VERSION
1.0

CCOR®

CUSTOMER CHAIN OPERATIONS REFERENCE MODEL

APICS SUPPLY CHAIN COUNCIL

Customer Chain Operations Reference Model

(CCOR)

Version 1.0

Table of Contents

Introduction

Background - The BPM Customer Chain Reference Model was developed by the Business Process Management organization of Hewlett-Packard. This model has to date served as the starting point for process modeling efforts by providing BPM modelers a core set of high-level common business processes for the Customer Chain and a common language for the exchange of process knowledge in this business domain.

The Model's structure is inspired by that of the Supply Chain Operations Reference Model (SCOR).

June, 2004 - Reference Model Released to APICS Supply Chain Council

The Change Process

This paragraph describes the process for subject matter experts and consultants to provide inputs and review proposals for changes to the reference model.

Customer-Chain Operations Reference-model

Process Identifier	**Customer Chain**
Description	The Customer Chain domain is defined as the collection of business activities associated with all phases of converting customer (segments) into orders. The Customer Chain distinguishes 3 process types: Planning processes; Execution Processes; and Enabling processes. Planning processes balance aggregated demand across a consistent planning horizon. Planning processes generally occur at regular intervals and can contribute to Customer Chain response time. Execution processes are triggered by planned or actual events. Execution processes include customer visits, responding to customer inquiries, creation of customer solutions, processing of claims and support calls. Enable processes prepare, maintain, and manage information or relationships upon which planning and execution processes rely

Child Processes

- P : Plan
- R : Relate
- S : Sell
- C : Contract
- A : Assist

P: Plan

Process Identifier	**P : Plan**
Description	Planning processes prioritize sales activities and assign sales targets to Customer Chain resources. Planning processes generally occur at regular intervals

Child Processes

▪ EP : Enable Plan ▪ PA : Plan Assist ▪ PC : Plan Contract ▪ PP : Plan Customer Chain ▪ PR : Plan Relate ▪ PS : Plan Sell

Key Inputs	Key Outputs
▪ R: Relate ▪ S: Sell ▪ C: Contract ▪ A: Assist	▪ R: Relate ▪ S: Sell ▪ C: Contract ▪ A: Assist

Process Identifier	**EP : Enable Plan**
Description	Enable Plan (Customer Chain) is the collection of processes to prepare, maintain, and manage information or relationships upon which Customer Chain planning processes rely.

Child Processes
▪ EP.01 : Manage Plan Business Rules ▪ EP.02 : Manage Customer Chain Performance ▪ EP.03 : Manage Plan Information ▪ EP.04 : Manage Customer Pricing ▪ EP.05 : Manage Customer Chain Assets ▪ EP.06 : Manage Knowledge Transfer ▪ EP.07 : Manage Customer Chain Configuration ▪ EP.08 : Manage Plan Regulatory Compliance ▪ EP.09 : Align Sales Plan with Financial Plan

Process Identifier	**EP.01 : Manage Plan Business Rules**
Description	The process of establishing, maintaining, and enforcing decision support criteria for customer chain planning which translate to rules for conducting business, i.e. developing and maintaining customer standards of an entire customer chain such as service levels, given service requirements by customer chain stakeholders, partners and customers. Business rules align Plan process policies with business strategy, goals, and objectives.

Key Inputs	Key Outputs
▪ input from Process Step: EP.08 : Manage Plan Regulatory Compliance (CC)	▪ Business Rules

▪ Business Rules ▪ Business Rules from Process Step: EP.04 : Manage Customer Pricing	

Process Identifier	**EP.02 : Manage Customer Chain Performance**
Description	The process of measuring actual integrated Customer Chain performance against internal and/or external standards to develop and implement a course of action to achieve targeted performance levels. Performance targets established for the execution of Customer Chain processes are reflected in the process elements for Plan, i.e. sales, pricing, cost, reliability, cycle time, responsiveness, and assets.

Key Inputs	Key Outputs
▪ input from Process Step: EP.03 : Manage Plan Information	▪

Process Identifier	**EP.03 : Manage Plan Information**
Description	The process of collecting, integrating and maintaining the accuracy of planning and execution information necessary to plan and execute the integrated Customer Chain. This includes sales targets and actuals, pricing targets and actuals, sales resources (people) and compensation, etc.

Key Inputs	Key Outputs
▪ Customer Chain Plan ▪ Relate Plan ▪ Contract Plan ▪ Sell Plan ▪ Assist Plan ▪ input from Process Step: EP.06 : Manage Knowledge Transfer	▪ Plan Data ▪ output to Process Step: EP.02 : Manage Customer Chain Performance ▪ output to Process Step: EP.06 : Manage Knowledge Transfer

Process Identifier	**EP.04 : Manage Customer Pricing**
Description	The process of defining, maintaining and enforcing customer or customer group pricing strategy, approval processes and alignment processes to business goals. The Business Development domain inputs product pricing into these processes.

Key Inputs	Key Outputs
▪ Product Pricing Data	▪ Customer Pricing ▪ Business Rules to Process Step: EP.01 : Manage Plan Business Rules

Process Identifier	**EP.05 : Manage Customer Chain Assets**
Description	The process of acquiring, maintaining and dispositioning an organization's Customer Chain capital assets. This includes automation tools to capture, store and deliver customer information (e.g. CRM systems) and facilities like customer centers, call centers, sales offices, etc

Key Inputs	Key Outputs
▪ input from Process Step: EP.07 : Manage Customer Chain Configuration	▪ output to Process Step: EP.07 : Manage Customer Chain Configuration

Process Identifier	**EP.06 : Manage Knowledge Transfer**
Description	The process of defining a Customer Chain knowledge transfer strategy and maintaining the information, which characterizes total Customer Chain knowledge management requirements. This includes creation and maintenance of training materials, delivery of training, and availability and accessibility of product information.

Key Inputs	Key Outputs
▪ input from Process Step: EP.03 : Manage Plan Information	▪ output to Process Step: EP.03 : Manage Plan Information

Process Identifier	**EP.07 : Manage Customer Chain Configuration**
Description	The process of defining, establishing, and maintaining the business model for a specific combination of product line, customer (group), market and geographic location.

Key Inputs	Key Outputs
▪ Customer Chain Plan ▪ input from Process Step: EP.05 :	▪ output to Process Step: EP.05 : Manage Customer Chain Assets

Manage Customer Chain Assets	

Process Identifier	EP.08 : Manage Plan Regulatory Compliance
Description	The process of identifying and complying with regulatory documentation and process standards set by external entities (e.g. government).

Key Inputs	Key Outputs
▪	▪ output to Process Step: EP.01 : Manage Plan Business Rules

Process Identifier	EP.09 : Align Sales Plan with Financial Plan
Description	The process of revising the long-term customer chain capacity and resource plans, given the inputs from the strategic and business plans. This includes revision of not only aggregate forecast and projections related to customer chain, Relate, Sell, and Contract plans, but also business assumptions.

Key Inputs	Key Outputs
▪ input from input: Finance, Tax & Treasury Processes	▪ Finance, Tax & Treasury Processes ▪ Revised Business Assumptions

Process Identifier	PA : Plan Assist
Description	The development and establishment of courses of action for specified time periods to ensure alignment of resources to requirements and identification of gaps. E.g. Support call center staff planning, infrastructure (web server/telecom) capacity planning, repair staff planning (warranty).

Child Processes
▪ PA.01 : Gather Assist Requirements ▪ PA.02 : Gather Assist Resources ▪ PA.03 : Balance Assist Requirements with Resources ▪ PA.04 : Publish Assist Plan

Process Identifier	PA.01 : Gather Assist Requirements
Description	The process of identifying, prioritizing, and considering as a whole with constituent parts, all sources of demand for post sales or post delivery

	support.

