

Huawei Tech. Co., Ltd

Digital CRM R2.1

TM Forum Framework 16.0 Certification

Business Process Framework (eTOM) Release 16.0

Self-Assessment Process Mapping Report

**Level 2 Process: 1.1.11 – Contact/Lead/Prospect
Management**

Version: V2R1

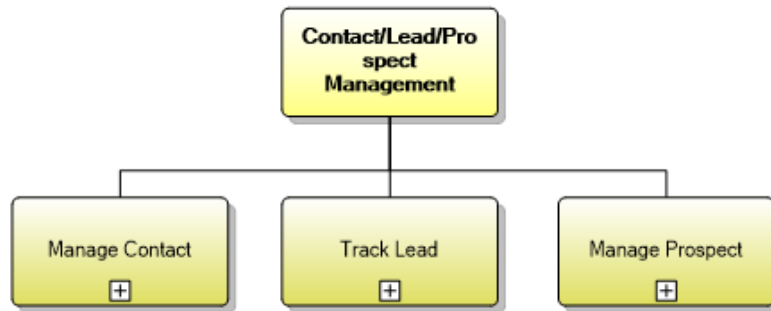
19 January 2017

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1 Level 2: 1.1.11 CONTACT/LEAD/PROSPECT MANAGEMENT



Framework Process	Level 3 Category	Process Identifier	Brief Description
Manage Contact	(3) eTOM Process Type	1.1.11.1	Manage all contacts between potential or existing Parties and the enterprise
Track Lead	(3) eTOM Process Type	1.1.11.2	Track a lead generated through marketing, or that arise in the course of business.
Manage Prospect	(3) eTOM Process Type	1.1.11.3	Match an assigned lead with the most appropriate products and ensure that a prospect is handled appropriately

1.1 Level 3: 1.1.11.1 Manage Contact

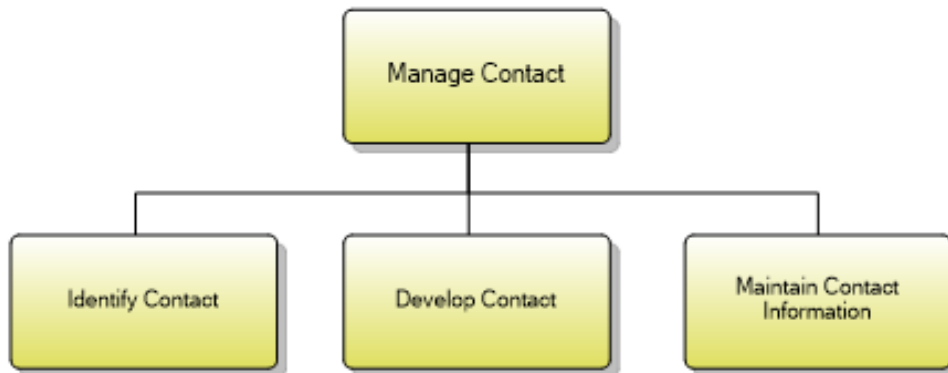


Figure 1 1.1.11.1 Manage Contact decomposition

Process Identifier: 1.1.11.1

Brief Description

Manage all contacts between potential or existing Parties and the enterprise

Extended Description

Manage Contact manages all contacts between potential or existing parties and the enterprise. It deals with the identification of a contact, its development, enhancement and update

