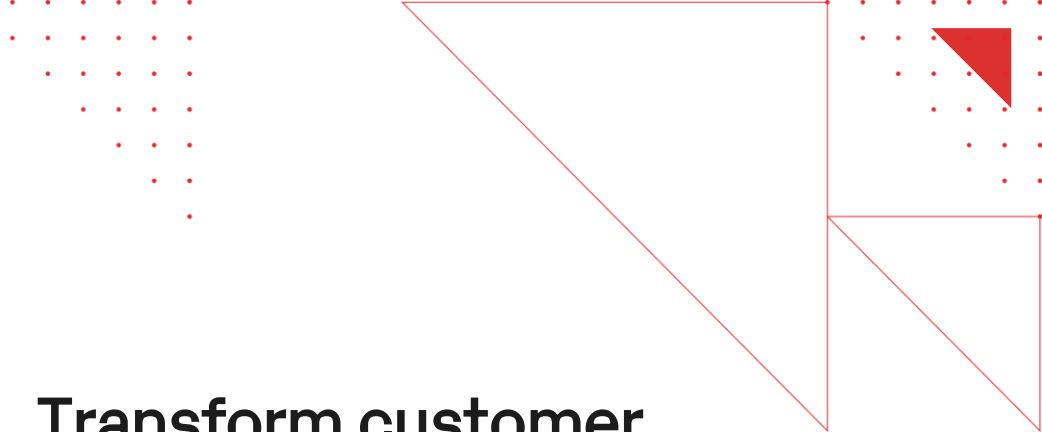# Transform customer experience with unified order management

Reach new levels of customer centricity with Salesforce
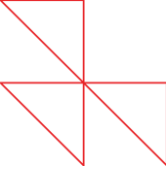
Credits

Manoj K Mohan | Kailash Prabhakaran | Rohit Karthikeyan

Prodapt

Elevating CX: The crucial role of Order Management System (OMS) in the Connectedness industry

OMS: Elevating Customer Experience

The ordering and fulfillment processes rely on an Order Management System as its backbone. A unified OMS is crucial for providing exceptional Customer Experience (CX) as it can make the difference between customers becoming loyal patrons or switching to a competitor

- A unified OMS can impact customer loyalty and revenue streams positively while reducing expenses, resulting in enhanced business performance

- The traditional OMS encounters significant challenges, such as reliance on manual processes, limited transparency, and inflexible systems, impeding ability to deliver an exceptional CX

- Service providers aim to reduce order fall-outs and enhance efficiency, necessitating the adoption of automation in their OMS

Global OMS market

- **90%** of customers say the experience in an order journey is as important as the product or service

- The **Traditional OMS**, which is disparate, is not built for seamless buying experiences

Source: Forrester

> " *To deliver on the promise of elevated CX, an effective OMS is essential. Identifying and addressing the right challenges that arise during each stage of the process is crucial to select the right OMS solution*

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What's holding service providers back from delivering an exceptional CX?
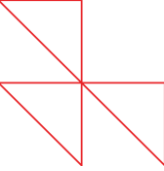
Customer challenges in each stage of the traditional order management journey

Capture

Duplicate Leads

Duplicate leads cause order fall-outs, inaccurate reporting, and poor customer experience

Generic order journeys

Lack of personalization makes the order journey generic across user personas - from customers to care agents

Orchestrate & fulfill

Order tracking challenge

Lack of real-time order status data poses challenges for technicians & customers in monitoring progress

Insufficient data

Inadequate technical information for technicians results in unsuccessful order services, impacting CX negatively

Customer service

Lack of automation

Manual assignment of service tickets and the manual updating of software patches impact CX

Disparate systems

Processing complaints on separate systems causes inefficiency and poor CX

Solution

Unified order management

Implement Salesforce OMS to elevate CX

Commerce Cloud - Order Management

- Salesforce (SF) OMS connects commerce and service, processes payments automatically, manages cancellations and returns, and more
- The platform is extremely powerful, right out of the box. But **to reap the maximum benefits, service providers must focus** on the right implementation approach

