sales managers can then define Price Lists for an agent or group of agents based on those propagated Products. A Price List will typically only contain the Products which represent solutions from the Product Catalog portfolio deemed suitable for the associated agent(s). Consequently, when a Prospect is routed to an agent or group of agents (see 1.1.1.4.1.3 mapping below), the associated Price List(s) serve(s) as an automatic filtering mechanism for Products appropriate for that Prospect.

Additional filtering for potential solutions can then be performed manually, by searching for Products that meet whatever criteria the agent has in mind (see ***Error! Reference source not found.****).*

Optional

Not used for this process element

Interactions

Not used for this process element

1.1.3 L4: 1.1.1.4.1.3 Assign Prospect to Sales Channel – Mapping Details

Process Identifier: 1.1.1.4.1.3

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.4.1.3 Assign Prospect to Sales Channel

Brief Description

Assign prospects to the appropriate sales channel; The purpose is to match assigned leads with the most appropriate products and ensure that these prospects are handled appropriately.

Extended Description

Not used for this process element

Explanatory

The purpose is to match assigned leads with the most appropriate products and ensure that these prospects are handled appropriately.

Mandatory

Assign prospects to the appropriate sales channel [AM]

*The Sales Force Automation components within Comverse ONE automatically assign prospects to sales agents automatically based on configured mappings. These configured mappings reflect the agents best suited to address the prospect's needs based on prospect attributes such as size, geographical area, and industry. See SFUAGp23 in the Supporting Evidence Documents folder for an overview of how this assignment process fits into the overall sales process for Business to Consumer (B2C) and Business to Business (B2B) sales, and see **Error! Reference source not found.**for an illustration of the process flow.*

*In addition, Prospects can be manually assigned to Agents as desired through the Sales UI, via the Reassign command in the Actions menu (see **Error! Reference source not found.**).*

Optional Not used for this process element **Interactions** Not used for this process element

1.1.4 L4: 1.1.1.4.1.4 Track & Report Prospect – Mapping Details

Process Identifier: 1.1.1.4.1.4 Track & Report Prospect

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.1.4 Track & Report Prospect
Brief Description Track each prospect through these processes and report the outcome (win or loss) of each prospect. These prospects represent a "pipeline" of potential sales, each of which is expressed in terms of the probability of successful sales closure and an estimate of the total attainable revenue. **Extended Description** Not used for this process element **Explanatory** These prospects represent a "pipeline" of potential sales, each of which is expressed in terms of the probability of successful sales closure and an estimate of the total attainable revenue. **Mandatory** Track each prospect through these processes and report the outcome (win or loss) of each prospect. [AM] *The sales pipeline is different for B2C and B2B customers; see SFUAGp23 in the Supporting Evidence Documents folder for an overview of the end-to-end processes, as well as* ***Error! Reference source not found.*** *.*

Tracking prospects through a pipeline for B2B sales is done through the creation and monitoring of Opportunities associated with a prospect. See ***Error! Reference source not found.*** *and its children:*

- ***Error! Reference source not found.***
- ***Error! Reference source not found.***
- ***Error! Reference source not found.***
- ***Error! Reference source not found.***

…as well as ***Error! Reference source not found.*** *for more information.*

The Pipeline Report (see ***Error! Reference source not found.****) provides summary information about where Opportunities are in the pipeline.*

The sales pipeline for B2C prospects is much simpler and primarily embodied in the Customer stage; an Individual customer is created whenever a new billing account is created (see ***Error! Reference source not found.****) and then converted into an Order as illustrated in* ***Error! Reference source not found.****.*

The Order is then processed normally; see ***Error! Reference source not found.****.*

Optional

Not used for this process element

Interactions

Not used for this process element

1.1.5 L3: 1.1.1.4.1 - Manage Prospect – TM Forum Assessor Scores

<to be provided by TM Forum on closeout of the assessment>

1.2 L3: 1.1.1.4.5 - Cross/Up Selling

Ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.

The purpose of this process is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products. The ongoing analysis of customer trends (e.g. usage, problems, complaints) is used to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises. Based on the data collected, more appropriate offerings should be recommended to the customer.

1.2.1 L4: 1.1.1.4.5.1 Analyze Customer Trends– Mapping Details

Process Identifier: 1.1.1.4.5.1

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.5.1 Analyze Customer Trends
Brief Description Use ongoing analysis of customer trends (e.g. usage, problems, complaints) to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises. The purpose is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products. **Extended Description** Not used for this process element **Explanatory** The purpose is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products. **Mandatory** Use ongoing analysis of customer trends (e.g. usage, problems, complaints) to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises. [AM]

Sales agents can review and analyze several different sources of information to determine whether a customer is a likely prospect for upselling, including:

- *Customer invoices*
  These data structures contain usage summaries, detailed billable transaction records for charges and credits, summaries of bill-time promotions and what charges they apply to, and related information, as described in ***Error! Reference source not found.*** *and* ***Error! Reference source not found.****.*
  The Customer Center GUI displays all invoices; see CCUGp273.pdf in the Supporting Evidence Documents folder for more information.
- *Account History*
  The Customer Center GUI displays account history for MTRs, balance recharges, usage, recurring charges, nonrecurring charges, offers, and billing. See CCUGp195.pdf in the Supporting Evidence Documents folder for more information.
- *Consolidated Transaction History*
  The Customer Center GUI displays a single consolidated screen for all balance-affecting transactions for the subscriber, both billed and unbilled. See CCUGp218.pdf in the Supporting Evidence Documents folder for more information.
- *Detailed Usage History*
  The Customer Center GUI displays additional detail for subscriber usage history; see CCUGp222.pdf in the Supporting Evidence Documents folder for more information. Specific information about unbilled usage can also be obtained; see CCUGp280.pdf in the Supporting Evidence Documents folder for more information.

This information is available in the Comverse ONE system for all customers, and produced and exposed automatically. It can be used to determine, for example, whether a customer is regularly overspending the limits on Bill-Time Promotions, which would suggest an upgrade to a higher-limit plan, or being charged for events which might be rated or billed differently under a different Offer, which would suggest an Offer Swap, or being billed for subscriber calls that are called regularly, which would suggest a change to Calling Circles, etc.

Although the production of the underlying data is automatic, the analysis itself is performed manually based on that data.

Additional information can also be obtained by manual request, such as on-demand invoices (see ***Error! Reference source not found.****) which provide summary information about as-yet-unbilled usage, unprocessed billable transactions, etc.*

Optional

Not used for this process element

Interactions Not used for this process element

1.2.2 L4: 1.1.1.4.5.2 Recommend Appropriate Offerings – Mapping Details

Process Identifier: 1.1.1.4.5.2

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.5.2 Recommend Appropriate Offerings
Brief Description Based on the data collected, recommend more appropriate offerings to the customer. **Extended Description** Not used for this process element **Explanatory** Not used for this process element **Mandatory** Based on the data collected, recommend more appropriate offerings to the customer. [AM] *Once the data described in 1.1.1.4.5.1 (and other data as appropriate) is fully analyzed and an appropriate new offering for upsell is identified, a recommendation or upsell proposal can be made.* *For B2B sales, the process for an upsell proposal is essentially identical to that for an initial sales proposal, as illustrated in **Error! Reference source not found.**.* *For B2C sales, CSRs initiate upsell proposals based on Upsell Leads. This is managed through the Customer Center GUI; see CCUGp404.pdf in the Supporting Evidence Documents folder for more information.* **Optional**

Not used for this process element

Interactions

Not used for this process element

1.2.3 L3: 1.1.1.4.5 - Cross/Up Selling – TM Forum Assessor Scores

<to be provided by TM Forum on closeout of the assessment>

1.3 L3: 1.1.1.4.6 - Develop Sales Proposal

Develop a sales proposal to respond to the customer's requirements

The purpose of this process is to develop a sales proposal to respond to the customer's requirements. This process commences following approval by the Qualify Customer process. The development of a sales proposal may require the selection of a standard product offering, may require the development of a non-standard offering, or may require the creation of a project team to construct an offering in response to a customer's Request For Proposal. In all cases, the processes are responsible for ascertaining the customer's requirements, determining the ability of the enterprise to support the customer requirements, and developing a proposal (or proposals) for the customer which meets the stated requirements. These processes assess the extent of enterprise support required to develop the sales proposal, marshal the necessary support across the enterprise and administer the sales proposal development activity to ensure that any timing constraints associated with eth customer requirements are achieved.

Note that development of a non-standard sales proposal or the response to a customer's RFP may require the development of unique solution designs. The development of unique solutions, within the context of current deployed capabilities, uses the Design Solutions process within Service Management & Operations to undertake the necessary feasibility studies. Where current capabilities are not able to support customer's requirements, the Product & Offer Capability Delivery processes are invoked to undertake any necessary assessment and business case development.

1.3.1 L4: 1.1.1.4.6.1 Ascertain Customer Requirements – Mapping Details

Process Identifier: 1.1.1.4.6.1

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.6.1 Ascertain Customer Requirements
Brief Description Ascertain the customer's requirements. This process commences following approval by the Qualify Customer process. The development of a sales proposal may require the selection of a standard product offering, may require the development of a non-standard offering, or may require the

creation of a project team to construct an offering in response to a customer's Request For Proposal.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Ascertain the customer's requirements. The development of a sales proposal may require the selection of a standard product offering, may require the development of a non-standard offering, or may require the creation of a project team to construct an offering in response to a customer's Request For Proposal. [AM]

In cases where the customer's requirements involve the selection of a standard product offering, this is essentially the same process as described for 1.1.1.4.1.1 Analyze Prospect Needs and 1.1.1.4.1.2 Identify Potential Solutions. To recap:

- *When an Offer is configured with the Comverse ONE Product Catalog, its availability within the Sales system is defined at the same time (see **Error! Reference source not found.**).*
- *Offers available within Sales are automatically propagated into the Sales system (see **Error! Reference source not found.***
- *and **Error! Reference source not found.**).Sales managers define Price Lists which filter Products appropriate for the customer.*
- *Additional filtering for potential solutions can be performed manually, by searching for Products that meet whatever criteria the agent has in mind (see **Error! Reference source not found.**).*