Key Inputs	Key Outputs
▪ Plan Data ▪ Customer Chain Plan	▪ output to Process Step: PA.03 : Balance Assist Requirements with Resources

Process Identifier	**PA.02 : Gather Assist Resources**
Description	The process of identifying, evaluating, and considering, as a whole with constituent parts, all resources that add value in post sales or post delivery support

Key Inputs	Key Outputs
▪ Plan Data	▪ output to Process Step: PA.03 : Balance Assist Requirements with Resources

Process Identifier	**PA.03 : Balance Assist Requirements with Resources**
Description	The process of developing a time-phased course of action that commits Assist resources to meet post sales and post delivery support requirements. This may include: support call center planning, repair (staff) planning, materials demand planning (as an input to support supply chain), etc

Key Inputs	Key Outputs
▪ input from Process Step: PA.02 : Gather Assist Resources ▪ input from Process Step: PA.01 : Gather Assist Requirements ▪ Business Rules ▪ Assist Schedule	▪ output to Process Step: PA.04 : Publish Assist Plan

Process Identifier	**PA.04 : Publish Assist Plan**
Description	The process of establishing and communicating the Assist plan

Key Inputs	Key Outputs
▪ input from Process Step: PA.03 : Balance Assist Requirements with	▪ Assist Plan

Resources	

Process Identifier	**PC : Plan Contract**
Description	The development and establishment of courses of action for specified time periods to ensure alignment of resources to requirements and identification of gaps. E.g. sales call center staff planning, infrastructure (web server/telecom) capacity planning, field sales staff planning.

Child Processes
▪ PC.01 : Gather Contract Requirements ▪ PC.02 : Gather Contract Resources ▪ PC.03 : Balance Contract Requirements with Resources ▪ PC.04 : Publish Contract Plan

Process Identifier	**PC.01 : Gather Contract Requirements**
Description	The process of identifying, prioritizing, and considering as a whole with constituent parts, all sources of demand for quotation.

Key Inputs	Key Outputs
▪ Customer Chain Plan ▪ Plan Data	▪ output to Process Step: PC.03 : Balance Contract Requirements with Resources

Process Identifier	**PC.02 : Gather Contract Resources**
Description	The process of identifying, evaluating, and considering, as a whole with constituent parts, all resources that add value in quotation processes.

Key Inputs	Key Outputs
▪ Plan Data ▪ Sell Plan	▪ output to Process Step: PC.03 : Balance Contract Requirements with Resources

Process Identifier	**PC.03 : Balance Contract Requirements with Resources**

Description	The process of developing a time-phased course of action that commits Contract resources to meet quotation requirements. This may include: call center planning, customer pricing planning, etc.

Key Inputs	Key Outputs
▪ input from Process Step: PC.02 : Gather Contract Resources ▪ input from Process Step: PC.01 : Gather Contract Requirements ▪ Business Rules ▪ Contract Schedule	▪ output to Process Step: PC.04 : Publish Contract Plan ▪

Process Identifier	**PC.04 : Publish Contract Plan**
Description	The process of establishing and communicating the Contract plan

Key Inputs	Key Outputs
▪ input from Process Step: PC.03 : Balance Contract Requirements with Resources	▪ Contract Plan

Process Identifier	**PP : Plan Customer Chain**
Description	The development and establishment of courses of action over specified time periods that represent a projected appropriation of Customer Chain resources to meet Customer Chain requirements.

Child Processes
▪ PP.01 : Gather Customer Chain Requirements ▪ PP.02 : Gather Customer Chain Resources ▪ PP.03 : Balance Customer Chain Requirements with Resources ▪ PP.04 : Establish Customer Chain Plans

Process Identifier	**PP.01 : Gather Customer Chain Requirements**
Description	The activities associated with identifying, aggregating, and prioritizing all sources of demand for the integrated Customer Chain. This includes the product life cycle forecast, market (segment) information and

	business (financial) goals.

Key Inputs	Key Outputs
▪ Business Plan ▪ Plan Data ▪ Revised Business Assumptions	▪ output to Process Step: PP.03 : Balance Customer Chain Requirements with Resources

Process Identifier	**PP.02 : Gather Customer Chain Resources**
Description	The activities associated with identifying, aggregating, and prioritizing all resources of the integrated Customer Chain. This includes realized revenue, order book, Customer Chain resources (account agents, sales people, call center staff, etc), customer portfolio (inventory of active and inactive accounts).

Key Inputs	Key Outputs
▪ Plan Data	▪ output to Process Step: PP.03 : Balance Customer Chain Requirements with Resources

Process Identifier	**PP.03 : Balance Customer Chain Requirements with Resources**
Description	The process of identifying and measuring the gaps and imbalances between demand (goals and targets) and resources in order to determine how to best address the variances through marketing (pricing, promotions), sales (new customers, customer engagements), and fulfillment (prioritization).

Key Inputs	Key Outputs
▪ PP.01 : Gather Customer Chain Requirements ▪ PP.02 : Gather Customer Chain Resources ▪ Business Rules	▪ PP.04 : Establish Customer Chain Plans

Process Identifier	**PP.04 : Establish Customer Chain Plans**
Description	The establishment and communication of courses of action and targets for the integrated Customer Chain.

Key Inputs	Key Outputs

▪ PP.03 : Balance Customer Chain Requirements with Resources	▪ Customer Chain Plan

Process Identifier	**PR : Plan Relate**
Description	The development and establishment of courses of action for specified time periods to ensure alignment of resources to requirements and identification of gaps. E.g. lead/prospect conversion quota, staff planning.
Child Processes	
▪ PR.01 : Gather Relate Requirements ▪ PR.02 : Gather Relate Resources ▪ PR.03 : Balance Relate Requirements with Resources ▪ PR.04 : Publish Relate Plan	

Process Identifier	**PR.01 : Gather Relate Requirements**
Description	The process of identifying, prioritizing, and considering as a whole with constituent parts, all sources of demand for relationship management.
Key Inputs	Key Outputs
▪ Plan Data ▪ Customer Chain Plan	▪ PR.03 : Balance Relate Requirements with Resources

Process Identifier	**PR.02 : Gather Relate Resources**
Description	The process of identifying, evaluating, and considering, as a whole with constituent parts, all resources that add value in relationship management processes.
Key Inputs	Key Outputs
▪ Plan Data	▪ PR.03 : Balance Relate Requirements with Resources

Process Identifier	**PR.03 : Balance Relate Requirements with Resources**

Description	The process of developing a time-phased course of action that commits Relate resources to meet relationship management requirements. This may include: lead/prospect planning, sales team planning, etc.

Key Inputs	Key Outputs
▪ PR.01 : Gather Relate Requirements ▪ PR.02 : Gather Relate Resources ▪ Business Rules ▪ Relate Schedule	▪ PR.04 : Publish Relate Plan

Process Identifier	**PR.04 : Publish Relate Plan**
Description	The process of establishing and communicating the Relate plan.

Key Inputs	Key Outputs
▪ PR.03 : Balance Relate Requirements with Resources	▪ Relate Plan

Process Identifier	**PS : Plan Sell**
Description	The development and establishment of courses of action for specified time periods to ensure alignment of resources to requirements and identification of gaps. E.g. sales quota, sales call center staff planning, field sales staff planning.

Child Processes	
▪ PS.01 : Gather Sell Requirements ▪ PS.02 : Gather Sell Resources ▪ PS.03 : Balance Sell Requirements with Resources ▪ PS.04 : Publish Sell Plan	

Process Identifier	**PS.01 : Gather Sell Requirements**
Description	The process of identifying, prioritizing, and considering as a whole with constituent parts, all sources of demand for selling products and services.

Key Inputs	Key Outputs
▪ Customer Chain Plan	▪ PS.03 : Balance Sell

▪ Plan Data	Requirements with Resources

Process Identifier	**PS.02 : Gather Sell Resources**
Description	The process of identifying, evaluating, and considering, as a whole with constituent parts, all resources that add value in selling processes.

Key Inputs	Key Outputs
▪ Plan Data ▪ Relate Plan	▪ PS.03 : Balance Sell Requirements with Resources ▪

Process Identifier	**PS.03 : Balance Sell Requirements with Resources**
Description	The process of developing a time-phased course of action that commits Sell resources to meet selling requirements. This may include: sales quota planning, sales team planning, etc.

Key Inputs	Key Outputs
▪ PS.01 : Gather Sell Requirements ▪ Business Rules ▪ Sell Schedule ▪ PS.02 : Gather Sell Resources	▪ PS.04 : Publish Sell Plan

Process Identifier	**PS.04 : Publish Sell Plan**
Description	The process of establishing and communicating the Sell plan.

Key Inputs	Key Outputs
▪ PS.03 : Balance Sell Requirements with Resources	▪ Sell Plan

R : Relate

Process Identifier	**R : Relate**
Description	The process of establishing and maintaining relationships with customers and intermediaries.