Explanatory

N/A

Mandatory

N/A

Optional

N/A

Interactions

N/A

1.1.1 Level 4: 1.1.11.1.1 Identify Contact

LEVEL 4 PROCESS MAPPING DETAILS 1.1.11.1.1 Identify Contact

Brief Description

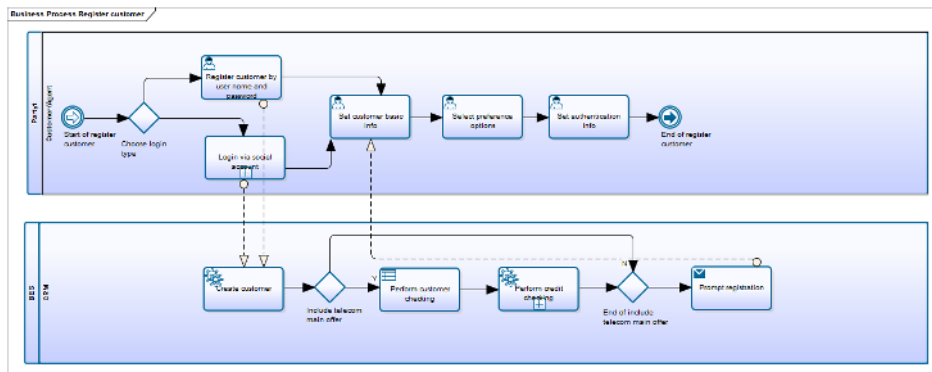
Identify Contact (Party) identifies a party contact with potential or existing parties and the enterprise. It deals with the registration of a contact and the information for access and for authorization. AM

Comment for the compliance:

For the management of contact, the system provides two modes:

- 1) The contact information belongs to the customer who has been activated in the network of the operator.
- 2) The contact information belongs to the “prospect or potential” customer who has not been activated in the network of the operator.

For the contact related to the 1st situation, please refer to the document BP.COMM Common Sub Processes. It includes the “Register customer sub-process”. The relevant process diagram in Huawei BP can be found here:



In this process, the activities of the diagram are used to realize the “Identify Contact” in TMF Process Framework.

#	Steps
1.	<p>Set customer basic info</p> <p>Set customer basic information, including customer name, contact, ID type, ID number, ID address, living address, birthday, nationality, belief, Social ID and email, etc.</p>

2. Select preference options

Set default currency, default language, do-not disturb setting (first choice channel, allowed date and time span)

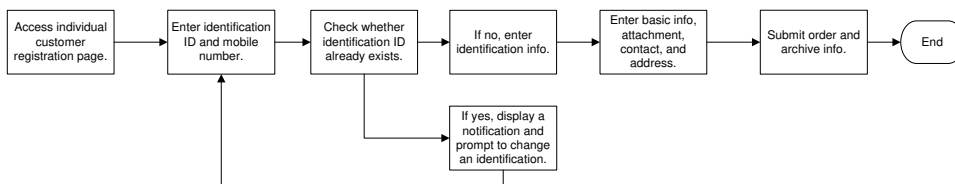
3. Set authentication info

Input authentication information, such as password, security authentication question and its answer. Input information will be used for subsequent customer authentication.

Here is the screen shot of “contact” information which is part of customer information:

The screenshot shows a web form for customer registration. It is divided into several sections:
1. **CERTIFICATE INFO**: Includes fields for Certificate Type, Certificate Number, Service Number, and Customer Name, with a 'Check' button.
2. **BASIC INFO**: Includes fields for Last Name, Middle Name, First Name, Gender (Male, Female, Unknown), Title (Mr, Mrs, Ms), and Nationality.
3. **ATTACHMENT LIST**: Includes an 'Upload' button.
4. **CONTACT INFO**: Includes a table with columns for Contact Type, First Name, Middle Name, Last Name, Title, Contact Method, and Operation.
5. **ADDRESS INFO**: Includes a table with columns for Region, Detailed Address, Postal Code, Address Type, Contact First, and Operation.
6. **USER INFO**: Includes fields for Password, Confirm Password, and All Language.
At the bottom right, there are 'SUBMIT' and 'BACK' buttons.

For the contact related to the 2nd situation, i.e., the customer has not been activated in the network, the business process is to record the contact information when the customer registers his/her basic and necessary information. This flow can be accomplished by the customer or by the operator staff (agent, CSR).



The relevant screen shot for the contact of the prospect customer:

CERTIFICATE INFO


*Certificate Type: <input type="text"/>	*Certificate Number: <input type="text"/> <input type="button" value="Read"/>
Effective Time: <input type="text"/>	Expiration Time: <input type="text"/>
Address on Certificate: <input type="text"/>	Issuing Authority: <input type="text"/>
Issuing State: <input type="text"/>	

BASIC INFO

[MORE](#)

*Last Name: <input type="text"/>	Middle Name: <input type="text"/>
*First Name: <input type="text"/>	Title: <input checked="" type="radio"/> Mr <input type="radio"/> Ms
Nationality: <input type="text"/>	Birthplace: <input type="text"/>

FILE LIST



NO Result!

CONTACT INFO

No Data

ADDRESS INFO

No Data

Extended Description

Register a contact and set access and authority details for a contact.

