

VP SALES – RETHINKING BUSINESS PROCESS EXAMPLES

A WHITE PAPER

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VP SALES – RETHINKING BUSINESS PROCESS EXAMPLES

EXECUTIVE SUMMARY

This white paper provides three examples of sales business process rethinking offering sales executives the opportunity to:

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

It does so by integrating XML (Extensible Markup Language), DRM (Digital Rights Management), Web Services, IAM (Identity and Access Management) and BPEL (Business Process Execution Language). The paper ends by referring to other white papers for more specific information about the technologies used.

INTRODUCTION

Selling products and services encompasses a large number of situations and challenges. To illustrate how XML (Extensible Markup Language), DRM (Digital Rights Management), Web Services, IAM (Identity and Access Management) and BPEL (Business Process Execution Language) can rethink sales business processes, I have created a mythical company called Acme Inc. Acme operates three separate businesses:

- Liquor wholesaler with a direct sales force
- Boutique financial business operating globally
- Manufacturing business operating globally with sales agents

Each business unit uses practical sales challenges. The examples and tools shown can be applied to almost any sized business. In these examples I have used Adobe LiveCycle as the representative of DRM.

Information on the technologies used in this paper can be found in the paper “[Five Reasons Why the VP Sales Should Rethink Their Business Processes](#)”.

VP Sales – Rethinking Business Process Examples

ACME LIQUOR INC. BUSINESS UNIT

Acme Liquor Inc. operates a direct sales force. It acts as a wholesale distributor for a wide variety of hard spirits and wine companies. Their accounts range from small bars and restaurants through to large hotel chains and sports arenas.

THE ACME LIQUOR VP SALES REVIEWS THE CHALLENGES FACING THEM:

1. Margins are shrinking on some product sectors as increased competition comes from other wholesalers. This requires more targeted marketing on higher margin products.
2. The sales force needs more up to date sales and forecasting tools in order to properly set realistic sales targets and manage sales execution campaigns.
3. The customers need more contact throughout the year in order to help them better manage their business and help Acme reach their sales targets with them.
4. Acme has a poor IT infrastructure. Much of the business is still done using paper based forms, spreadsheets and a wide variety of older data systems. This is causing the VP Sales grief whenever they try to move quickly in getting information out to the sales force and customers.

HERE'S WHAT THE ACME LIQUOR VP SALES DID:

1. All existing paper sales reporting forms were now digitized using Adobe LiveCycle. The electronic forms exactly matched the existing paper based forms. When the sales rep filled in the online forms, the data was now easily extractable out of the forms in XML. This could be easily input into a variety of the legacy systems without manual intervention.
2. The VP Sales worked with IT to understand the existing business processes for inputting sales data into the variety of legacy data applications. Together they did the following:
 - a. Several of the data store applications could be easily modified to accept XML documents.
 - i. These applications were converted to web services.
 - ii. BPEL was used to automatically extract the XML from the online forms the sales people were filling in
 - iii. BPEL automatically sent the form information to the applications
 - iv. This automated about 80% of the business process to input the information
 - b. For those applications where the cost of converting them to XML was too high, they had BPEL extract the form data from the form and send it to a role defined in Acme Liquor's Identity and Access Management system as "Input Clerk". The clerk would receive the electronic information and enter it by hand into the application.

