

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

# Intelligent Workflows for Lead to Order

Intelligent Workflows for Lead to Order

Version: 1.0

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## 1 Overview

This Lead-to-Order Intelligent Workflow package is developed and maintained by IBM to bring transparency, visibility, efficiency, and integration to the Lead to Order process, spanning across multiple systems like SAP Customer Experience portfolio and SAP S/4HANA. This package contains use case documentation for the end-to-end Lead-to-Order business process that helps to understand how the different processes in disparate systems have been rewired using SAP Workflow Management to derive increased productivity and customer experience.

It integrates the following business transactions & approval requirements:

- SAP Sales Cloud: Lead will be created & converted to an opportunity. Opportunity status changes to In-process.
- SAP Sales Cloud: opportunity approval by a sales representative.  
SAP CPQ quotation creation & linkage with the relevant opportunity.
- SAP CPQ quotation customer confirmation from external mail.
- SAP Sales Cloud: quotation replication with reference to customer accepted CPQ quotation.
- SAP CPQ request creation for relevant sales orders in SAP S/4HANA.
- SAP S/4HANA sales order creation with configuration details.
- Process Visibility as part of SAP Workflow Management for monitoring and tracking business end-to-end process.

## 2 Lead-to-Order Workflow Overview

### 2.1 Business Scenario and its Challenges

Lead-to-Order process for a product bundle including sales, service and subscription item for Industrial, machinery and components industry. The challenges faced typically are the following:

- Inefficient interaction channels for Sales Representative
- Huge efforts required to build complex Product configurations in Quotes
- Sub-optimal Pricing proposal for customer quotes.
- Lack of integration of Customer feedback in Sales Process
- Limited Visibility around business KPIs across end-to-end process

## 2.2 Business Needs

To enable companies to achieve next level of maturity and readiness for the future and become Cognitive Enterprise:

- Build modular end-to-end Intelligent Workflows for IM&C Industry specific scenarios of Lead-to-Order, Service Management & Execution and Outcome based Billing across SAP suite of applications along with IBM Cognitive / AI solutions. This scenario focusses on the Lead-to-Order scenario.
- Orchestrate business processes providing embedded Data Intelligence and automation, delivered on SAP Business Technology Platform.
- Provide visibility to the Business Outcomes through live Key Performance metrics of the end-to-end processes

## 2.3 Solution

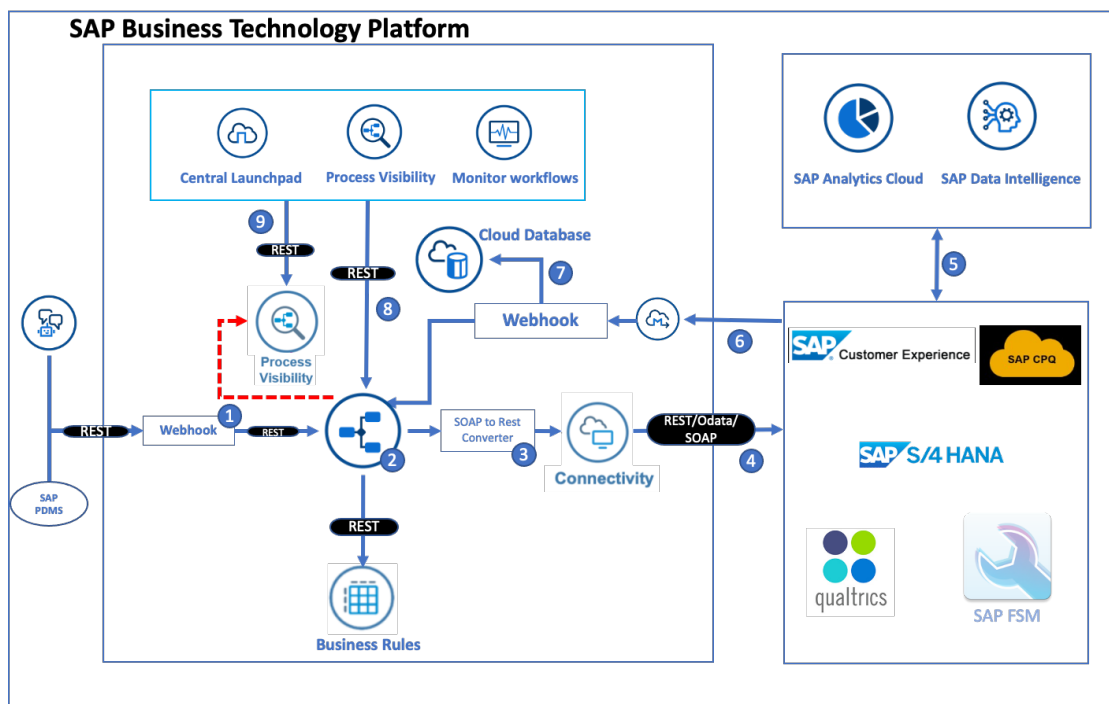
Intelligent Workflows to execute business functions across Lead-to-Order, Service Management & Execution and Outcome based Billing with ability to provide process performance visibility. This workflow is focused on Lead-to-Order process