Explanatory

N/A

Mandatory

N/A

Optional

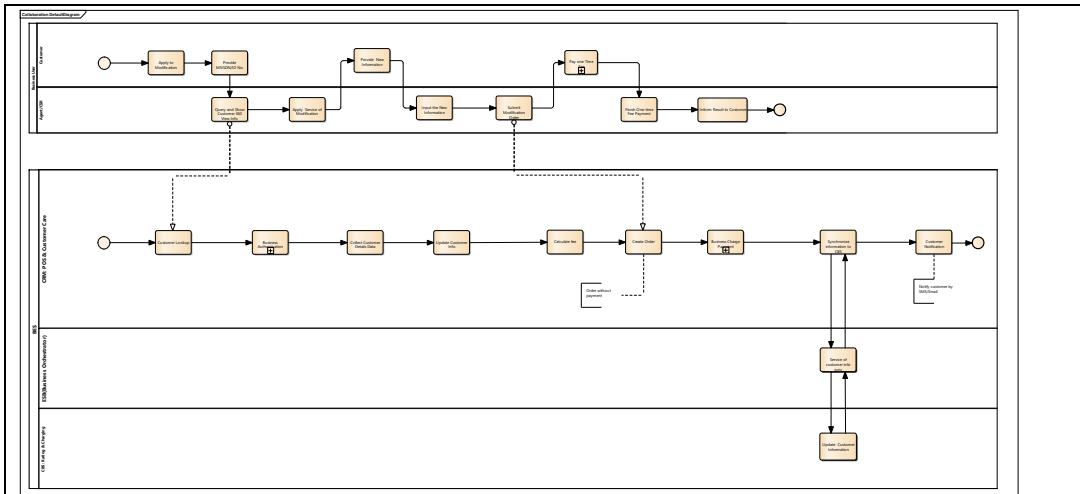
N/A

Interactions

N/A

1.1.2 Level 4: 1.1.11.1.3 Maintain Contact Information

LEVEL 4 PROCESS MAPPING DETAILS 1.1.11.1.3 Maintain Contact Information
<p>Brief Description</p> <p>Maintenance of the contact information. E.g. Update and removal of contacts. Enquiry and reporting related to the contact registering AM</p> <p>Comment for the compliance:</p> <p>AM (Please refer to the document BP.CC.CUSTMGT.01 “Modify Customer”)</p> <p>The relationship between the contact and the customer always exist. The contact is managed as the appended part of the customer entity. The customer types can be described as.</p> <ul style="list-style-type: none">▪ The customer has been activated and in this situation the contact needs to be managed on the basis of an existing activated customer.▪ During the phase of lead or opportunity, the customer has not been formally activated. However, the salesman can record the prospect (potential) customer information. Even the salesman only records the “contact” data, such “contact” still needs to be annexed to the customer so the salesman can track that possibly future customer. As the SID description “proposals made to potential customers”. <p>Therefore, contact Information is part of customer information so its modification can be combined into the process of modifying customer data.</p> <p>The relevant process diagram in Huawei BP can be found here:</p>



In this process, the activities of the diagram are used to realize the “Maintain Contact Information” in TMF Process Framework.

4	Apply Service of Modification	<i>CSR applies for service modification in CRM.</i>
5	Input the New Information	<i>CSR inputs the new information that the customer provided into the CRM system</i>
6	Submit Modification Order	<i>CSR submits order of modification after the customer finish providing information.</i>

Here is the screen shot of “Maintain contact information” which is part of “Customer Information Change”



CERTIFICATE INFO

*Certificate Type: Passport	*Certificate Number: 2016121417304766	Read
Effective Time:	Expiration Time:	
Address on Certificate:	Issuing Authority:	
Issuing State:		

BASIC INFO

MORE ▾

Customer Code: 31000013119	*Default Account: 31000013112
*Last Name: 624034	Middle Name:
*First Name: 345486	Title: <input checked="" type="radio"/> Mr <input type="radio"/> Ms
Nationality:	Birthplace: 2016121417304766

FILE LIST

Upload



NO Result!

CONTACT INFO

New

No Data

ADDRESS INFO

New

<input type="radio"/> Region	Detailed Address	Postal Code
Jiangsu Province-NanJing City-Jiangning	yfvrnGckvU	2372200055
Address Type	Contact First	
Office Address	No	

[Details](#) [Modify](#) [Delete](#) [Copy](#)

Extended Description

The purpose of this process is to keep the contact information up to date. At request be able to list and report contact information.

