



# **SIEBEL BUSINESS PROCESS IMPLEMENTATION GUIDE**

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# Introduction

This guide provides overview information on how to implement Siebel business processes. This guide is useful when you are planning a new Siebel implementation, or planning changes to an existing Siebel implementation. [Chapter 1](#) briefly explains business processes and introduces the set of business processes that Siebel Systems offers. [Chapter 2](#) walks you through the steps involved in implementing Siebel business processes. [Chapter 3](#) provides information about how to work with the Siebel business processes offering and how to read the diagrams into which the business processes are built.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees who are members of an implementation planning team:

<b>Business Analyst</b>	Persons responsible for documenting business objectives, processes, and requirements, as well as the organization of the company. The business analyst also evaluates functional and process prioritization, and maps the business objectives to Siebel business process solutions.
<b>Project Manager</b>	Persons responsible for creation and execution of the project plan. The project manager facilitates project communication, monitors project scope, resolves project issues, and makes sure that deadlines are met.
<b>Executive Sponsor</b>	Persons responsible for executive-level sponsorship of the project, who actively participate in the project, and drive commitment to schedules. In conjunction with the project manager, the executive sponsor is responsible for validation and execution of the implementation plan.

<b>IT Lead/Technical Architect</b>	Persons responsible for analyzing and documenting system integration requirements. The IT lead evaluates integration complexity, the application integration strategy, and the data strategy. This individual develops systems transition strategies, reviews the Siebel solutions for impact analysis, and develops the solutions for technical requirements, such as Smartscripts, CTI, and Workflows.
<b>Application Lead/Application Architect</b>	Persons responsible for bridging the business and technical requirements, and developing a proposed solution for each requirement. The application lead evaluates the gap complexity and development type (such as standard configuration versus custom development) between the business requirements and the Siebel functionality. The application lead should have solid knowledge of Siebel Tools.
<b>Workshop Facilitator</b>	Persons responsible for conducting business requirements workshops and helping the team prioritize business goals, processes, and requirements.

This guide assumes you are familiar with Siebel applications and that you have a basic understanding of business processes. For additional resources on business processes, see [“Additional Resources” on page 9](#).

## How This Guide Is Organized

This guide complements the *Siebel Cross-Industry Business Process Reference*, and provides contextual information about how to implement Siebel business processes. You can read this guide as a stand-alone document to understand the fundamentals of Siebel business processes and what you need to do to implement them, or you can read it in conjunction with *Siebel Cross-Industry Business Process Reference* as you plan your Siebel implementation.

To understand the role that business processes and best practices play in Siebel applications, read the following sections of this guide:

- [Chapter 1, “Overview of Siebel Business Processes”](#)
- [“A Recommended Framework for Implementing Siebel Business Processes” on page 29](#)
- [“Implementation Planning Scenarios” on page 34 in Chapter 2, “Using Siebel Business Processes.”](#)

To understand how to use the business process diagrams provided in *Siebel Cross-Industry Business Process Reference* and *Siebel Cross-Industry Business Process Reference Companion CD*, read this guide in its entirety.

For a quick glimpse of what the symbols in the diagrams mean, see [“Business Process Component Descriptions” on page 74](#).

## Siebel Business Processes and the Universal Application Network

Siebel Systems’ business processes and Siebel Systems’ Universal Application Network (UAN) technologies may appear to be similar solutions, but they are two distinct product offerings.

A business process is a set of activities organized to achieve a business objective. The Siebel business processes described in this guide show the cross-industry business process solutions that Siebel applications support. By contrast, the UAN solution includes prebuilt Integration Application Processes (IAPs). These IAPs run on Siebel Systems’ partners’ integration servers and help connect Siebel applications to other enterprise-class applications for data exchange, synchronization, and update between applications, in a lower-cost and more scalable manner than other currently available approaches.

As such, the business processes provided in this guide depict possible blueprints for using Siebel applications to support your business processes, and they reference UAN IAPs where appropriate. For more information on IAPs in Siebel business process diagrams, see [“Representing Integration in Subprocess Diagrams” on page 83](#).

For more detailed information on UAN and integration application processes, see the documentation provided with the UAN product.



## Additional Resources

You can find further information about Siebel business processes, implementing Siebel applications, and business process management concepts in the following books:

- *Siebel Cross-Industry Business Process Reference*
- *Siebel Cross-Industry Business Process Reference Companion CD*
- *Planning a Successful Siebel Implementation*
- *Siebel Business Process Designer Administration Guide*
- *Business Process Management: The Third Wave*, by Howard Smith, Peter Fingar; 311 pages, December 2, 2002, Meghan-Kiffer Press; ISBN: 0929652339
- *Improving Performance: How to Manage the White Space on the Organizational Chart* (Jossey-Bass Management Series) by Geary A. Rummler, Alan P. Brache; 256 pages, 2nd edition (May 12, 1995) Jossey-Bass; ISBN: 0787900907

## **Revision History**

*Siebel Business Process Implementation Guide, Version 7.5*

# Overview of Siebel Business Processes

# 1

This book can be read as a companion piece to *Siebel Cross-Industry Business Process Reference*. The diagrams presented in *Siebel Cross-Industry Business Process Reference* model business processes as implemented in Siebel applications. *Siebel Cross-Industry Business Process Reference* also provides information that specifies the best practices that are found in each business process, as well as the Siebel products used in implementing each business process.

A business process is a set of activities organized to achieve a business objective. A simple business process might involve just one individual or system performing a small set of tasks. A complex business process can involve numerous tasks that are performed by multiple individuals, groups, and systems within an organization. A business process can include partners and third-party systems as well.

A best practice is a proven methodology for achieving a business objective. Siebel Systems' experience with over 3,500 software deployments has led to the identification of the business processes distributed in *Siebel Cross-Industry Business Process Reference*.

# Why Siebel Systems Is Providing Business Processes

Siebel Systems created the *Siebel Cross-Industry Business Process Reference* to provide business process models that clearly show the most common and effective uses of Siebel applications. You can use these business process models to avoid some of the common pitfalls of business process redesign efforts, such as wasting time conducting a lengthy review of the inefficiencies or flaws in the current business processes. Often a company will make the mistake of starting with a blank sheet of paper to redesign the business processes of the work currently being performed. In this case, the first step of the redesign work typically involves identifying and eliminating the inefficiencies in these existing processes. This is a very time-consuming exercise because standards have to be agreed to, tools have to be selected, and numerous processes have to be documented. This approach is especially flawed if software is required to support a business process because the software often does not support the entire redesigned process or the specific sequence of tasks that were defined.

To help you avoid this scenario, Siebel Systems has predesigned the most frequently-used business processes supported by Siebel software, which provide you the highest return on your investment. The business processes that Siebel Systems provides are mapped directly to Siebel screens and have been validated by Siebel customers, partners, and implementation experts. By starting with the Siebel business processes in planning your Siebel implementation, you can focus on functionality that Siebel applications support in premapped processes, and you can better address the trade-offs of customization. You can determine which customizations to your business processes and to your Siebel implementation are vital to your company. However, you should remember that significant customizations result in longer implementation times, increased expense, and additional upgrade challenges.

## Business Process Modeling

Business process modeling is the creating of diagrams to map out business processes, as experienced by the users of a system. Business process models are used in analysis of business operations and in business requirements gathering.

Many business operations are too complex to comprehend in their entirety. Business process modeling reduces this complexity by filtering out nonessential details and allowing users to focus on only that which is relevant at the business level that the business process model is addressing. For example, the business process for launching a marketing campaign contains high-level steps that can be broken down into greater levels of detail and more specific tasks. One of these more detailed tasks could be reviewing a National Change of Address list before sending out a direct mailing. While this step is important to complete, it may not be necessary to keep in mind when considering the high-level flow of activities in the business process for launching a marketing campaign, and might simply be referred to as part of a step called *Validate Addresses* in a model of the high-level flow.

A basic business process model depicts *who* does *what* over *time*, for the purpose of analyzing a meaningful unit of work in a company. Business process models are useful for organizing work, understanding problems, communicating between team members, preparing documentation, and promoting understanding of business requirements.

A business process model depicts the flow of work typically followed by users or systems to complete a sequence of tasks. Models can map business processes at multiple levels. The models presented in *Siebel Cross-Industry Business Process Reference* show four levels of detail:

- 1 The *solution map* shows the entire set of business processes for a single enterprise domain or multiple enterprise domains. An enterprise domain is a grouping of business processes from the perspective of an entire enterprise, such as the cross-industry set of business processes covering Customer Relationship Management (CRM), Employee Management, and Partner Management. The Solution Map also shows the functional domains within the enterprise domains. A functional domain applies to a typical business unit within a company, such as the Sales organization. [Figure 3 on page 19](#) shows a solution map.

- 2 The *process relationship diagram* shows one functional domain, such as Sales, and the process domains with the groupings of related business processes within those process domains. A process domain, such as Sales Execution, groups business processes logically by activity. For example, the Sales Execution process domain includes business processes for Account Management, Lead Management, and Opportunity management. [Figure 3 on page 19](#) shows process domains within a solution map. [Figure 16 on page 76](#) shows a sample process relationship diagram.
- 3 The *business process diagram* shows a series of steps completed in the flow of a business process that accomplish a major business objective. [Figure 1 on page 16](#) shows a sample business process diagram.
- 4 The *subprocess diagram* shows a greater level of detail for the high-level tasks represented in a business process diagram. [Figure 2 on page 17](#) shows a sample subprocess diagram.

For more information about the diagram levels that appear in *Siebel Cross-Industry Business Process Reference*, see [“Hierarchy of Business Process Diagram Levels” on page 72](#).

### The Solution Map

A solution map provides high-level business process models categorized by the business objectives of the organization. A solution map includes the process domains in which tasks are executed to meet these objectives. For example, a solution map for the enterprise domains of CRM, Employee Management, and Partner Management shows process domains including Marketing, Sales, and Service. In turn, the Marketing process domain shows functional domains that include Campaign Management, Event Management, and Needs Analysis.

A business analyst or manager can review the solution map to make sure that the way a task such as campaign management is performed supports the organization’s high-level business objective for marketing activities.

### The Process Relationship Diagram

The next level of process model, the process relationship diagram, represents more detailed business processes in support of the organization’s business objective for marketing activities, such as the business process model called Plan Campaign.

### The Business Process Diagram

The third level of detail, the business process diagram, shows the actual sequence of steps involved in a task referred to in a process relationship diagram. In the example of the Plan Campaign task, there is a business process diagram called Plan Campaign.

### The Subprocess Diagram

To continue with the example of planning a campaign, you can apply even more detailed business process models, such as those that move through the processes of determining available inventory or defining the audience of the campaign. These processes are represented with subprocess diagrams.

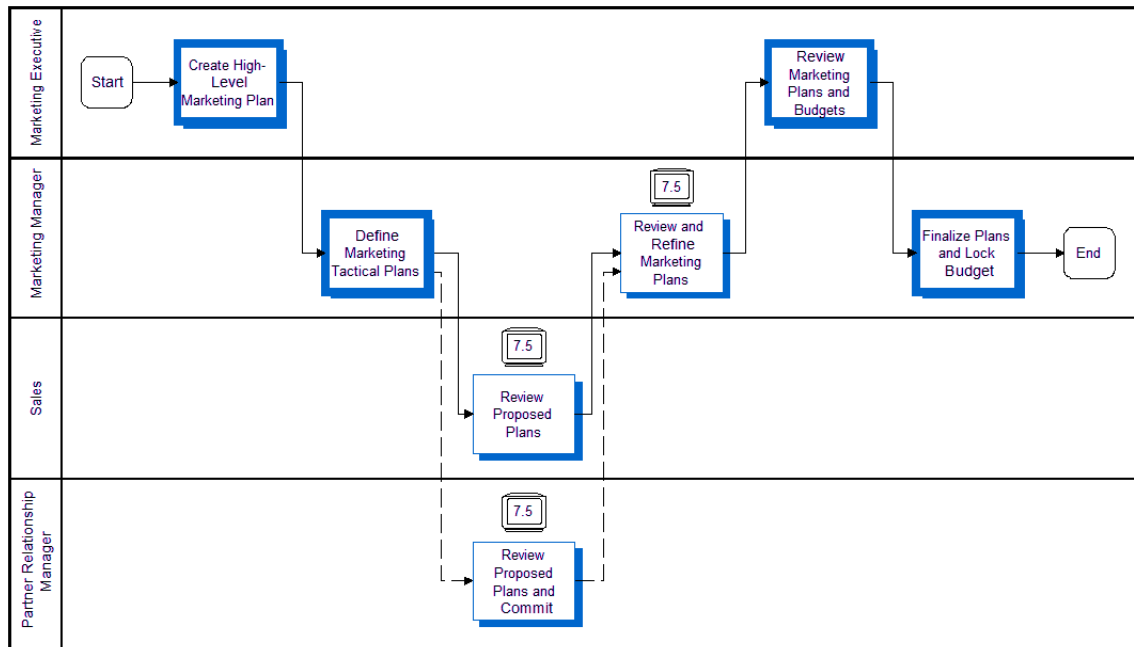
### Business Process Diagrams Model Steps in Sequence

A typical Siebel business process model contains a sequence of steps, some of which can be performed by individuals or groups within your company, and some of which can be performed by the Siebel application.

For example, when a marketing executive completes her part of the business process modeled in the diagram called *Create Marketing Plans and Budgets*, she starts by creating a high-level marketing plan. For more information, see [Figure 1 on page 16](#).

The *Create Marketing Plans and Budgets* step in the business process is represented in detail in a subprocess diagram called *Create High-level Marketing Plan*. For more information, see [Figure 2 on page 17](#). Within the sequence of steps in the *Create High-level Marketing Plan* subprocess, the marketing executive's first step is to align marketing and corporate goals. In this step, she uses the Siebel application.

Figure 1 shows a sample Siebel business process model, *Create Marketing Plans and Budgets*, as mentioned in the preceding example. In the sequence of tasks shown, each task falls into a specific row. Each row, called a *swimlane*, contains tasks performed by specific individuals or groups that typically have different roles or functions in an organization. The tasks performed are business process *steps*, and the type of task performed in each step is represented by a symbol. The steps are completed in a specific sequence, moving from left to right across the diagram.

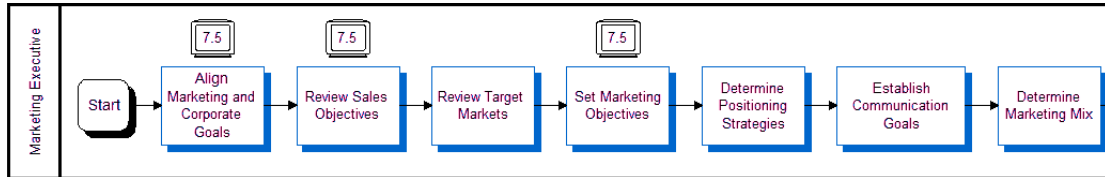


**Figure 1. Sample Business Process Model: Create Marketing Plans and Budgets**

In this example, the roles of marketing executive, marketing manager, the sales team, and the partner relationship manager interact through a sequence of tasks in the process of creating marketing plans and budgets. If you are planning an implementation of Siebel Marketing, you can compare this Create Marketing Plans and Budgets business process and others provided in *Siebel Cross-Industry Business Process Reference* to the way your company currently conducts its marketing operations to determine possible changes to your existing business processes.



Figure 2 shows a portion of a sample Siebel subprocess model: Create High-Level Marketing Plan, as mentioned in the preceding example. This level of diagram shows greater detail within a task represented in a business process model.



**Figure 2. Sample Subprocess Model: Create High-Level Marketing Plan**

The symbols used in Siebel business process models are a simplified set drawn from the flowchart symbols published by the American National Standards Institute (ANSI). For detailed descriptions of all the symbols used, see [“Business Process Component Descriptions”](#) on page 74.