> *This insight discusses a holistic approach to successfully implement Salesforce OMS and enhance customer experience (CX)*

3

Prodapt

Salesforce OMS for CX transformation: A strategic implementation approach

To optimize the CX, service providers should **employ a holistic and customer-centric implementation approach** that encompasses the entire order journey, viewed through three different lenses

Lens 1: Examine primary shortcomings during order capture stage and address issues

Lens 2: Investigate major inefficiencies in the order orchestration stage and resolve issues

Lens 3: Analyze the customer service stage to identify and resolve any gaps

Order capture stage

Lens 1

Identify key gaps in customer journey and map Salesforce core capabilities to deliver an elevated experience

Order orchestration & fulfillment stage

Lens 2

Orchestrate and fulfill orders using industry-specific building blocks, coupled with Salesforce OM capabilities

Order service stage

Lens 3

Deliver exceptional CX through unified order servicing and automated service processes

The recommended implementation approach effectively overcomes challenges, **leading to a superior CX.** Additionally, service providers can decrease the **time required to implement an OMS solution by up to 40%**, expediting their journey towards a modernized OMS system
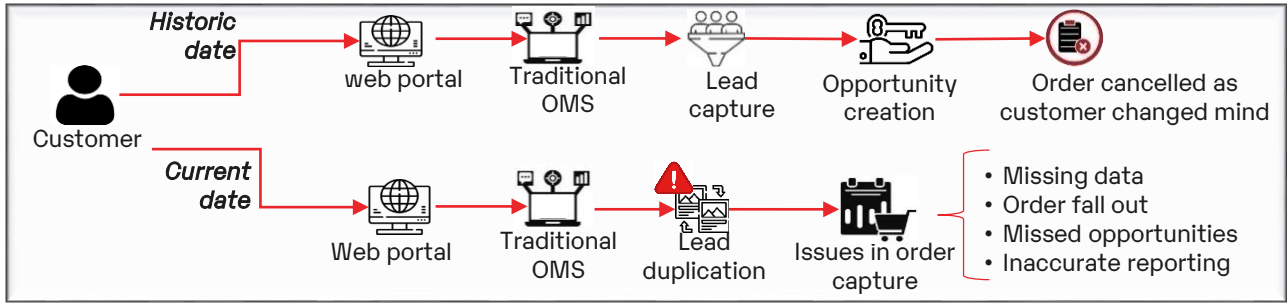
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Identify key gaps in customer journey and map SF core capabilities to deliver an elevated experience
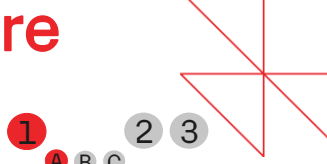
Presented below are some of the significant challenges caused by the traditional OMS in the Connectedness industry
Inaccurate mapping of a lead's lifecycle during order capture, which can lead to duplicated data & inaccurate reporting; and the issue of multiple personas using the same order journey regardless of different touchpoint requirements
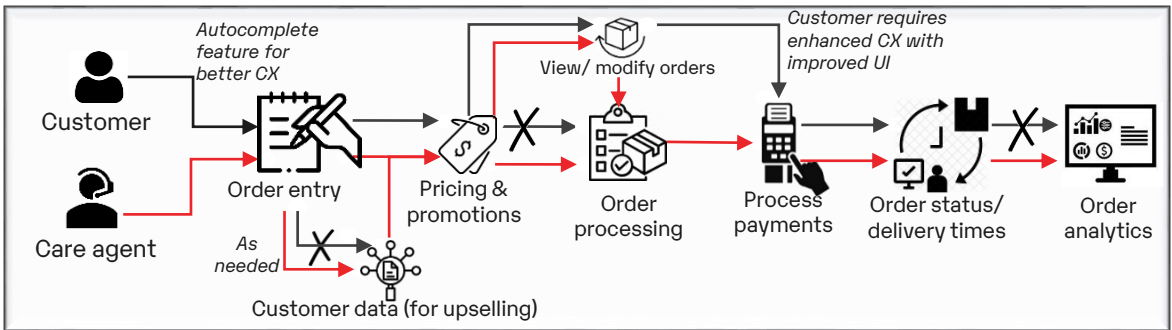
Traditional OMS challenge: Inaccurate lead lifecycle mapping during order capture

