

Punching Above Your Weight

Automating Decisions for Better Customer Relationships

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Background



@tstephen10

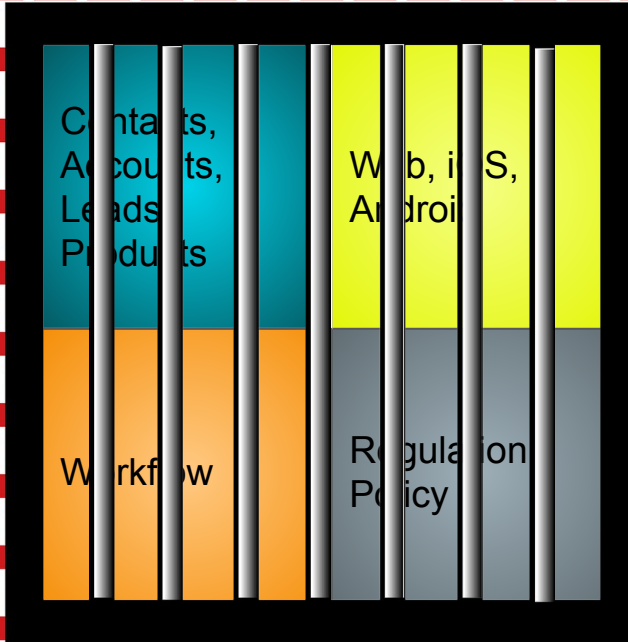
- **Enterprise Software**
- **Almost 10 years at Staffware / TIBCO**
- **XPDL 1.x, 2.x**
- **BPMN 1.x, 2.x**
- **DMN 1.x**



Traditional CRMs



Picking the locks

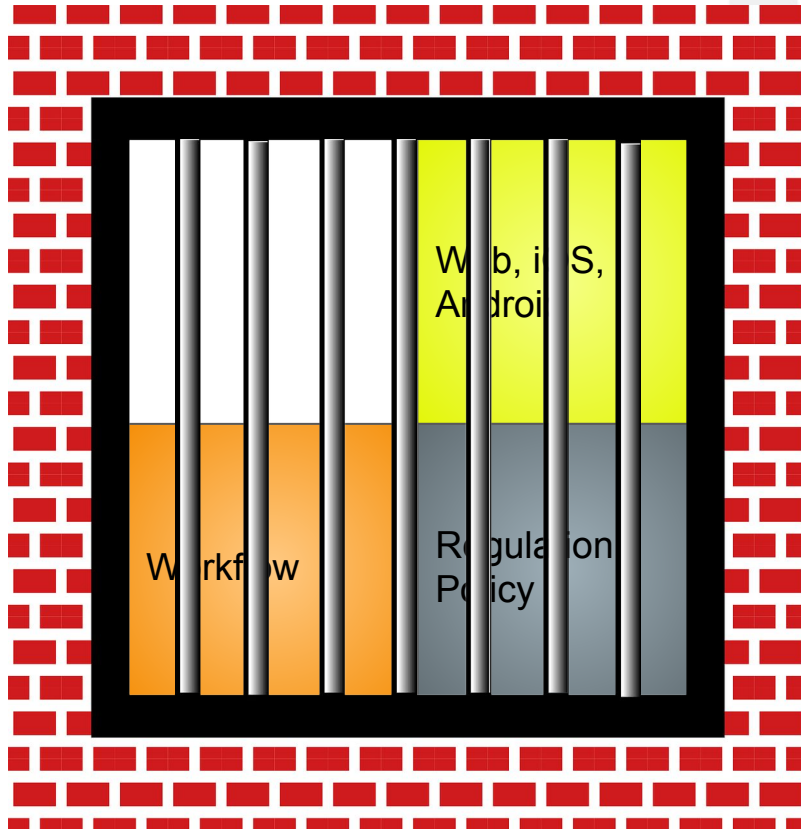


How can I....