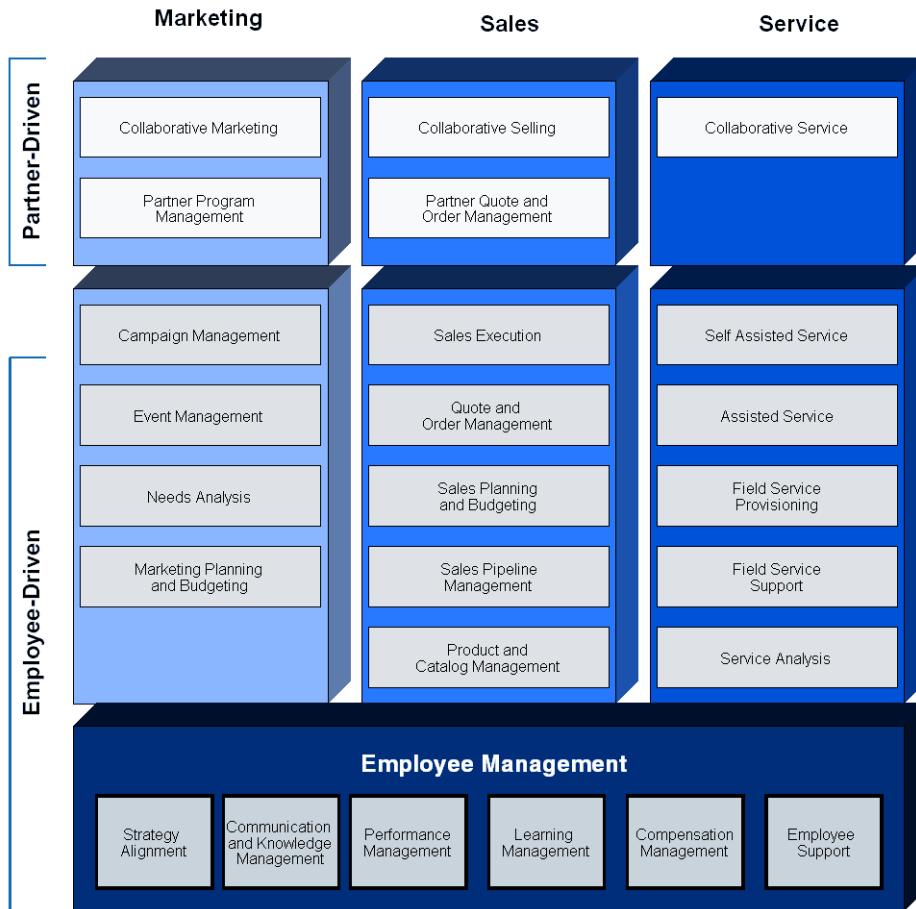
# Overview of Business Processes Provided in This Release

The business processes modeled in *Siebel Cross-Industry Business Process Reference*'s diagrams serve as blueprints that you can use to help your company accelerate the design and deployment of customer-centric business processes.

The Siebel business process diagrams are presented in the following sets:

<b>Marketing Processes</b>	This section includes the key function-specific processes for marketing activities (such as <i>Analyze Campaign Results</i> ).
<b>Sales Processes</b>	This section includes the key function-specific processes for sales activities (such as <i>Create Sales Forecast</i> ).
<b>Service Processes</b>	This section includes the key function-specific processes for service activities (such as <i>Manage Inbound Service Call</i> ).
<b>Partner Processes</b>	This section includes the key processes associated with Partner Management, which are the processes used to manage relationships with partners and resellers (such as <i>Train and Certify Partners</i> ).
<b>Employee Processes</b>	This section includes the key processes associated with Employee Management, which are the processes used to manage workforce performance and maximize organizational agility (such as <i>Review Employee Performance</i> ).

[Figure 3](#) shows an enterprise-wide view of all these business processes, in the solution map. This is the entire set of Siebel business processes for the enterprise domains covering CRM, Employee Management, and Partner Management. The solution map also shows the functional domains within the CRM enterprise domain: Marketing, Sales and Service.



**Figure 3. Solution Map for Cross-Industry Business Processes**

# Overview of Best Practices Provided in This Release

The business processes modeled in *Siebel Cross-Industry Business Process Reference* include a set of best practices drawn from Siebel Systems' experience with over 3,500 software deployments. The business process diagrams are accompanied by reference pages, where you can find information on the best practices associated with each business process. The reference pages also explain the following about each business process:

- What the business process helps an organization to do
- The Siebel products required to implement the business process
- The prerequisites and inputs that are required to implement the business process
- The results and outputs that define the outcome of the business process
- The metrics for measuring performance and results of the business process
- The roles involved in the business process

By reviewing the reference pages for the business process diagrams, you can learn further information about how the business processes work, and why the business processes were mapped out to flow the way they do.

In the example of the *Create Marketing Plans and Budgets* business process modeled in [Figure 1 on page 16](#), one of the best practices found in this process is *Align Marketing and Corporate Goals*. *Align Marketing and Corporate Goals* has been documented from Siebel Systems' work with customer companies, as well as from direct customer input. This direct customer input has shown that, for a company developing a marketing campaign, the proven and accepted best practice is to first make sure that the goals for marketing are in alignment with the overarching goals of the company.

This chapter explains how to use the business processes in *Siebel Cross-Industry Business Process Reference* while planning changes to an existing Siebel implementation, or while planning a new deployment of Siebel applications. This chapter includes the following:

- General guidelines for planning a business process-based implementation
- A suggested implementation framework as well as scenarios for implementation planning
- An explanation of how to access the business process diagrams on the *Siebel Cross-Industry Business Process Reference Companion CD*
- Instructions for using the Siebel Add-in for the third-party application in which the diagrams are formatted.

You use the Siebel business processes presented in *Siebel Cross-Industry Business Process Reference* by reviewing the printed diagrams within the book, as well as by accessing the files for the diagrams on the *Siebel Cross-Industry Business Process Reference Companion CD*.

You can use the Siebel business processes to plan and design the business processes you will be implementing in your company. The business processes modeled in the diagrams serve as blueprints as you plan how to address your company's specific business process needs. Many of your company's specific business process needs can be supported by Siebel functionality. You can use the diagrams to determine the amount of customization (if any) you will need as you implement Siebel applications in your business. Because the business process diagrams include integration points, you can evaluate and plan the specific integration requirements necessary for your business processes. An example of a specific integration requirement is integration between the Siebel application and a supply chain management application, so that sales forecast data can be exported from the Siebel application to the supply chain management application.

By accessing the files on the *Siebel Cross-Industry Business Process Reference Companion CD*, you can view the business process diagrams in their Corel iGrafx (.igx) source files. The source files link directly to the Siebel application, so you can test and demonstrate how a business process's steps map to Siebel screens and views. If needed, you can customize the business process diagrams to meet your company's specific requirements.

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**NOTE:** The business process diagrams are formatted as Corel iGrafx (.igx) files. You must install Corel iGrafx Flowcharter in order to access the files.

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You should align the business processes presented in *Siebel Cross-Industry Business Process Reference* with the needs and goals of your company, and customize the business processes accordingly. However, these Siebel business process models were designed as best practices supported by Siebel applications, and it is recommended that you adhere as closely as possible to the default Siebel implementation for best results.

## Guidelines for Planning a Siebel Implementation

Siebel Systems provides business process solutions in the *Siebel Cross-Industry Business Process Reference* as well as on the *Siebel Cross-Industry Business Process Reference Companion CD*. You should map your business goals to these business process solutions to reach your starting point for developing and implementing business processes that meet your company's needs.

Not all companies view business processes in the same way. Some companies have documented business processes that are no longer used. Some companies have documented business processes that all employees know and follow. Other companies have set sequences of actions that all employees know and follow, but they are not documented.

A widely agreed upon implementation best practice is that you should base your redesigned business processes on the inherent business processes supported by the software you are purchasing. Siebel Systems has documented business processes that allow you to deploy Siebel software in the least amount of time possible with minimum expenditure.

## Customizing Siebel Software

Companies that purchase enterprise software are agreeing to make significant changes to increase their returns and—in the case of CRM—to improve customer satisfaction.

In addition, these companies have determined that purchasing software solutions—rather than building their own software solutions—provides an improved return on investment. What sets a company apart from its competitors is its ability to execute, its culture, or its employees. Some constituents within a company believe, however, that it is the company's unique use of a technology that sets it apart from its competitors. The use of custom-built technology can sometimes be a strategic advantage. However, by using Siebel business-process-based applications, in conjunction with the Siebel Universal Application Network and Siebel Systems' support for Web services, customers can easily combine Siebel applications with other enterprise-class applications that support their unique service or product offerings.

Rather than heavily configure the Siebel application to match your current business processes, it is recommended that you select from the premapped business processes that Siebel applications support. Overcustomization can reduce the efficiency of the software and the business process.

However, there may be compelling business reasons why a company needs to configure its implementation of the Siebel application to the company's business processes. For example:

- A business process the company requires is not provided among the premapped business processes that Siebel Systems provides.
- A feature that the company considers parts of its competitive advantage is not provided in the premapped business processes that Siebel Systems provides.

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**NOTE:** A company may decide to configure its implementation if the current sequence of tasks does not exactly follow the sequence of tasks provided in the predesigned business process. Before deciding on configurations, you should confirm that the predesigned process (despite the altered sequence of tasks) prevents you from achieving your business goal, and therefore will not work.

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## Modifying Siebel Business Processes

After reviewing the predesigned business processes and your existing business processes, you may need to customize these business processes or create new business processes. This requires an evaluation of your existing business processes, as well as careful documentation of the user requirements that are not met by the predesigned business processes.

### Researching Existing Business Process Information

If your current business processes are supported by software, you should gather information on how the software supports these business processes. You should also understand the limitations of the current software that you want to address in the new business process, so that you can overcome these limitations in the new business process.



Companies generally collect detailed business requirements by evaluating a business process with a group of business users who work with the business process. Evaluation of current business processes provides a helpful reference point as the new business process is designed or validated. Existing business processes can come from documented formal business processes, management guidelines, written guidelines of process rules or approval paths, and internal procedures (written or unwritten).

In a facilitated session, generally a work group will evaluate a business process by walking through each step, detailing requirements along the way. If you are participating in a facilitated session, you should choose a set of business processes that most closely address a specific business objective. As you walk through each step of a business process, you can then record business requirements associated with each step. In general, each step in a business process relates to a specific view in the relevant Siebel application. If a step does not relate to a specific view, it may be a step that is always performed manually, or it may be a task that the Siebel application does not support.

You gather business requirements that you will then turn into system designs. There are three types of requirements you should consider collecting when you evaluate your chosen business processes:

- **Functional requirements.** Functional requirements describe how the business process will behave. Examples of functional requirements include business rules, field additions and changes, and reporting requirements.
- **Non-functional requirements.** Non-functional requirements are necessary to support the operation of the business process. Examples of non-functional requirements include backup, performance and scalability, and administration needs.
- **Integration requirements.** Integration requirements depend on how the business process will receive or send data between systems. Examples of integration requirements include the data conversion approach, batch frequency, integration synchronicity, and data volume handling.

In gathering business requirements, the goal is to determine the most appropriate way to meet user needs in the Siebel application. For example, if a user requests that upon completing a specific step within one Siebel screen, another action should happen, the implementation team will determine the best way to implement that request using the Siebel application. The ideal method will require as little application customization as possible.

When customization is necessary, Siebel Workflow allows you to configure workflows without coding. This simplifies future upgrades to your Siebel application. Of course, your company's priorities and architectural principles may require application changes at the code level. This depends on your company's business objectives, and, in some cases, the span of your company's overall Siebel solution.

After you have gathered as much information as you can about existing business processes, review the information you have collected to determine whether there are areas for improvement in the business process or whether a new process might be useful. Consider the following possibilities:

- Are there new management guidelines to follow?
- Are there current problems that need to be solved?
- Are there customer satisfaction issues to address?
- Are there business processes that you would like to automate?

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**NOTE:** Siebel Systems uses Requisite Pro from IBM/Rational to record business requirements. These business requirements are linked to the business processes, so that work plans can be generated at the process level and complete business process solutions can be designed and built.

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## Implementing Business Process Modifications

Siebel business processes are blueprints for your successful implementation and are easy to modify. All business processes are developed using Corel iGrafx Flowcharter 2003. Siebel business processes also contain an add-in to Corel iGrafx that allows you to navigate to the Siebel views that support a business process.

While Corel iGrafx (purchased separately) comes with its own user documentation, it is simple to modify a business process within this tool. Corel iGrafx provides a drag-and-drop user interface, so symbols within the diagrams can be easily moved, changed, and reordered. If your company needs a unique approach to implementing a Siebel business process, a Siebel-trained business analyst on your project team can identify other relevant Siebel views and link these views to the business process diagram. As you modify the business process to meet your company's needs, you should be sure to capture detailed business requirements, as described in [“Researching Existing Business Process Information” on page 24](#).

## **Business Processes and Siebel Business Process Designer**

It is necessary to determine how each business process will be implemented. Some business processes should be implemented through a workflow in the Siebel application, which then enforces a specific set and sequence of tasks.

An implementation that requires a workflow is typically one that:

- Is performed infrequently
- Is complicated
- Is performed by low-skilled workers
- Has regulatory requirements

Siebel Business Process Designer allows you to define, manage, and enforce your application workflows. Because Siebel applications are flexible and support multiple ways of meeting your company's business needs, it is up to the project manager to select the most appropriate method based on the company's technical architecture and business processes. Generally, a technical member of the project team configures Siebel Workflow according to the specifications of the business process and the business requirements. However, it is a good idea for project leaders and business users to have an overview of the types of actions Siebel Workflow can address to make sure that business processes are designed and implemented in a way that meets the business requirements. For more information on Siebel Workflow and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Business processes that are highly variable or that require flexible-use scenarios that are coordinated with other business processes are not good candidates for a workflow-based implementation. For these business processes, configurators need to identify the many different scenarios necessary to complete the steps. Configurators should then modify views, data tables, and business components as necessary to support each scenario. Effective implementation of these business processes typically involves user training with supporting documentation, which may include online help. For more information on customizing your current Siebel online help system, see *Siebel Developer's Reference*.

There must be a balance between the flexibility a company allows its users and the restrictions it puts in place. Rules should be present to guide the users, whether the business process is implemented in Siebel Workflow or not. These rules can be provided as procedural guidelines or they can be configured into a workflow, but it is important to remember that an extremely restrictive application can decrease productivity and cause work to be redone.

## **Deploying Your Business Processes**

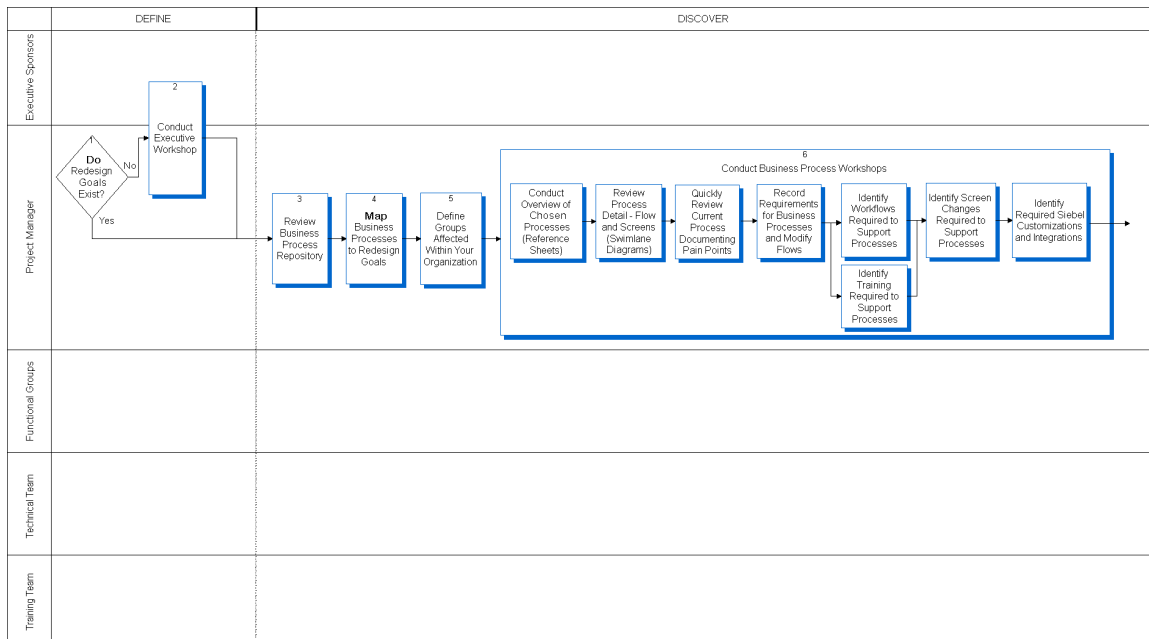
Once a business process is developed to meet your company's needs, configurations must be tested before the business process is rolled out to users. It is important to confirm that a business process works from start to finish. The effectiveness of the business process lies in the entire process, not in any individual step or view. Organize your testing phase around business processes, not around Siebel views or steps within the business processes.