Challenge scenario: 1

Historic date
Customer → web portal → Traditional OMS → Lead capture → Opportunity creation → Order cancelled as customer changed mind

Current date
Web portal → Traditional OMS → Lead duplication → Issues in order capture
- Missing data
- Order fall out
- Missed opportunities
- Inaccurate reporting

The traditional OMS lacks the capability to utilize historical lead data to aid the order capture process, leading to the duplication of leads

Traditional OMS challenge: Same order journey for diverse user personas

Challenge scenario: 2

Customer / Care agent → Order entry → Pricing & promotions → Order processing → Process payments → Order status/ delivery times → Order analytics

Autocomplete feature for better CX
View/ modify orders
Customer requires enhanced CX with improved UI
As needed → Customer data (for upselling)

— Care agent journey
— Customer journey
✕ Irrelevant touch-point for customer

Traditional OMS often uses a single order journey that is designed to cater to multiple user personas. For e.g., a care agent requires a comprehensive overview of a customer's order journey that includes multiple touch points. However, when customers are compelled to go through the same touch points and order journey, it can become a challenging experience for them
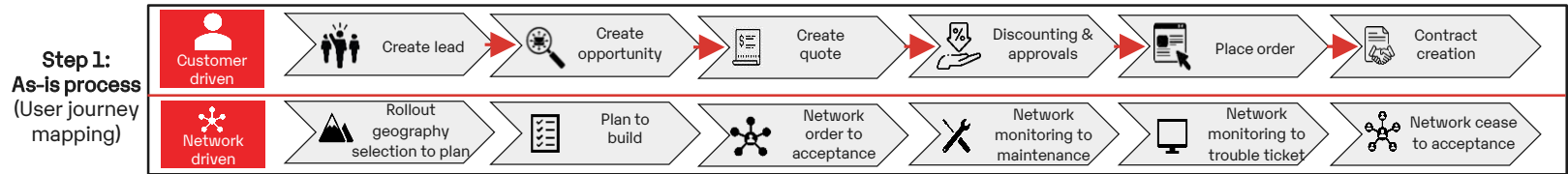
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Streamline customer journeys in order capture stage, with the right SF Commerce Cloud implementation approach

Step 1: Analyze the current process to gain an understanding of how things are currently being done
Step 2: Identify the key pain-points in the process that need to be addressed in order to improve efficiency & effectiveness
Step 3: Analyze the user journey considering different user personas and the time spent across different touchpoints
Step 4: Determine remediation by mapping the pain points/ gaps with SF OMS capabilities to determine how these can be addressed & resolved

Step 1: As-is process (User journey mapping)

Customer driven → Create lead → Create opportunity → Create quote → Discounting & approvals → Place order → Contract creation

Network driven → Rollout geography selection to plan → Plan to build → Network order to acceptance → Network monitoring to maintenance → Network monitoring to trouble ticket → Network cease to acceptance

Step 2: Pain point mapping

- Siloed systems leading to unallocated payments
- Poor selling & quoting experiences
- Bad invoicing resulting in poor forecasting
- Manual deal renewals
- Lack of transparency into customer data

Step 3: Analyze the order journey considering different user personas and the time spent across different touchpoints

Example

User persona 1: Customer
Required time spent in order journey: Low
Required No. of touch points: Minimum

User persona 2: Care agent
Required time spent in order journey: Medium
Required No. of touch points: Minimum

