An “Opportunity” to Use BODs

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- B2B Implementation Issues
- Solution
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**Description of business case**

B2B Implementation Issues

Solution

Questions
Business Environment

CompanyBlue is a manufacturer who keeps track of “opportunities” to sell their products to customers.

CompanyBlue has distributors (Reds) who in turn sell to retailers who sell to customers.

CompanyBlue has retailers (Greens) who buy either from CompanyBlue or from distributors and sell directly to customers.

Sometimes other companies (Magentas) provide additional services to be added to the product before it is delivered to the customer.

Sometimes CompanyBlue sells directly to the customer (yellows).

Because CompanyBlue has many products, a sale may be made by multiple retailers or split between a retailer and CompanyBlue.
Many segments of the supply chain can be involved in a sale and each can take on multiple roles.
An 'opportunity' is the intersection of customer and product. At its highest level it represents market planning.
At the lower levels it represents sales planning.
An Opportunity minimally consists of:

- A customer
- One or more products with expected quantity and an expected price
- A sales team
- A decision date and status
- Comments
A 'Sales Team' consist of an 'opportunity owner' from one of

Green1-A A retailer Red1-B A distributor Blue-A A manufacturer

And zero or more contacts from zero or more of

Green1-A A retailer Red1-B A distributor Blue-A A manufacturer

Value1-A A consultant
So a sales team would be

Green1-A + or + Red1-B or + Blue-A or + Green1-A + + Red1-B

Green1-A + or + Blue-A or + Red1-B + or + Blue-A or + Value1-A

Red1-B + or + Value1-A or + Blue-A or + Value1-A

Blue-A + or + Value1-A or + Red1-B or + Value1-A

Blue-A + or + Value1-A or + Red1-B or + Value1-A

Blue-A + or + Value1-A or + Red1-B or + Value1-A

Green1-A + or + Value1-A or + Red1-B or + Value1-A
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Description of business case

B2B Implementation Issues

Solution

Questions
Currently each group had its own data and shared as necessary

But most sharing was by reentering the data into a second system.
And it certainly made sense to have a single repository

But, would they use CompanyBlue's database as the repository?
It made sense to let Company Blue manage the data

Before an opportunity could become a sale, CompanyBlue would HAVE to know about it. CompanyBlue needed to know about opportunities to be able to plan their production. CompanyBlue was the only one with a vested interest in EVERY opportunity.

BUT

The distributors and retailers had a fear that the CompanyBlue sales reps would “steal” business from them if they knew the details of certain opportunities.
A second issue was that some partners had a B2B connection with CompanyBlue and wanted to use that, while others wanted to use a WebService to communicate.
A third issue was that both B2B and WebServices had a concept of 1:1 communication while opportunities needed to be shared among multiple partners.
The final issue was that CompanyBlue used Siebel, while others used SalesForce.com, others used their own inhouse systems while many just used Excel.

What should the message format be?
So it came down to four big issues.

1. How could CompanyBlue host the data but still keep it invisible to its own people?

2. What transport would be used?

3. How could they do multiple-recipient B2B or web service?

4. What message format would be used?
Agenda

Description of business case

B2B Implementation Issues

Solution

Questions
The decision was made for CompanyBlue to operate the repository but to keep it separate from their own opportunity database and to handle it like it was a third party repository.
The shared repository would be based on the same system as was used internally by CompanyBlue.

But the interface would be based on a B2B standard.
Since some of the partners were already using RosettaNet, it was decided that the message should be a RosettaNet-like message.

Some would use it in their B2B process but others might use it as a web service message.
But RosettaNet had no Opportunity message defined.

So it was decided to use the OAG Opportunity noun for the message.
But the internal group would not be ready to define the message for another couple of months.

While the external group needed to define the message immediately so they could start moving forward.
The external group defined a single message to make the RosettaNet process easier.

The single message would be used for all scenarios.
The OAG 'Opportunity' noun was quite extensive so it was decided to use a subset for the shared message.

The data that could be shared was restricted by the fact that different systems used different data and that there was certain data that some partners would not share with others. In the end the data was limited to:

- Customer and customer contacts
- Sales team contacts
- Product (Product classification, quantity, $ amount)
- Decision date
- Win Probability
- Sales cycle state
- Incentive programs
- Comments

To avoid problems, sales team members who were not the opportunity owner were limited to adding comments. The sales team 'owner' was able to update most everything.
But internally when the process was later defined, the messages were defined slightly differently.

A partner sends in a new opportunity or an update to an existing opportunity. An acknowledgment would be sent back to show what was done.

When an opportunity is updated, the entire opportunity is sent to all members of the sales team. A 'FaultBOD' was created to deal with the situation where the message could not be read.
So when it was all put together, the gateway would transform the formats for the B2B implementation.
While the web service could either work directly with the internal hub or through the Gateway using the OAG message.

The repository stores opportunities in a database where a 'Get' gets one opportunity at a time or sends a message that there are none for that partner.
To allow for multiple recipients in B2B, it was decided to allow for recurring receivers in the message sent to the gateway and for the gateway to send out multiple messages.
To summarize the solution

1. How could CompanyBlue host the data but still keep it invisible to its own people?
   A replica of the database was used with controls as to what was shared with the original.

2. What transport would be used?
   RNIF was used for those RNIF-enabled partners and two “flavors” of web service was used for others.

3. How could they do multiple-recipient B2B or web service?
   The message was designed for multiple recipients and the gateway would send a copy to each recipient.

4. What message format would be used?
   A subset of the OAG 'Opportunity' noun was used as the basis for both the external and internal messages.
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Description of business case

B2B Implementation Issues

Solution

Questions
BackUp
The Opportunity Record

ID
Name
Status/SalesStage
Decision Date
Close Date
Close reason
Amount
Winning Probability

ID
Name
Address

FirstName
Last Name
Telephone
eMail
Job Title

Note
Incentive
Attachment
Revenue
SalesTeam
Source
Attachment
Detail

Customer
Contact
Note
SalesParty
Source
Incentive

Internal Format
Opportunity
Header
Account
Contact
SalesTeam
Source
Incentive
Attachment

'Opportunity' noun

Not used