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



Data

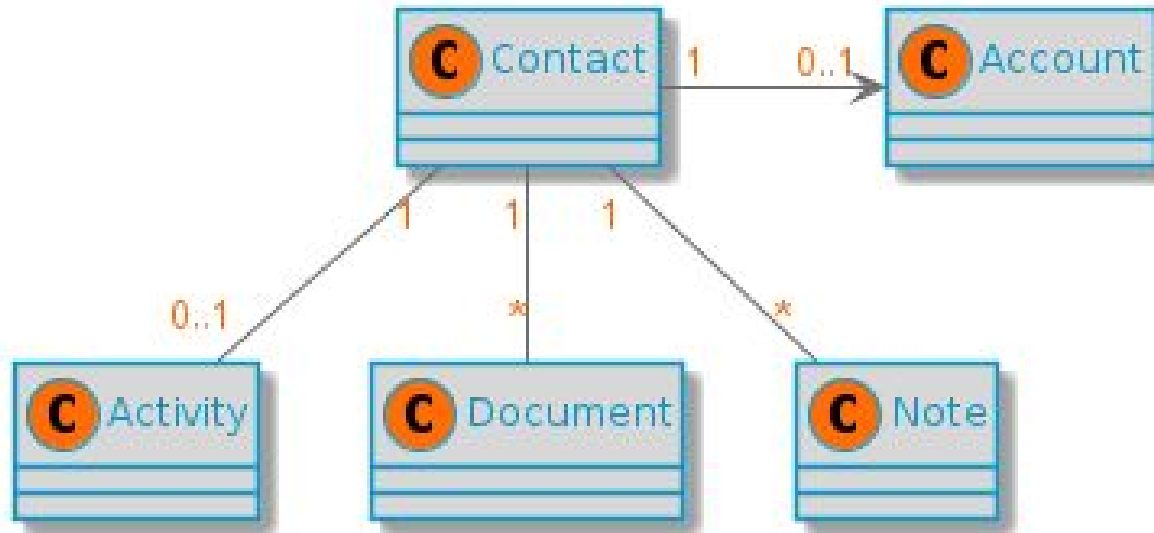


Contacts,
Accounts,
Leads,
Products

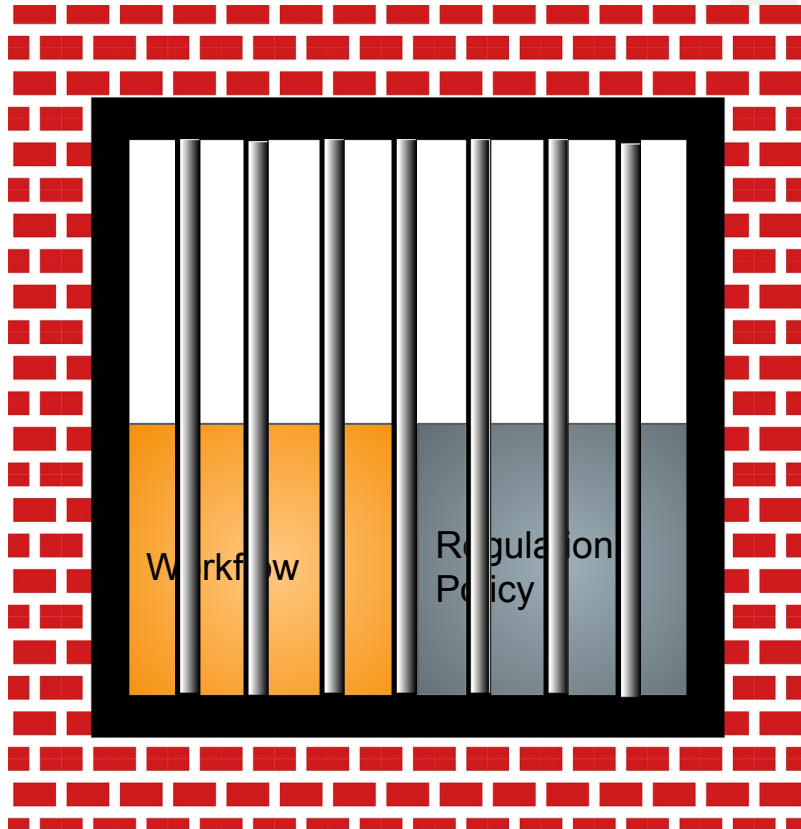
One consistent, published
domain model serving