	This includes selecting the engagement model (grouped accounts), assigning an account manager/team (intermediary/named accounts), obtaining the customer's needs (intermediary/named accounts) and establishing the customer's profile

Child Processes	
▪ ER : Enable Relate ▪ R1 : Relate to Intermediary ▪ R2 : Relate to Grouped Account ▪ R3 : Relate to Named Account	
Key Inputs	**Key Outputs**
▪ P: Plan ▪ S: Sell ▪ C: Contract	▪ P: Plan ▪ S: Sell ▪ C: Contract

Process Identifier	**ER : Enable Relate**
Description	Enable Relate is the collection of processes to prepare, maintain, and manage information or relationships upon which Relate execution processes rely.

Child Processes	
▪ ER.01 : Manage Relate Business Rules ▪ ER.02 : Manage Relate Performance ▪ ER.03 : Manage Relate Information ▪ ER.04 : Manage Customer Portfolio ▪ ER.05 : Manage Relate Capital Assets ▪ ER.06 : Manage Relate Knowledge Transfer ▪ ER.07 : Manage Relate Network ▪ ER.08 : Manage Relate Regulatory Compliance	

Process Identifier	**ER.01 : Manage Relate Business Rules**
Description	The process of defining requirements and establishing, maintaining, and enforcing decision support criteria, in alignment with business strategy, goals, and objectives. The business strategy defines the criteria for Relate business rules that are translated into guidelines, policies and engagement models for establishing and maintaining relationships with intermediaries (partners), groups of similar customers (grouped accounts) and named accounts.

	Relate business rules include: engagement models, customer selection and classification processes and approval criteria and processes.

Key Inputs	Key Outputs
▪ Rules of Engagement ▪ ER.08 : Manage Relate Regulatory Compliance ▪ Business Rules ▪ ER.04 : Manage Customer Portfolio	▪ Business Rules ▪ Conformance Issue ▪

Process Identifier	**ER.02 : Manage Relate Performance**
Description	The process of measuring actual performance against internal and/or external standards and goals of customer retention, customer satisfaction and financial performance.

Key Inputs	Key Outputs
▪ ER.03 : Manage Relate Information	▪ ER.07 : Manage Relate Network

Process Identifier	**ER.03 : Manage Relate Information**
Description	The process of collecting, sorting, defining hierarchy and managing information in support of Relate planning and execution processes. The information managed includes: customer, customer organization, customer classification, market (segment), customer requirements, status, and history.

Key Inputs	Key Outputs
▪ ER.06 : Manage Relate Knowledge Transfer ▪ ER.04 : Manage Customer Portfolio	▪ ER.02 : Manage Relate Performance ▪ ER.06 : Manage Relate Knowledge Transfer ▪ ER.04 : Manage Customer Portfolio

Process Identifier	**ER.04 : Manage Customer Portfolio**

Description	The collection of processes of defining, maintaining and enforcing intermediary, customer group and customer profiles. This includes setting, maintaining and distributing customer profiles, group profiles and classification guidelines. The Business Development domain inputs market segmentation information to these processes. This includes setting and applying rules for retaining and archiving customer information and customer history.

Key Inputs	Key Outputs
▪ ER.03 : Manage Relate Information ▪ Customer Profile	▪ ER.03 : Manage Relate Information ▪ ER.01 : Manage Relate Business Rules

Process Identifier	**ER.05 : Manage Relate Capital Assets**
Description	The process of acquiring, maintaining and dispositioning an organization's capital assets related to relationship management. This includes automation tools to capture, store and deliver customer information (e.g. CRM systems) and facilities like customer centers.

Key Inputs	Key Outputs
▪ ER.07 : Manage Relate Network	▪ ER.07 : Manage Relate Network

Process Identifier	**ER.06 : Manage Relate Knowledge Transfer**
Description	The process of defining a Relate knowledge transfer strategy and maintaining the information, which characterizes total Relate knowledge management requirements. This includes creation and maintenance of training materials, delivery of training, and availability and accessibility of customer information.

Key Inputs	Key Outputs
▪ ER.03 : Manage Relate Information	▪ ER.03 : Manage Relate Information

Process Identifier	**ER.07 : Manage Relate Network**

Description	The process of defining, establishing, and maintaining the business model for a specific combination of product line, customer (group), market and geographic location. And the process of defining and maintaining a network of suppliers for customer information. This includes approved background information providers on customers (credit bureaus, etc).

Key Inputs	Key Outputs
▪ ER.05 : Manage Relate Capital Assets ▪ Relate Plan ▪ ER.02 : Manage Relate Performance	▪ ER.05 : Manage Relate Capital Assets

Process Identifier	**ER.08 : Manage Relate Regulatory Compliance**
Description	The process of identifying and complying with regulatory documentation and process standards set by external entities (e.g. government).

Key Inputs	Key Outputs
▪	▪ ER.01 : Manage Relate Business Rules

Process Identifier	**R1 : Relate to Intermediary**
Description	The process of converting markets/segments into customers by establishing and maintaining relationships with intermediaries (e.g. channel partners, resellers, retailers, etc). This includes gathering partner information, obtaining understanding of channels and partners needs and identifying product and/or service offerings for the channel partner.

Child Processes

- R1.01 : Identify Intermediaries
- R1.02 : Assign Account
- R1.03 : Define Engagement Model
- R1.04 : Obtain Customer Needs
- R1.05 : Establish Customer Profile
- R1.06 : Release to Sell

Process Identifier	**R1.01 : Identify Intermediaries**
Description	The activities of receiving and logging a request to establish intermediary profiles. This process can be driven by Relate plans or external companies requesting a intermediary business relationship. Prospect intermediaries are identified and initially reviewed based on decision support criteria maintained in ER.01 : Manage Relate Business Rules.

Key Inputs	Key Outputs
▪ Relate Plan	▪ R1.02 : Assign Account Manager

Process Identifier	**R1.02 : Assign Account Manager**
Description	For each of the prospect intermediaries an account manager will be assigned. This includes scheduling the account management resources.

Key Inputs	Key Outputs
▪ R1.01 : Identify Intermediaries	▪ R1.03 : Define Engagement Model ▪ Relate Schedule

Process Identifier	**R1.03 : Define Engagement Model**
Description	The activities of defining the engagement model for the interaction with the prospect intermediary. Each intermediary may require a unique engagement model or multiple intermediaries may share a 'standard' engagement model. The engagement models are collected in ER : Enable Relate for potential reuse.

Key Inputs	Key Outputs
▪ R1.02 : Assign Account Manager	▪ R1.04 : Obtain Customer Needs

▪ Business Rules	▪ Rules of Engagement

Process Identifier	**R1.04 : Obtain Customer Needs**
Description	The activities of collecting, aggregating, and reviewing customer requirements. Information gathered may include: business processes and practices, product lines, credit line, etc.

Key Inputs	Key Outputs
▪ R1.03 : Define Engagement Model ▪ Customer Profile	▪ R1.05 : Establish Customer Profile

Process Identifier	**R1.05 : Establish Customer Profile**
Description	The activities of collecting customer information and establishing or maintaining a customer profile. Information gathered may include: company size, organization structure, financial performance, business processes and practices, credit line, history, etc. The definition of the content of a customer profile is maintained in ER : Enable Relate processes.

Key Inputs	Key Outputs
▪ R1.04 : Obtain Customer Needs	▪ R1.06 : Release to Sell ▪ Customer Profile

Process Identifier	**R1.06 : Release to Sell**
Description	The activities associated with handing the intermediary profile over to the Sell process. This may include a review of the prospect intermediary, resulting in the decision not to pursue a relationship with the prospect and closing and archiving the customer profile.

Key Inputs	Key Outputs
▪ R1.05 : Establish Customer Profile	▪

Process Identifier	**R2 : Relate to Grouped Account**

Description	The process of establishing and maintaining relationships directly with grouped account customers. This includes selecting the engagement model and the account group and establishing the customer profile.

Child Processes	

- R2.01 : Select Engagement Model
- R2.02 : Establish/Update Customer Profile
- R2.03 : Select Account Group
- R2.04 : Release to Sell

Process Identifier	**R2.01 : Select Engagement Model**
Description	The activities of selecting the model for the customer relationship. The selection may involve an understanding of the customer and/or the customer's needs. Engagement models for grouped accounts are standard shared models that are established in the 'Manage Relate Business Rules' enable process.