- Sales Intelligence:
  - Ability for Sales Representative to converse using multiple channels
  - Chatbot connected with an interaction platform (Facebook / WhatsApp) and Sales Application (SAP Sales Cloud) to help User elicit information in an automated fashion
  - SAP Business Technology Platform ML services based Predictive Model to Score Opportunity based on historical records.
- Integrated Product Configuration & Customer Self Service:
  - Product Configuration and Customer Self Service
  - Integration of SAP Sales Cloud with SAP CPQ providing ability to user to launch SAP CPQ Quote from SAP Sales Cloud
  - User can perform complex product configuration in SAP CPQ Quote, generate Quote Document and send to Customer
  - Customer can accept / reject / propose changes to the Quote. Once Quote is accepted, the Order will be sent to SAP S/4 HANA
- Quotation Experience
  - Improve the customer experience during the quotation process using Qualtrics Survey
  - Accessing the customer feedback in the single view in SAP Customer Experience portfolio
  - Improving win rate by adopting the customer feedback
- Cognitive Pricing
  - Fetching optimal Price to increase the Quote Win rate
- Sales Performance Dashboard
  - Get real time outlook of Sales and Pipeline Performance KPIs

## 2.4 Value Proposition

- Better Selection of Opportunity by 40% through a Predictive score.
- Improved Win Rate of 25% through Optimal Quote price using IBM Cognitive Pricing.
- Configure Quote adapted to customers' requirements leading to improved Quote-turn-around-Time.
- Capture Customer Feedback earlier in Sales cycle.
- Provides insights on sales performance and Pipeline KPIs.
- Modular Intelligent Workflows for key capabilities with SAP Process Visibility service.

## 2.5 Architecture – Intelligent Workflow Lead-to-Cash with Outcome Based Billing



## 2.6 Artifacts (Processes, Decisions, Visibility Scenarios)

**Fiori UI:** This simple Fiori Application (hosted on SAP HANA Cloud) has been developed to help User register request from a list of available option. On submitting the request form, our intelligent workflow is triggered via a webhook. This application can easily be replaced with a chatbot or any other Sales application.

**Lead-to-Order Workflow:** This Intelligent Workflow depicts Industry specific scenarios of Lead-to-Order with steps to Lead Creation, Lead-to-Opportunity conversion, Sales Quotation creation in C4C and finally posting the newly created order in SAP S/4 HANA Order creation in CPQ. It also gathers feedback from users through Qualtrics.

**Business KPIs Dashboard (Process Visibility):** This Process Visibility Dashboard enables process excellence, process transparency, process transformation by providing one view of the process. It provides actionable insights on our running workflow processes and identifying bottlenecks.

## 2.7 Solution Components

- SAP S/4HANA 1909 (minimum version)
- SAP Sales Cloud
- SAP CPQ
- SAP Workflow Management
- SAP Data Intelligence 3.0

## 2.8 References

If you are interested to use this intelligent workflow, please contact:

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