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

Simple but extensible customer domain model



User and application interface

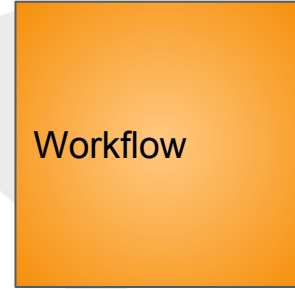
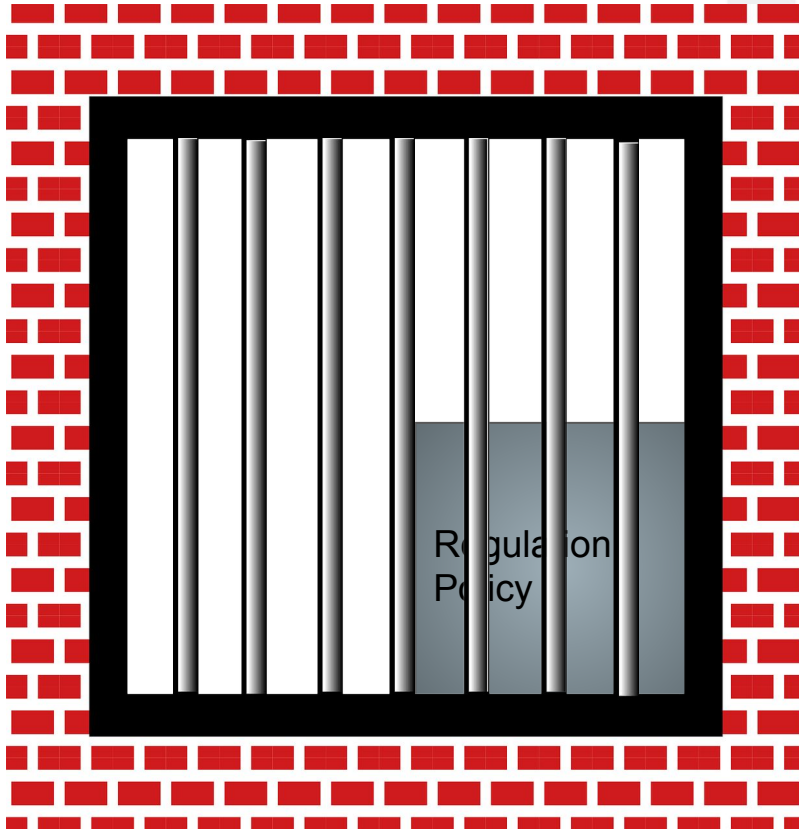


Web, iOS,
Android

One set of APIs serving

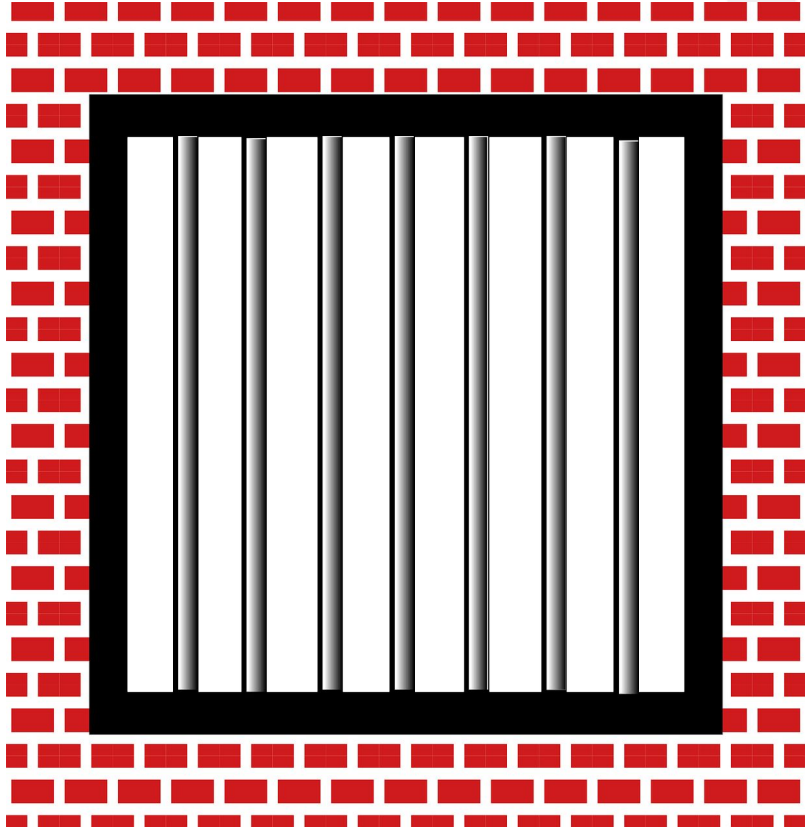
- Web
- Mobile
- Partners
- Third party services

