Punching Above Your Weight

Automating Decisions for Better Customer Relationships

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Omny link

Background

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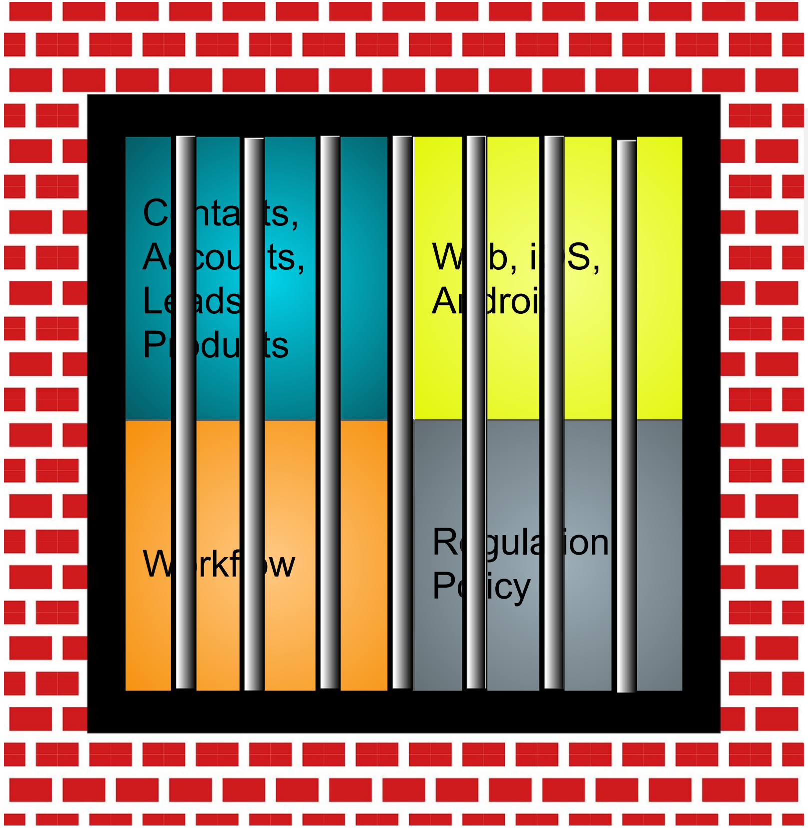
- Enterprise Software
- Almost 10 years at Staffware / TIBCO
- XPDL 1.x, 2.x
- BPMN 1.x, 2.x
- DMN 1.x

Traditional CRMs

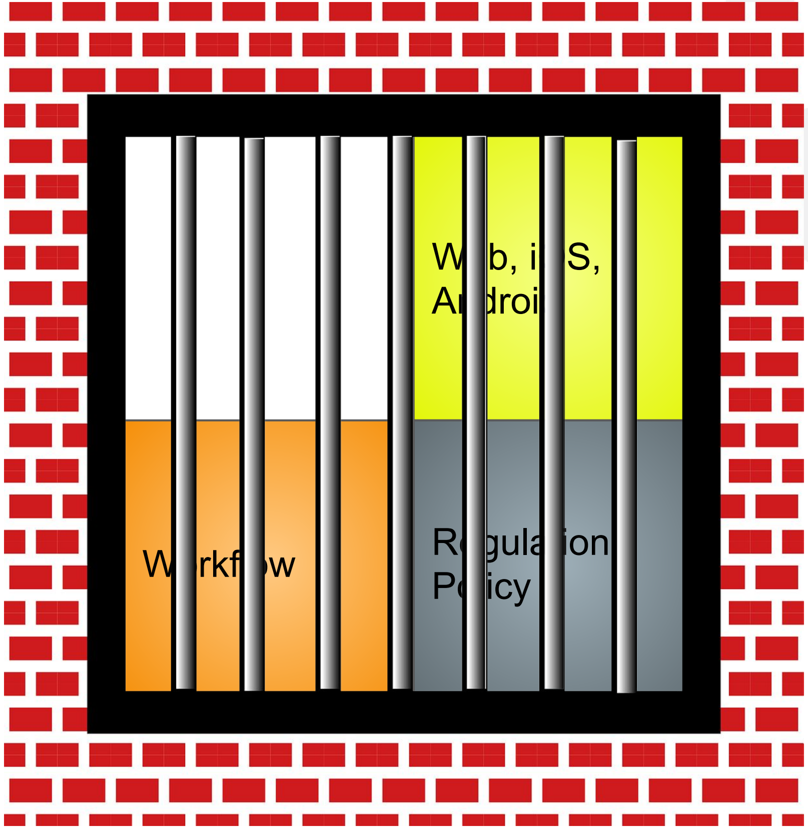
Picking the locks



How can I….