*Even for non-standard offerings, if a general handling process for a class of non-standard offerings can be defined, the standardized parameters that control that process can simply become part of a standard offering. For example, a relatively common non-standard offering scenario is where a provider negotiates a special rate with a prospect for an existing Product; this is handled by Comverse ONE as part of the standard Offer through Individual-Case Basis (ICB) Rating functionality (see **Error! Reference source not found.**). Although this is part of a non-standard offering, it is handled in exactly the same way as a standard offering.However, in some cases truly non-standard offerings – that is, ones where no general handling process exists for the class – are desired or necessary. This is typically a customized and client-specific process and therefore primarily manual; it is up to the service provider to allocate internal resources to a specialized project team, for example,*

and Comverse ONE is not involved in this process. Where Comverse ONE does enter into the process is in making the non-standard offering available for Ordering, Billing, Payments etc. *The majority of this process is identical to the configuration process for standard offerings, as captured in 1.1.1.1 and other L2 processes and not recapitulated here; in most particulars, a non-standard offering is treated identically to a standard offering by Comverse ONE… ultimately an Offer is designed, attached to a Bundle, propagated automatically throughout the Comverse ONE database, etc.* *A significant exception is subscriber eligibility, of course; a non-standard offering developed for a single client is typically only available to that client.(In some cases there may be broader availability; for example, an offering may be developed for a particular reseller and made available to that reseller's clients, but the principle is the same.) Comverse ONE supports this through configurable rules based on Subscriber attributes for eligibility and serviceability during product provisioning; see **Error! Reference source not found.** and **Error! Reference source not found.** for more details.* **Optional** Not used for this process element **Interactions** This process commences following approval by the Qualify Customer process.

1.3.2 L4: 1.1.1.4.6.2 Determine Support for Customer Requirements – Mapping Details

Process Identifier: 1.1.1.4.6.2

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.4.6.2 Determine Support for Customer Requirements
Brief Description Determine the ability of the enterprise to support the customer requirements. These processes assess the extent of enterprise support required to develop the sales proposal, marshal the

necessary support across the enterprise and administer the sales proposal development activity to ensure that any timing constraints associated with eth customer requirements are achieved.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Determine the ability of the enterprise to support the customer requirements. These processes assess the extent of enterprise support required to develop the sales proposal, marshal the necessary support across the enterprise and administer the sales proposal development activity to ensure that any timing constraints associated with eth customer requirements are achieved. [M]

As noted for 1.1.1.4.6.1, *this is typically a customized and client-specific process and therefore primarily manual; it is up to the service provider to allocate internal resources to a specialized project team, for example, and to assess and marshal the necessary support within the provider's organization. Comverse ONE is not directly involved in this process, although it can provide information (for example, details about the customer and the products, and Ordering and Billing support) which support the process.*

Optional

Not used for this process element

Interactions

Not used for this process element

1.3.3 L4: 1.1.1.4.6.3 Develop Proposal against Customer Requirements – Mapping Details

Process Identifier: 1.1.1.4.6.3

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.4.6.3 Develop Proposal against Customer Requirements

Brief Description

Develop a proposal (or proposals) for the customer which meets the stated requirements. The development of a sales proposal may require the selection of a standard product offering, may require the development of a non-standard offering, or may require the creation of a project team to construct an offering in response to a customer's Request For Proposal. Note that development of a non-standard sales proposal or the response to a customer's RFP may require the development of unique solution designs. The development of unique solutions, within the context of current deployed capabilities, uses the Design Solutions process within Service Management & Operations to undertake the necessary feasibility studies. Where current capabilities are not able to support customer's requirements, the Product & Offer Capability Delivery processes are invoked to undertake any necessary assessment and business case development.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Develop a proposal (or proposals) for the customer which meets the stated requirements. The development of a sales proposal may require the selection of a standard product offering, may require the development of a non-standard offering, or may require the creation of a project team to construct an offering in response to a customer's Request For Proposal. Note that development of a non-standard sales proposal or the response to a customer's RFP may require the development of unique solution designs. The development of unique solutions, within the context of current deployed capabilities, uses the Design Solutions process within Service Management & Operations to undertake the necessary feasibility studies. Where current capabilities are not able to support customer's requirements, the Product & Offer Capability Delivery processes are invoked to undertake any necessary assessment and business case development. [AM]

As described for 1.1.1.4.6.1 and 1.1.1.4.6.2, some aspects of this process (e.g. selection of standard product offerings and standardized parametrization of non-standard offerings) are handled directly by Comverse ONE while other aspects (e.g., creating a project team and development of unique solutions) are supported indirectly.

Once those aspects are established, developing the proposal itself and exporting it to the customer/prospect is managed through the Sales GUI as illustrated in **Error! Reference source not found.** and **Error! Reference source not found.**.

Optional

Not used for this process element

Interactions

Not used for this process element