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

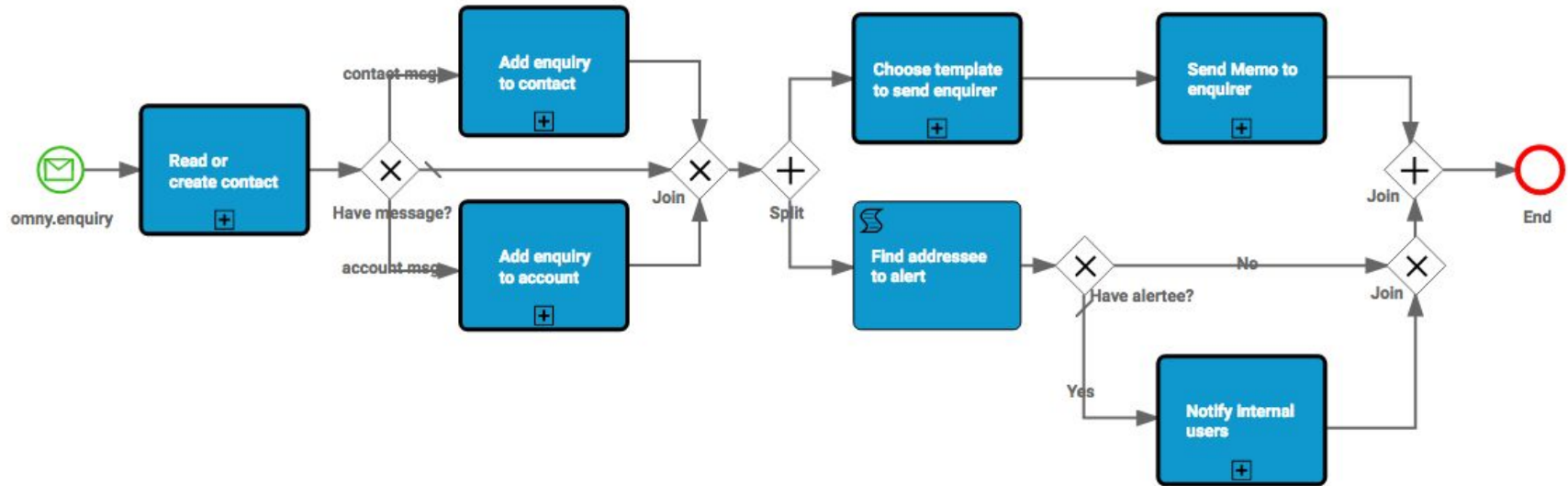
What could be simpler?