- respond faster?
- decide when to call a new lead / existing client
- serve more clients?
- ensure policy is followed?

Data

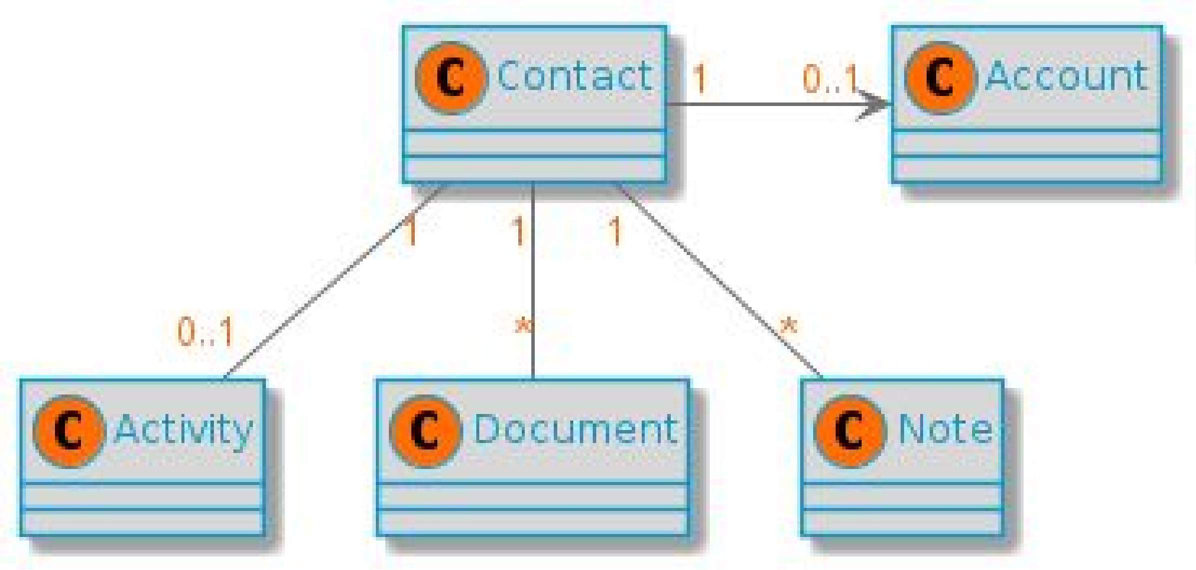


Contacts,
Accounts,
Leads,
Products

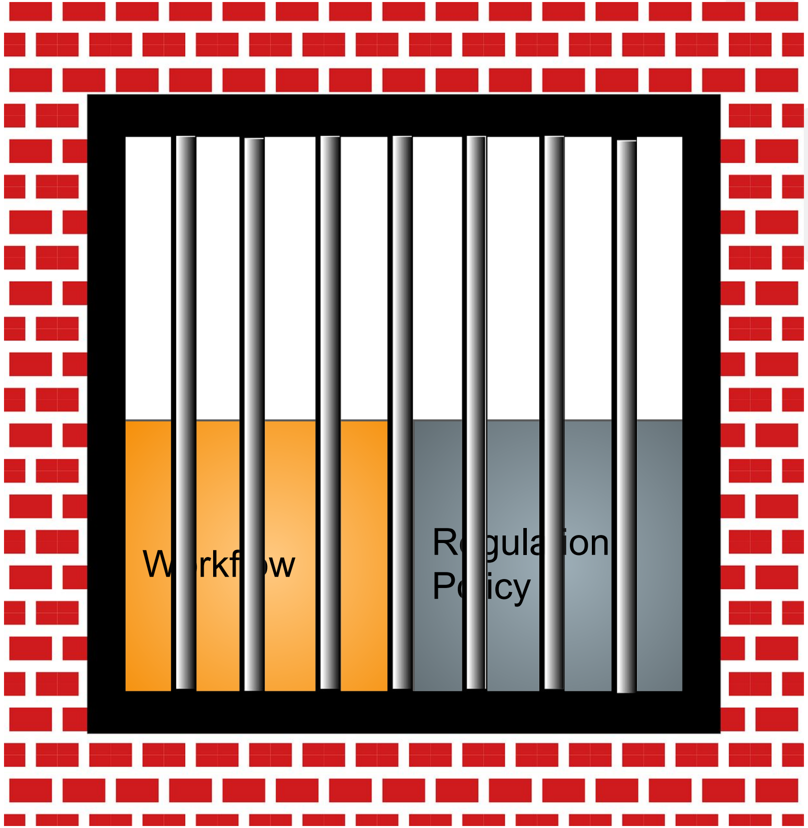
One consistent, published domain model serving