User persona 3: Partner/ Vendor
Required time spent in order journey: High
**Required No. of touch points:** Maximum

Optimize and customize the order journey based on each user persona and touchpoint

Step 4: Salesforce core capability mapping (Mapping capabilities can elevate the user experience)

Order lifecycle	Inventory availability	Order routing
• Order create APIs • Account- contact hierarchy • Order creation • Pre- integrated to B2C Commerce	• Location-level availability • Reservation Mgmt • Reports & analytics	• UI order routing flow • Scheduled re-routing • Einstein order allocation

1 A B C 2 3

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Identify key gaps in customer journey and **map SF core capabilities** to deliver an elevated experience
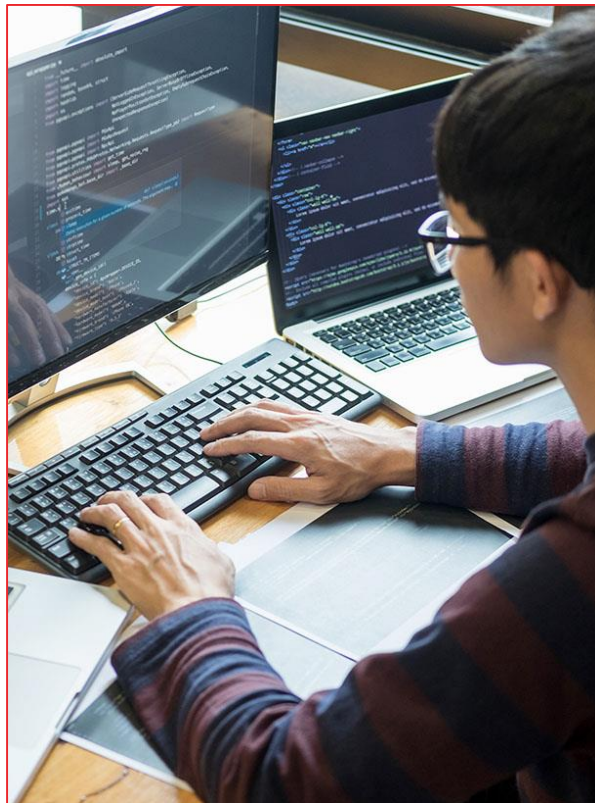
Recommendations

- Leverage TM Forum Business Process Framework (eTOM) to understand, design, develop and manage processes involved in order management journey

- Analyze sequence of components by using Vlocity Action Debugger Capability of Salesforce Comms cloud

- Measure and analyze time spent at each step in the Order Capture Process using Vlocity OmniStudio Analytics

- Centralize product modeling and use a REST API like Product Catalog Management to let partners access and integrate your product data seamlessly

- Improve appointment date accuracy by leveraging Vlocity Integration procedures for Asynchronous API processing

- Utilize pre-built connectors, to integrate tax engines such as Vertex. By doing so, you can streamline the integration process and take advantage of the existing functionality of these connectors
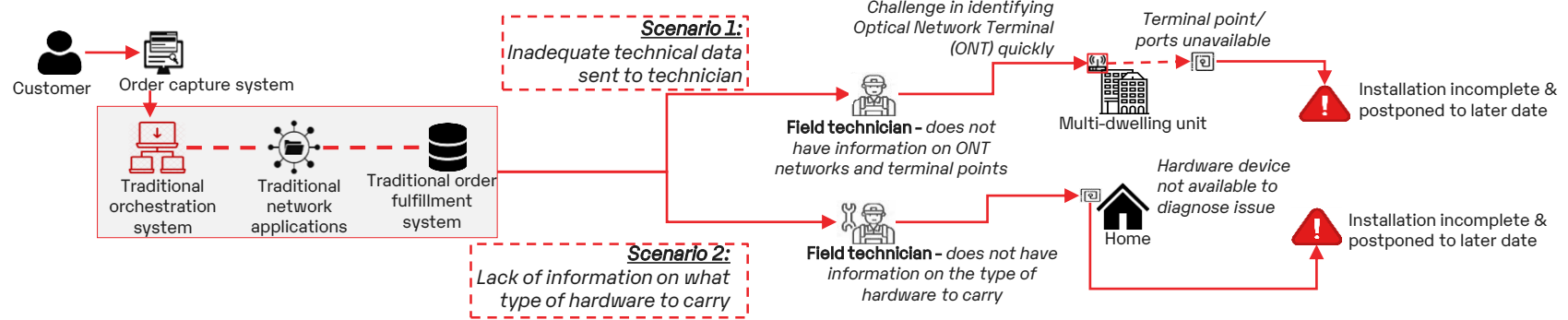
Benefits