Explanatory

Reserved for future use.

Mandatory

Reserved for future use.

Optional

Reserved for future use.

Interactions

Reserved for future use.

1.2 Level 3: 1.1.11.2 Track Lead

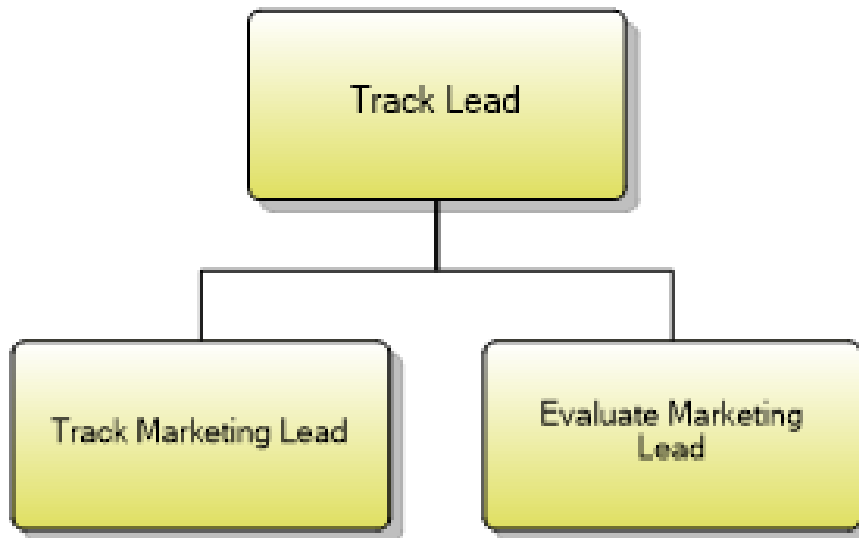


Figure 2 1.1.11.2 Track Lead decomposition

Process Identifier: 1.1.11.2

Brief Description

Track a lead generated through marketing, or that arise in the course of business. AM
(Please refer to the document BP.SAL.SM.02 Manage Sales Lead)

Extended Description

Track Lead identifies a lead following on from marketing campaign advertising, or one that arises otherwise in the course of business and collected here. A lead is tracked, evaluated, and other processes are notified (such as Selling) for further action. AM (Please refer to the document BP.SAL.SM.02 "Manage Sales Lead", BP.SAL.SM.03 "Create Opportunity")

