SCENARIO — CUSTOMER REQUIRES DIGITAL BUSINESS PRODUCT

Find | Buy | Use

Customer

- Customer has a need
- Customer calls TBC centre
- Provides dealer previous usage info
- Considers quoted options
- Accept quote
- Reject quote
- Provides information and approval signature
- Complete & sign application forms
- Call Telstra call centre to change time
- Technical visit by Telstra technician
- Call dealer to enquire about status
- Discuss status info
- Products Activated
- First Bill
- Confused about bill

Dealer Tasks

- Discuss needs with customer
- Qualify customer information
- Updates own CRM tool with customer info
- Gets product info from Retail Live
- Generates quotes (considering commissions & needs)
- Presents quotes and brochures
- Gathers required forms and completes information
- Get configuration details
- Complete application forms
- Scan application forms & store
- TBC admin enters order into DB OOT
- Submit saved order in DB OOT
- Look up status in DB OOT
- If can not understand call Dealer Care quoting TRN to discuss status
- Completion advice email
- Gets client to email bill so can translate it
- Commission Paid
- Commission Claim if not paid

Telstra FOH

- SEP — Product Info
- DC — Customer Info — SEP
- SEP — SEP check order in OOT
- Call — Communication about technical visit
- Call — Change appointment time
- DC — Look up orders on internal systems
- TAT — Completion advice

Telstra BOH

- Provisioning processes
- Bill generated
- Internal Finance Department

Artefacts/Tools

- Customer info .spreadsheet from SEP
- Internal CRM
- Marketing Collatoral
- Retail Live
- MaxIm (customer data)
- Marketing Collateral
- Quote
- Retail Live
- Application & Configuration forms
- Follow up emails
- Provisioning communications
- DB OOT
- DB OOT
- Provisioning communications (completion advice email)
- Customer Bill
- ICE
- Follow up emails

Irritatants

- Having to call Telstra / SEP for customer info (delay)
- Can not see current services or usage information / rely on a request to their SEP or a call to Dealer Care
- Hard to find/search for information on Retail Live - Telstra customers can be identified in various ways (ABN, CIDN)

- Cant print or download form for Digital Business from Retail Live (current bug)
- Dealers don't know who to contact at Telstra to get this form

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- Getting forms signed is a very manual process

- Having to go onsite to get authorisation signature or get client to scan and email forms with signature

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- Admin person has to send a draft of order to SEP to review before it goes into OOT
- OOT tool sometimes crashes while entering info and data is lost

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- No ability to organise site visits / no visibility either

- Multiple templates/formats for communication emails
- DTOW information often vague
- Hard to chase down status of orders
- If order has an assigned case manager it can get hard to follow up with them directly

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- No visibility for tech visits
- Do not always receive completion advice communications

- Challenging to explain bill to customer (lack of info)

- Commission claims time consuming and manual process
- Claims take too long to pay
- Have to track job completion and submit for commission payment manually

Dealer Needs

- Customer usage data (if existing customer) and other information
- Solid awareness of Telstra products
- Awareness of relevant bundles/campaigns
- Marketing collateral to share with client

- Who to call for different problems
- Who to escalate problems to (particularly problematic for dealers without Telstra SEPs)

- Easy way to collect the customer information needed for provisioning of orders
- Understanding of ordering processes and time-frames

- Easy way for customers to authorise orders
- Easy way for dealers to give Telstra required information

- Understand how to fill out forms on OOT tool

- Visibility of technician appointments and ability to modify them

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- Status tracking
- Understanding of order rejections (DTOW) and actions required to progress order
- Understanding of escalation processes and who to call within Telstra for different issues
- One point of contact for specific orders

- Visibility of tech appointments
- Ability to amend tech appointments
- Need to know when orders are complete
- Need to know when related orders are complete

- Access to billing info

- Ability to track and enter commission claims
- Ability to generate reports financial data

Opportunities

- Product Training
- Up to date product and bundle information
- Share related internal communications and updates in regards to product pricing plans, product launches, etc... with dealers
- Access to customer data required for ordering and quoting

- Online ordering via a unified portal (in future) for now:
- Standard application form formats
- Review application forms - consolidate some fields and remove redundant customer information
- Provide consistent way (info architecture) for dealers to access forms for different products on Retail Live
- Verify customer details when both customers and dealers call FOH to continually update customer database

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- Application forms pre-populated with customer data and on-line completion and submission
- One ordering portal across all products with ordering forms for different products following a similar flow.
- Streamline ordering of different products to similar process
- Training on ordering process/time-frames
- A online help chat for dealers with queries

- Enable sales staff to submit orders and config data via ipad
- Voice & digital signatures
- Train sales staff to use easy to use ordering portal

- Provide contextual help with ordering tool
- Online ordering
- Review of ordering tools and identify opportunities to amalgamate/consolidate some systems
- Provide training on products and ordering tools

- Visibility of customer notes and ability to change appt times

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- Online status tracking with access to notes
- Training about escalation processes
- Visibility of order related notes (maxim)
- Clear communication in English not Telstra speak

- Status tracking through a portal that shows status of related orders as well
- Visibility of notes relating to technical visits and a form to change appointment times on behalf of client

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- Billing visibility for their customers orders

- Easy to use commission functionality on a web portal

LEGEND

- DC — Dealer Care
- SEP — Service Edge Professional
- Call — Telstra Call Center
- TAT — Telstra Activations Teams
- tool — Telstra/dealer tool
- tool — Telstra only tool
- tool — Dealer internal tool
- can happen