- Web site
- Messaging
- Sales dashboard
- Reporting
- Transform at edge for integration

Simple but extensible customer domain model



User and application interface

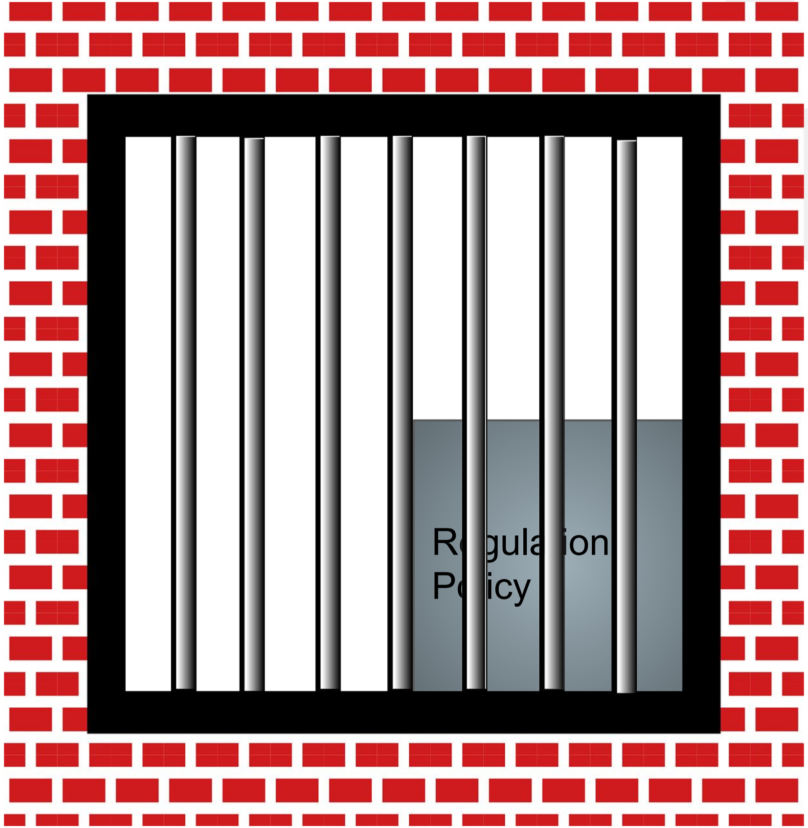


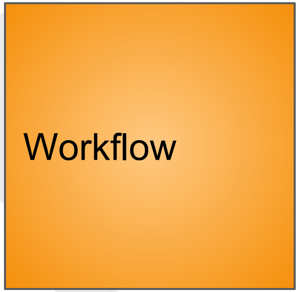
Web, iOS, Android

One set of APIs serving

- Web
- Mobile
- Partners
- Third party services