Explanatory

N/A

Mandatory

N/A

Optional

N/A

Interactions

N/A

1.2.1 Level 4: 1.1.11.2.1 Track Marketing Lead

LEVEL 4 PROCESS MAPPING DETAILS

1.1.11.2.1 Track Marketing Lead

Brief Description

Not used for this process element

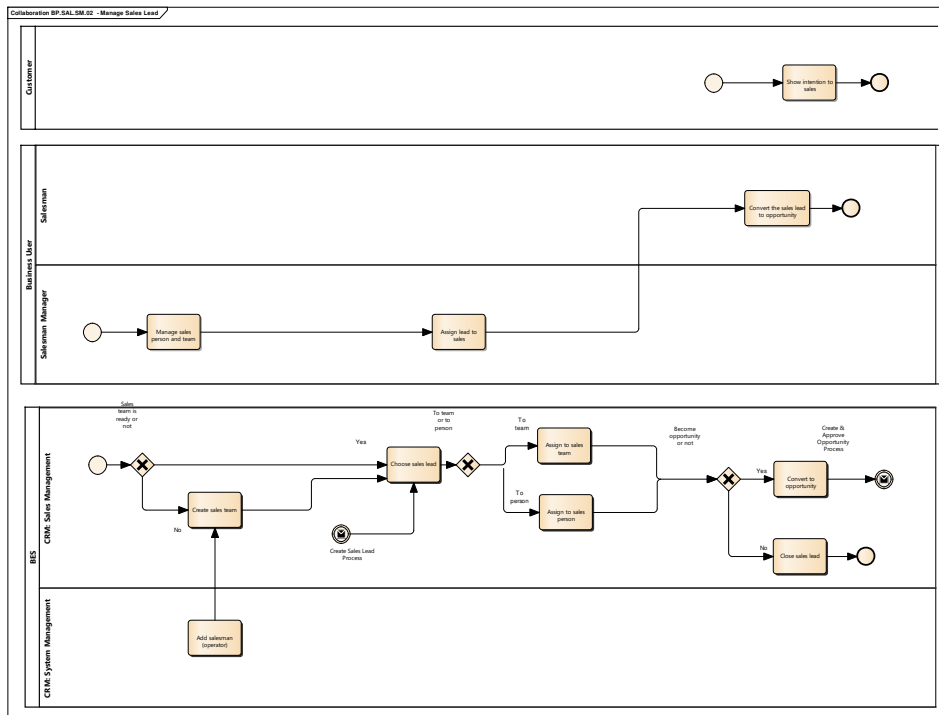
Extended Description

Track lead following on from marketing campaign advertising, or one that arises otherwise in the course of business and collected here. AM

Comment for the compliance:

AM (Please refer to the document BP.SAL.SM.02 Manage Sales Lead)

The relevant process can be found here:



In this process, a group of activities are used to realize the “Track Marketing Leads” in TMF Process Framework. Here are the details of these activities which can be found in the Huawei BP document:

#	Steps
1	Manage sales person and team: The sales manager can manage the sales person or team who will handle the newly created sales lead.
2	Sales team is ready or not If the required sales team has existed the lead can be assigned to the team or sales person. The next step is "6 Choose sales lead". Otherwise the next step is "3 Create sales team".
3	Create sales team: The sales team is created including its sales member.
4	Add salesman (operator): The salesman is added into CRM as one member of sales team for the lead.
5	Assign lead to sales: The salesman manager assigns the lead to the proper team or sales person.
6	Choose sales lead: The existing lead is chosen for the assignment.
7	To team or to person If the lead should be handled by the sales team, the next step is "8 Assign to sales team". Otherwise the next step is "9 Assign to sales person"
8	Assign to sales team: The lead is assigned to the sales team as one task.
9	Assign to sales person: The lead is assigned to the certain sales person as one task.

Here is the screen shot of tracking the marketing lead:

The screenshot displays a CRM interface for tracking a marketing lead. At the top, there is a navigation bar with icons for '+ NEW', 'DELETE', 'QUALIFY', 'DISQUALIFY', 'ASSIGN', and a dropdown menu. Below this is a lead profile card for lead ID 234. The card includes fields for 'Parent Customer for', 'Parent Contact for', 'Status' (set to 'New'), and 'Owner' (set to 'First name L.'). A progress bar below the card shows the lead is in the 'Quality (Active)' stage, with other stages like 'Develop', 'Propose', and 'Close' visible. The main content area is divided into several sections: 'Lead Info' (Contact details), 'POSTS' (a list of activities), 'Profile Information' (Lead details), and 'Competitors' (a list of competitors).

Explanatory

N/A

Mandatory

N/A

Optional

N/A

Interactions

N/A

1.2.2 Level 4: 1.1.11.2.2 Evaluate Marketing Lead

LEVEL 4 PROCESS MAPPING DETAILS 1.1.11.2.2 Evaluate Marketing Lead
Brief Description Not used for this process element
Extended Description Evaluate and notify another processes, such as Selling, that a lead exists for further action. AM
Comment for the compliance: <i>AM (Please refer to the document BP.SAL.SM.02 Manage Sales Lead)</i> <i>The relevant process can be found in the previous section.</i> <i>In this process, a group of activities are used to realize the “Evaluate Marketing Leads” in TMF Process Framework. Here are the details of these activities which can be found in the Huawei BP document:</i>
Show intention to sales: <i>The customer shows intention to the sales so the lead can be accepted as opportunity or closed as useless.</i>
Convert the sales lead to opportunity: <i>The lead is converted to opportunity by the salesman if there is a potential sale.</i>
Become opportunity or not: <i>If the lead can become one opportunity, the next step is “13 Convert to opportunity”.</i> <i>Otherwise the next step is “14 Close sales lead”</i>
Convert to opportunity: <i>The lead is converted to one new sales opportunity so it can be managed effectively.</i>
Close sales lead: <i>The lead is closed for it has no actual sales value.</i>
Explanatory N/A

Mandatory

N/A

Optional

N/A

Interactions

N/A