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3. The VP Sales and the IT department worked together to create sales reports using Adobe LiveCycle:
 - a. The reports were populated automatically with data from three different applications; sales forecasting, shipping and general ledger.
 - i. They used XML data to populate the data from each application into an integrated sales report
 - ii. They used Adobe LiveCycle and the Identity and Access Management systems to:
 1. Authorize access to the sales reps for each report as well as the sales rep's manager
 2. Required use of the sales reps uid and password to access the document
 3. The sales reps could only open the document using their Acme Liquor digital key. This was used to reduce the impact from lost laptops. When the laptop was reported missing by the sales rep, Acme would immediately revoke the digital key and thus protect the sensitive sales data stored on the laptop. When the person who stole the laptop would try to open the documents, the laptop would use the internet, find the certificate had been revoked and refuse to decrypt the sales data.
 - iii. Sales reps now began to receive weekly reports instead of the previous monthly reports. This allows for more constant updating of the sales rep of problem accounts developing or identifying new sales opportunities.
4. The VP Sales then designed a new customer sales information strategy:
 - a. Customers would now receive a monthly electronic sales report from Acme Liquor outlining where they were on the agreed upon yearly sales plan they and the sales rep had agreed upon
 - i. The electronic report used Adobe's LiveCycle to create the report drawing on data from the sales, shipping and general ledger applications
 - ii. The Acrobat document used Acme Liquor branding so that it was very professional looking
 - iii. The Acrobat document gave the customer a graphical depiction of where they were in each product category versus their sales targets
 - iv. The Acrobat document gave current outstanding orders
 - v. The Acrobat document also gave sales incentive information specifically tailored to the customer
 - vi. Customers could accept the document sent via email unsecured or, if they wanted, could request a digital key to encrypt and decrypt the documents that were being sent to them.
 1. The keys were automatically provisioned and deprovisioned to the customer by the IAM system.
 2. The customer would go online, authenticate to the Acme Liquor web page, then request a certificate if they so chose

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- to. This then made the security of the information a matter of customer choice.
- 3. When the customer ceased to be an Acme Liquor customer the IAM system would immediately revoke the digital certificate for the customer.
- vii. Key accounts could automatically extract data from the reports and easily insert it into their own data systems using XML.

This now put another line of communication with the customer in addition to the sales reps sales calls. It helped to drive customer sales upwards.

- b. If customers agreed, they would also begin to receive electronic brochures relating to new products from Acme's product producers.
 - i. Acme would control the sales chain. All sales and marketing information would be sent out from Acme and not to the customers directly by the supplier.
 - ii. The product producers would provide Acme with PDF documents. Acme would sometimes simply send out the PDF brochures directly or, in other instances, it would repackage the PDF documents and resend them out using both Acme Liquor's and the producers marketing brand.
 - iii. The electronic distribution offered Acme and its producers the following advantages:
 - 1. Reduced cost of distribution
 - 2. Increased speed of transmitting the information to the customer
 - 3. Could be integrated with sales rep calls
 - 4. Could be printed out by the customer if they wanted to
- 5. The VP Sales began to rethink communication with Acme product producers. Acme did the following:
 - a. Began to distribute sales reports back to the product producer as Adobe Acrobat PDF documents. This presented a unified electronic reporting interface for Acme and the producers.
 - b. They both agreed to use Adobe LiveCycle for the reports. This way Acme could create the reports using various applications internally via XML and the product producer could then extract the information from the reports using XML and easily insert it into their own internal applications.
 - c. Began to create web services for their shipping and billing systems. This allowed Acme and the product producers to:
 - i. Set proper security over the documents being produced and sent
 - 1. Use IAM and Adobe LiveCycle to set security policies over who can create the documents, who can view the documents, who can edit the documents and the security for the documents in electronic transit.

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- ii. Easily take information out of the documents and insert it into their own internal applications.
 - iii. Sped up the reporting system by automating portions of it.
- 6. The VP Sales then began work with IT on creating web based customer ordering systems:
 - a. They began by first working on the ordering systems and setting them up as web services.
 - b. They then had to modify their IAM systems and add customers to the identity infrastructure.
 - c. They used Abode LiveCycle forms to mimic the paper based forms the customers were currently using
 - d. Next they constructed BPEL processes over the forms
 - i. The customer would log on to Acme Liquor’s web site using their uid and password
 - ii. They then filled in the ordering forms
 - iii. The customer then digitally signs the order forms
 - iv. BPEL and LiveCycle first of all extracted customer information out of the forms and checked for authenticity of the customer and integrity of the documents
 - 1. It did this by first checking to see if the customers digital certificate is valid
 - 2. It also checks to see if the form sent and received has been changed in any way
 - v. BPEL next talks to the credit worthiness database to see if the customer’s credit limit is acceptable for the order
 - 1. If not it immediately flags the sales rep and the accounting department using the IAM system
 - 2. If it is acceptable it then accepts the order and inserts the data into the order entry systems
 - e. This was a big step forward in improving customer satisfaction over their older paper based ordering systems. 24 hours a day customers could make or check on order processes.