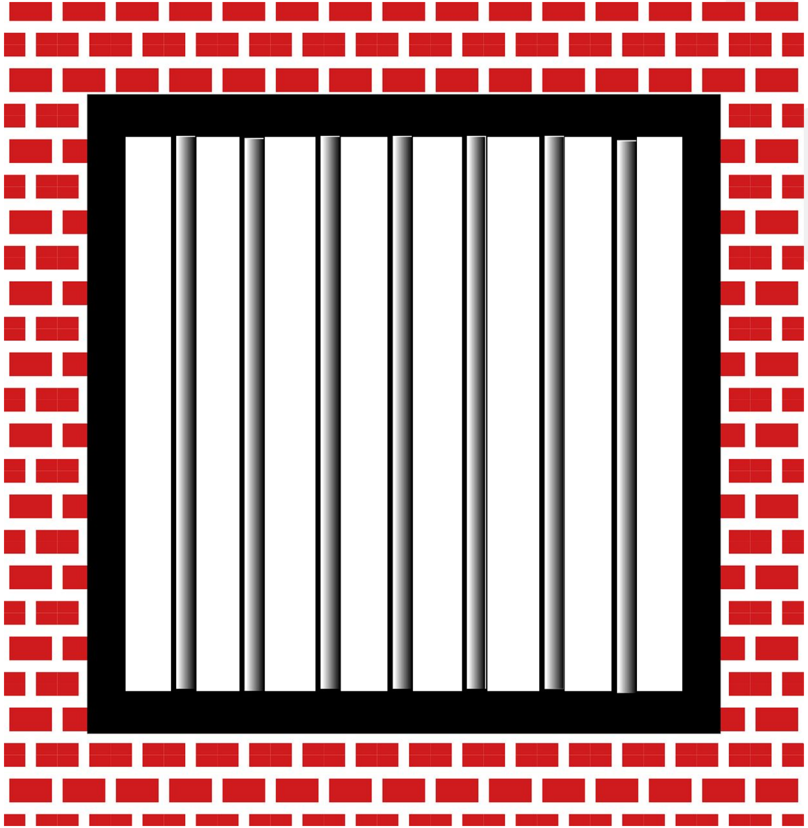
User and automated workflow





- Seamlessly drive work through your organisation and partners
- Incremental automation for increasing efficiencies

Consistent decision making



Regulation, Policy

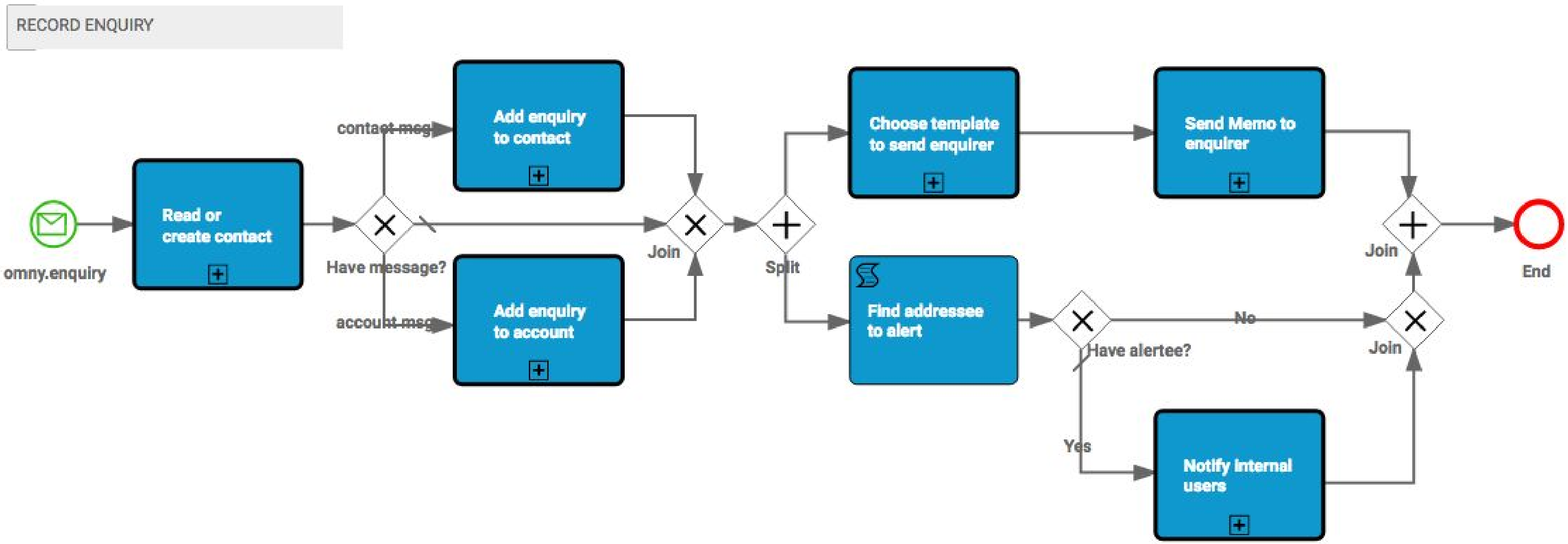
- Ah, finally! This is Decision Camp after all!