- Achieve omnichannel order capture, allowing customers to place orders through any channel, including online, phone or app, and provide a consistent experience across all channels

- Provide tailor-made order journey based on user personas, thereby accelerating the order flow

- Up to 40% reduction in development time through reusable Salesforce CPQ components

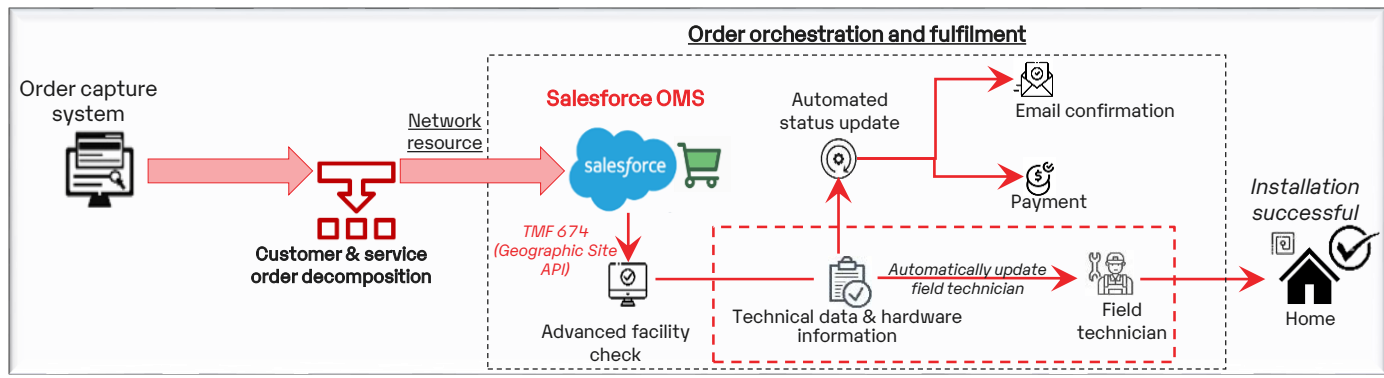**Prodapt**

Orchestrate and fulfill orders using **industry-specific building blocks,** coupled with Salesforce OM capabilities

Order orchestration and fulfilment in traditional OMS results in incomplete service and poor customer experience

Customer

Order capture system

Traditional orchestration system

Traditional network applications

Traditional order fulfillment system

Scenario 1:
Inadequate technical data sent to technician

Challenge in identifying Optical Network Terminal (ONT) quickly

Terminal point/ ports unavailable

Field technician – *does not have information on ONT networks and terminal points*

Multi-dwelling unit

Installation incomplete & postponed to later date

Scenario 2:
Lack of information on what type of hardware to carry

Field technician – *does not have information on the type of hardware to carry*

Hardware device not available to diagnose issue

Home

Installation incomplete & postponed to later date

Order orchestration and fulfilment with Salesforce OMS accelerates service delivery and reduces development time due to reusable components

Order orchestration and fulfilment

Order capture system

Customer & service order decomposition

Network resource

Salesforce OMS

salesforce

TMF 674 (Geographic Site API)