As new business processes are deployed, it is crucial that users are trained on the new ways of doing things. Introduce users to the new business processes (whether or not workflows have been employed) to give them a chance to learn the new functionality and the new flow of work. Little to no training may result in low user acceptance, decreased productivity, and errors—problems which can impact revenue. You should train users on the procedures for completing their tasks in the context of a business process. Relating an individual user's steps to the overarching business process can motivate individual users because they can see how their actions impact the larger process, the organization, and the customer's experience.

# A Recommended Framework for Implementing Siebel Business Processes

In this guide, the term *Siebel implementation* means deploying a Siebel solution where there is none already in place, as well as making changes to an existing deployment of Siebel applications.

Figure 4, Figure 5, and Figure 6 show a business process diagram that models a recommended way to plan a Siebel implementation that employs Siebel business processes.

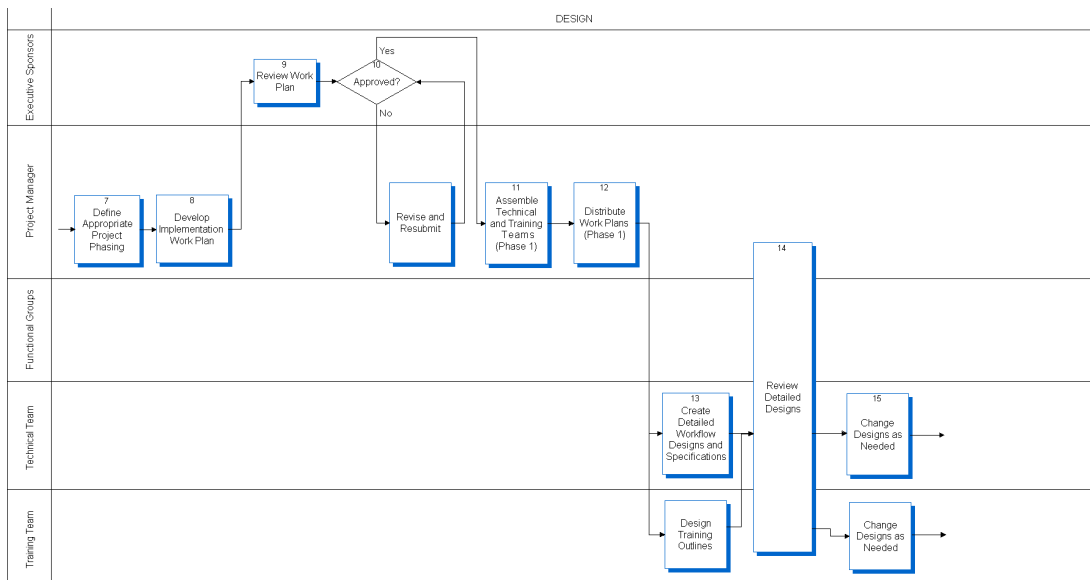


**Figure 4. Business Process for Planning a Siebel Implementation (Part One of Three)**

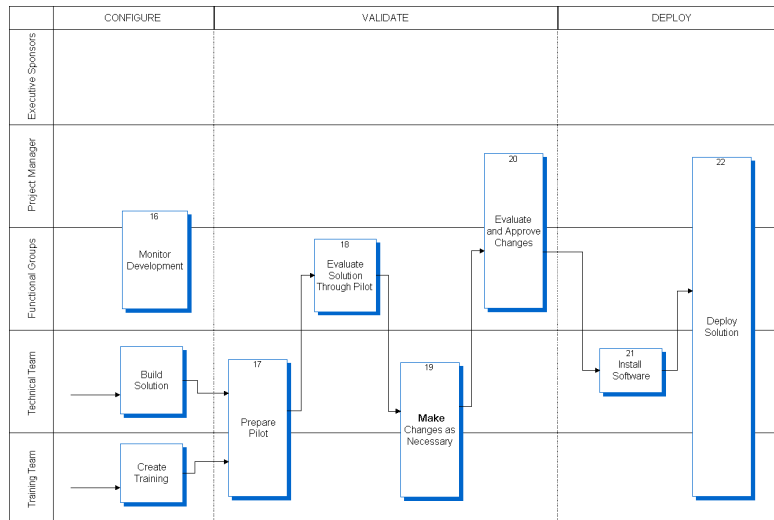
## Using Siebel Business Processes

### A Recommended Framework for Implementing Siebel Business Processes

The top row in [Figure 4](#), [Figure 5](#), and [Figure 6](#) separates the diagram into six implementation stages: Define, Discover, Design, Configure, Validate, and Deploy. The column at the left edge of the diagram shows the roles that perform the tasks of the planning project. These roles make up the members of the implementation planning team: executive sponsors, an implementation project manager, functional groups, a technical team, and a training team.



**Figure 5. Business Process for Planning a Siebel Implementation (Part Two of Three)**



**Figure 6. Business Process for Planning a Siebel Implementation (Part Three of Three)**

**Define** *Steps 1 and 2.* You start by defining your company’s Siebel implementation goals. What are the reasons behind your company’s decision to implement Siebel applications? What are the specific business objectives that you are aiming to meet?

An example of a well defined business objective is *decrease customer defection by 25 %*. An example of a goal that is not specific enough is *manage customer retention*. One way of defining clear and precise implementation goals is to conduct an executive workshop, and get the executives within the company to agree on a handful of the most important problems the business is facing, and the necessary actions to focus on to solve them.

**Discover** *Steps 3 through 6.* Once a set of specific implementation goals is determined, you begin the process of discovering your business requirements. Review the business process diagrams provided in *Siebel Cross-Industry Business Process Reference* and make decisions about which Siebel business processes align with your implementation goals. Consider the roles within each business process to determine which groups within your company will be affected by the implementation plans. When you know which groups are affected, you can involve representatives from these groups in gathering the rest of the requirements.

Now your implementation planning team has grown to include individuals who will be involved in the actual implementation. This group might include representatives from your I.T. department, senior managers from departments the implementation will affect, an executive sponsor, and a workshop facilitator.

You can conduct business process workshops to discover the business requirements, and get buy-in from all groups involved. The implementation planning team reviews the overview information and process details (contained in the reference pages for the business process diagrams) for the relevant Siebel business processes, and identifies the specific Siebel business processes to implement. The team reviews the current processes in place to determine:

- Which processes work well
- Which processes can be kept and improved
- Which processes need to be replaced

The team then determines:

- Which parts of the selected business processes need to be modified or customized to meet the company's particular requirements
- Which elements of each business process will use Siebel Workflow to support the process
- Which elements of each business process will require training for users

The business requirements gathering sessions that the implementation planning team conducts should also yield decisions on the screen and view changes that will be needed in the software's user interface, as well as identification of necessary customizations and integration points.

### **Design**

*Steps 7 through 15.* After your business requirements have been discovered and clearly defined, you move on to the design phase of your implementation planning. The most important part of this design stage is defining the phasing for the Siebel implementation project. Phasing is critical because the implementation should occur in stages. This is useful for several reasons:

- Separating a project into stages helps to keep the size and scope manageable



- Your company can begin to benefit from the implementation sooner, once the first stage has been completed but before the other stages are finished
- The knowledge and experience your company gains in the early stages of the implementation project can be applied in the later stages

For example, an implementation of Siebel Service should go live in one of three call centers within a company, so that it affects a fraction of the total number of users rather than all the service users at once.

You then use the separate stages identified to create a detailed work plan, and then get buy-in and approval from the executive sponsor. You assemble technical and training teams, containing members of the implementation planning team as well as other individuals who will configure the Siebel application and design the necessary training. You distribute work plans to begin work on Phase One of the project. The technical team creates detailed Siebel Workflow designs and specifications. The training team creates outlines for upcoming instruction for users. The implementation planning team then reviews these designs and outlines.

- Configure** *Step 16.* While the project manager monitors development, the technical team configures the Siebel implementation, and the training team develops training.
- Validate** *Steps 17 through 20.* The implementation must be tested before it goes live to all users, so the work of the technical team and the training team is built into a pilot program, in which the functional groups of users evaluate the new and improved business processes and the Siebel application. The technical and training teams make changes to the solution as necessary, and then the functional groups and the implementation planning team evaluate and approve the changes.
- Deploy** *Steps 21 and 22.* At this point, the Siebel implementation is ready for deployment to all users, so the technical team moves the installation from the development environment to the production environment. Then the implementation planning team, the functional groups, and the technical and training teams collaborate to deploy the solution.

## Implementation Planning Scenarios

The scenarios presented in this section show how a company can plan a Siebel implementation and apply Siebel business processes from *Siebel Cross-Industry Business Process Reference*.

In the first scenario, a large manufacturing company is seeking to increase customer satisfaction while cutting service costs. The company determines the goal it expects to achieve, implements a specific business process to reach this goal, and takes the steps necessary to make certain that the groups involved can operate effectively in the new system.

In the second scenario, a worldwide car-rental company makes changes to some of its marketing practices in order to target a different market. The company implements a Siebel business process that allows it to increase its marketing reach while at the same time reducing marketing costs. This implementation plan is more involved as it includes the customization of a business process, as well as integration with an external reservations system.

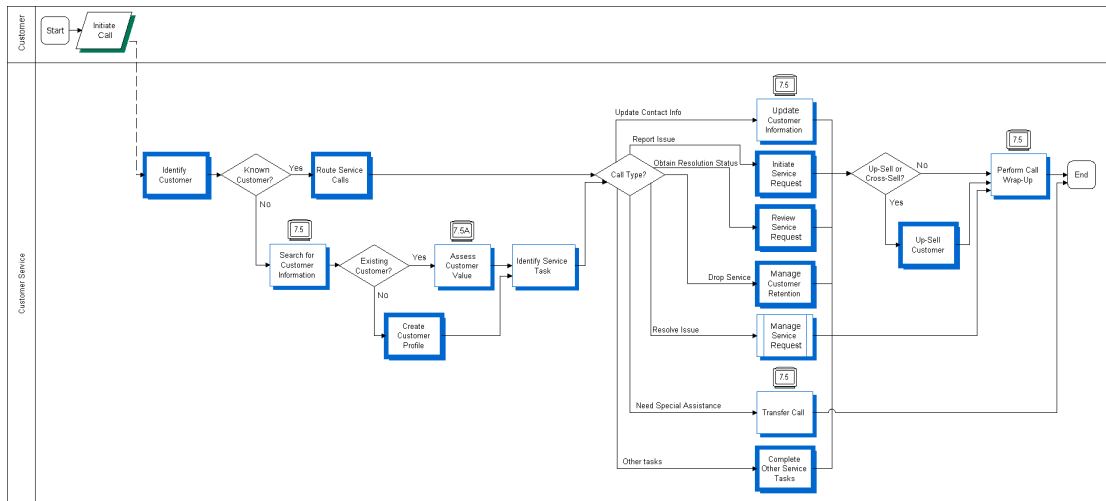
Each company in these two scenarios has determined it has a problem it wants to fix by implementing software. Each has evaluated the offerings of several software vendors, and has chosen Siebel applications as its software solution. The scenarios relate the ways in which the adoption of Siebel business processes has solved the problems that each company wanted to address.

### Scenario One: Summit Technologies Deploys *Manage Inbound Service Call*

In this scenario, Summit Technologies decides to apply the *Value-Based Service Coverage* best practice by adopting the *Manage Inbound Service Call* business process supported by Siebel software, within a new implementation of Siebel applications. This scenario is an example of a straightforward adoption of a Siebel business process, with no customization.

Figure 7 shows the business process diagram for the *Manage Inbound Service Call* business process.

**NOTE:** The business process modeled in Figure 7 is a simplified version of the actual *Manage Inbound Service Call* business process. The actual business process includes more steps.



**Figure 7. *Manage Inbound Service Call* Business Process**

In rolling out the *Manage Inbound Service Call* business process, Summit Technologies first determines the business goal for its Siebel implementation. Then Summit figures out exactly what is needed to address this business goal and reviews Siebel business processes to determine their fit with the company's requirements. Next the company decides how to implement the business process solution. After that, Summit configures, validates, and deploys Siebel software to support this business process solution.

## Company Profile

Summit Technologies produces test and measurement devices, semiconductor products, and chemical analysis tools for communications equipment manufacturers and biopharmaceutical companies in more than 120 countries. Headquartered in California, Summit Technologies has 41,000 employees in over 40 countries. The company had revenues of \$8.4 billion in fiscal year 2001.

Summit's customer service operations include three inbound call centers as well as an email-fax response team that collaborates with the call center staff. Each of the three call centers has a different toll-free telephone number, and each center receives calls specific to its area of expertise. One call center provides general customer service, another offers technical support, and the third helps customers with their application support requests.

One of Summit's business goals is to minimize service costs while maximizing the level of service provided to customers. The test and measurement market, in which Summit Technologies operates, has seen intense competition in the last several years. Customers are demanding deeper discounts, higher levels of service and ease of doing business, as well as the latest technology and sound technical support.

The company is faced with the problem of beating out its competitors to retain its position as market leader, while keeping costs down and providing top-quality service to hold on to its customers. Summit meets its business goals by improving the operations of the company's call centers through the deployment of a new implementation of Siebel applications.

**Define**     **Defining Implementation Goals.** Summit Technologies' current business priority is to service its customers better than any of its competitors. Before settling on this priority, a group of company vice presidents and directors forms an executive team to consider the problem areas affecting their business, and they clearly define each problem area with quantifiable metrics. After gauging the importance of each problem area, the Summit executive team realizes that poor customer satisfaction is the most important and controllable reason for declining revenues. When customers are unhappy with the service they are getting, they take their business elsewhere. In this way, the executives decide that customer defection is their main problem to focus on.

The vice president of customer service tells the other team members that unless they can find better, faster, and cheaper ways of doing things, they will continue to lose customers. She also reports that call center agents have up to eight systems open at any given time. The IT director informs the group that since the agents are forced to reference multiple systems, they do not always have consistent information. The IT director adds that most of the current systems do not offer the flexibility that the call center needs.

In considering their business challenges, the executive team comes to the conclusion that the problem of customer defection can be addressed by:

- Improving coordination between the various departments within Summit to make interaction with the customer more efficient and effective
- Improving the way in which service requests are resolved by using an automated process that eliminates the errors, inefficiency, and poor productivity of the current manual process
- Employing standardized tools for problem diagnosis and automation of error-prone aspects of service delivery, such as call routing, entitlement verification, and escalations
- Replacing inefficient legacy systems and fragmented business processes with a streamlined approach to the business
- Achieving a real-time view into key performance indicators, such as quantifiable metrics about customer defections

The Summit executive team determines that in order to meet these goals, they will focus on improving the operations of the call center in their implementation planning. They will use the metrics they identified for the problem of customer defection in order to establish a benchmark from which to measure progress. Now that they have defined Summit's implementation goals, they call in their business analyst to continue with analyzing call center operations.

**Discovering Business Requirements.** The business analyst reviews the business process diagrams provided in *Siebel Cross-Industry Business Process Reference* in order to determine which Siebel solutions address the implementation goals for improving call center operations to reduce customer defection. In the *Service Business Processes* section, he finds the business process diagram and reference pages for the *Manage Inbound Service Call* business process. This business process seems to address Summit's implementation goals.

The *Manage Inbound Service Call* business process includes the following best practices that can be applied to Summit's customer defection problem:

- Dynamic, Data-Driven Call Resolution
- Intelligent Issue Recognition and Routing
- Multidimensional Service Opportunities Analysis
- Implement Rules and Guidelines for Workflow
- Value-Based Service Coverage

This scenario will limit its focus to the *Value-Based Service Coverage* best practice.

