

**Five Reasons Why VP Sales Should Rethink Their Business Processes**

**FIVE REASONS WHY VP SALES  
SHOULD RETHINK THEIR BUSINESS PROCESSES**

**A WHITE PAPER**

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“The Business of Identity Management”**

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SHOULD RETHINK THEIR BUSINESS PROCESSES**

**EXECUTIVE SUMMARY**

This white paper lay out how a VP Sales can:

1. Increase sales
2. Reduce costs
3. Gain competitive advantage
4. Enhance the customer experience
5. Reduce time to close sales

The paper outlines how this is possible by rethinking sales business processes. The benefits can be achieved by integrating into your business processes:

- XML (Extensible Markup Language)
- Web Services
- DRM (Digital Rights Management)
- IAM (Identity and Access Management)
- BPEL (Business Process Execution Language)

The paper quickly reviews the tools, then outlines how to achieve the benefits listed above. After reading this paper, a sister paper "[VP Sales – Rethinking Business Process Examples](#)" is recommended to provide sales business process examples.

## Five Reasons Why VP Sales Should Rethink Their Business Processes

### INTRODUCTION

As the VP Sales for your enterprise, you're always facing challenges to:

- Increase sales
- Reduce costs
- Gain competitive advantage
- Enhance the customer experience
- Reduce time to close sales

The premise of this white paper is that these challenges can be met by rethinking your sales business processes by:

1. Using existing global protocols that almost all vendors support and
2. Integrating several existing technologies with your existing infrastructure

Specifically, the benefits can be achieved by integrating into your business processes:

- XML (Extensible Markup Language)
- Web Services
- DRM (Digital Rights Management)
- IAM (Identity and Access Management)
- BPEL (Business Process Execution Language)

In a separate paper "[VP Sales – Rethinking Business Process Examples](#)" I provide three companies sales processes and show how to practically achieve the benefits. However, before reading that paper I strongly recommend that you first read this paper to quickly understand the technologies and protocols used. This will then help you make sense of the other paper.

### THE TOOLS

There are several tools you need to understand in order to deploy them:

- XML (Extensible Markup Language)
- Digital Rights Management (DRM) represented by Adobe LiveCycle
- Web Services
- Identity and Access Management (IAM)
- Business Process Execution Language (BPEL)

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### XML

One of the biggest challenges in the past has been the unique application programming interfaces (API's) required to get one application talking to another. Today, the great news is that a [standard protocol \(XML\)](#) has been widely adopted by almost all major software vendors to alleviate this.

For example, the sales data taken out an IBM DB2 database can be transferred easily via XML into a CRM application running on a Oracle database. Information filled in an online form can be easily extracted via XML and entered into a sales brochure.

XML offers:

- Global protocol
- Wide support by software vendors
- Ease of use in transferring data between applications
- No requirement for customized API coding development and maintenance

There are a number of globally accepted legal XML protocols either completely developed or currently being worked on at:

- [OASIS \(Organization for the Advancement of Structured Information Standards\)](#)  
It is a “not-for-profit, international consortium that drives the development, convergence, and adoption of e-business standards. The consortium produces more Web services standards than any other organization along with standards for security, e-business, and standardization efforts in the public sector and for application-specific markets. Founded in 1993, OASIS has more than 5,000 participants representing over 600 organizations and individual members in 100 countries.” Their work on [eContracts](#) amongst others may be of interest to you.
- [XBRL \(extensible Business Reporting Language\)](#). It is an XML based language for the electronic communication of business and financial data. Composed of over 400 companies and governments, it provides open standards with no license fees. It is widely used in the financial industry.
- [OAGI \(Open Applications Group\)](#) has lead on several XML standards for different industries including automotive, CRM and HR.

The bottom line? You need to be using XML to change the speed with which your enterprise works exchanging data between applications internally and externally.

### Digital Rights Management (DRM)

Enterprise information is often still paper based. When it does become electronic, there is often little or no control information around the electronic document indicating who can view the information, who can edit it, document version control, digital signatures, etc.

Digital Rights Management (DRM) is the activity of producing, managing and archiving electronic documents. [Adobe's LiveCycle](#) product is used as a DRM example in this paper.

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With DRM you can:

- Determine who can create a document
- Who can view the document
- Provide built in version control over the document
- Specify the security around the document
- Provide workflows on who can see the document
- Provide authorization workflows
- Digitally sign the document if desired
- Ensure document authenticity
- Ensure document integrity
- Provide document auditing to see who has viewed or edited the document

LiveCycle provides all of this. Additionally it also provides XML support. By using LiveCycle then you can produce online forms that exactly match current printed forms, extract the data via XML and insert it quickly and securely into other applications. Further, LiveCycle also offers support for CAD 3D images.

While LiveCycle can run on it's own in an enterprise, this paper strongly recommends integrating it with the IAM, Web Service and BPEL infrastructure. This avoids silo-ization of security policies and also enables business process rethinking beyond just the documents.