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SUMMARY:

The Acme Liquor Inc. VP Sales increased sales by:

- Standardizing all information paper and electronic using Adobe LiveCycle and Adobe Acrobat
- Cut down time to update sales information systems by using XML and web services
- Dramatically improved sales rep performances by providing them with weekly sales report information
- Improved sales via “touching the customer” more often via
 - Customized sales reports
 - Customized brochures and incentive information
- Happier customers
 - Better information targeted to their needs
 - Frequent contact
 - Online ordering 24 hours a day
 - Realizing early on a customer was going to have trouble meeting a sales target
- Happier product producers
 - Increase sales
 - Run more targeted marketing and sales campaigns
 - Faster response to moving markets by sales reps

Acme Liquor Sales VP also:

- Cut costs
 - Significantly reduced paper distribution costs with customers
 - Significantly reduced paper distribution costs with sales reps
 - Reduced and eliminated most paper distribution with their product producers
- Increased sales responsiveness to changing markets

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ACME FINANCIAL BUSINESS UNIT

Acme Financial Inc. is a small speciality financial boutique operating in more than fifty countries around the world. Their market is wealthy investors with net worth over \$50 million. Customers are guaranteed privacy, high quality investment advice and speciality service.

The VP Sales for Acme Financial Inc. wants to offer customers higher end services. In reviewing their market, the VP wants to:

1. Offer all investment advice in the language the customer prefers to deal in
2. Offer more secure printed statements to customers in language of their choice
3. Ensure that no one else other than the customer and only three people at Acme Financial; the Sr. VP Finance, the CEO and the account manager can view any electronic material sent to the customers
4. Use three factor authentication to the customers to access their accounts information online as well as to view any electronic documents
5. Develop highly customized marketing materials which only the VP Sales, the Account Manager and the CEO of the bank can access in addition to the customer using data.

HERE IS WHAT THE ACME FINANCIAL INC. VP SALES DID:

1. The VP and CSO first of all standardized all customer documents using Adobe LiveCycle. This allowed them to:
 - a. Control who can create the documents by using LiveCycle and IAM security policies
 - b. Control security around individual pieces of information within the forms the customer inputs
 - c. Use the existing IAM customer three factor authentication system (retina scan, password and secure ID token) for viewing the customer electronic documents
 - d. Provided Acme Financial with the ability to create secure, professional looking, highly customized customer statements in the language of the customer.
 - i. Acme developed document templates for each language of their customers.
 - ii. They then built highly secure internal web services to their financial customer applications (using XML). The web services security policies administered by IAM and LiveCycle specified that only the Sr. VP Finance, the CEO and the customer account manager can view the customer documents in addition to the customer
2. They then used BPEL to build up the customer financial statements
 - a. BPEL would first of all query the CRM web service for the customer preferred language