The business analyst now needs to involve other individuals from functional groups within Summit, to make sure that the *Manage Inbound Service Call* business process can be implemented in a way that meets the implementation goals. He needs to discover the specific business requirements for deploying this business process within the company's call center operations.

The business analyst identifies individuals to comprise a representative sample of all the functions carried out in Summit's call center operations. The representative sample includes call center agents, call center managers, IT staff, and anyone else who can provide information about the call center business processes currently in use. Meeting one-on-one with each of these individuals, he interviews them to get answers to a number of questions, including the following:

- What are the key activities of each of the three call centers?
- Who calls into the call centers?
- Do callers join separate queues?
- Do you distinguish between fee-based and free callers?
- What activities do agents perform?
- What are the specific steps in the process for receiving a call and for handling a call?
- When do hand-offs occur?
- Which activities are manual, and which are automated?

- When is data from other systems accessed?

Now the business analyst forms an implementation planning team drawing from all the functional groups within Summit that will be affected by changes to call center operations. From within the company, he assembles a call center manager from each of the three call center facilities, a call center agent, and an IT manager. The business analyst acts as project manager for this implementation planning team, and as a facilitator for the team's discussions.

The implementation planning team conducts a business requirements workshop to capture and record call center business requirements for the new business process. The business analyst demonstrates the *Manage Inbound Service Call* business process for the team, and the team reviews the way it works, step by step. The team records Summit's detailed requirements for each step in the flow. The team agrees that the *Manage Inbound Service Call* business process should fit Summit's business requirements, through a discussion of the ways in which each call center currently handles calls.

During this discussion, the business analyst summarizes Summit's current business process for managing inbound service calls, and the implementation planning team briefly reviews its flow:

- 1 A customer calls into one of the three Summit call centers and is routed to a queue specific to the call center.
- 2 An available agent receives the call, greets the customer, and gathers identification information.
- 3 The agent accesses multiple systems to obtain the customer's profile, transaction history, and other information.
- 4 The agent guesses the value of the customer based on a history containing the last three months.
- 5 The agent listens while the customer explains the problem, then takes one of the following actions:
  - The agent accesses information to resolve the problem.
  - The agent transfers the call to someone else who can help, such as another agent or an expert in another department.
- 6 Next, the agent puts the customer on hold to research a solution.

- 7 The agent then talks to the customer again, either to explain the solution and wrap up the call, or, if the agent cannot resolve the issue while the customer is holding, to make arrangements for another call with the customer at a later time.

During times when the agents are not on calls with customers, they perform administrative tasks or remain idle awaiting calls.

The most important findings the business analyst makes in his review of the current business process are:

- All call-center activities are performed manually, which has led to avoidable errors, inconsistency in the customer experience, and unnecessary costs because manual processes require more time and effort.
- Neither active nor idle call-agent time is tracked systematically, so call center reports may be inaccurate and unreliable.

By considering the call center's existing business process for handling inbound service calls, the implementation planning team determines that:

- There is no resource pooling across the three call centers, so some agents remain idle while customers wait on hold.
- Customers join multiple call queues, on a first-come first-served basis.
- There is no queue prioritization, so there is no way to give high-value customers better service or less waiting time.

The implementation planning team determines that the *Manage Inbound Service Call* business process will meet their business requirements, and that Summit can deploy the business process as-is, with no modifications necessary.

The new call center operations will now take the following steps:

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**NOTE:** The parts of the business process steps in *italics* replace ineffective parts of Summit's former business process.

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- 1 A customer calls into one of the three Summit call centers *and is routed to a queue from which all three call centers draw calls for available agents.*



- 2 An available agent receives the call, greets the customer, and gathers identification information.
- 3 The agent accesses *one source, the Siebel application*, to obtain the customer's profile, transaction history, and other information.
- 4 *The agent uses the Siebel application to score the customer.*
- 5 *The agent uses the Siebel application to assess the customer's value.*
- 6 The agent listens while the customer explains the problem.
  - a *If the customer is considering dropping the service, the agent concentrates on managing customer retention.*
  - b Then the agent accesses information to resolve the problem, or transfers the call to someone else who can help, such as another agent or an expert in another department
- 7 Next, the agent puts the customer on hold to research a solution.

The agent then talks to the customer again, either to explain the solution and wrap up the call, or, if the agent cannot resolve the issue while the customer is holding, to make arrangements for another call with the customer at a later time.

**Design**

**Designing the Business Solution.** The Summit implementation planning team next creates an action plan for deploying the Siebel business process for handling inbound service calls. Focusing on the *Value-Based Service Coverage* best practice, they first discuss and come to agreement on the relevant metrics to score customer value, based on lifetime value and loyalty scores. They plan to implement technology that will provide an accurate view of customer value based on real-time predictive analytic measures and data-driven rules. This technology must also allow for real-time in-queue reprioritization to minimize hold times for high-value customers.

The team applies the *Manage Inbound Service Call* business process to replace Summit's current business process for managing inbound service calls, using Siebel software to support the new business process.

- Configure**     **Configuring the Siebel Implementation.** Under the monitoring of the business analyst, a technical team uses Siebel Tools to configure the Siebel application as-is, without performing any additional customization other than user-interface preferences. Meanwhile, a training manager from Summit coordinates with the technical team and monitors progress on the new implementation's Siebel Tools user-interface configurations to create a training session for the system's users on the new functionality and the enhanced business process for handling service calls.
- Validate**     **Testing the Siebel Implementation.** The technical team runs tests on the Siebel implementation before it goes live, making sure the entire process works as planned from beginning to end. The implementation planning team evaluates and approves a pilot implementation.
- Deploy**     **Deploying the Siebel Implementation.** Now Summit's Siebel implementation is ready for deployment, so the technical team moves the installation from the development environment to the production environment, and the implementation planning team, the users, the technical team, and the trainer collaborate to deploy the solution.

### Implementation Results

Summit Technologies has identified a problem, decided to address it by implementing a Siebel business process solution, and chosen Siebel applications as the supporting software. The company has implemented the *Manage Inbound Service Call* business process to solve the problem of customer defection by improving the customer service it provides in its call centers.

Summit finds that the automation of call-center tasks provided with the Siebel application—in addition to the consolidation of eight legacy systems into a single, stable application—reduces call handling times by an average of 40%, because less time is required for accessing information. Not only that, but the pooling of available agents from all three call centers reduces customer wait times by an average of 23%. This improved efficiency boosts customer satisfaction scores by 17%, while simultaneously increasing the agent utilization rate from 63% to 77% by making more work possible by fewer agents.

## Scenario Two: Reliance Rent-A-Car Deploys *Launch Campaign*

In this scenario, Reliance Rent-A-Car decides to apply the *Real-Time Offering* best practice by adopting the *Launch Campaign* business process supported by Siebel software, within a new implementation of Siebel applications. This scenario is an example of a more complex adoption of a Siebel business process that involves customization and integration with another system.

Figure 8 shows the business process diagram for the *Launch Campaign* business process.

**NOTE:** The business process modeled in Figure 8 is a simplified version of the actual *Launch Campaign* business process. The actual business process includes more steps.

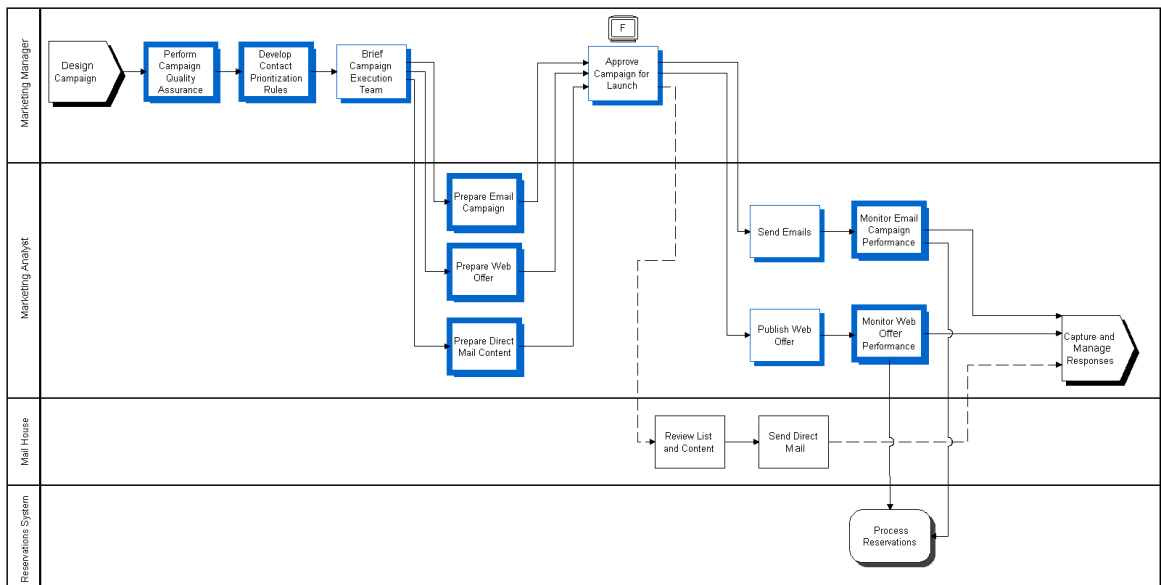


Figure 8. *Launch Campaign* Business Process

In rolling out the *Launch Campaign* business process, Reliance first determines the business goal for its Siebel implementation. Then the company figures out exactly what is needed to address this business goal and reviews Siebel business processes to determine their fit with the company's requirements. Next Reliance decides how to implement the business process solution. After that, the company configures, validates, and deploys Siebel software to support this business process solution.

### Company Profile

Reliance Rent-A-Car is the largest vehicle rental company in the US in terms of revenue and number of rental transactions. Reliance has 50,000 employees at more than 5,000 offices worldwide, with 4,300 in the US. The company had revenues of \$6.3 billion in fiscal year 2001.

Reliance Rent-A-Car's services include vehicle rentals to consumers, fleet management to businesses, and the sale of preowned cars to the general public. The bulk of Reliance's revenues comes from vehicle rentals.

One of Reliance Rent-A-Car's business goals is to increase market share and brand awareness as the premier rental car company, specifically in the local market rather than the airport market. Competition in the car-rental market as a whole centers around price, reliability, ease of pick-up and return, and customer service, but companies are also able to gain a competitive advantage through advertising and marketing. In recent years, there has been a downturn in US rentals and a sharp decline in travel rentals. At the same time, customers are choosing to rent cars for leisure activities and special occasions. For these reasons, rental car companies are looking to the local market for revenue opportunities.

In the local market, Reliance specializes in renting vehicles to consumers in two categories: those who need a replacement vehicle due to an accident or theft, and those who want to use a vehicle other than their own for a short business or leisure trip, such as attending a wedding or taking a family vacation. Reliance knows that the large majority of replacement rental customers are referred by insurance company claims adjusters. To attract replacement rental customers, Reliance salespeople focus on developing and maintaining relationships with insurance company staff as well as employees at local auto body shops.

The attracting of customers in the short-trip category is the focus of this scenario. Reliance's current efforts in marketing to local-market customers do not use low-cost advertising mechanisms such as email and Web offers, and the decentralized organization of Reliance's branch offices hinders marketing execution. The current marketing efforts are focused primarily around a direct mail campaign created at headquarters but executed regionally, drawing from branch office contact information and customer records. The campaign execution occurs with inconsistent timing across the country, and response is difficult to track and measure with accuracy.

The company is faced with the problem of stiff competition for local-market customers. To attract these customers and increase sales revenues, Reliance focuses on the goal of expanding and improving its marketing efforts to reach a significantly greater number of customers. Reliance meets this goal by employing multiple channels for its outbound marketing, and by making each campaign more effective through the deployment of a new implementation of Siebel applications.

**Define** **Defining Implementation Goals.** Reliance's current business priority is to increase revenues, while maintaining its market leadership position by penetrating deeper into local markets. To determine this priority, a group of company vice presidents gathered to form an executive team to consider the problem areas affecting their business. The Reliance executive team realized that the company's competitors are heavily dependent on airport rentals, so Reliance is seeing increased competition in the local market as competing companies try to offset their decreasing airport rental revenues.

In considering their business challenges, the executive team concludes that the company can achieve deeper penetration in the local rental market by:

- Better understanding customers' needs and preferences to create profitable segments
- Targeting segments with personalized campaigns based on demographic data as well as customer history
- Using lower-cost channels, such as the Web, to market promotions, discounts, and packages to the 95 million licensed drivers over the age of 21 in the US
- Using detailed customer data from body shops to target rentals that match customer profiles (such as matching luxury rental cars with luxury car owners)

- Providing higher-end luxury and sport vehicles to match special-occasion rental opportunities

The Reliance executive team determines that in order to meet these goals, they will focus on Web-based marketing in their implementation planning. Now that they have defined Reliance's implementation goals, they call in their business analyst to continue analyzing Reliance's marketing operations. Discover

**Discovering Business Requirements.** The business analyst reviews the business process diagrams provided in *Siebel Cross-Industry Business Process Reference* in order to determine which Siebel solutions address the implementation goals for achieving deeper market penetration in the local rental market. In the *Marketing Business Processes* section, he finds the business process diagram and reference pages for the *Launch Campaign* business process. This business process seems to address Reliance's implementation goals.

The *Launch Campaign* business process includes the following best practices that can be applied to address Reliance's marketing challenges:

- Campaign Quality Control
- Real-Time Offering

This scenario will limit its focus to the *Real-Time Offering* best practice.

The business analyst now needs to involve other individuals from functional groups within Reliance, to make sure that the *Launch Campaign* business process can be implemented in a way that meets the implementation goals. He needs to discover the specific business requirements for deploying this business process within the company's marketing operations.

The business analyst identifies individuals to comprise a representative sample of all the functions carried out in Reliance's marketing operations. The representative sample includes marketing managers and analysts, branch managers, IT staff, and anyone else who can provide information about the marketing business processes currently in use. Meeting one-on-one with each of these individuals, he interviews them to get answers to a number of questions, including the following:

- What tactics are currently used in developing promotional offers and marketing campaigns?

- What tasks do the individual branch offices perform in executing marketing campaigns?
- Where do the customer lists come from, and how are they compiled?
- What types of customer data is gathered and compiled? What is currently known about customer preferences and rental histories?
- What types of other data on customer lists is used in existing marketing activities, such as opt-out lists, suppression lists, seed lists, and National Change of Address (NCOA) data?
- What percentage of direct mail from marketing campaigns is returned as undeliverable?
- What are the percentages of offers delivered for the marketing campaigns executed within the last year? These percentages are calculated using the number of offers sent, minus the number of offers returned as undeliverable.
- What system is currently in place for tracking customer leads?
- What are the various I.T. systems and applications currently in use for Reliance's marketing activities?
- How many email and Web server resources are available for use in marketing operations?

Now the business analyst forms an implementation planning team that draws from the functional groups within Reliance that will be affected by changes to marketing operations. From within the company, he assembles a group including the vice president of outbound marketing, marketing managers from each region of the US, and a senior IT manager from Reliance's headquarters in Kansas City. The business analyst acts as project manager for this implementation planning team, and as a facilitator for the team's discussions.

The implementation planning team conducts a business requirements workshop to capture and record marketing business requirements for the new business process. The business analyst demonstrates the *Launch Campaign* business process for the team, and the team reviews the way it works, step by step. The team records Reliance's detailed requirements for each step in the flow. The team agrees that the *Launch Campaign* business process should fit Reliance's business requirements, through a discussion of the ways in which Reliance currently conducts outbound marketing.

During this discussion, the business analyst summarizes Reliance's current business process for outbound marketing, and the implementation planning team briefly reviews its flow:

- 1** Marketing managers and marketing analysts at headquarters decide on promotional offers and design a marketing campaign, consisting primarily of direct mailings to existing customers and contacts from mailing lists.
- 2** The marketing managers distribute the campaign plan and materials to regional managers in branch offices around the country.
- 3** Branch offices in all regions coordinate direct mailings, often modifying the original promotional materials as the branch managers see fit.
- 4** Branch representatives track campaign response through direct questioning of customers, usage of promotional codes by customers, and responses to customer service questionnaires completed by a small percentage of customers.
- 5** Marketing analysts from headquarters gather information and response data from branch offices quarterly, and aggregate the data using Microsoft Excel to determine response rates.
- 6** Marketing managers evaluate response rates and the information gathered from branch offices for use in future campaign planning.