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

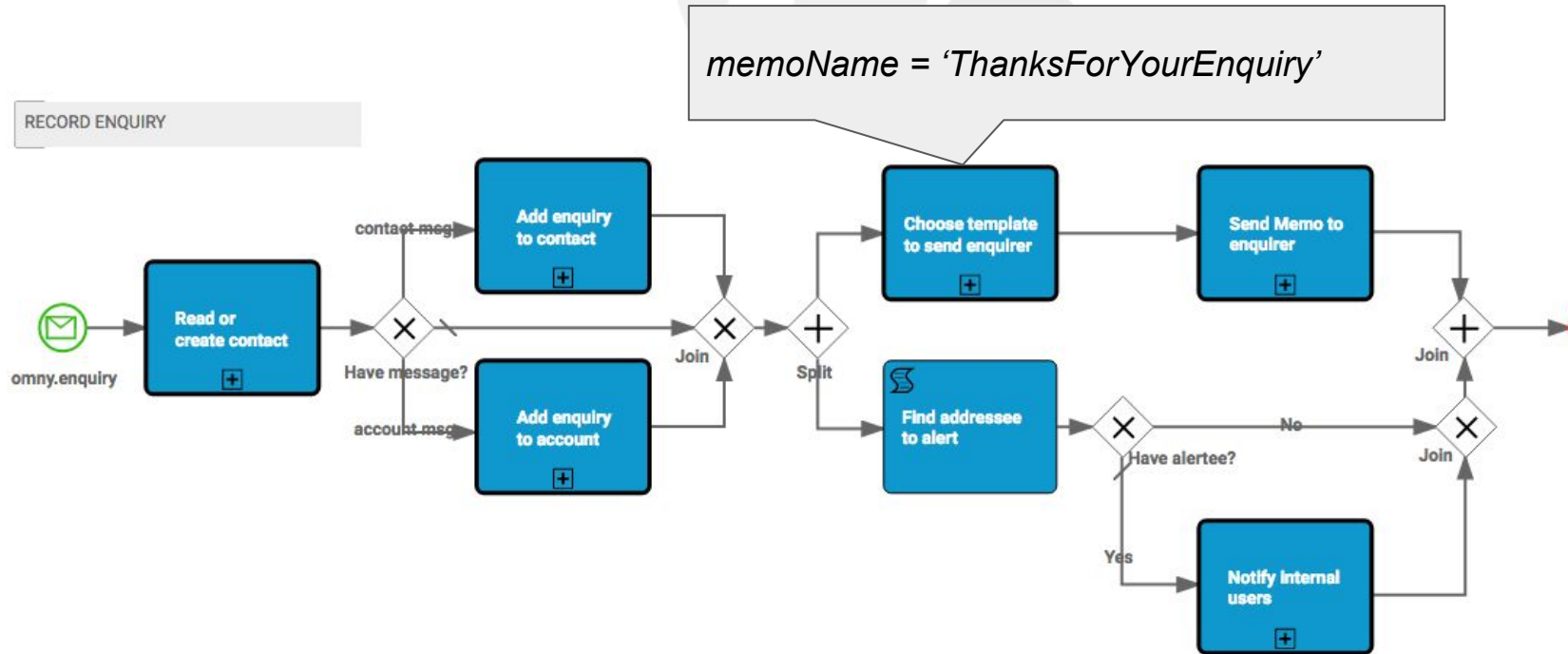


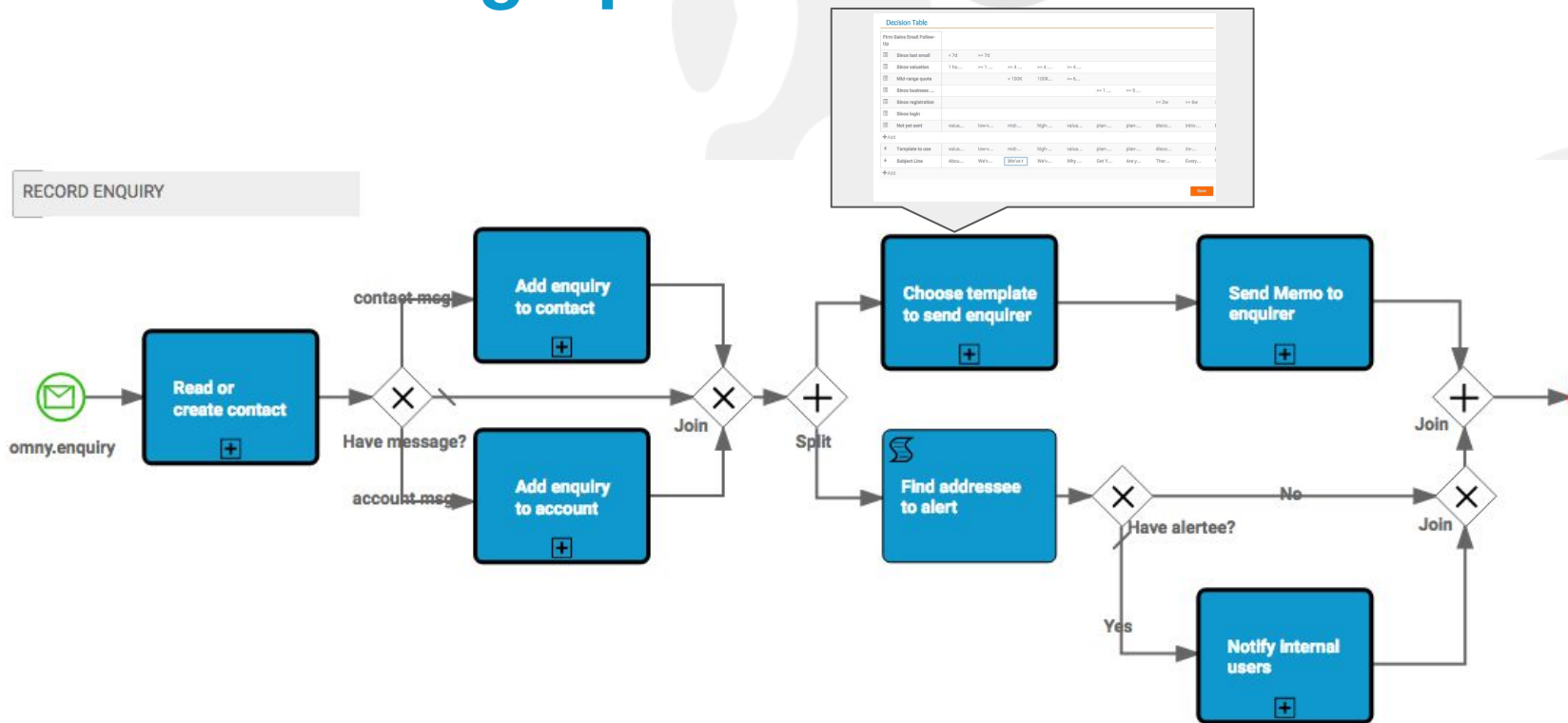
Initial lead handling

RECORD ENQUIRY



Initial lead handling - simplicity out of the box





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



The screenshot displays the 'firmgains Contact Management' web application. The interface includes a header with the company logo and name, a search bar, and a sidebar with navigation options like 'Contacts', 'Tasks', and 'Notes'. The main content area shows a form for managing a contact, with fields for 'Ref:', 'Owner:', 'Existing Customer?', 'Stage:', 'Enquiry Type:', 'Account Type:', and 'Tags:'. A dropdown menu is open, showing options: 'Add task', 'Send email', 'Recommend follow up (no mail sent)', and 'Run email follow up'. A callout box labeled 'DMN' (Decision Management Network) points to this menu, indicating that the system uses decision logic to recommend actions. Below the form, there is a 'Contact Information' section and a 'Marketing' section. On the right side, there is a 'Tasks' section with 2 tasks and a 'Notes' section with 3 notes. The notes are listed with timestamps and user avatars, showing a history of interactions.

DMN

about a minute ago (11/07/2017, 18:11) Given the financials data supplied, sector information and location this looks like a good fit to refer to broker

about 5 hours ago (11/07/2017, 12:55)

about 8 hours ago (11/07/2017, 09:32)