Advanced facility check

Automated status update

Email confirmation

Payment

Technical data & hardware information

Automatically update field technician

Field technician

Installation successful

Home

- The TM Forum SID model is used to create a product's fundamental building blocks, which can be used across platforms
- TM Forum Open APIs allow service providers to build microservices based on a benchmarked information model, and Salesforce CPQ can simplify order management

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Orchestrate and fulfill orders using **industry-specific building blocks**, coupled with Salesforce OM capabilities

Recommendations
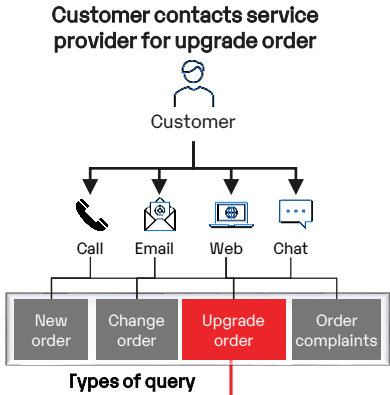
- Leverage TM Forum's SID Model to clearly define the distinction between Customer Facing Spec (CFS) and Network Resource Facing Spec (RFS)

- Use Order Decomposition to transform a commercial order into a technical order and generate fulfillment requests, which will be used during the orchestration process

- Use the catalog to dynamically generate, sequence, and monitor orchestration processes according to the specific context of each order and to ensure that the information contained on the order is communicated to the systems that fulfill the order

- Ensure orchestration items or tasks in the workflow are executed in the correct sequence and provide the correct information to each fulfillment system

- Set a technical product attribute as "not assetizable" so that Order Management does not store Personally Identifiable Information (PII) in OM internal technical inventory
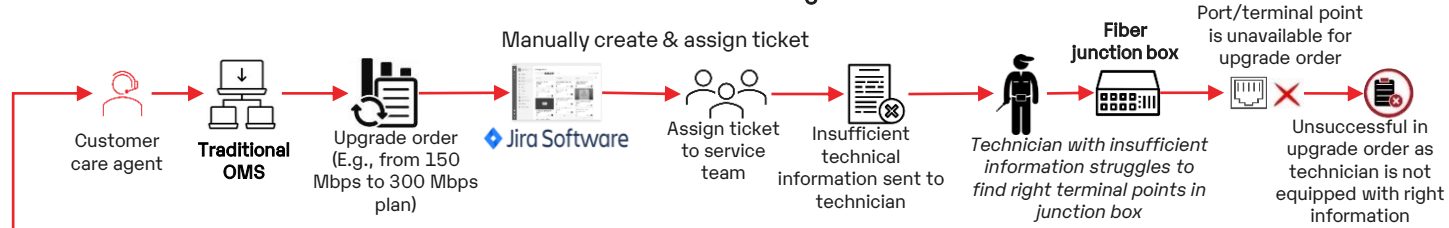
Benefits

- Salesforce OMS offers inventory and warehouse visibility, increasing transparency in order orchestration & fulfillment stages and leading to a 20% boost in click & collect purchases

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Deliver exceptional CX through **unified order servicing and automated service** processes