The most important findings the business analyst makes in her review of the current business process are:

- Campaign execution is inconsistent among branch offices. Often the promotions created by headquarters are modified by the branches, and the timing that is carefully chosen to align with the offers in the materials is often not the timing adhered to by the branch offices.



- Feedback that comes directly from customers, as branch staff interact with them, is not recorded and compiled. When it is recorded, this feedback seldom reaches headquarters marketing staff.
- Data gathered from branch offices is sketchy, there is not enough of it, and the numbers are difficult to aggregate because the response comes from campaign execution that varies with each branch.
- Response rates seem inaccurate, due to insufficient response data.
- Marketing activities are not targeted to specific market segments.

By considering Reliance's existing business process for launching a marketing campaign, the implementation planning team determines that:

- Each campaign should generate significantly more response per dollar spent.
- Campaigns must be executed consistently across the country, with less direct involvement of branch staff.
- Marketing efforts must employ multiple channels and focus on Web offers and email campaigns in addition to direct mail.
- Quality control is needed to reduce the number of offers sent to obsolete addresses and customers not specifically targeted, as well as to improve the effectiveness of each marketing campaign.
- Sales, up-sell, and cross-sell rates must improve by giving branch agents detailed offer knowledge, as well as by prioritizing contacts for offers sent, and using real-time offer capabilities.

The implementation planning team determines that the *Launch Campaign* business process will meet their business requirements, and that Reliance can deploy the business process by making a few necessary modifications to include the company's existing reservation system.

The new marketing operations will now take the following steps:

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**NOTE:** The parts of the business process steps in *italics* replace ineffective parts of Reliance's former business process.

---

- 1 Design the marketing campaign.
- 2 *Perform quality assurance on the planned marketing campaign.*
- 3 *Develop contact prioritization rules for the campaign recipients.*
- 4 Brief the campaign execution team.
- 5 Prepare *three* separate parts to the campaign:
  - a *Prepare an email campaign.*
  - b *Prepare a Web offer.*
  - c Prepare a direct mail campaign.
- 6 Approve the campaign for launch.
- 7 Execute the campaign with the following steps happening at the same time:
  - a *Send emails.*
  - b *Publish Web offer.*
  - c Send direct mail offers.
- 8 *Monitor performance of email, Web offer, and direct mail campaign elements.*
- 9 Capture and manage campaign responses.

#### Design

**Designing the Business Solution.** The Reliance implementation planning team next creates a plan of action for deploying the Siebel business process for launching a marketing campaign, specifically for use with prospective customers in the local rental market. Focusing on the *Real-Time Offering* best practice, they first discuss and come to agreement on the imperative to market more effectively to more prospective customers, without significantly increasing marketing costs. They plan to implement technology that will provide low-cost, personalized marketing offers to prospective customers in targeted segments.

The team applies the *Launch Campaign* business process to replace Reliance's current business process for outbound marketing, using Siebel software to support the new business process.

**Configure**     **Configuring the Siebel Implementation.** Reliance uses a home-grown application to allow insurance adjusters and auto body shops to create reservations for Reliance rentals for their clients. Reliance executives and employees greatly value this system, and they want to be able to continue using it. They also want to track the business that comes to the company through this channel. They intend to extend their marketing offers to these replacement rental customers, and track responses of replacement-rental marketing offers separately from the responses to the local market campaigns.

This added requirement of marketing to replacement rental customers and allowing partners to create reservations requires customization to the *Launch Campaign* business process. A technical team of Reliance staff members uses Siebel Workflow to build the step in. They also configure the implementation to include an integration point with Reliance's reservation system, for order management.

**Validate**     **Testing the Siebel Implementation.** The implementation planning team has planned and configured the Siebel implementation, and before it is deployed and rolled out to the users, the configurations must be tested. The team executes the business process to make sure that it works from beginning to end. The team validates the effectiveness of the business process, and makes necessary changes until it works exactly as planned.

**Deploy**     **Deploying the Siebel Implementation.** Now that the business process has been proven to work as intended, the team deploys the implementation and the users begin operating under the new *Launch Campaign* business process. Within two months, the first campaign is launched as the emails and direct mailings go out, and the Web offers get published.

## Implementation Results

Reliance Rent-A-Car has identified a problem, decided to address it by implementing a Siebel business process solution, and chosen Siebel applications as the supporting software. The company has implemented the *Launch Campaign* business process to meet the challenge of more deeply penetrating the local rental market by improving its outbound marketing operations.

Reliance has seen fast results, as the new use of Internet marketing channels has changed the way the company markets its services. The quality assurance process performed before launching each new campaign tests the readiness of the overall campaign as well as the specific channels employed, which makes all the company's marketing efforts significantly more effective.

The use of multichannel marketing strategies, as well as quality control on all offers sent to existing and prospective customers, has caused the percentage of offers delivered to jump from 68% to 96%, while the number of offers sent has increased over 400% with the addition of the email and Web marketing channels. The real-time offerings presented through the Web offers have given Reliance significant upsell opportunities, as 19% of all bookings online have taken the form of specialty rentals such as SUVs and convertibles suggested in real-time to customers based on customer input in Web site form fields. The real-time offerings also have allowed branch agents to increase their specialty-rental bookings, as the agents consider customers' response to questions as well as their prior rental histories to determine the recommendations the agents gave to customers.

Reliance achieved these sales increases while *decreasing* marketing costs, due to the use of low-cost email and Web marketing channels, and due to the quality control which greatly improved existing direct mail efforts.

## Using the Business Process Diagrams on the CD

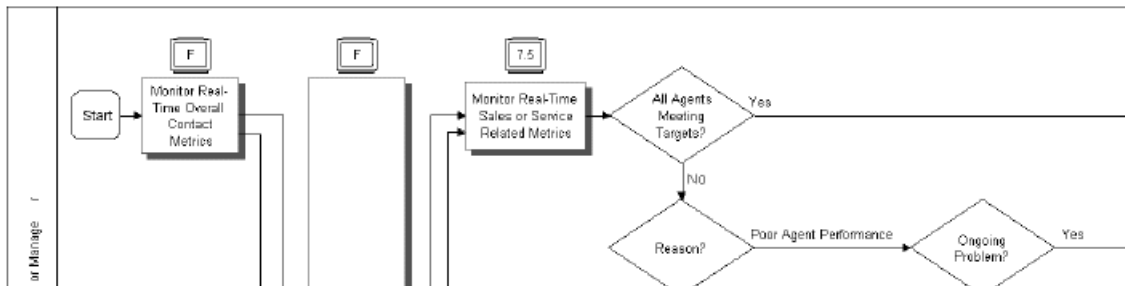
The instructions in this section explain how to access the Corel iGrafx source files for the business process diagrams in *Siebel Cross-Industry Business Process Reference*. You access the source files in order to test and demonstrate how the steps within a business process link directly to screens and views within the Siebel application, and also in order to modify the business process diagrams to suit your company's needs.

To view a business process diagram, such as one that you have selected from *Siebel Cross-Industry Business Process Reference*, navigate to the appropriate folder on the *Siebel Cross-Industry Business Process Reference Companion CD*.

The business process diagrams are grouped into separate categories by functional domain, such as Sales, Marketing, or Service. (For more information about business process domains, see [“Hierarchy of Business Process Domains” on page 70.](#)) Each diagram is numbered to indicate its functional domain and its level of business process.

For example, if you want to find the *Analyze Real-Time Service Effectiveness* business process diagram, you note that this diagram is labeled with the number 4.11.1 in *Siebel Cross-Industry Business Process Reference*. [Figure 9](#) shows how a diagram is numbered.

### 4.11.1 Analyze Real Time Service Effectiveness Business Process



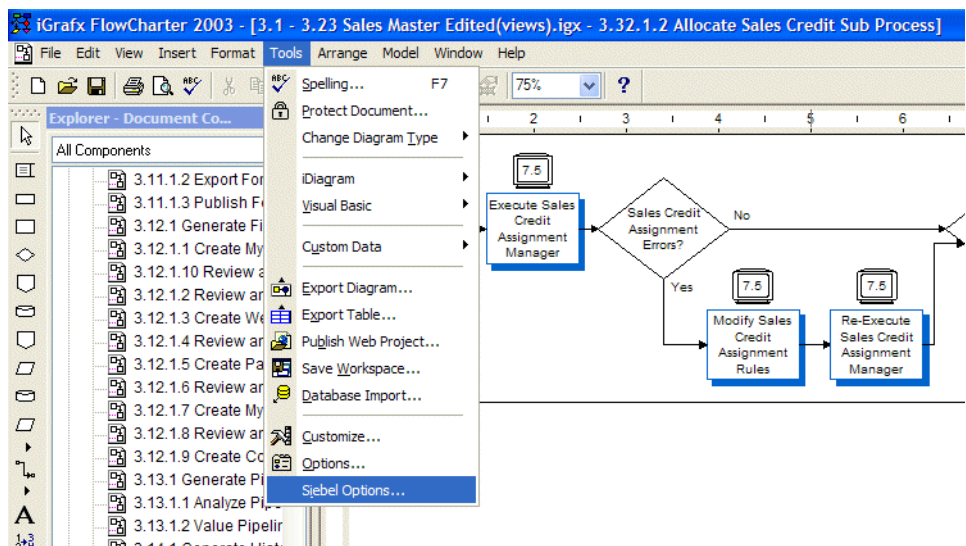
**Figure 9. Numbering of Business Process Diagrams**

Once you have found the diagram you want to view, navigate to the corresponding folder on the *Siebel Cross-Industry Business Process Reference Companion CD*: 4. Service. Then double-click the file called *4.11 Analyze Real Time Service Effectiveness.igx*. This file opens in iGrafx Flowcharter, and in the Explorer view you see that *4.11.1* labels the business process, while the corresponding subprocess (*Monitor Real-Time Performance*) takes the number *4.11.1.1* to indicate another level of detail to the business process.

## Using the Siebel Add-in for Corel iGrafx Flowcharter

The Siebel Add-in for Corel iGrafx Flowcharter is a program that you add to your installation of Corel iGrafx Flowcharter. You use the Siebel Add-in so that iGrafx Flowcharter can interface with your Siebel application, so that you can modify Siebel business processes, or so that you can demonstrate how they operate and which screens and views are accessed. The Siebel Add-in provides the ability to navigate to a view within the Siebel application. Installing the Siebel Add-in adds a Siebel Options menu and a Shape Properties menu to your installation of iGrafx Flowcharter.

Figure 10 shows the Siebel Options menu command that is added to the bottom of the iGrafx Flowcharter Tools menu when the Siebel Add-in has been installed.



**Figure 10. Siebel Options Menu Command in iGrafx Flowcharter Tools Menu**

The Siebel Add-in is installed to a drive on your local machine. You must prepare your local machine before using the Siebel Add-in for iGrafx Flowcharter.

### **To prepare the local machine**

- 1** Make sure that a Siebel client application is running, and accessing data from a local database such as Sample.

---

**NOTE:** Only one instance of a Siebel application should be running at one time. Close any browsers running other instances, or instances of SupportWeb and Siebel.com.

---

- 2** Close all browsers other than the one running the Siebel application.
- 3** Shut down Windows Services for IIS and Personal Web Manager.
  - a** From the Start menu, choose Programs > Administrative Tools > Services.
  - b** Scan the listing in the Services window and determine whether the following services exist:
    - ☐ IIS Admin
    - ☐ Simple Mail Transfer Protocol (SMTP) Service
    - ☐ World Wide Web Publishing Service
  - c** If any of the services in the preceding list exist, continue to [Step 4](#). If none of the services in [Step b](#) are listed, skip to [“To install the Siebel Add-in” on page 57](#).
- 4** Find the service named IIS Admin and note its value from the Services list’s Status column.
  - If the current Status is Started, then right-click and choose Stop from the context menu.

A prompt appears, asking if you want to stop additional services. Choose Yes to stop these additional services as well. These services are dependent services that require the IIS Admin service to be running. Since the IIS Admin service is now stopped, the other services need to be stopped as well.
  - If the Status column is blank, skip to [“To install the Siebel Add-in” on page 57](#).



- 5 In the Services window, right-click the IIS Admin service, and choose Properties from the context menu.

The Properties dialog box displays options for the Windows service.

- 6 On the General tab, in the Startup Type drop-down list, choose Manual. Click OK.

---

**NOTE:** This step is necessary in order to avoid performing [Step 1](#) through [Step 4](#) each time the machine is started.

---

- 7 Repeat [Step 5](#) for the Simple Mail Transfer Protocol (SMTP) Service and the World Wide Web Publishing Service, as these are dependents of the IIS Admin Service.

---

**CAUTION:** Errors may occur if these services' Startup Type properties are not set to Manual.

---

#### **To install the Siebel Add-in**

- 1 Make sure the iGrafx application is not running.
- 2 Copy the SiebelIGrafXAddinSetup.exe file from the network location to a local drive.

---

**NOTE:** See your system administrator for the network location of the SiebelIGrafXAddinSetup.exe file.

---

- 3 Start the SiebelIGrafXAddinSetup.exe file by double-clicking the file.

The Welcome screen appears.

- 4 Click the Next button.

A screen appears showing the destination folder where the Siebel Add-in will be installed.

- 5 Accept the default installation folder, and click Next.

A screen appears showing which components will be installed.

- 6 Accept the defaults settings, and click Next.

The installation finishes, and a screen appears stating that the Siebel Add-in has been installed successfully.

- 7 Click Finish to complete the installation.

### ***To begin using the Siebel Add-in***

- 1 After installing the Siebel Add-in, start iGrafx Flowcharter and create a new process or open an existing diagram.

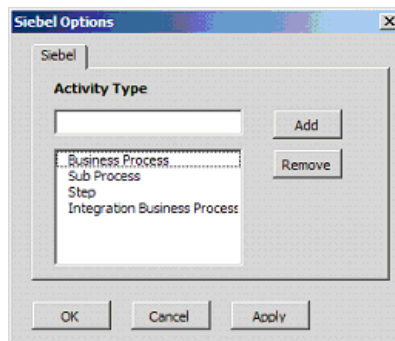
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**NOTE:** The Siebel Add-in will not work for the Basic Diagram that is loaded when iGrafx is first started.

---

- 2 In the Tools menu, choose Siebel Options to verify that the Siebel Options menu exists.

The Siebel Options dialog box appears.



The Siebel Options dialog box allows the administrator to provide values that match the desired process taxonomy. Activity Types are associated with shapes in an iGrafx diagram. These activity types are used to align Siebel business process entities with your business requirements.

---

**NOTE:** All shapes that are associated with the Step type allow the user to navigate automatically to a Siebel view.

---

- 3** If you want to add an Activity Type to the process taxonomy list, type the new name in the Activity Type field and click the Add button.
- 4** If you want to remove an Activity Type, select the type in the Activity Type list and click the Remove button.
- 5** When finished using the Siebel Options dialog box, click OK.

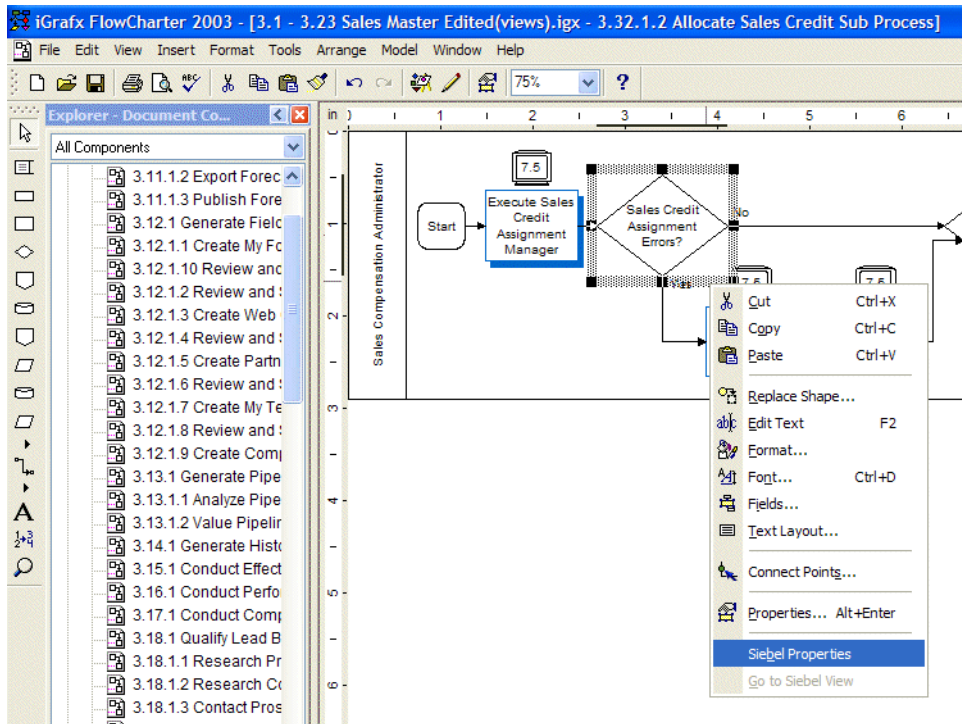
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**NOTE:** If you made changes that do not need to be saved, click the Cancel button instead. You can use the Apply button to save changes immediately. If an activity value is added or removed, clicking Apply will save that change without exiting the dialog box.