Scenario 1: Initial lead handling

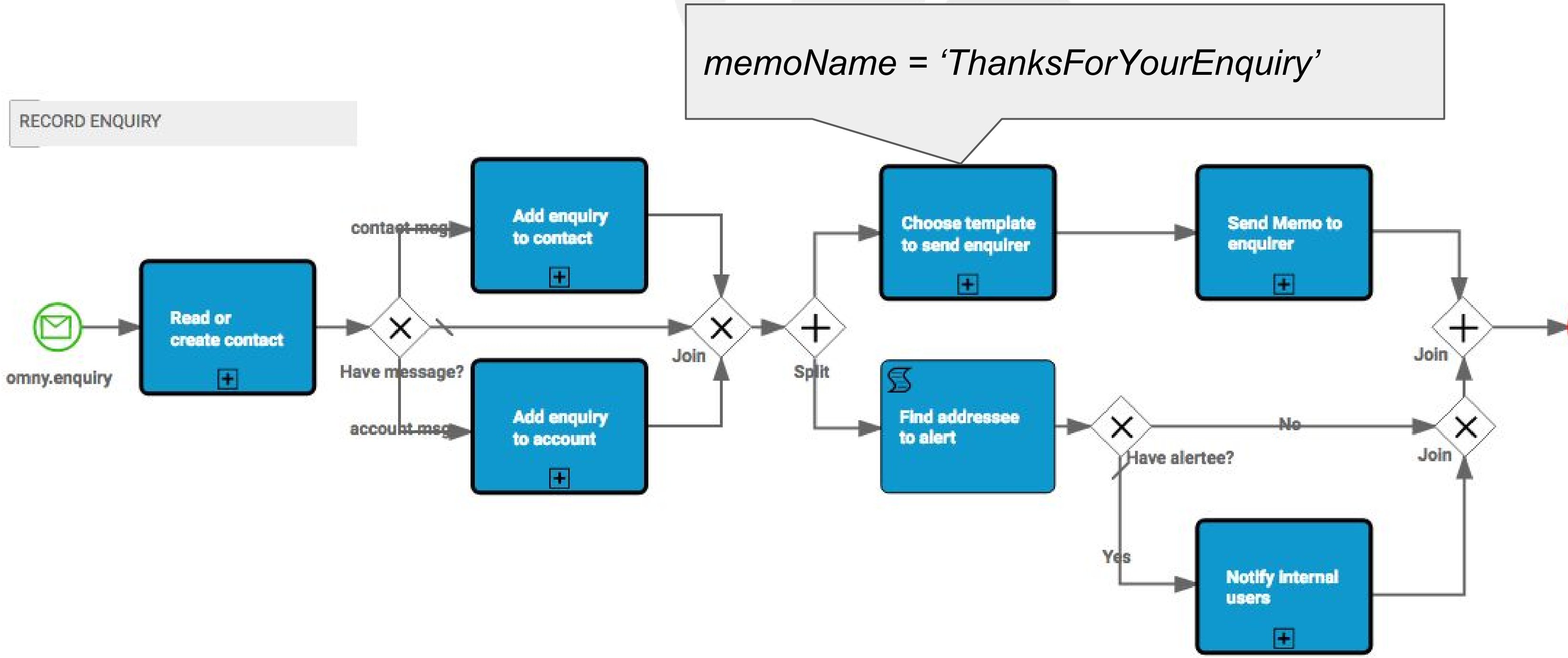
What could be simpler?

- Record a lead
- Decide how to respond...
  - Immediately ;
  - And then more comprehensively