Key Inputs	Key Outputs
▪	▪

Process Identifier	**R2.02 : Establish/Update Customer Profile**
Description	The activities of collecting customer information to establish or maintain a customer profile. The content definition that drives what is collected for a customer profile is maintained by the enable process, 'Manage Customer Portfolio' (can differ for each customer segment or selling motion). The processes for maintaining the customer's profile data are defined by the enable process 'Manage Relate Information'.

Key Inputs	Key Outputs
▪	▪

Process Identifier	**R2.03 : Select Account Group**
Description	The activities of selecting an account group for the customer. Selection may be based on information

	provided by the customer (captured in the customer profile) or based on information generated by the contact tool the customer uses. The rules that are used to select the account group are established by the enable process, 'Manage Relate Business Rules'.

Key Inputs	Key Outputs
▪ Business Rules	▪ R2.04 : Release to Sell ▪ Customer Profile

Process Identifier	**R2.04 : Release to Sell**
Description	The activities of transitioning the customer over to the Sell or Quote process. This activity may include the creation of one or more sales opportunities or the distribution of customer information in support of other processes. It may involve a qualification process to determine if the customer should continue onto the sell process or establishing an account for the customer.

Key Inputs	Key Outputs
▪ R2.03 : Select Account Group	▪

Process Identifier	**R3 : Relate to Named Account**
Description	The process of establishing and maintaining relationships directly with named account customers. This includes assigning the account team, defining the engagement model, obtaining customer needs and establishing the customer profile.

Child Processes	
▪ R3.01 : Qualify Customer ▪ R3.02 : Assign Account Team ▪ R3.03 : Define Engagement Model ▪ R3.04 : Obtain Customer Needs ▪ R3.05 : Establish/Update Customer Profile ▪ R3.06 : Communicate Named Account Business Rules ▪ R3.07 : Release to Sell ▪ R3.08 : Identify Prospective Customer	

Process Identifier	**R3.01 : Qualify Customer**

Description	The activities of receiving and approving a request to create a named account for a customer. The request can be lead-generated or a request from a customer directly. The prospect account is reviewed then approved or denied based on criteria defined by the enable process, 'Manage Relate Business Rules'.

Key Inputs	Key Outputs
▪	▪

Process Identifier	**R3.02 : Assign Account Team**
Description	The activities of assigning an account manager or account team to the account. The business rules for assignment are defined by the enable process, 'Manage Relate Business Rules'. The scheduling of the account management resources, an input into the assignment process, is managed by the enable process, 'Manage Relate Network'.

Key Inputs	Key Outputs
▪	▪ R3.03 : Define Engagement Model ▪ Relate Schedule

Process Identifier	**R3.03 : Define Engagement Model**
Description	The activities of defining the model for selling to the customer based on the customer and their needs. It may include defining the activities, roles and task ownership. Each customer may require a unique engagement model and may utilize a standard engagement model as a starting point. Standard engagement models and guidelines for named accounts are managed in the 'Manage Relate Business Rules' enable process.

Key Inputs	Key Outputs
▪ R3.02 : Assign Account Team ▪ Conformance Issue	▪ R3.04 : Obtain Customer Needs

Process Identifier	**R3.04 : Obtain Customer Needs**
Description	The activities of collecting and reviewing customer needs and identifying the customer's problems. The information gathered may include general product and service needs, overall financing needs, timelines and problems or gaps of current solutions.

Key Inputs	Key Outputs
▪ R3.03 : Define Engagement Model ▪ Customer	▪

Process Identifier	**R3.05 : Establish/Update Customer Profile**
Description	The activities of collecting customer information to establish or maintain a customer profile. The content definition that drives what is collected for a customer profile is maintained by the enable process, 'Manage Customer Profile' (can differ for each customer segment or selling motion). The processes for maintaining the customer's profile data are defined by the enable process 'Manage Relate Information'.

Key Inputs	Key Outputs
▪	▪

Process Identifier	**R3.06 : Communicate Named Account Business Rules**
Description	The activities of documenting and communicating the processes, requirements, and service levels to relevant internal and external process owners - like Deliver and Return in supply chain and Contract and Assist in Customer Chain.

Key Inputs	Key Outputs
▪	▪ R3.07 : Release to Sell ▪ Business Rules

Process Identifier	**R3.07 : Release to Sell**

Description	The activities of transitioning the customer over to the Sell or Quote process. This activity may include the creation of one or more sales opportunities or the distribution of customer information in support of other processes. It may involve a qualification process to determine if the customer should continue onto the sell process or establishing an account for the customer.

Key Inputs	Key Outputs
▪ R3.06 : Communicate Named Account Business Rules	▪

Process Identifier	**R3.08 : Identify Prospective Customer**
Description	The activities involved in compiling and assessing customer leads or the creation of new leads by sales representatives or others resulting in the identification of a specific prospective customer.

Key Inputs	Key Outputs
▪	▪

S: Sell

Process Identifier	**S: Sell**
Description	The process of establishing an understanding of the customer's needs and presenting and/or developing a solution to meet those needs. This includes refining the customer's profile (intermediary/named accounts), developing and presenting the business model (intermediary), listing the proposed solutions (grouped accounts), developing a detailed solution (named accounts) and educating the customer on the product (grouped accounts).

Child Processes	
▪ ES : Enable Sell ▪ S1 : Sell to Intermediary ▪ S2 : Sell to Grouped Account ▪ S3 : Sell to Named Account	

Key Inputs	Key Outputs
▪ P: Plan	▪ P: Plan

▪ R: Relate ▪ C: Contract	▪ R: Relate ▪ C: Contract

Process Identifier	**ES : Enable Sell**
Description	Enable Sell is the collection of processes to prepare, maintain, and manage information or relationships upon which Sell execution processes rely
Child Processes	
▪ ES.01 : Manage Sell Business Rules ▪ ES.02 : Manage Sell Performance ▪ ES.03 : Manage Sell Information ▪ ES.04 : Manage Solution Portfolio ▪ ES.05 : Manage Sell Capital Assets ▪ ES.06 : Manage Sell Knowledge ▪ ES.07 : Manage Sell Network ▪ ES.08 : Manage Sell Regulatory Compliance ▪ ES.09 : Manage Sales Force Compensation	

Process Identifier	**ES.01 : Manage Sell Business Rules**
Description	The process of defining, maintaining, and enforcing rules which affect the selling of products and services. The Sell business rules provide criteria that are translated into guidelines, policies and engagement models for selling products and services to intermediaries (partners), groups of similar customers (grouped accounts) and named accounts. Sell business rules include: engagement models and product offering guidelines
Key Inputs	Key Outputs
▪ ES.08 : Manage Sell Regulatory Compliance ▪ Business Rules	▪ Business Rules

Process Identifier	**ES.02 : Manage Sell Performance**
Description	The process of defining the requirement and monitoring the performance of selling products and services against internal and/or external standards

	and goals of customer retention, customer satisfaction and financial performance.

Key Inputs	Key Outputs
▪ ES.03 : Manage Sell Information	▪ ES.07 : Manage Sell Network

Process Identifier	**ES.03 : Manage Sell Information**
Description	The process of collecting, maintaining, and communicating information to support sales planning and execution processes. The information to be managed includes: status, ordering and credit history, product/services information, etc.

Key Inputs	Key Outputs
▪	▪ ES.02 : Manage Sell Performance ▪ ES.09 : Manage Sales Force Compensation

Process Identifier	**ES.04 : Manage Solution Portfolio**
Description	The process of defining, maintaining and enforcing product (offering) information. This includes setting, maintaining and distributing information on product and services specifications, interoperability, market positioning . The Business Development domain inputs product information (e.g. product pricing and specifications) and marketing collateral into these processes.

Key Inputs	Key Outputs
▪	▪

Process Identifier	**ES.05 : Manage Sell Capital Assets**
Description	The acquisition, maintenance, and disposition of sales capital assets. This includes call centers, call center automation tools, sales force automation tools, etc.

Key Inputs	Key Outputs
▪ ES.07 : Manage Sell Network	▪ ES.07 : Manage Sell Network

Process Identifier	**ES.06 : Manage Sell Knowledge Transfer**

Description	The process of defining a Sell knowledge transfer strategy and maintaining the information, which characterizes total Sell knowledge management requirements. This includes creation and maintenance of training materials, delivery of training, and availability and accessibility of product information.

Key Inputs	Key Outputs
▪	▪ Training Material

Process Identifier	**ES.07 : Manage Sell Network**
Description	The process of defining, establishing, and maintaining the business model for a specific combination of product line, customer (group), market and geographic location. And the process of defining and maintaining a network of suppliers for product/services information.