---

### Using the Siebel Properties Menu

As you work with shapes in an iGrafx diagram, you can right-click a shape to display a context menu and choose the Siebel Properties menu command, as shown in Figure 11.



**Figure 11. Context Menu Showing Siebel Properties Menu Command**

The Siebel Properties dialog box allows you to associate an Activity Type to the current shape. If the current shape is of type Step, the Siebel Properties dialog box shows an additional value, Siebel View Name. This value allows you to navigate to the corresponding view in the Siebel application.

**To associate an Activity Type to a shape**

- 1 In an iGrafx diagram, choose the shape you want to associate an Activity Type to.
- 2 Right-click the shape to display the context menu, and choose Siebel Properties.
- 3 In the Properties dialog box, choose a value from the Activity Type drop-down list.

The values listed correspond to the values input by the administrator in the Siebel Options menu.

You can associate a Siebel view name only to the activity type Step. For other activity types, the view name box is disabled.

**To associate a Siebel view name**

- 1 Complete [Step 1](#) through [Step 3](#) in “[To associate an Activity Type to a shape.](#)”
- 2 In the Siebel View Name field, type the Siebel view name exactly as it appears in the Siebel application.

---

**NOTE:** An easy way to make sure the view name you type in is exactly the same as in the Siebel application is to highlight and copy the view name from the About View dialog box in the Siebel application. Then paste it into the Siebel View Name field of the Properties dialog box.

---

- 3 When you are finished entering values in the Properties dialog box, click OK.

**Using the Go To Siebel View Command**

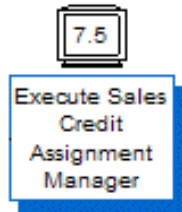
The Go to Siebel View command allows you to navigate to a shape’s corresponding view in the Siebel application for shapes that have a Siebel View icon above them.

---

**NOTE:** The Go to Siebel View command will not work with implementations that have been heavily customized.

---

The Siebel View icon is shown in [Figure 12](#).



**Figure 12. Shape with Siebel View Icon**

The number inside the Siebel View icon specifies the version number of the Siebel application. There are other ways that information is represented as well:

- When a letter *F* appears inside the Siebel View icon, the icon represents feature functionality planned for a future release of Siebel applications.
- When a letter *A* appears inside the Siebel View icon, the icon represents an action that is performed automatically by the Siebel application, in the background. In these cases, the view icon does not link to a view, because there is no view association with the action.
- When a letter *C* appears inside the Siebel View icon, the icon represents an action that requires configuration of the Siebel application.

---

**NOTE:** The Siebel application must be running in order for the Go To Siebel View command to work.

---

### ***To invoke the Go To Siebel View command***

- 1 Verify that the shape's activity type is Step by right-clicking on the shape and choosing Siebel Properties from the context menu.

- 2** Verify that the Siebel view name listed in the Siebel View Name field of the Properties dialog box has a value that exactly matches the Siebel client application view name.
- 3** Click OK to exit the Properties dialog box.
- 4** Right-click the shape and choose Go To Siebel View.
- 5** Switch to the Siebel application to see the navigated view.

---

**NOTE:** If the view you are linking to requires Siebel Analytics and you have not purchased this product, the view will not appear and you will see an error message.

---



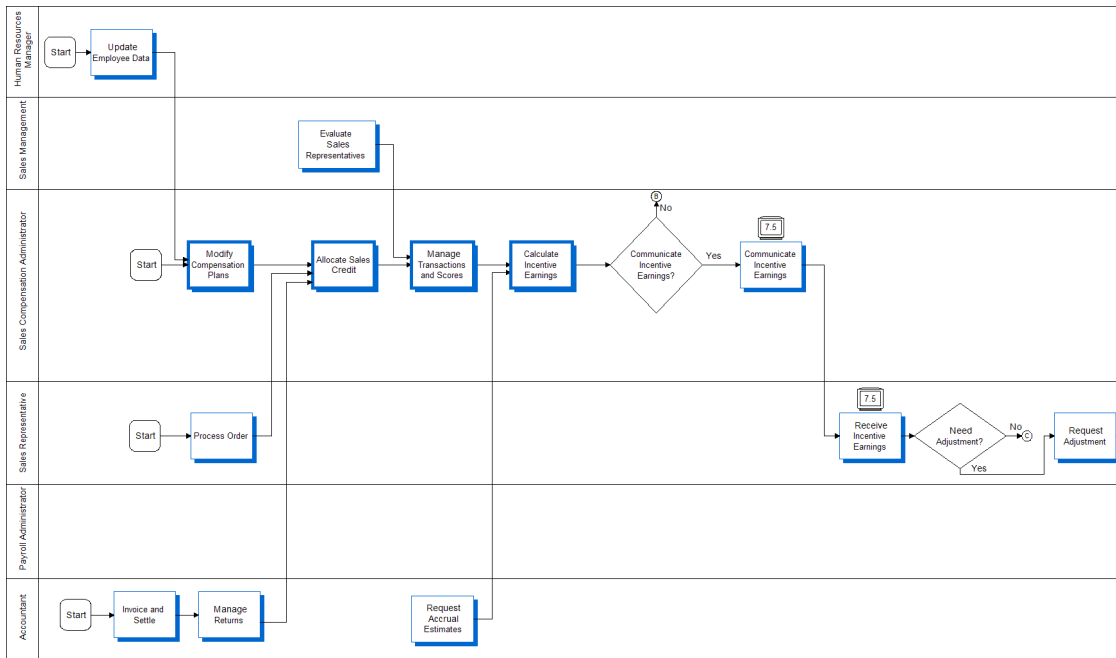


## Siebel Business Process Components and Categories

# 3

To understand the business process diagrams contained in *Siebel Cross-Industry Business Process Reference*, it helps to know how the diagrams were created. Each business process was created using a set of user roles and symbols. Each business process fits into one of four levels within a hierarchy of business process diagrams.

[Figure 13](#) shows a sample business process diagram. A sequence of tasks flows from left to right, with each task fitting into one of the diagram's rows. Each row of the diagram represents one role: an individual, group, or system that has certain functional responsibilities and that performs specific tasks during the process. The number of rows in the diagram is determined by the number of roles involved in the process.



**Figure 13. Sample Business Process Diagram: Calculate Sales Compensation and Payments**

## **Swimlanes Divide Ownership of Activities**

The rows within a diagram are called *swimlanes*. Each swimlane is labeled to indicate the role (owner) of the task. The sequence of tasks is connected by arrows. When a task is completed, an arrow points to the next task in the sequence; this task is in the same swimlane if performed by the role that performed the previous task, or it is in another swimlane if performed by a different role.

# Roles Represent Functions

The roles performed in a business process are labeled on the far left of each swimlane. The roles that appear comprise a set chosen to represent the functions performed by the various departments in a company or organization. Only the departments in a company or organization with which Siebel business processes interact are represented as functions or swimlane labels. In Siebel business process diagrams that require more than one page (multipage process maps), these swimlane labels are repeated on every page.

## **Symbols Represent Tasks**

Arrows link tasks within and across the swimlanes. Each general task type is represented by a symbol.

One of two symbols begins each business process diagram: the Start step symbol or the Process Connector symbol. A Start step symbol begins a business process diagram and is located in the first role's swimlane. In cases where a business process diagram does not begin with a Start step symbol, a Process Connector symbol appears instead; this indicates that the process is initiated by another process. The Process Connector symbol is linked to its preceding business process diagram in the iGrafx file.

An End step symbol ends every business process diagram at the logical conclusion of the business event.

A variety of other symbols are used to depict the other types of tasks performed. For example, an icon that shows a computer monitor with a version number represents a task supported by the Siebel application. See [“Business Process Component Descriptions” on page 74](#) for detailed descriptions of each symbol shown in the business process diagrams.

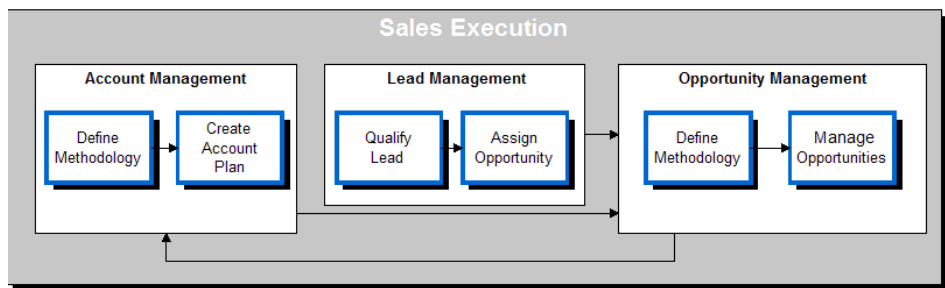
## Hierarchy of Business Process Domains

*Siebel Cross-Industry Business Process Reference* classifies business processes into three separate domain levels. Each domain offers a different degree of detail in classifying business processes. Siebel business processes are organized into these three domain levels so that you can quickly locate the area of functionality you want. The business process domains are separated as follows:

- **Enterprise domain.** An enterprise domain, such as CRM, Employee Management, and Partner Management, or a particular industry, is a grouping of business processes from the perspective of an entire enterprise. An enterprise domain includes multiple functional domains. For example, within the CRM enterprise domain there are the Sales, Marketing, and Service functional domains.
- **Functional domain.** A functional domain, such as Sales, applies to a typical business unit within a company, such as the Sales organization. The Sales functional domain includes multiple process domains, such as Sales Execution, Quote and Order Management, and Sales Pipeline Management.
- **Process domain.** A process domain, such as Sales Execution, provides another degree of specificity, grouping business processes logically by activity. The Sales Execution process domain includes business processes for Account Management, Lead Management, and Opportunity management.

In this way, the Account Management business processes fit into the Sales Execution process domain, within the functional domain of Sales, within the CRM enterprise domain. [Figure 14](#) shows the Account Management business processes along with the other business processes that fall into the Sales Execution process domain.

## Sales



**Figure 14. Sales Execution Process Domain**

“[Hierarchy of Business Process Diagram Levels](#)” on [page 72](#) describes the various levels of Siebel business process diagrams, in which each of these domains is represented.

# Hierarchy of Business Process Diagram Levels

There are four levels of detail represented in the Siebel business process diagrams. Each of these levels is explained in [“Business Process Component Descriptions” on page 74](#). The four levels are as follows:

- 1 Solution map.** This is the highest-level view of business processes. The solution map shows the entire set of business processes for an enterprise domain on one page. This level of diagram filters out the lower-level specifics to allow you to focus on how the business processes in the enterprise domain relate to the various organizations of your company, as well as to the people involved—people in your company, in partner companies, and among your customers. The solution map details the functional domains within each area of your enterprise.
- 2 Process relationship diagram.** A process relationship diagram shows one functional domain, such as Sales, in detail on one page. Process relationship diagrams show the process domains within the functional domain. In the example of the Sales functional domain, the process domains Sales Execution, Quote and Order Management, Sales Planning and Budgeting, Sales Pipeline Management, and Product and Catalog Management are shown. The process relationship diagrams also show how the business processes within a number of process domains relate to one another. For example, in the Sales Execution process domain, Opportunity Management business processes depend on both Account Management business processes as well as Lead Management business processes.
- 3 Business process diagram.** This level of diagram maps strategic processes, indicating interactions between users in your company and the end customer, as well as partners and external companies. This level contains steps and subprocesses, as well as clearly defined inputs and outputs. A typical business process diagram shows a series of inputs and converts them into a specific output, such as *Create Sales Forecast*, which rolls up individual sales representative forecasts into a company-wide forecast.



- 4 Subprocess diagram.** A subprocess diagram shows a detailed series of steps, typically executed by one person, that can be reused in multiple business processes. Subprocess diagrams allow the detail of common work sequences to be summarized at the business process diagram level, so as not to detract from understanding of the overall function of the business process. Subprocesses detail the steps supported by the Siebel application, Universal Application Network (UAN) integration application processes, and external applications. An example of a subprocess is *Build Action Plan*, a subprocess within the *Create Sales Forecast* business process.

Within the Siebel business process diagrams, there are process steps, as well as integration application processes.

- **Step.** A step is a discrete action typically performed by one person. A step can also be performed by a system, or it can represent an integration point. A step is a clearly defined and time-bound task, such as *Enter Quote*, not *Manage Delivery*.
- **Integration Application Process.** An Integration Application Process (IAP) uses code to define standards-based interaction between one or more applications. An IAP is application independent. An example of this is the *Submit Order* IAP, which passes order information from one system to another (from the Siebel application to a third-party order fulfillment system). An IAP runs typically within a process controller on an integration server provided by a Siebel integration server partner. In Siebel business processes, IAPs are triggered by steps. In the preceding example, the *Submit Order* IAP is triggered by a step called *Submit Order*.

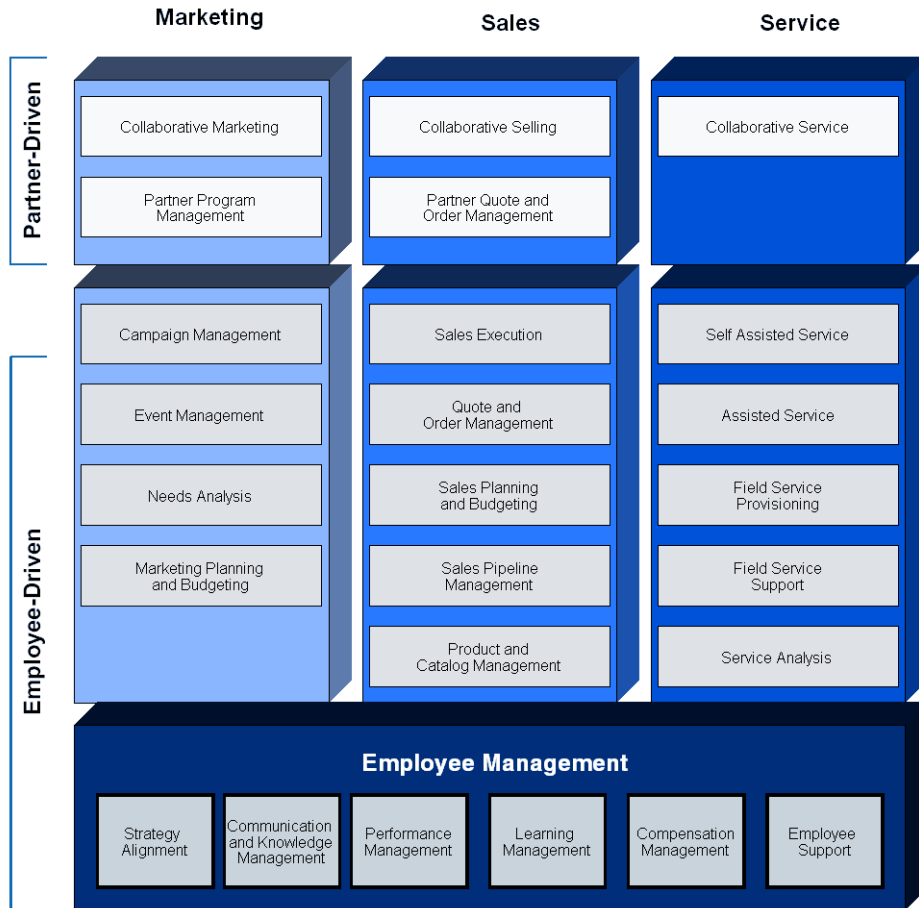
# Business Process Component Descriptions

This section provides detailed descriptions for each of the components that comprise the four levels of diagrams used to map out Siebel business processes.