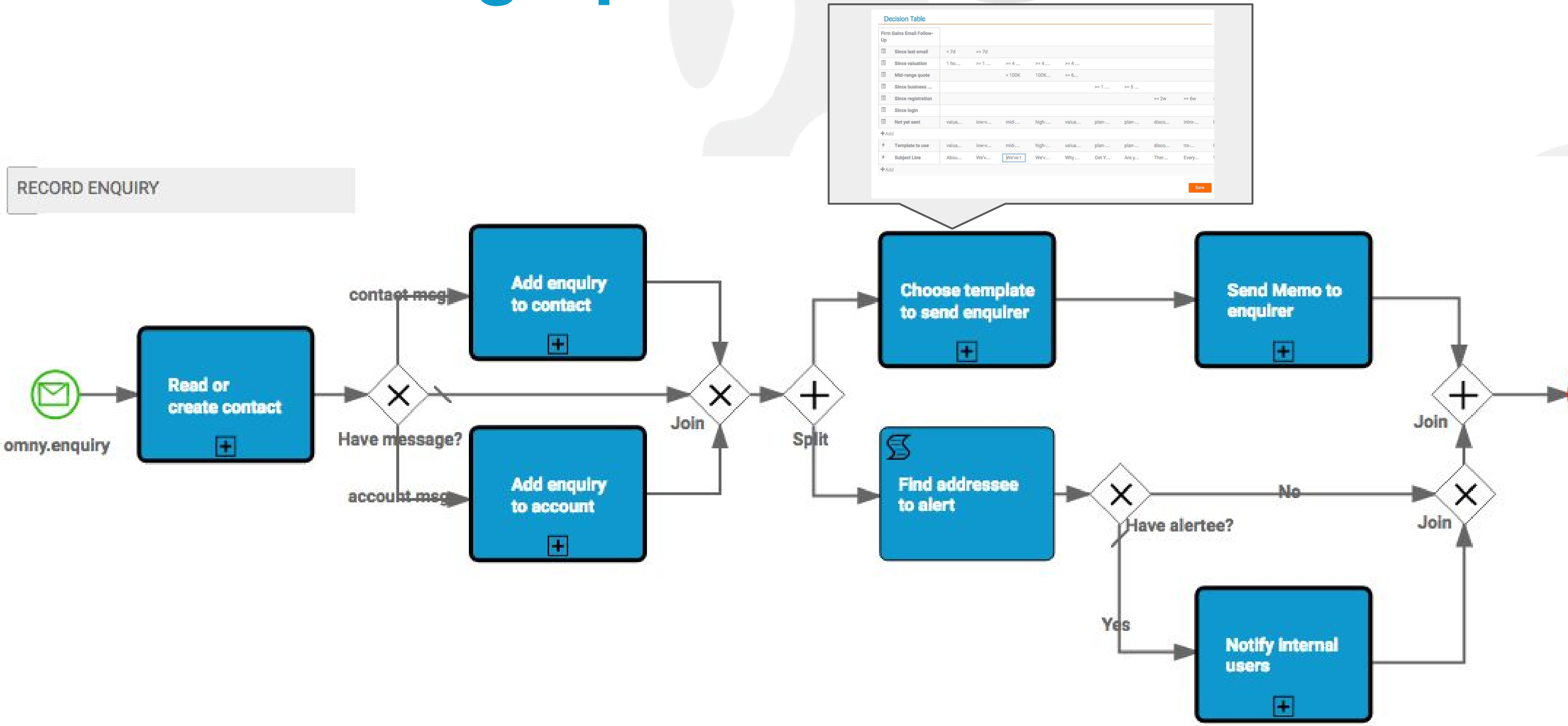
Initial lead handling



Initial lead handling - simplicity out of the box



Initial lead handling - powerful customisation



Firm Gains Email Follow-Up									
Since last email	< 7d	>= 7d							
Since valuation	1 ho...	>= 1 ...	>= 4 ...	>= 4 ...	>= 4 ...				
Mid-range quote			< 100K	100K...	>= 6...				
Since business ...						>= 1 ...	>= 5 ...		
Since registration								>= 2w	>= 6w
Since login									
Not yet sent	valua...	low-v...	mid-...	high-...	valua...	plan-...	plan-...	disco...	intro-...
Template to use	valua...	low-v...	mid-...	high-...	valua...	plan-...	plan-...	disco...	tro-...
Subject Line	Abou...	We'v...	We've t	We'v...	Why ...	Get Y...	Are y...	Ther...	Every...

Let’s take a closer look at that decision model…

Choose Response

P	EBITDA	Location	SIC	Response
1	<= 50000	-	-	"DECLINE"
2	[50000,300000]	-	86101,86102,862…	"HEALTHCARE"
3	[50000,300000]	"NORTH-EAST"	-	"NORTH_EAST"
4	[50000,300000]	"LONDON & SE, M…	-	"SERVICES"
5	>=300000	-	-	"HI-VALUE"