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- b. It would then query three customer financial systems for the data which would be presented using XML
 - c. BPEL and LiveCycle would then insert the data into the customer document template
 - d. BPEL would then forward the document to the Account Manager for comments, edits and approval
 - e. IAM/LiveCycle would first of all require a three factor authentication for the account manager to open the document.
 - f. All edits and document version control would be controlled by LiveCycle.
 - g. The account manager would digitally approve the document and digitally sign the document.
3. They then used LiveCycle and IAM to secure the documents for viewing by the customer:
- a. All documents were never sent over the internet unless requested by the customer. Instead, customers would login to the Acme Financial Inc. website using their three factor authentication. They would then be able to peruse their statements.
 - b. If the customer wanted them sent electronically, Acme Financial would encrypt the documents using the customer's public encryption key. Then they would send the document using Acme Financial's private encryption key.
 - i. The customer would first of all decrypt the document using Acme's public key. Then they would decrypt the document using their own private key. Finally they would provide the three factor authentication to view the document.
 - c. The documents were checked by LiveCycle to ensure that the documents authenticity and integrity were intact. The customer could be provided with an audit trail to determine who had opened, viewed and edited the document.
4. They used LiveCycle, XML, and IAM to create customized marketing and sales brochures for the customer:
- a. Once a customer had gone through clearance and was accepted as a possible customer of Acme Financial Inc., they filled in an online form, in the language of the customer, together with the Acme Financial Inc. Account Manager
 - b. IAM was used to register the customer's retina scan, give them a secure ID token and assign them specific privileges.
 - c. IAM was also used to provide Adobe LiveCycle with Account Manager ability to create the customer accounts.
 - d. The account information was filled in online.
 - e. The customer used a digital signature to verify the information
 - f. The account manager used their digital signature to verify the information
 - g. BPEL was used to send the documents for approval from the Senior Account Manager to open accounts.

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- h. When the approval was given, the accounts were then created by BPEL providing the information via XML to the various Acme Financial customer applications.
- i. The web service security policies internally within Acme required application authentication to verify the application was itself authenticated (using IAM) and highly secure communication between the BPEL server and the financial applications. All processes were controlled such that only the Sr. VP Finance, the CEO and the Account Manager could view details about the customer.

SUMMARY

The Acme Financial Inc. VP Sales was able to:

- Offer customer ability to deal in the document language of their choice by using Adobe, Adobe LiveCycle and information provided by Acme Financial's applications systems
- Provided extremely secure electronic documentation to the customer leverage their existing IAM customer three factor authentication system
- Provided limited ability for Acme Financial Inc's employees to view customer data:
 - Used Acme Financial Inc's IAM and LiveCycle to restrict viewing privileges to only three people
 - Used highly secure web services internally to limit viewing and/or interception of data
 - Used LiveCycle to limit who could edit the documents
 - Used LiveCycle and IAM to get Account Manager comments and approval before sending the documents out
- Used XML, IAM, LiveCycle and BPEL to create customer accounts
- Used LiveCycle, XML, IAM and BPEL to help create highly customized customer marketing materials
- Sell a secure exclusive service

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ACME MANUFACTURING INC.

Acme Manufacturing Inc. does petrochemical, oil and gas component manufacturing. It operates three manufacturing sites in Europe, Asia and South America. Most of their orders come from sales agents located around the world.

The VP of Sales for Acme Manufacturing has several challenges:

1. Retain competitive advantages over their competitors by better controlling the loss of sensitive drawings through sales agents and customers to competitors.
2. Reduce costs associated with marketing materials.
3. Desires to still use sales agents but also allow customers to order directly from Acme thus passing along to them greater discounts.
4. Wants to streamline the ordering process with sales agents.

HERE'S WHAT THE ACME MANUFACTURING INC. VP OF SALES DID:

1. The VP of Sales and VP of IT examined the different types of documents that Acme was currently using with sales agents and customers. They were producing PDF, CAD, Word, Excel and PowerPoint documents in both print and electronic format. They decided to standardize all sales documents in Adobe Acrobat PDF format. Adobe can work with CAD 3D files as well and embed them in Acrobat. By doing so they:
 - a. Created publishing standards for all customer documents
 - i. Eliminated the problems in the past with different documents being used for customers that were out of date
 - ii. Print and electronic documents would look the same
 - b. Offer the ability to display 3D images in documents that better explain how engineered components work. This will greatly help sales agents and customers understand products and drive sales.
2. They decide to use Adobe LiveCycle to:
 - a. Assign document viewing privileges for each document. Many of the documents would be viewable by almost all sales agents and customers. However, they now are able to classify sensitive documents and individually control who can view them.
 - b. Acme sales department people can individually assign viewing privileges for each document either in LiveCycle or in the Acme Manufacturing IAM system.
 - c. Provides an audit path to see who viewed the sensitive documents and when this occurred. This will help in determining when a leak occurs to competitors where it occurred and when.
 - d. Highly sensitive documents will be digitally encrypted and only able to be opened by those individuals Acme gives out encryption keys to. The encryption keys will be managed by Acme Manufacturing IAM systems. This means that when a relationship ends with sales agent, their encryption key, if they had been given one, will be immediately revoked thus protecting the Acme Manufacturing documents in the sales agents control.