## Solution Map

A solution map shows the business processes within an enterprise domain, grouped into functional domains, such as Marketing, Sales, and Service. The rows in a solution map diagram represent high-level groupings of the roles involved, such as partners and employees. The diagram's columns, containing the functional domains, overlap the rows to indicate which functional domains correspond to each grouping of roles.

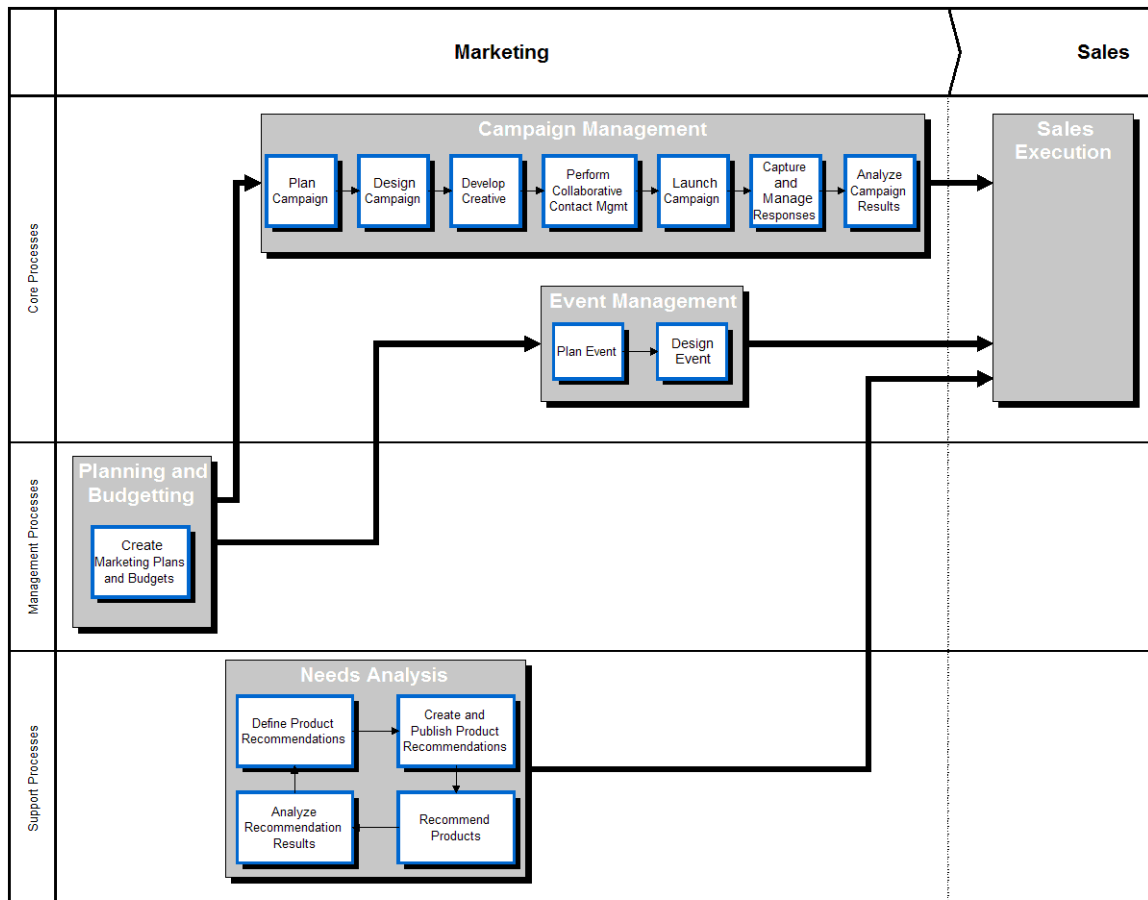
Figure 15 shows an example of a solution map.



**Figure 15. Solution Map for Cross-Industry Business Processes**

### Process Relationship Diagram

A process relationship diagram shows a functional domain (such as Marketing, Sales, or Service) with all its process domains. A process relationship diagram shows the interrelationship of all business processes within the functional domain. Figure 16 provides an example of a process relationship diagram.

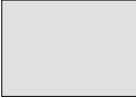



**Figure 16. Sample Process Relationship Diagram: CRM Marketing**

Symbols Used in Process Relationship Diagrams

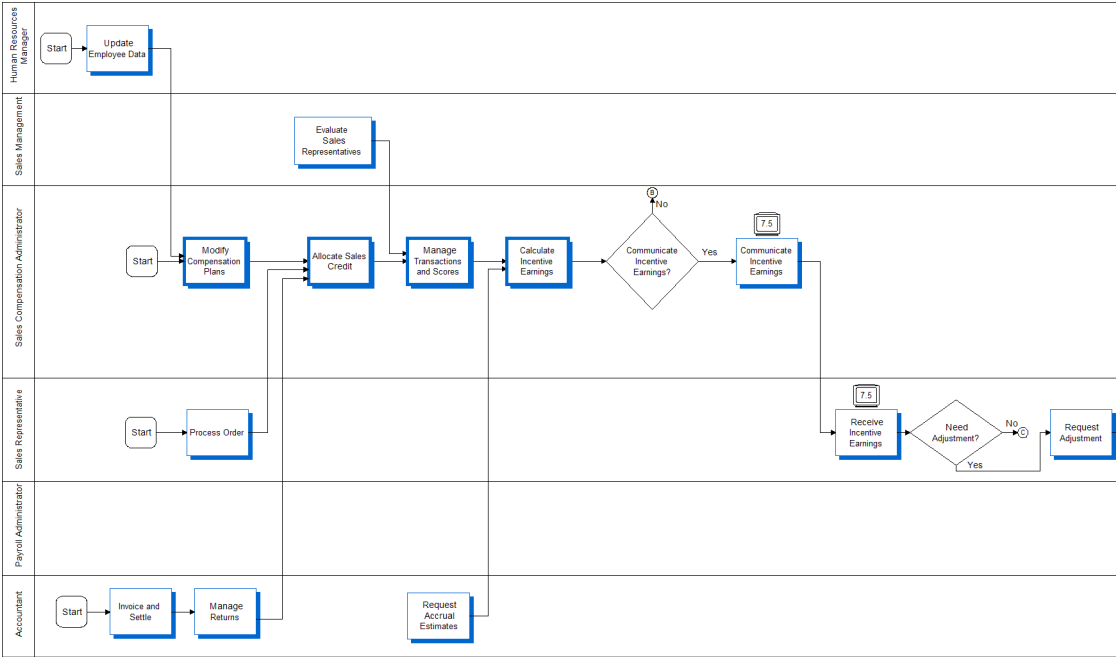
Table 1 describes the symbols used in Siebel process relationship diagrams.

Table 1. Symbols Used in Process Relationship Diagrams

Symbol	Description
 Process Domain	A gray rectangle represents a <i>process domain</i> . This box has a heading and contains one or more related business process boxes inside. The business process boxes are linked in a logical manner using arrows.
 Business Process	A blue rectangle represents a <i>business process</i> .

# Business Process Diagram

A business process diagram maps out the work of a company by depicting *who* does *what* over *time*. A business process involves multiple groups, individuals, or systems within a company, including the customer as well as partners and third-party systems. A business process diagram is often comprised of many steps representing subprocesses, such as in the example shown in [Figure 17](#). Steps that are subprocesses appear as shaded blue rectangles with thick borders.

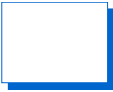







**Figure 17. Sample Business Process Diagram: Calculate Sales Compensation and Payments**

## Symbols Used in Business Process Diagrams

The symbols shown in [Table 2](#) are used in Siebel business process diagrams and subprocess diagrams.

**Table 2. Symbols Used in Siebel Business Process Diagrams and Subprocess Diagrams**

Symbol	Description
 <p>Step</p>	A shaded blue rectangle with a shadow represents a task and is known as a <i>step</i> . If more than one individual, group, or system performs a step, the step box spans across multiple swimlanes.
 <p>Subprocess</p>	A shaded blue rectangle with a thick border represents a <i>subprocess</i> . The underlying subprocess is composed of multiple steps, and this symbol directs you to a subprocess diagram that details those steps.
 <p>Step Outside of Firm</p>	A rectangle with a standard black border represents a task that is performed by an organization outside of your company (such as a partner or a vendor).
 <p>Subprocess Outside of Firm</p>	A rectangle with a bolded border represents a subprocess that is performed by an organization outside of your company (such as a partner or a vendor).
 <p>Customer Step</p>	A green parallelogram with a shaded border represents a step performed by the customer.
 <p>Decision Step</p>	A diamond is used for decisions and branching logic. A decision step is not a task and does not take any time to perform. The decision step routes options to the various outcomes of the question it poses. All lines that exit a diamond are labeled with text, most commonly stating <i>Yes</i> and <i>No</i> .

**Table 2. Symbols Used in Siebel Business Process Diagrams and Subprocess Diagrams**


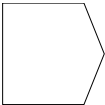





Symbol	Description
 <b>Nested Business Process</b>	A nested business process symbol indicates that another business process is performed at this point during the process. The user returns to the original business process after completing the nested business process.
 <b>Off-Page Process Connector</b>	An off-page process connector shows the link between a process at the right-hand edge of the current diagram page and another process located in a different diagram on another page. The off-page process connector is also used at the left-hand edge of a diagram to depict the process that precedes the process shown in the diagram.
 <b>Start Step</b>	A Start step is used to show the beginning of a business process. If the process has been immediately preceded by a different process, the off-page process connector is used instead.
 <b>End Step</b>	An End step is used to show the finish of a business process and appears immediately following the last step.
 <b>Siebel View Icon</b>	A Siebel View icon indicates a step that is performed either automatically or by a user within the Siebel application. The View icon indicates a step that contains a link to a Siebel view, and this view can be launched by right-clicking on the view icon for that step. The View icon indicates the version number of the application that supports the step (such as Siebel 7.5). If the step is expected to be supported in future versions, the View icon contains an F. If the View icon contains an A (such as 7.5A or FA), the step is supported by automated functionality (such as a call to a business service within the Siebel application) and does not have a specific view associated with it.

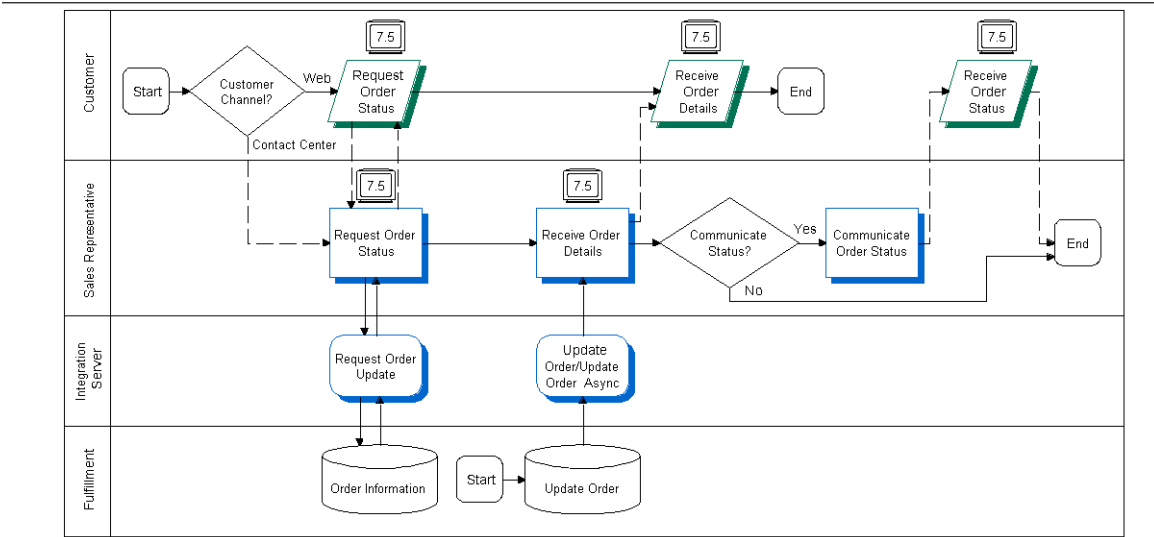


Table 2. Symbols Used in Siebel Business Process Diagrams and Subprocess Diagrams

Symbol	Description
 Dashed Line	A dashed line is used to connect steps that are performed outside your company. A dashed line also depicts data or information that enters the process from outside your company. This line connects to the customer, as well as to partner and third-party organizations.
 Solid Line	A solid line is used to connect steps performed within your company.

# Subprocess Diagram

A subprocess is a repeatable component of a business process. A subprocess diagram shows a greater level of detail for one step than is shown within a business process diagram. A subprocess diagram depicts the detailed steps performed by one role or multiple roles within a department, such as a sales representative and a sales manager. [Figure 16](#) provides an example of a subprocess diagram.


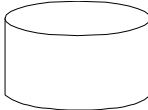


**Figure 18. Sample Subprocess Diagram: *Check Order Status***

## Symbols Used in Subprocess Diagrams

Table 2 on page 79 shows symbols used in both business process diagrams and subprocess diagrams. The symbols described in Table 3 are used exclusively in the subprocess diagrams.

**Table 3. Symbols Used in Siebel Subprocess Diagrams**

Symbol	Description
 <b>Integration Application Process</b>	An Integration Application Process (IAP) symbol shows the interaction between Siebel applications and a third-party application delivered through UAN. An integration is represented with two arrows, one going into the symbol and the other going out, indicating a request for information and a reply with the information requested.
 <b>Third-Party System</b>	A third-party system database symbol indicates a step performed by a system outside of Siebel applications. The integration between these applications may or may not be available through UAN. If the third-party system is connected directly to a Siebel-supported step (indicated by a Siebel View icon and a blue-bordered box) without first connecting to an IAP symbol, then UAN does not support this integration. If the third-party system is connected through an IAP symbol, UAN supports this integration.

## Representing Integration in Subprocess Diagrams

While Integration Application Processes are recommended integration solutions, IAPs are not the only way to integrate to Siebel applications, nor does Siebel Systems provide IAPs for every integration scenario. In some cases, a direct integration (also known as a point-to-point integration) makes more sense than integration using an IAP. For example, when another application such as a tax calculation utility simply acts on or supplements data in the Siebel application, a direct integration should be used rather than an IAP. In the subprocess diagrams, these direct integrations are shown as Siebel-supported steps that connect directly to a third-party data source.

# Building Your Own Business Process Diagrams

This section explains how to create business process diagrams for business processes, subprocesses, and process relationship diagrams. Instructions for creating process relationship maps appear after the instructions for creating business processes and subprocesses because creating process relationship maps can only take place after the business processes have been mapped.

Siebel Systems currently recommends using Corel iGrafx Flowcharter™ 2003 to map business processes. All diagrams depicted in *Siebel Cross-Industry Business Process Reference* were created with the Flowcharter™ 2003 software.

## Creating a Business Process Diagram


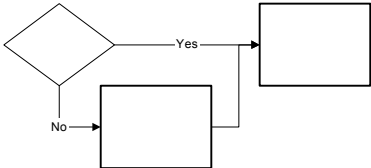
Multiple business processes comprise a process domain. You should map each business process separately on its own page. Choose a logical starting point within the list of business processes you intend to map. It is likely that you will revisit and update the list of business processes as you are creating the business process diagrams.

### Line Styles

When creating business process diagrams, using lines in a consistent manner is important to communicating the meaning of a business process. A business process diagram always shows forward progress, using the bottom axis for time measurement. Return loops, common in flowcharts, are typically not used in business process diagrams. Lines are meant to show inputs and outputs, so it is often helpful to label the lines. By labeling a line with the output of its step, you can make it clear that specific results must be achieved within a step before moving onto the next step.

Table 4 shows the line-routing conventions used in the business process diagrams.