Key Inputs	Key Outputs
▪ ES.05 : Manage Sell Capital Assets ▪ ES.02 : Manage Sell Performance ▪ Sell Plan	▪ ES.05 : Manage Sell Capital Assets

Process Identifier	**ES.08 : Manage Sell Regulatory Compliance**
Description	The process of identifying and complying with regulatory documentation and process standards set by external entities (e.g. government).

Key Inputs	Key Outputs
▪	▪ ES.01 : Manage Sell Business Rules

Process Identifier	**ES.09 : Manage Sales Force Compensation**
Description	The process of defining, establishing, maintaining, monitoring, and enforcing a sales force compensation strategy. This includes identifying and sourcing relevant data, calculation of compensation, and authorizing payment.

Key Inputs	Key Outputs
▪ ES.03 : Manage Sell Information	▪

Process Identifier	**S1 : Sell to Intermediary**
Description	The process of establishing and maintaining the 'catalog' of offering product and services to the customer. This includes creating customer's understanding of his need for a specific product or service. Providing product/services specifications, performance information, white papers, etc.

Child Processes
▪ S1.01 : Define Engagement Model ▪ S1.02 : Refine Customer Profile ▪ S1.03 : Develop Business Model ▪ S1.04 : Present Business Model ▪ S1.05 : Obtain Feedback & Refine ▪ S1.06 : Release to Contract

Process Identifier	**S1.01 : Define Engagement Model**
Description	The activities of defining and documenting the sales engagement model.

Key Inputs	Key Outputs
▪ Sell Plan	▪ S1.02 : Refine Customer Profile ▪ Sell Schedule

Process Identifier	**S1.02 : Refine Customer Profile**
Description	The activities of obtaining the customer profile, engaging with the customer to obtain business model requirements, and adding the requirements to the customer profile.

Key Inputs	Key Outputs
▪ S1.01 : Define Engagement Model ▪ Customer Profile	▪ Customer Profile ▪ S1.03 : Develop Business Model

Process Identifier	**S1.03 : Develop Business Model**
Description	The activities of architecting the proposed business model. This includes the definition of the type of

	business (product and/or services, authorized reseller, authorized repair, etc.), documentation of transaction methods and content, operational and financial processes, etc. And obtaining internal approvals.

Key Inputs	Key Outputs
▪ S1.02 : Refine Customer Profile ▪ Business Rules	▪ S1.04 : Present Business Model

Process Identifier	**S1.04 : Present Business Model**
Description	The activities of presenting the business model to the intermediary. This may include explanation of deviations from the requirements (where appropriate).

Key Inputs	Key Outputs
▪ S1.03 : Develop Business Model ▪	▪ S1.05 : Obtain Feedback & Refine ▪

Process Identifier	**S1.05 : Obtain Feedback & Refine**
Description	The activities of collecting and reviewing the intermediaries response to the business model and refining the proposal based on this feedback.

Key Inputs	Key Outputs
▪ Feedback from input: Customer ▪ S1.04 : Present Business Model	▪ S1.06 : Release to Contract

Process Identifier	**S1.06 : Release to Contract**
Description	The activities associated with releasing the intermediary to the quotation process. This may include a review of the prospect intermediary and signing a contract or resulting in the decision not to pursue a relationship with the prospect and closing and archiving the customer profile.

Key Inputs	Key Outputs
▪ S1.05 : Obtain Feedback & Refine	▪

Process Identifier	**S2 : Sell to Grouped Account**
Description	The process of establishing and refining the grouped account customer's needs and presenting and/or developing a solution to meet those needs. This includes selecting the engagement model, refining the customer's needs, listing proposed solutions and educating the customer on the solution.

Child Processes	
▪ S2.01 : Select Engagement Model ▪ S2.02 : Obtain Customer Needs ▪ S2.03 : Determine Proposed Solutions ▪ S2.04 : Present Solution to Customer ▪ S2.05 : Release to Contract	

Process Identifier	**S2.01 : Select Engagement Model**
Description	The activities of selecting the model for selling to the grouped account customer. The model may define the activities, roles and task ownership of the selling process. Engagement models for selling to grouped accounts are standard shared models that are established in the 'Manage Relate Business Rules' enable process.

Key Inputs	Key Outputs
▪	▪ S2.02 : Obtain Customer Needs

Process Identifier	**S2.02 : Obtain Customer Needs**
Description	The activities of gaining an understanding of the grouped account customer's needs. This understanding could be obtained by engaging with the customer (asking questions, prompting customer to supply profile/preferences on the web), observing historical behavior (purchasing history, browsing history) or through using available market data (customer demographic data, company data) to determine needs.

Key Inputs	Key Outputs
▪ S2.01 : Select Engagement Model ▪ Customer	▪

Process Identifier	S2.03 : Determine Proposed Solutions
Description	The activities of analyzing the grouped account customer's needs and determining what solutions would meet those needs. Possible solutions are maintained by the enable process 'Manage Product Portfolio'.

Key Inputs	Key Outputs
▪	▪

Process Identifier	S2.04 : Present Solution to Customer
Description	The activities of presenting the proposed solutions to the grouped account customer and educating them on the product or service. Information provided may include product specifications. It could include on-site workshops explaining product features and how they meet the customer needs and in some cases a test version may be supplied to the customer. This information exchange is facilitated by the enable process 'Manage Sell Knowledge Transfer'.

Key Inputs	Key Outputs
	▪

Process Identifier	S2.05 : Release to Contract
Description	The activities of transitioning the grouped account customer over the Contract process. This activity may include the updating of sales opportunities and the distribution of customer information in support of other processes.

Key Inputs	Key Outputs
▪	▪

Process Identifier	S3 : Sell to Named Account
Description	The process of establishing and refining the named account customer’s needs and presenting and/or developing a solution to meet those needs. This includes refining the customer’s needs, developing high level and detailed solutions and obtaining

	solution expertise.

Child Processes
▪ S3.01 : Define Engagement model ▪ S3.02 : Refine Customer Needs (detailed) ▪ S3.04 : Develop High Level Solution ▪ S3.05 : Obtain Product/Solution Expertise ▪ S3.06 : Develop Detailed solution ▪ S3.07 : Release to Contract

Process Identifier	**S3.01 : Define Engagement model**
Description	The activities of defining and documenting the sales process for the named account customer. This could include defining the activities and who should be involved in the selling motion and whether additional expertise is needed in cases where a customer's needs dictate a complex or large solution. Guidelines defining a named account customer engagement model are managed by the enable process 'Manage Sell Business Rules'.

Key Inputs	Key Outputs
▪ Business Rules ▪ Sell Plan	▪ Sell Schedule ▪ S3.02 : Refine Customer Needs (detailed)

Process Identifier	**S3.02 : Refine Customer Needs (detailed)**
Description	The activities of obtaining the named account customer profile, engaging with the customer to obtain detailed requirements and documenting the detailed requirements. Detailed needs could include localized requirements, factory and logistics requirements or detailed product or service needs. Multiple roles with differing expertise could perform this process for the same named account customer during the Sell process. The processes for maintaining the customer's profile data are defined by the enable process 'Manage Sell Information'.

Key Inputs	Key Outputs
▪ S3.01 : Define Engagement model	▪

Process Identifier	**S3.04 : Develop High Level Solution**
Description	The activities of architecting a proposed high level solution for a named account customer. A product test may be included in developing a solution. Product and Services information used to develop the solution is maintained by the enable process 'Manage Product Portfolio'

Key Inputs	Key Outputs
▪	▪ S3.05 : Obtain Product/Solution Expertise

Process Identifier	**S3.05 : Obtain Product/Solution Expertise**
Description	The activities of obtaining detailed product/solution experts to consult on the development of a solution for a named account customer. It includes identifying and scheduling the experts to participate in the solution development process. Solution expertise resources are managed or maintained by the enable process 'Manage Sell Network'

Key Inputs	Key Outputs
▪ S3.04 : Develop High Level Solution	▪ S3.06 : Develop Detailed solution

Process Identifier	**S3.06 : Develop Detailed solution**
Description	The activities of architecting a detailed solution for a named account customer. It may include leveraging solution expertise to match a solution to a customer's needs or business processes and practices between the customer and different organizations to ensure the customer's needs are facilitated (service level agreements). It may include the technical feasibility of a solution or the availability of product. Product and Services information used to develop the solution is maintained by the enable process 'Manage Product Portfolio'.