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3. Use LiveCycle, IAM, BPEL and CRM to better target information to the sale agents.
 - a. The CRM contains information on what sales agents have ordered in the past
 - b. The CRM is converted to a web service.
 - c. BPEL queries the CRM web service to determine what sales agents in the past have ordered a particular part.
 - d. It then forwards the XML extract of the CRM response to Adobe LiveCycle where the information is input into targeted brochures customized with the sales agent information.
 - e. BPEL then queries the CRM and IAM web services for emailing addresses and forward the electronic brochure to the customers.
4. The VP Sales and VP IT examine the ordering process for sales agents. They eliminate most paper based processes and instead:
 - a. Use LiveCycle to prepare online ordering forms that exactly resemble current paper based forms.
 - b. Extract information out of the online forms via XML when the forms are submitted.
 - c. Use BPEL to first check if the purchase order is coming from an existing sales agent by querying the CRM.
 - i. If not, then BPEL emails a sales department clerk to do a credit check and create the account.
 - ii. If so, then BPEL runs a credit check against the company ERP web service.
 - d. If the credit check comes back satisfactory from the ERP, BPEL then inputs the data using XML to the company's ERP ordering system.
 - i. If the amount is above a pre-set level, then BPEL emails a IAM role called "PO Approver" to approve the Purchase Order.
 - ii. When approved BPEL takes over and forwards a request to the ERP system to create a customer order number.
 - e. BPEL waits for a customer order number to be issued by the ERP system. It then queries Acme's shipping system for time and delivery information.
 - f. BPEL then forwards the information to LiveCycle where a formal document on the customer order is created. LiveCycle uses security policies to determine who can view the document and edit it. For certain purchase orders over a high dollar amount, the customer order is digitally signed by LiveCycle automatically and then sent electronically to the sales agent.
5. They use a similar process for customers wanting to order directly instead. The business process flow is very similar to the one outlined above.

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SUMMARY:

The Acme Manufacturing Inc. VP of Sales has accomplished:

- Standardization of all documents the customer can receive
- Enhanced sales by using CAD 3D drawing in PDF
- Mitigated risk of sensitive documents being given to the competition
- Streamlined their ordering business process with sales agents
- Reduced ordering processing times and costs
- Offered their customers direct ordering ability
- Created customized, targeted brochures aimed at specific customers based on their previous buying history
- Reduced existing sales costs by significantly reducing the amount of paper being produced and sent out to customers and sales agents

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CONCLUSION

The wide variety of examples used in this paper demonstrates the positive sales results that can be achieved by rethinking sales business processes. The integration of XML, web services, DRM, IAM and BPEL offers sales executives the opportunity to:

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

A separate paper “[Five Reasons Why the VP Sales Should Rethink Their Business Processes](#)” explaining each of the technologies used in this paper should be read.

The integration of the technologies is not a panacea for all sales challenges. There will be old applications where the cost to convert them to XML and/or convert the application to a web service will not cost justify. However, there will be many, many processes where this can be done and implemented cost effectively, relatively quickly and with a high ROI.

Your enterprise likely has many of the components already in place. You probably have:

- An enterprise identity directory
- Some form of an Identity and Access Management (IAM) system
- Some XML already being used
- Adobe PDF documents in use

If so, you need to add to this:

- BPEL server
- Adobe LiveCycle license
- Perhaps update the IAM to be able to do web service enforcement

In this case, the costs of deployment are relatively low. Deployment times of 30-120 days are possible for simple business processes if you already have the above infrastructure in place.

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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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