Also available to support users

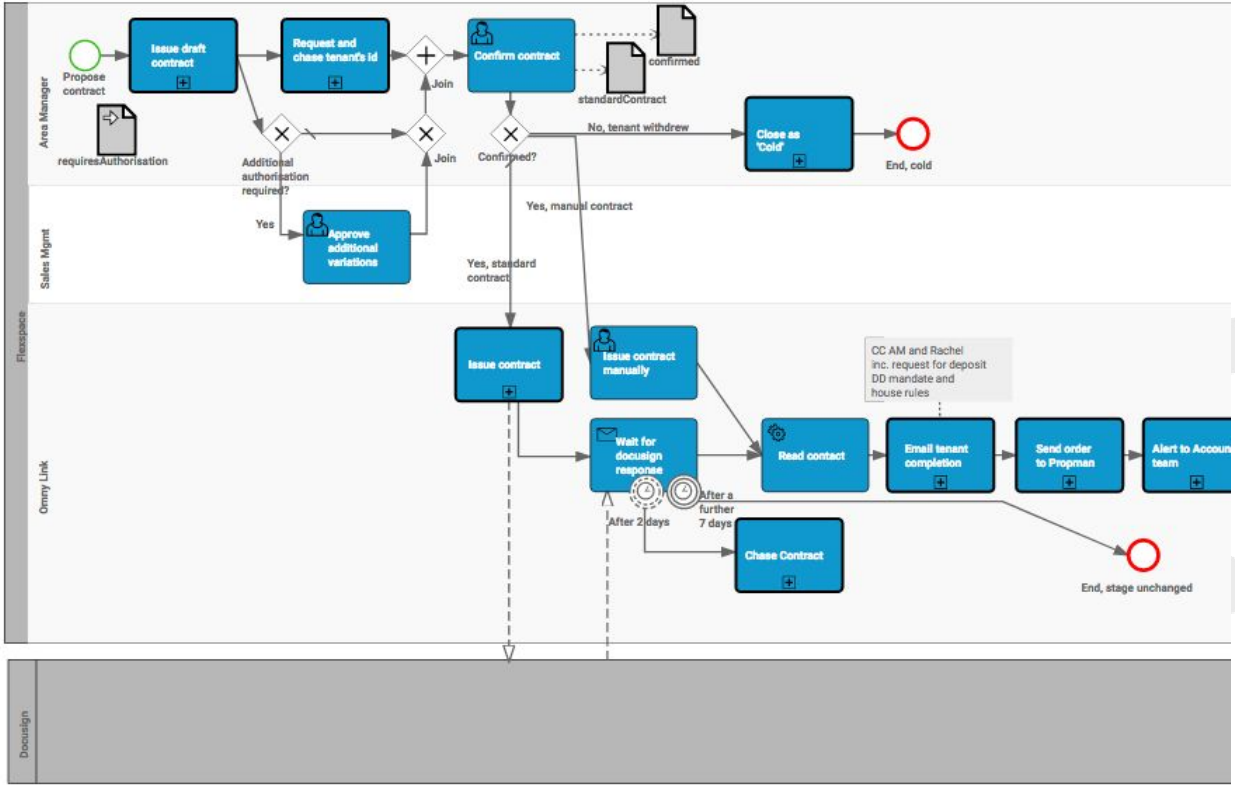
=> Decision consistency

Scenario 2: Composing a contract

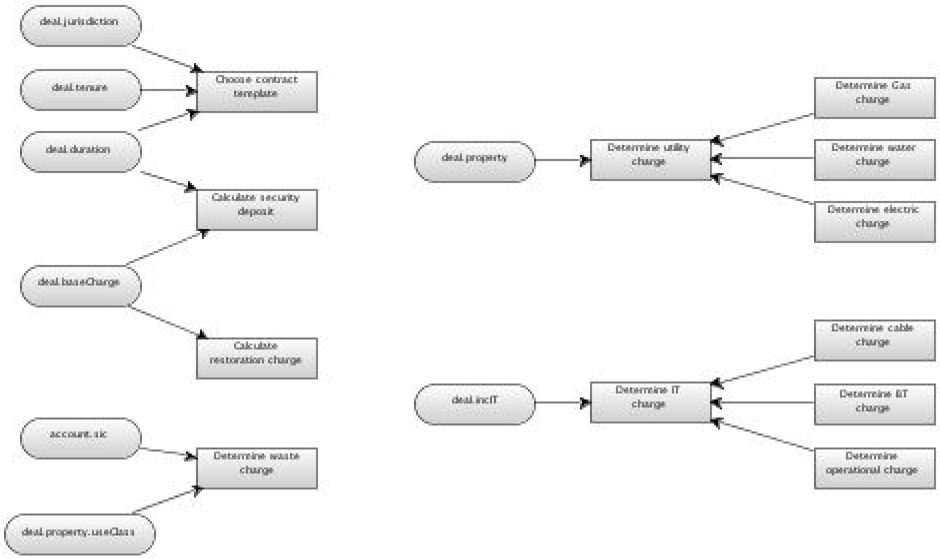
A property company:

- Different legal jurisdictions
- Short term or long term
- Tenured or contracted out
- A host of fees applicable in different circumstances and properties

Closing a deal



Composing a contract



Pay back

Pay back

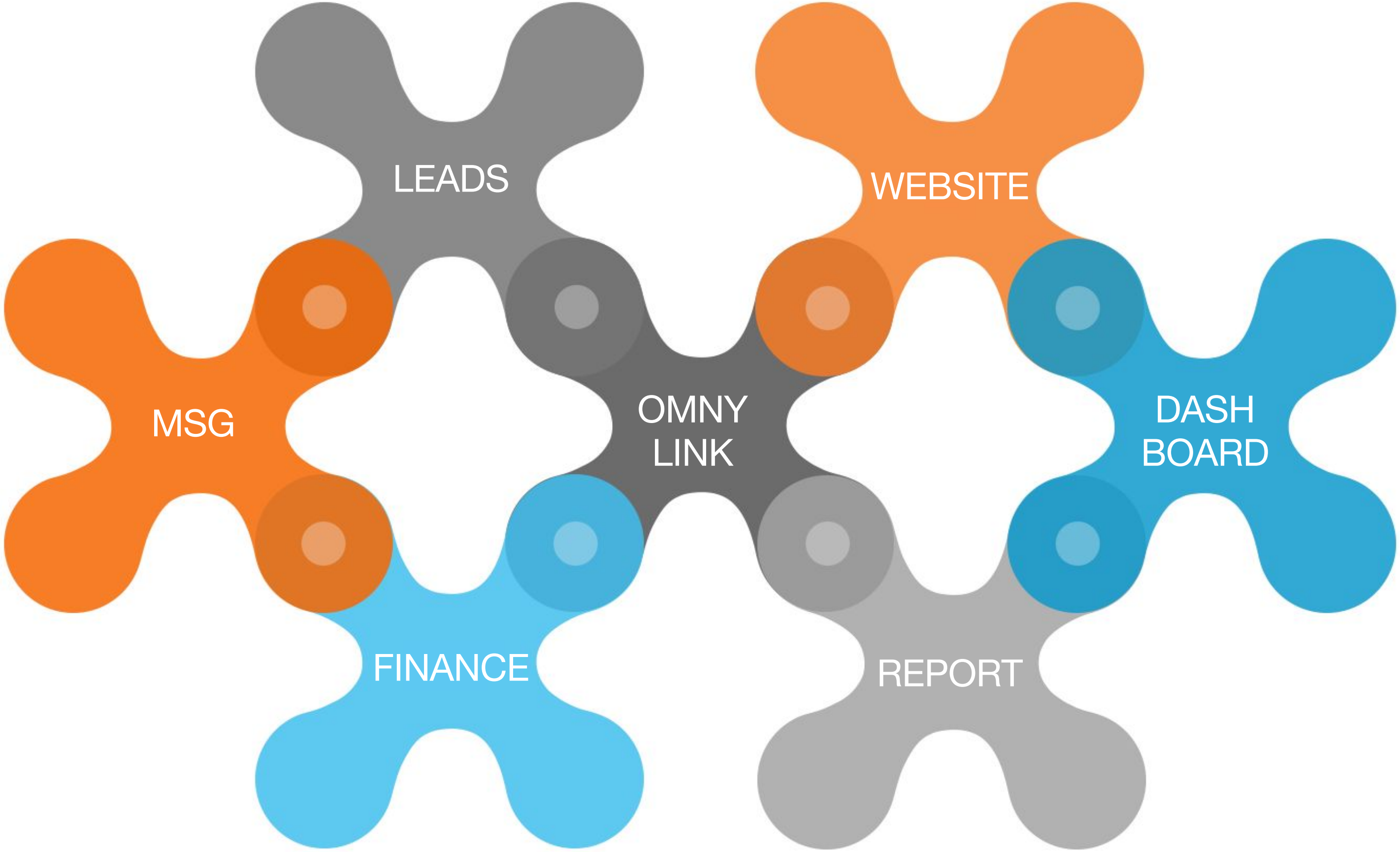
73%

Conclusions

Composable: By abstracting away difference it is possible for new or evolving scenarios to be supported

Consistent and repeatable: the same decision is always made in the same way no matter the user or software environment

Clear and auditable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FINANCE
REPORT