Key Inputs	Key Outputs
▪ S3.05 : Obtain Product/Solution Expertise	▪ S3.07 : Release to Contract

Process Identifier	**S3.07 : Release to Contract**
Description	The activities associated with releasing the named account customer solution to the Contract process. This may include signing or issuing service level agreements with internal/external organizations or the distribution of customer information in support of other processes.

Key Inputs	Key Outputs
▪ S3.06 : Develop Detailed solution	▪

C : Contract

Process Identifier	**C : Contract**
Description	The process of pricing a solution and gaining customer agreement. This includes receiving the request for contract (grouped accounts), configuring and pricing the proposal (named accounts), obtaining internal approval (named accounts), publishing a pricelist (intermediary), obtaining customer agreement and closing the deal.

Child Processes	
▪ C1 : Contract to Intermediary ▪ C2 : Contract to Grouped Account ▪ C3 : Contract to Named Account ▪ EC : Enable Contract	
Key Inputs	**Key Outputs**
▪ P: Plan ▪ S: Sell ▪ R: Relate	▪ P: Plan ▪ S: Sell ▪ R: Relate

Process Identifier	**C1 : Contract to Intermediary**
Description	The process of creating a standard offering to intermediaries (distributors, value added resellers, retailers, etc) for standard products/services. This includes the creation and maintenance of the pricelists for these partners.

Child Processes	

- C1.01 : Develop Product Offering
- C1.02 : Publish Pricelist
- C1.03 : Obtain Customer Agreement
- C1.04 : Close the Deal
- C1.05 : Release to Deliver

Process Identifier	**C1.01 : Develop Product Offering**
Description	The activities of developing a product catalog for the intermediary. This includes product and pricing. The development of the catalog may be an internal only or a shared responsibility with the intermediary. Multiple intermediaries may share one catalog. The content of the catalog may be dependant on the business model details established in the Sell process.

Key Inputs	Key Outputs
▪ Contract Plan ▪ Business Rules	▪ C1.02 : Publish Pricelist ▪ Contract Schedule

Process Identifier	**C1.02 : Publish Pricelist**
Description	The activities of publishing the pricelist to the intermediary. This includes the activities of presenting the proposal and obtaining internal approvals before publishing the pricelist.

Key Inputs	Key Outputs
▪ C1.01 : Develop Product Offering ▪ Product Catalog	▪ C1.03 : Obtain Customer Agreement ▪ Customer

Process Identifier	**C1.03 : Obtain Customer Agreement**
Description	The activities of obtaining feedback, and refining where appropriate and obtaining intermediary agreement.

Key Inputs	Key Outputs
▪ C1.02 : Publish Pricelist ▪ Feedback from input: Customer	▪ C1.04 : Close the Deal

Process Identifier	**C1.04 : Close the Deal**
Description	The activities of obtaining a signature from the

	customer to affirm contract.

Key Inputs	Key Outputs
▪ C1.03 : Obtain Customer Agreement	▪ C1.05 : Release to Deliver

Process Identifier	**C1.05 : Release to Deliver**
Description	The activities associated with handing the intermediary over to the Deliver process. This includes providing information for intermediary setup in order management systems, release of business model information (processes and practices) and supply chain requirements, etc.

Key Inputs	Key Outputs
▪ C1.04 : Close the Deal	▪

Process Identifier	**C2 : Contract to Grouped Account**
Description	The process of pricing a solution and gaining customer agreement for a Grouped Account. This includes receiving the request for a contract, configuring the product/solution and pricing the product/solution.

Child Processes
▪ C2.01 : Receive Request for Contract ▪ C2.02 : Configure Product/Solution ▪ C2.03 : Price Product/Solution ▪ C2.04 : Obtain Customer Agreement ▪ C2.05 : Close Deal ▪ C2.06 : Release to Deliver

Process Identifier	**C2.01 : Receive Request for Contract**
Description	The activities of receiving and logging a request for a contract proposal for a grouped account customer. This may include a confirmation from the customer that they are interested in the solution provided and would now like to understand the precise configuration, pricing, terms and conditions pertaining to the purchase of this solution. The guidelines for receiving and logging a contract proposal are maintained by the enable process

	'Manage Contract Business Rules'.

Key Inputs	Key Outputs
▪ Request for Contract from input: Customer ▪ Business Rules	▪ C2.02 : Configure Product/Solution ▪

Process Identifier	**C2.02 : Configure Product/Solution**
Description	The activities of configuring the product or solution for the grouped account customer using a catalog of current products. This includes validation of availability and selection of integration, packaging, labeling, and shipping requirements. The catalog of current products is maintained by the enable process 'Manage Customer Pricing'. The customer configuration information is managed by the enable process 'Manage Contract Information'.

Key Inputs	Key Outputs
▪ C2.01 : Receive Request for Contract ▪ Product Catalog	▪ C2.03 : Price Product/Solution

Process Identifier	**C2.03 : Price Product/Solution**
Description	The activities of pricing the product or solution for the grouped account customer using current pricing information for the account group. This includes providing information on rebate programs and selecting and obtaining approval for discounts. Pricing for the account group is maintained by the enable process 'Manage Customer Pricing'.

Key Inputs	Key Outputs
▪ C2.02 : Configure Product/Solution ▪ Product Pricing Data	▪ C2.04 : Obtain Customer Agreement ▪

Process Identifier	**C2.04 : Obtain Customer Agreement**
Description	The activities of issuing, validating, refining and obtaining approval for the grouped account customer's contract proposal.

Key Inputs	Key Outputs

▪ C2.03 : Price Product/Solution ▪ Feedback from input: Customer	▪ C2.05 : Close Deal

Process Identifier	**C2.05 : Close Deal**
Description	The activities of obtaining a signature from the grouped account customer to convert the proposal into a contract. Signatures can be obtained using different means of communication: signature on a written contract, signature on a quote(fax), electronic signature (web based quotations), providing credit card details (web or call based quotations), etc. The rules for closing a deal are maintained by the enable process 'Manage Contract Business Rules'.

Key Inputs	Key Outputs
▪ C2.04 : Obtain Customer Agreement ▪	▪ C2.06 : Release to Deliver

Process Identifier	**C2.06 : Release to Deliver**
Description	The activities of transitioning the customer over to the Deliver process in the Supply Chain. This may include the distribution of information in support of other processes, formatting the information, providing reference information and providing contract information.

Key Inputs	Key Outputs
▪ C2.05 : Close Deal ▪	▪ Customer Order

Process Identifier	**C3 : Contract to Named Account**
Description	The process of pricing a solution and gaining customer agreement for a Named Account. This includes developing a proposal, configuring and pricing the proposal, obtaining internal approval, presenting the proposal to the customer and obtaining feedback and refining.

Child Processes

- C3.01 : Initiate Proposal
- C3.02 : Configure & Price Proposal
- C3.03 : Obtain Internal Approval
- C3.04 : Present Proposal to Customer
- C3.05 : Obtain Feedback and Refine
- C3.06 : Obtain Customer Agreement
- C3.07 : Sign Contract/Close Deal
- C3.08 : Release to Deliver

Process Identifier	**C3.01 : Initiate Proposal**
Description	The activities of initiating a proposal for a named account customer. It includes receiving and logging the request for a proposal and understanding and evaluating what needs to be included as part of the proposal. It may also involve setting up the coordination of the response to an RFP (Request for Proposal) activity. The rules for developing a contract proposal are maintained by the enable process 'Manage Contract Business Rules'.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**C3.02 : Configure & Price Proposal**
Description	The activities of configuring and pricing the product or solution for the named account customer using a catalog of current products and account specific pricing. This includes validation of availability and documentation of integration, packaging, labeling, shipping and installation requirements and selecting and obtaining approval for discounts

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**C3.03 : Obtain Internal Approval**
Description	The activities of presenting the proposal to the named account customer. This may include an explanation of deviations from the request for proposal (where appropriate) and may involve a number of presentations, resources or supporting information. Supporting information and guidelines for presentation are maintained by the enable process 'Manage Contract Knowledge Transfer'.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	C3.04 : Present Proposal to Customer
Description	The activities of presenting the proposal to the named account customer. This may include an explanation of deviations from the request for proposal (where appropriate) and may involve a number of presentations, resources or supporting information. Supporting information and guidelines for presentation are maintained by the enable process 'Manage Contract Knowledge Transfer'.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	C3.05 : Obtain Feedback and Refine
Description	The activities of collecting and reviewing the named account customer's response to the proposal and determining if the proposal needs to be refined. It may include a process for determining whether the contract proposal process needs to be revisited or whether the contract can refined without revisiting the contract proposal process.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	C3.06 : Obtain Customer Agreement
Description	The activities of obtaining approval for the contract proposal from the named account customer. This may include generation of a contract, a Statement of Work (SOW) or a customer catalog once the approval is received.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	C3.07 : Sign Contract/Close Deal
Description	The activities of obtaining a signature from the named account customer to convert the proposal into a contract and any other processes that would constitute closing the deal. This may include the set

	up of a customer catalog.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**C3.08 : Release to Deliver**
Description	The activities associated with transitioning the named account customer contract over to the Deliver (Supply Chain) process. This may include the distribution of information in support of other processes, formatting the information, providing reference information and providing contract information.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC : Enable Contract**
Description	Enable Contract is the collection of processes to prepare, maintain, and manage information or relationships upon which Contract execution processes rely.