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### Web Services

Taking XML documents and doing something with them across disparate networks, applications and with different users requires the use of “Web services”. Web services are a [globally accepted set of protocols](#) that almost all software vendors support. The protocols offer enterprises the ability to:

- Transfer information between networks using TCP/IP (internet protocols)
- Transfer documents between applications using XML
- Secure the type of connection being used
- Define the security around the XML document

Therefore, by converting existing applications and processes to web services, the enterprise can:

- Avoid the pain of inter-application exchange of information
- Avoid the pain of inter-network exchange of information
- Provide enterprise security standards for web services
- Use additional web service standards for business process execution

### Identity and Access Management (IAM)

Most mid to large enterprise currently have some form of identity and access management infrastructure deployed. Your IAM infrastructure should offer:

- Unique identifiers for each individual using your systems and applications
- Unique identifiers for each application within the enterprise
- Enterprise directory services for quick reference to an identity’s tombstone level identity information
- Enterprise provisioning services for applications, assets and systems access
- Enterprise authentication services (Single sign on/reduced sign on)
- Enterprise role definitions (roles, title, positions, groups, macro-roles)
- Enterprise audit services
- Web service policy enforcement
- Federated identities

IAM thus is critical to providing the identities and quickly provisioning them. It also provides the security policies governing what an identity and/or an application can do.

There is a OASIS globally accepted protocol for the [access control](#) portion of IAM supported by almost all IAM vendors. IAM also operates under global protocols for federating the identities. These include [SAML](#), [WS Security](#), [Liberty Alliance](#) and [Shibboleth](#).

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### Business Process Execution Language (BPEL)

BPEL is a set of globally recognized [protocols](#) (supported by most software vendors) to standardize the coordination or “orchestration” of web services. It therefore creates the sequence of activities for executing web services.

BPEL allows the enterprise to:

- Automate portions or all of traditional business processes
- Query data stores, extract the data using XML and transfer to other applications, identities or business partners
- Orchestrate interactions of lengthy business processes

For example, a BPEL process could take data input online for by your customer, query the CRM web service to see if they are a customer, if so then query the ERP web service to do a credit check, then request a customer order number from the ERP web service and then create the electronic order document in LiveCycle and send it out to the customer.

Let’s look at how assembling the pieces enable the business results stated at the beginning of this paper.

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### ACHIEVING THE BENEFITS

Practical sales business process examples of the benefits listed below are outlined in the paper “VP Sales – Rethinking Business Process Examples”. Additional non sales business process examples can be found in the paper “[Saving Operating Dollars Using BPEL, IAM and DRM](#)”, “[Rethinking HR Business Processes](#)” and “[Rethinking Corporate Counsel Business Processes – An Example](#)”.

### Increase Sales

You can increase sales by:

1. Increased target marketing
  - a. Link your existing customer history data stores (e.g. CRM's, shipping, order entry) with XML, LiveCycle, web services, IAM and BPEL:
    - i. Convert data stores to accepting XML documents
    - ii. Create web services around the data stores
    - iii. Create target market campaigns using customer's past buying habits
    - iv. Create a BPEL process that queries the data stores for customers matching the target campaign
    - v. Extract data about the customer and automatically insert it into LiveCycle documents
    - vi. Use the CRM and/or IAM systems to provide customer email addresses
    - vii. Automatically send out the customized brochures to the customers
    - viii. Have your sales department follow up with the customer
2. “Touch the customer” more often
  - a. In addition to sales calls from your sales representatives, increase the contact between your enterprise and the customer by designing sales campaigns that provides the customer with:
    - detailed electronic reports on their orders
    - status relative to the sales targets agreed upon with the sales representative
    - provide sales and incentive information and updates
      - i. Convert sales documents to LiveCycle
      - ii. Use XML to extract information from disparate sales, shipping and customer applications running in your enterprise
      - iii. Use XML to obtain customer information from some of your suppliers if required via XML
      - iv. Use BPEL to obtain the XML information from the application web services and insert it into LiveCycle documents
      - v. Use BPEL, IAM and CRM to automatically send the documents to the customers

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3. Automate the customer ordering process to offer 24 hour a day seven day a week online ordering
  - a. Use XML to standardize order data
  - b. Use LiveCycle to create online order forms which exactly match existing order forms (reduce confusion to the customer)
  - c. Use LiveCycle and BPEL to extract XML information from the forms
  - d. Use BPEL to provide the business logic to check with other enterprise data stores on customers' credit worthiness.
  - e. If required, use BPEL to seek human approval using IAM infrastructure
  - f. Use BPEL to automatically seek the ERP or Customer Order system to obtain a Customer Order Number
  - g. Use BPEL, IAM and LiveCycle to automatically create an electronic customer order or customer waybill
  - h. Use IAM and LiveCycle to automatically determine the web service and DRM policies around the customer order or customer waybill document
  - i. Use LiveCycle to automatically digitally sign the documents if desired and/or use BPEL, IAM and LiveCycle to have a enterprise person digitally sign the document if desired
  - j. User BPEL, IAM and LiveCycle to automatically send out the customer order or customer waybill to the customer.