Customer contacts service provider for upgrade order

Customer

| Call | Email | Web | Chat |

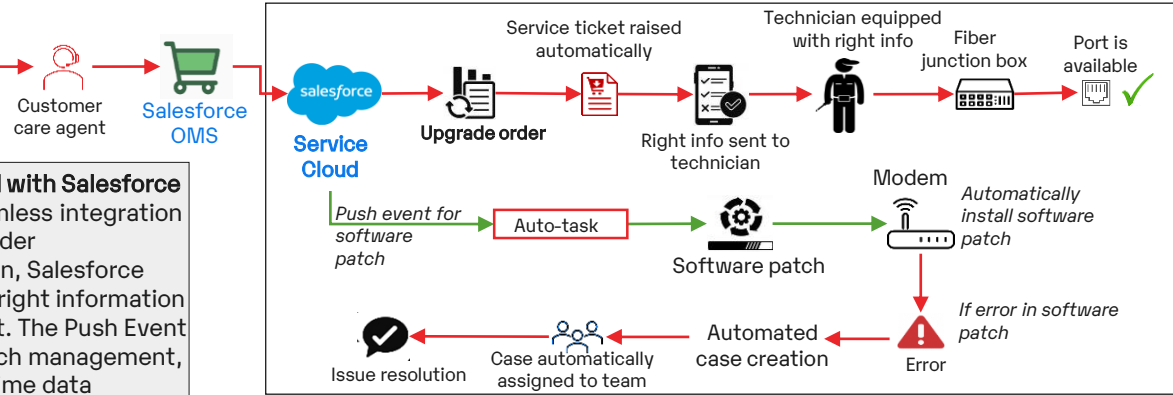| New order | Change order | **Upgrade order** | Order complaints |

Types of query

Traditional OMS: Requires manual intervention and doesn't equip technicians with right information for efficient order servicing

Customer care agent → **Traditional OMS** → Upgrade order (E.g., from 150 Mbps to 300 Mbps plan) → **Jira Software**

Manually create & assign ticket

Assign ticket to service team → Insufficient technical information sent to technician → *Technician with insufficient information struggles to find right terminal points in junction box* → **Fiber junction box** → Port/terminal point is unavailable for upgrade order → Unsuccessful in upgrade order as technician is not equipped with right information

Salesforce OMS: Automates case assignment, empowers technicians with right data, and automates software upgrades

Customer care agent → **Salesforce OMS** → **Service Cloud** (salesforce) → Upgrade order → Service ticket raised automatically → Right info sent to technician → Technician equipped with right info → **Fiber junction box** → Port is available ✓

Push event for software patch → Auto-task → Software patch → Modem *Automatically install software patch* → *If error in software patch* → Error → Automated case creation → Case automatically assigned to team → Issue resolution

> "Salesforce OMS is **tightly coupled with Salesforce Service Cloud** as it allows for seamless integration between customer service and order management. With this integration, Salesforce OMS equips technicians with the right information and automates case management. The Push Event is used to automate software patch management, & trigger updates based on real-time data

- Technician is successful in upgrade order, as he is equipped with the right information
- Salesforce OMS offers automated management of software patches and initiates real-time updates

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Deliver exceptional CX through **unified order servicing and automated service** processes

Recommendations

- Identify various channels for customer communications and configure them using Salesforce tools such as Email to Case, Web to Case, and CTI Plugin

- Identify all the possible touchpoints in the journey requiring specific agent support. Leverage Salesforce Skill based work assignment to allocate work to the right agent who has the skillset to for the job

- Leverage the "push event" feature, which is activated when an external system or a Salesforce user makes a specific change to the order associated with a push event orchestration item

- Use Salesforce Omnichannel configuration to define the effective workload an agent should receive at any point in time

- Use automated service workflows to process cancellations, reshipments, discounts, exchanges, and returns

- Create a case and associate it with the related order summary. The agent's action on the order is captured in the case history and the order history

Benefits

- **25% reduction in customer service handling time:** Customer service efficiency gains through lower case volume, higher first call resolution (FCR) rates, and decreased call handling time

- **30% reduction in fulfilment costs** through end-to-end visualization of fulfilment flows and guided task resolution

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Benefits achieved by a leading service provider in North America after **implementing Salesforce OMS**

25%

Reduction in customer service handle time

40%

Reduction in development time through reusable components

20%

Additional purchase from click & collect. Visibility into inventory across store locations, fulfilment centers, and warehouses. Cross sell enabled purchases grew 20% Y-o-Y

Advanced data visibility

Dynamic omnichannel experience

Customer experience improvement

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Thank you

insights@prodapt.com