Child Processes
▪ EC.01 : Manage Contract Business Rules ▪ EC.02 : Manage Contract Performance ▪ EC.03 : Manage Contract Information ▪ EC.04 : Manage Customer Pricing ▪ EC.05 : Manage Contract Capital Assets ▪ EC.06 : Manage Contract Knowledge Transfer ▪ EC.07 : Manage Contract Network ▪ EC.08 : Manage Contract Regulatory Compliance

Process Identifier	**EC.01 : Manage Contract Business Rules**
Description	The process of defining, maintaining, and enforcing rules which affect the acceptance of a request for contract and issuance of a contract or bid. This includes establishing and enforcing internal approval processes for pricing, discounts, demo products, etc.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.02 : Manage Contract Performance**

Description	The process of defining the requirement and monitoring the performance of closing contracts against internal and/or external standards and goals of customer retention, customer satisfaction and financial performance.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.03 : Manage Contract Information**
Description	The process of collecting, maintaining, and communicating information to support contract closing planning and execution processes. The information to be managed includes: status, history, call and web traffic tracking, etc.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.04 : Manage Customer Pricing**
Description	The process of defining, maintaining and enforcing a strategy for customer or customer group pricing. This includes setting, maintaining and distributing customer specific, grouped accounts and intermediary pricing, discounts and rebates. The Market Chain inputs product pricing into these processes.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.05 : Manage Contract Capital Assets**
Description	The acquisition, maintenance, and disposition of quotation capital assets. This includes call centers, call center automation tools - like call tracking, sales force automation tools - like pricing and configuration software, etc.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.06 : Manage Contract Knowledge Transfer**
Description	The process of defining a Contract knowledge transfer strategy and maintaining the information, which characterizes total Contract knowledge management requirements. This includes creation

	and maintenance of training materials, and delivery of training.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.07 : Manage Contract Network**
Description	The process of defining, establishing, and maintaining the business model for a specific combination of product line, customer (group), market and geographic location.

Key Inputs	Key Outputs
▪ xxx	▪ xxx

Process Identifier	**EC.08 : Manage Contract Regulatory Compliance**
Description	The process of identifying and complying with regulatory documentation and process standards set by external entities (e.g. government).

Key Inputs	Key Outputs
▪ xxx	▪ xxx

A: Assist

Process Identifier	**A : Assist**
Description	The process of providing post sales support for products/services provided to the customer. This includes receiving, logging, assigning support resources and responding to customer inquiries, (warranty) claims and quality feedback for products and services.

Child Processes	
▪ A1 : Self Assist ▪ A2 : Assist Remote ▪ A3 : Assist On-Site ▪ EA : Enable Assist	

Key Inputs	Key Outputs
▪ P: Plan	▪ P: Plan

Process Identifier	**A1 : Self Assist**
Description	The process of enabling customers to perform post

	sales support for products/services provided. This includes receiving, logging, providing access to support libraries and responding to customer inquiries, (warranty) claims and quality feedback for products and services.

Child Processes	
▪ A1.01 : Receive Inquiry/Request ▪ A1.02 : Route Request ▪ A1.03 : Identify Solution ▪ A1.04 : Propose Solution ▪ A1.05 : Release Solution to Customer ▪ A1.06 : Close Request	

Process Identifier	**A1.01 : Receive Inquiry/Request**
Description	The receipt and logging of Assist requests from the customer. Self-Assist requests can be received through internet and/or automated phone services (e.g. menu driven answering service for sending a fax with requested information to the customer).
Key Inputs	Key Outputs
▪ Inquiry from input: Customer	▪ A1.02 : Route Request

Process Identifier	**A1.02 : Route Request**
Description	The process of analyzing the Assist request to determine where/how the request can be best supported.
Key Inputs	Key Outputs
▪ A1.01 : Receive Inquiry/Request	▪ A1.03 : Identify Solution

Process Identifier	**A1.03 : Identify Solution**
Description	The process of identifying a proposed 'solution' to the Assist request based on the information provided by the customer.
Key Inputs	Key Outputs
▪ A1.02 : Route Request ▪ Business Rules	▪ A1.04 : Propose Solution

Process Identifier	**A1.04 : Propose Solution**

Description	The interaction with the customer to offer the identified solution and acceptance of the response from the customer on the proposed solution(s). A negative response might trigger the request for additional information and the rerouting of the Assist request or the release of the Assist Request to Assist Remote

Key Inputs	Key Outputs
▪ A1.03 : Identify Solution ▪ Feedback from input: Customer	▪ A1.05 : Release Solution to Customer ▪ Proposal to output: Customer

Process Identifier	**A1.05 : Release Solution to Customer**
Description	The actual transfer of the solution to the customer. This can be performed using one or more of the following media: automated fax services, internet downloads, internet redirection, automated voice response, etc.

Key Inputs	Key Outputs
▪ A1.04 : Propose Solution	▪ A1.06 : Close Request ▪ Solution to output: Customer

Process Identifier	**A1.06 : Close Request**
Description	The activities associated with closing the Assist request. This may include offering the customer to provide feedback on the effectiveness of the assist offering, sending a signal to the financial processes that the billing process should begin for services provided, and archiving the Assist request in support of analyzing the performance of the Assist processes

Key Inputs	Key Outputs
▪ A1.05 : Release Solution to Customer ▪ Feedback from input: Customer	▪ output: Finance, Tax & Treasury Processes

Process Identifier	**A2 : Assist Remote**
Description	The process of providing remote post sales support for products/services provided to the customer. This includes receiving, logging, assigning support

	resources and responding to customer inquiries, (warranty) claims and quality feedback for products and services

Child Processes	
▪ A2.01 : Receive Inquiry/Request ▪ A2.02 : Route Request ▪ A2.03 : Identify Solution ▪ A2.04 : Propose Solution ▪ A2.05 : Distribute Solution ▪ A2.06 : Release Solution to Customer ▪ A2.07 : Close Request	

Process Identifier	**A2.01 : Receive Inquiry/Request**
Description	The receipt and logging of assist requests from the customer. Assist Remote requests can be received through (electronic) mail, phone, fax or in store

Key Inputs	Key Outputs
▪ Inquiry from input: Customer	▪ A2.02 : Route Request

Process Identifier	**A2.02 : Route Request**
Description	The process of analyzing the Assist request to determine where the request can be best supported. This may include the validation of warranty.

Key Inputs	Key Outputs
▪ A2.01 : Receive Inquiry/Request	▪ A2.03 : Identify Solution

Process Identifier	**A2.03 : Identify Solution**
Description	The process of identifying a proposed 'solution' to the Assist request based on the information provided by the customer.

Key Inputs	Key Outputs
▪ A2.02 : Route Request ▪ Business Rules	▪ A2.04 : Propose Solution

Process Identifier	**A2.04 : Propose Solution**
Description	The interaction with the customer to offer the identified solution and acceptance of the response

	from the customer on the proposed solution(s). A negative response might trigger the request for additional information and the rerouting of the Assist request or the release of the Assist Request to Assist Remote.

Key Inputs	Key Outputs
▪ A2.03 : Identify Solution ▪ Feedback from input: Customer	▪ A2.05 : Release Solution to Customer ▪ Proposal to output: Customer ▪ A2.06 : Release Solution to Customer

Process Identifier	**A2.05 : Distribute Solution**
Description	The process of processing the Assist request and passing the solution on to the appropriate organizations. (An example scenario is the engagement with the supply chain process to issue an RMA for return product and creation of a customer order to replace the product).