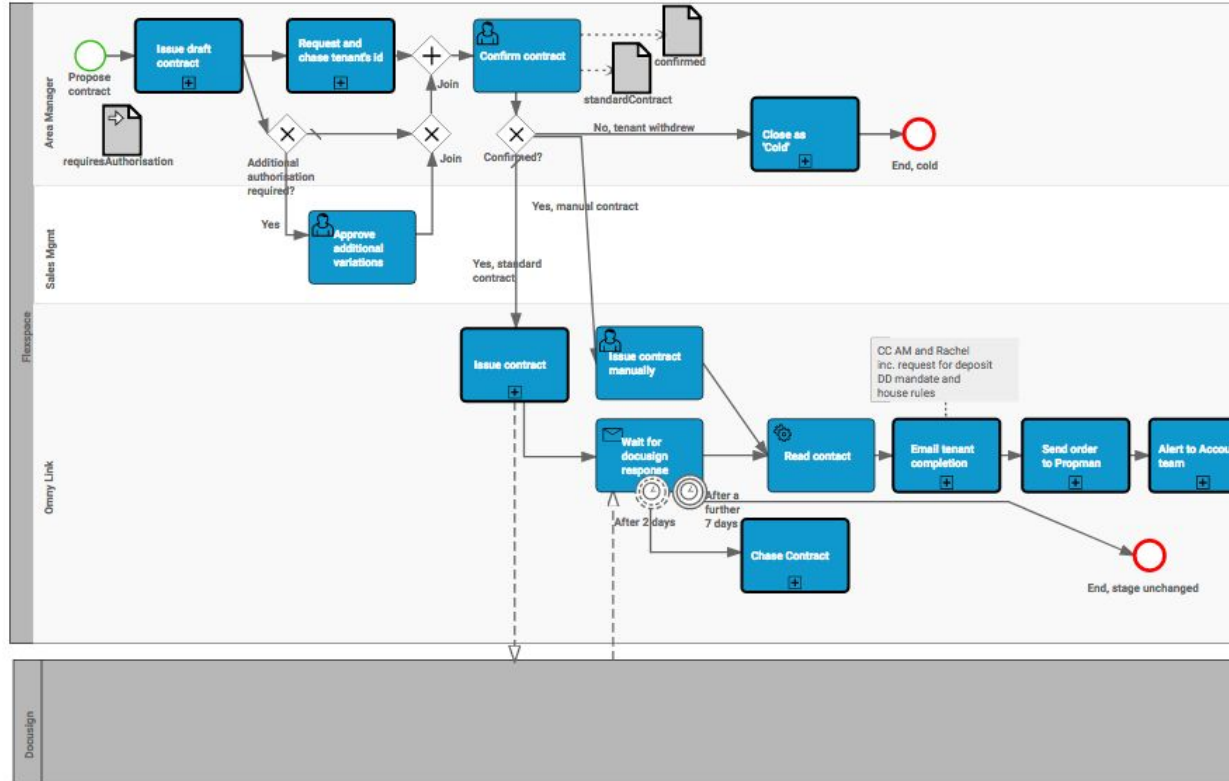
Scenario 2: Composing a contract

A property company:

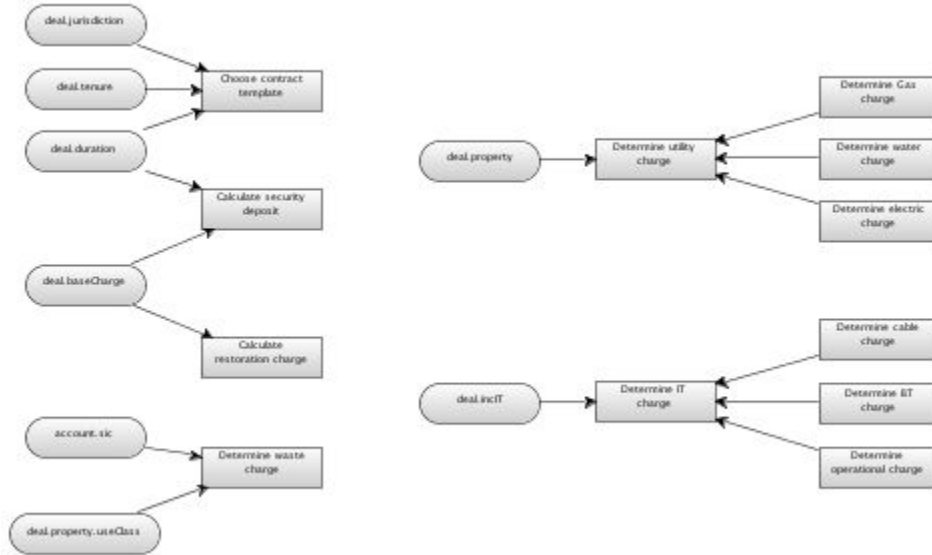
- Different legal jurisdictions
- Short term or long term
- Tenured or contracted out
- A host of fees applicable in different circumstances and properties



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