## Reduce Costs

You can reduce costs by:

1. Standardizing all sales documents using LiveCycle
  - a. Eliminate paper wherever appropriate
  - b. Print documents exactly matching electronic version thus reducing possible customer confusion and time spent sorting the customer out
2. Use XML
  - a. Provides standards to accept customer purchase orders electronically regardless of their underlying applications
    - i. You can accept to use global industry standards defining what each term in the document mean
    - ii. If not available, then you must set the agreed upon XML standards with your customers such that both they and you can map from the XML terms used in the exchange to the internal applications.
3. Automate portions of a sales business process
  - a. Reduce personnel labor costs associated with handling and processing paper
    - i. Use XML, web services, LiveCycle, IAM and BPEL to automate portions or all of a business sales process
    - ii. Still allow for human intervention where required
    - iii. Still allow for exception processes

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### Gain Competitive Advantage

By rethinking your sales business processes you can gain competitive advantage:

1. Offer the customer faster service
  - a. Use XML, BPEL, IAM, web services and BPEL to offer self serve or faster completion of processes
2. Protect the corporate knowledge and avoid leaks to your competition
  - a. Use LiveCycle and IAM to:
    - i. Create document classification
      1. Some sales documents will be able to be read by anyone
      2. Other more sensitive sales and technical information exchanged with sales representatives, sales agents and customers will have:
        - a. Authorization viewing privileges assigned to them
        - b. May require the individual to authenticate in order to view the documents
        - c. May use digital certificates to open the documents with online revocation ability (meaning the person may still retain the documents on their computer but be unable to open them after the certificate has been revoked).
        - d. Will provide complete auditable report over who has created, viewed and edited the document.

### Enhance the Customer Experience

Rethinking your sales business processes can enhance the customer experience by:

1. Reducing possible customer confusion
  - a. Standardize all customer documents using LiveCycle
  - b. Use LiveCycle version control to make sure only the correct version of the document is in use
  - c. Use LiveCycle, web services and BPEL to ensure that the customer services all use the same version of the documentation
2. Design business processes where the customer can still talk to a human if they desire to
  - a. Use BPEL to allow a business process to go to a human if either the customer or the enterprise desires it
3. Use a wider variety of technologies to help explain things to the customer. For example, LiveCycle supports CAD 3D. This means that the electronic sales documents your produce can use CAD 3d images to help explain how a product works.

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### **Reduce Time to Close Sales**

By rethinking your business processes you can reduce time to close sales:

1. Offer online ordering ability
  - a. Use XML, LiveCycle, IAM, web services and BPEL to offer online ordering 24 hours a day
  - b. Touch the customer more often in integrated sales campaigns where the sales rep and the customer are kept up to date with order information; product announcements, incentives, etc. (see point #2 in “Increase Sales”).

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### CONCLUSION

This paper, together with the paper “[VP Sales – Rethinking Business Process Examples](#)” clearly demonstrate that by rethinking sales business processes, the VP Sales can:

1. Increase sales
2. Reduce costs
3. Gain competitive advantage
4. Enhance the customer experience
5. Reduce time to close sales

The point of this paper is to get you, the VP Sales to step back from your business and rethink the business processes anew. What have been presented in this paper are practical tools that now allow all this to happen within your enterprise.

In some cases, you will find significant gains to be had. In others, the gains may be incremental. By adding all the gains up, you will find that your enterprise is able to increase sales, cut costs and gain more manoeuvrability in the marketplace as a result.

Your enterprise already likely has many of the components in place:

- Enterprise identity directory
- Identity and Access Management infrastructure
- Adobe PDF documents in use
- Some XML is already in use

To take advantage of what have been written in this paper you’ll need to:

- Purchase Adobe LiveCycle
- Ensure your IAM infrastructure can support web services
- Purchase a BPEL server

If the above situation applies to you, then the purchase costs can be quite reasonable. The tools used apply to all other business units in the enterprise as well so you shouldn’t have to bear the entire costs in Sales.

Assuming that you have the above infrastructure and the first business processes you tackle are relatively simple, the deployment time can also be quite quick. In many cases deployment can occur within 30-120 days.

The tools and processes outlined above do not solve every sales business process challenge that you have. For instance, it may be that some legacy applications are too expensive to convert to XML and/or web services. Further, some business processes may not be cost-effective to convert to BPEL. Having said this, there will be many, many business processes within sales that it can and should be applied to.

## **Five Reasons Why VP Sales Should Rethink Their Business Processes**

Please refer to other papers addressing the benefits to specific enterprise roles and illustrative examples of BPEL:

- [“Six Reasons the COO Should Be Interested in BPEL, IAM and DRM”](#)
- [“Rethinking Corporate Counsel Business Processes – An Example”](#)
- [“Five Reasons Why Corporate Counsel Should Rethink Their Business Processes”](#)
- [“Saving Operating Dollars Using BPEL, IAM and DRM”](#)
- [“Rethinking HR Business Processes”](#)
- [“The Challenges With Using BPEL”](#)

### **ABOUT THE AUTHOR:**

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