Key Inputs	Key Outputs
▪ A2.04 : Propose Solution	▪ A2.06 : Release Solution to Customer ▪ Appropriate Customer Chain (execution) Process

Process Identifier	**A2.06 : Release Solution to Customer**
Description	The actual transfer of the solution to the customer. This can be performed using one or more of the following media: phone, fax, other electronic media, etc.

Key Inputs	Key Outputs
▪ A2.05 : Distribute Solution ▪ A2.04 : Propose Solution ▪	▪ A2.07 : Close Request ▪ Solution to output: Customer

Process Identifier	**A2.07 : Close Request**
Description	The activities associated with closing the Assist request. This may include offering the customer to provide feedback on the effectiveness of the assist offering, sending a signal to the financial processes

	that the internal or external billing process should begin for services provided (warranty), and archiving the Assist request in support of analyzing the performance of the Assist processes.

Key Inputs	Key Outputs
▪ A2.06 : Release Solution to Customer ▪ Receipt Notification ▪ Feedback from input: Customer	▪ output: Finance, Tax & Treasury Processes

Process Identifier	**A3 : Assist On-Site**
Description	The process of providing post sales support for products/services provided to the customer at the customer site. This includes receiving, logging, assigning support resources and responding to customer inquiries, (warranty) claims and quality feedback for products and services

Child Processes	
▪ A3.01 : Receive Inquiry/Request ▪ A3.02 : Authorize Request ▪ A3.03 : Schedule On-site Assist ▪ A3.04 : Obtain Materials ▪ A3.05 : Repair Product ▪ A3.06 : Dispose Materials ▪ A3.07 : Close Request	

Process Identifier	**A3.01 : Receive Inquiry/Request**
Description	The receipt and logging of assist requests from the customer. Assist On-site requests can be received through (electronic) mail, phone or fax.

Key Inputs	Key Outputs
▪ Inquiry from input: Customer	▪ A3.02 : Authorize Request

Process Identifier	**A3.02 : Authorize Request**
Description	The process of validation and authorization of the Assist request. This includes warranty/contracts verification.

Key Inputs	Key Outputs
▪ Business Rules ▪ A3.01 : Receive Inquiry/Request	▪ A3.03 : Schedule On-site Assist

Process Identifier	**A3.03 : Schedule On-site Assist**
Description	Assist resources are identified and reserved for an Assist On-Site event based on service levels agreements.

Key Inputs	Key Outputs
▪ Assist Plan ▪ A3.02 : Authorize Request	▪ Assist Schedule ▪ A3.04 : Obtain Materials

Process Identifier	**A3.04 : Obtain Materials**
Description	The identification of materials (expected to be) required for the Assist On-site event and activities associated with expediting the materials to the customer site or group/individuals performing the Assist On-site.

Key Inputs	Key Outputs
▪ A3.03 : Schedule On-site Assist	▪ A3.05 : Repair Product

Process Identifier	**A3.05 : Repair Product**
Description	The process of preparing, decomposing the product, replacing the part and re-assembling the product at the customer site. The product is fully operational upon completion.

Key Inputs	Key Outputs
▪ A3.04 : Obtain Materials ▪	▪ A3.06 : Dispose Materials

Process Identifier	**A3.06 : Dispose Materials**
Description	The disposition of materials replaced during the repair (assist) event. This process can link to a supply chain process trying to salvage replaced materials.

Key Inputs	Key Outputs
▪ Return Material Authorization ▪ A3.05 : Repair Product	▪ Return Material Request ▪ A3.07 : Close Request

Process Identifier	**A3.07 : Close Request**
Description	The activities associated with closing the Assist request. This may include offering the customer to

	provide feedback on the effectiveness of the assist offering, sending a signal to the financial processes that the internal or external billing process should begin for services provided (warranty), and archiving the Assist request in support of analyzing the performance of the Assist processes.

Key Inputs	Key Outputs
▪ Feedback from input: Customer ▪ A3.06 : Dispose Materials	▪ output: Finance, Tax & Treasury Processes ▪

Process Identifier	EA : Enable Assist
Description	Enable Assist is the collection of processes to prepare, maintain, and manage information or relationships upon which Assist execution processes rely.

Child Processes	
▪ EA.01 : Manage Assist Business Rules ▪ EA.02 : Manage Assist Performance ▪ EA.03 : Manage Assist Information ▪ EA.04 : Manage Warranty ▪ EA.05 : Manage Assist Capital Assets ▪ EA.06 : Manage Assist Knowledge Transfer ▪ EA.07 : Manage Assist Network ▪ EA.08 : Manage Assist Regulatory Compliance	

Process Identifier	EA.01 : Manage Assist Business Rules
Description	The process of defining, maintaining, and enforcing rules which affect the post sales and post delivery support for products and services. The Assist business rules provide criteria that are translated into guidelines, policies and engagement models for post sales and post delivery support to intermediaries (partners), groups of similar customers (grouped accounts) and named accounts. Assist business rules include: warranty validation and solution offering guidelines

Key Inputs	Key Outputs
▪ EA.08 : Manage Assist Regulatory Compliance	▪ EA.02 : Manage Assist Performance

▪ Business Rules	▪ Business Rules

Process Identifier	**EA.02 : Manage Assist Performance**
Description	The process of defining the requirement and monitoring the performance of providing post sales and post delivery support for products and services against internal and/or external standards and goals of customer retention, customer satisfaction and financial performance

Key Inputs	Key Outputs
▪ EA.01 : Manage Assist Business Rules ▪ EA.03 : Manage Assist Information	▪ Conformance Issue ▪ EA.07 : Manage Assist Network

Process Identifier	**EA.03 : Manage Assist Information**
Description	The process of collecting, maintaining, and communicating information to support post sales and post delivery support planning and execution processes. The information to be managed includes: warranty status, ordering and credit history, product/services information, etc.

Key Inputs	Key Outputs
▪ Engineering Change Notice ▪ EA.06 : Manage Assist Knowledge Transfer	▪ Product Quality Issue ▪ EA.02 : Manage Assist Performance ▪ EA.06 : Manage Assist Knowledge Transfer ▪ EA.04 : Manage Warranty

Process Identifier	**EA.04 : Manage Warranty**
Description	The process of defining, maintaining and enforcing warranty information. This includes collecting, maintaining and distributing warranty information. The Supply Chain inputs shipment/delivery information.

Key Inputs	Key Outputs
▪ EA.03 : Manage Assist Information	▪ Product Quality Issue

Process Identifier	**EA.05 : Manage Assist Capital Assets**
Description	The acquisition, maintenance, and disposition of support capital assets. This includes support call centers, call center automation tools, etc.

Key Inputs	Key Outputs
▪ EA.07 : Manage Assist Network	▪

Process Identifier	**EA.06 : Manage Assist Knowledge Transfer**
Description	The process of defining a Assist knowledge transfer strategy and maintaining the information, which characterizes total Assist knowledge management requirements. This includes creation and maintenance of training materials, delivery of training, and availability and accessibility of training and warranty information.

Key Inputs	Key Outputs
▪ EA.03 : Manage Assist Information	▪ EA.03 : Manage Assist Information

Process Identifier	**EA.07 : Manage Assist Network**
Description	The process of defining, establishing, and maintaining the support business model for a specific combination of product line, customer (group), market and geographic location. And the process of defining and maintaining a network of relationships with internal and/or external process groups required to provide satisfactory customer support. (e.g. Spare part fulfillment, Supply Chain for returns and replacements, Sales for quotation for additional products or services).

Key Inputs	Key Outputs
▪ Assist Plan ▪ EA.02 : Manage Assist Performance	▪ EA.05 : Manage Assist Capital Assets

Process Identifier	**EA.08 : Manage Assist Regulatory Compliance**

Description	The process of identifying and complying with regulatory documentation and process standards set by external entities (e.g. government).

Key Inputs	Key Outputs
▪ input: Finance, Tax & Treasury Processes ▪ input from input: Legal Processes ▪	▪ EA.01 : Manage Assist Business Rules ▪

Process Identifier	**xxx**
Description	xxx

Child Processes	
▪ xxx	

Process Identifier	**xxx**
Description	xxx

Key Inputs	Key Outputs
▪ xxx	▪ xxx

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