Table 4. Line-Routing Conventions for Business Process Diagrams

Symbol	Description
	Whenever possible, route arrows into the left side of a step and out of the right side to communicate the flow between tasks and views. This preserves the concept of the bottom axis as the timeline.
	When routing lines out of a decision box, label lines with appropriate descriptors, such as <i>Yes</i> or <i>No</i> .

#### **To create a business process diagram**

- 1** Determine the roles involved in the business process. By definition, a business process involves multiple groups, individuals, or systems within an organization.

If you are mapping a business process that happens entirely within a single functional area, such as the sales organization, you should make use of as many roles in that functional area as are appropriate. If a business process involves multiple functional areas within the company, you can simply label the swimlane with that function name, unless the particular role within the functional area adds to understanding of the business process.

For example, if you are building a marketing business process for lead management, you want to represent several different roles within the functional area of marketing to depict the interaction and work performed by various roles in the marketing department. The end of the business process involves the hand-off of leads to the sales department. In this case, it is important to note which role in the sales department receives leads: a telesales representative, who then qualifies the leads. Calling this role out in the label for its swimlane adds to the overall understanding of the lead management business process you are creating.

- 2** Create one swimlane for each role and label each swimlane.

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**NOTE:** When creating a multipage process diagram, it is best to repeat the swimlane labels on every page.

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- 3** Determine the inputs of this business process. What needs to have happened before this business process can begin? What information is necessary to have? What triggers this business process?
- 4** Place a Start step symbol in the first role's swimlane. If necessary, you can use a process connector symbol to indicate this business process is initiated by another business process. The process connector can then be linked to the previous business process diagram using the hyperlink capability of many desktop applications.

- 5 Determine the output of the business process. What is the end result? When is this business process complete? What is the logical conclusion of the business event?
- 6 Place an End step symbol at the far right of the diagram. In some cases, this can be a process connector symbol instead, indicating a link to another business process rather than an end of the business event.
- 7 Place the appropriate task symbol in the diagram to create the first step in the business process. Label this step with a brief verb-noun combination that describes the action taken. If this step is performed within the Siebel application, place the Siebel View icon just above the task symbol.
- 8 Continue placing task symbols to indicate the subsequent steps of the business process, linking the steps with arrows in a forward motion, left to right. When necessary, label the arrow lines to show the outputs of the steps.
- 9 Once you have mapped all of the steps in the business process, link your final task symbol to the End step symbol or the off-page connector symbol that represents the end of the business process.

Once you have determined the flow of the business process, you should define the subprocesses that it contains, as necessary. In many cases, a step within a business process is a subprocess. Instructions for creating subprocess diagrams are explained in [“Creating a Subprocess Diagram” on page 90](#), but in completing the job of building a business process diagram, it is necessary to understand which tasks will comprise a business process, and which tasks will instead comprise a subprocess within that business process.

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**NOTE:** When you complete the task explained in [“To decide which tasks comprise subprocesses” on page 88](#), you may have identified subprocesses that you need to add as steps within the business process diagram you have created. In this case, repeat [Step 8 in the “To create a business process diagram” procedure](#) until all the steps that represent subprocesses appear in your diagram.

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#### To decide which tasks comprise subprocesses

- 1 Consider how the business process will be used.

A subprocess is a sequence of steps generally performed by one person and likely to be used in multiple business processes or on its own. As you build your business process diagrams, you may see patterns of subprocesses emerge that can help you determine whether a sequence of steps is a business process all its own, or a subprocess contained within multiple business processes.

In general, there are three reasons to create subprocesses when building business process diagrams:

- **Reusability.** Patterns repeat. When subprocesses can be identified, this technology or these procedures can be built once and called on by many business processes.
  - **Independent utility.** Subprocesses are often useful on their own (stand-alone) and can be executed outside the context of a business process. For this reason, it is useful to identify, and if appropriate, code them separately.
  - **Hiding extraneous detail.** Creating subprocesses in a business process helps convey understanding of the business process without getting into lower-level detail. Step-by-step interactions with a system are generally captured at the system level. This level of detail is not required and is usually not desired when describing how a business process works at a high level.
- 2 Determine how the tasks within a sequence of steps are divided between roles. Generally, if a single role in a business process is performing three or more steps consecutively, consider whether or not these steps hang together logically. If they do, you should consider creating a subprocess for this sequence of steps.

#### Do's and Do Not's for Creating a Business Process Diagram

Siebel Systems recommends the following practices in creating business process diagrams:

- **Do** name your business process diagram files according to the hierarchy explained in [“Hierarchy of Business Process Diagram Levels” on page 72](#). For example, the name *Respond to Email Subprocess* clearly identifies the file as a subprocess diagram.



- **Do** title the diagrams by placing a header in the file that displays the business process name.
- **Do** create steps with descriptions using action verbs such as: *Define, Create, Generate, Synchronize, Publish, Determine, Approve, Update, Prepare, Price, Modify, Apply, Identify, Assess, Update, Promote, and Send.*
- **Do** show, when appropriate, how steps within the business process correspond to views in the Siebel application. Place the Siebel View icon directly above a task box when its task is accomplished using the Siebel application.
- **Do** identify integration points that exist within the Siebel application and which can be called from the user interface. Note both types of integration: integrations performed through UAN, and point-to-point integrations already built. These two types of integrations should be depicted differently.
- **Do** make sure that all business processes have a clear starting point and a clear ending point.
- **Do** create a list of accepted roles and function names for the labeling of swimlanes so that swimlanes for various business processes are not labeled inconsistently, with various labels representing the same role or function.
- **Do** decide on an accepted style for labeling the boxes in task symbols, for example, all text within the boxes should use title case: *Process Customer Information* not *Process customer information.*
- **Do**, when developing multipage business process maps, label each page with the “[page number] of [total pages]” format. This pagination format is particularly useful when printing diagrams and when sending files to colleagues electronically, as it helps to make sure that all pages are printed or received.
- **Do** format business process maps for landscape pages. Business process maps are typically no more than one page high for ease of review, but they may be multiple pages in length.
- **Do not** use vague descriptions for tasks, such as *Manage, Maintain, and Monitor.*
- **Do not** use the conjunction *and* in a task box. If two tasks need to happen, split them into separate steps.
- **Do not** use a slash [ / ] in a task box, such as *Create/Update Item.* Split the two tasks into separate steps.

- **Do not** use plural nouns to indicate that the system or individual should process multiple items. For example, use *Create Bundle* (one bundle) not *Create Bundles*, Enter Order (one customer order) not Enter Orders. Following this guideline helps to keep your business process focused on a fixed timeline and a specific action.
- **Do not** resize boxes, unless absolutely necessary.
- **Do not** change text size in boxes, unless absolutely necessary.
- **Do not** show return loops, unless absolutely necessary. The bottom axis of a business process diagram represents time. Return loops violate the implicit time sequence.
- **Do not** change any of the colors in the diagram.
- **Do not** add any new shapes to the diagram.
- **Do not** use Siebel View icons above subprocess symbols. Use the Siebel View icons only for *steps* within a business process diagram or within a subprocess diagram.

## Creating a Subprocess Diagram

In designing subprocesses, it is important to show how the Siebel application will interact with other systems. For example, Siebel Systems has recently introduced the Universal Application Network to deliver integration between Siebel applications and third-party applications using an integration server. Integration can be point-to-point, with a line in a diagram directly connecting a Siebel application step to a third-party application. Integration can also be achieved through an integration application process, represented by an IAP symbol as shown in [Table 3 on page 83](#).

### **To create a subprocess diagram**

- 1 For every subprocess symbol used in the business process diagrams you build, create a subprocess diagram.

- 2 Complete the subprocess diagram in the same manner as the business process diagram, as described in [“To create a business process diagram” on page 86](#).

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**NOTE:** As you create the necessary swimlanes for each role, it is helpful to remember that in subprocesses, the roles are typically systems or individuals rather than organizational groups. However, do not use a separate swimlane to represent the Siebel application. Instead, use the Siebel View icon to represent that the Siebel application is supported in a particular step, performed by the user for the particular swimlane’s role. You can input the view name by double-clicking on the symbol. On the General tab of the Properties dialog box, enter the view name in the Name field.

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- 3 Make sure to represent the Integration Application Processes (IAPs) that are supported through Siebel UAN.
  - a Represent the IAPs by adding an Integration Server swimlane and third-party application swimlane at the bottom of the diagram.
  - b Create a vertical arrow extending down from a step within the other swimlanes. The line should connect to an IAP symbol within the Integration Server swimlane and then extend to the third-party system symbol placed in the third-party system swimlane. The line that extends from the IAP to the third-party system should be dashed to indicate that the step takes place outside the company.
  - c If there is a synchronous response from the third-party application, indicate this by drawing a return-arrow line that moves back into the Siebel application through the same IAP symbol. If there is an asynchronous response, indicate the delay by showing the arrow returning to the Siebel application through a different IAP symbol.

### Creating a Process Relationship Diagram

The purpose of a process relationship diagram is to show the interrelationship of all processes in a given functional domain (such as Marketing, Sales, or Service). In order to create a process relationship diagram, you must first develop and validate the business process diagrams that comprise the functional domain you will represent in the process relationship diagram. Creating process relationship diagrams is the most challenging form of business process mapping, as it requires an in-depth understanding of the subject matter you are documenting and a clear grasp of the sequence and inter-relationship of the processes you are connecting.

Process relationship diagrams are a navigational aid for a logical collection of business processes. Project planning teams or business process redesign teams generally rely on one designated individual to develop the skills necessary to create process relationship diagrams for their goals, and this individual can facilitate discussions to gain group-wide consensus on the structure of these diagrams.

#### ***To create a process relationship diagram***

- 1** Create a swimlane template for the diagram. Three suggested swimlane names are the following:
  - *Core Processes* for the main processes of this functional domain
  - *Management Processes* for those processes conducted by management to support the core processes

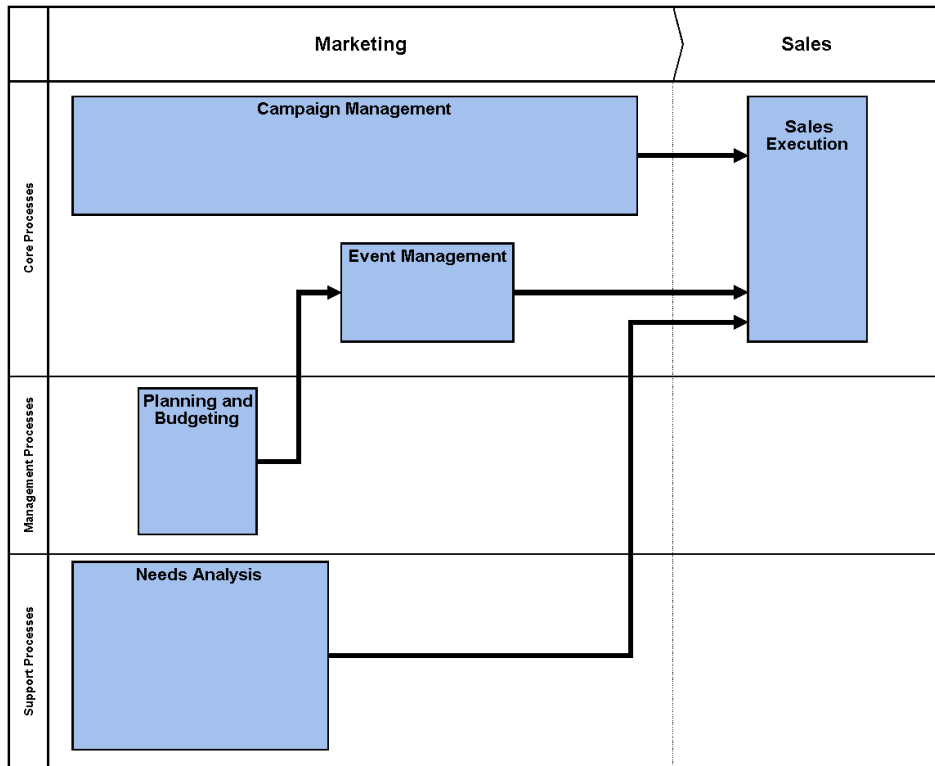
- *Support Processes* for those processes that support the overall functional domain

Figure 19 shows blank swimlanes in a swimlane template.

	Marketing	Sales
Core Processes		
Management Processes		
Support Processes		

Figure 19. Creating Swimlanes for Process Domains

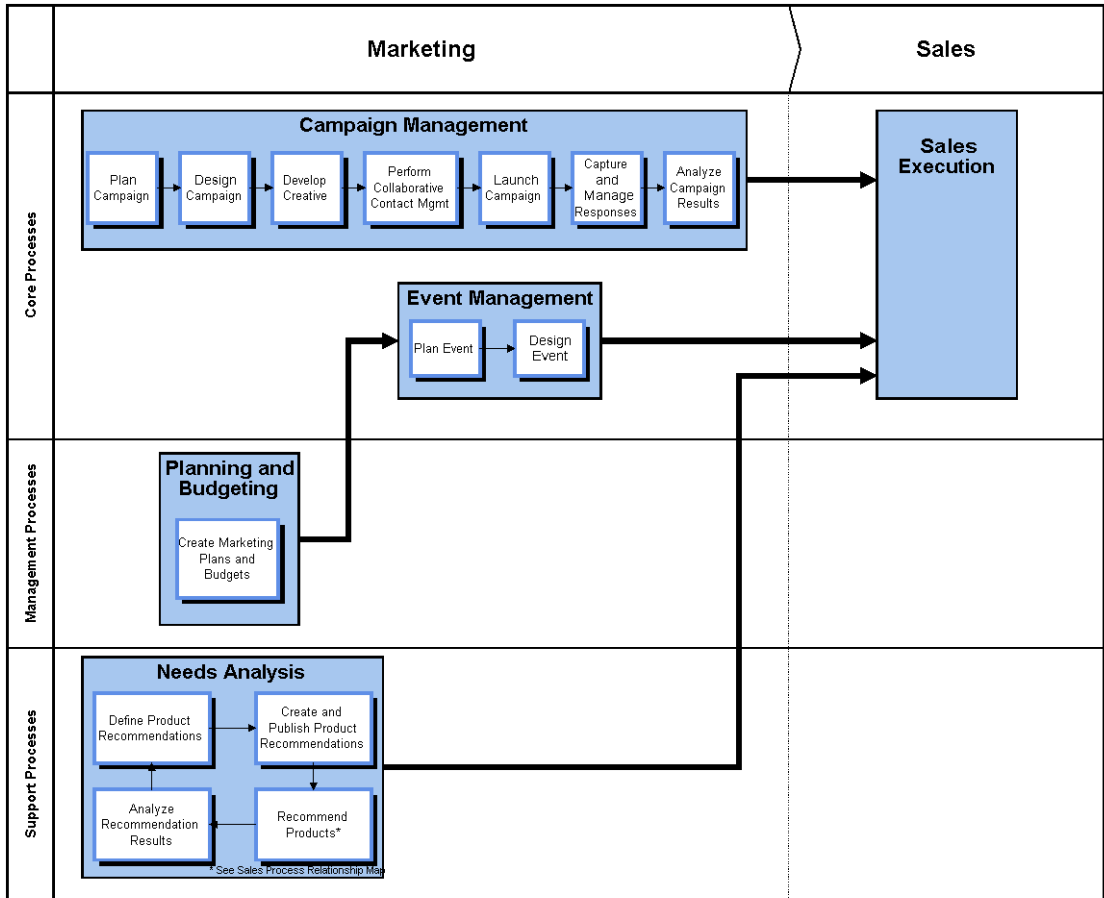
- 2 Create boxes on a page to depict the main process domains (logical collections of business processes) that are included in the functional domain that you are mapping. You should order these in the sequence in which they occur, as shown in Figure 20.



**Figure 20. Creating Boxes for Process Domains**

- 3 Inside each process domain, create boxes to define subprocess domains if there are logical groups of business processes that occur before another set of business processes. You can offset these separate subprocess domains inside each process domain by using a different color for the subprocess domain boxes.

- 4 Insert boxes for the business processes, connecting them in the logical order in which they occur, as shown in [Figure 21](#).



**Figure 21. Sample Process Relationship Diagram**

