

Case Study: Company Creation Form

Client Implementation Process: The onboarding process is separated into two halves: Discovery and Deployment. The Discovery section allows Client Implementation to find out how Concord's services are going to be used. The Deployment section is how the customer gets configured.

Section One: Discovery: As part of the onboarding discovery process, Client Implementation carries out a discovery call with the end customer to collect account level and the business level details.

Section Two: Deployment: Customers fill out provisioning form to provide most of the following information in this section, if something is missed on the provisioning form, Client Implementation team will obtain it during the deployment call.

Pain Point:

Concord Sales takes the responsibility for filling out the Provisioning Form for the trial accounts while Client Implementation handles the intaking of the Provisioning Form for all commercial Fax Online accounts (including NEXTSTEP). Once the spreadsheet is completed with the required fields provided by the customer, the spreadsheet is passed down to Premium Support by the two teams.

Next, Premium Support aids in creating the company account. Premium Support refers to the data on the spreadsheet which provides important details needed for creating the account. By this time, the data has been manually touched by two different teams. The process is repetitive, requiring Premium Support to copy and paste from the spreadsheet into Order Entry. If Support has any questions or needs clarification from the spreadsheet, they then reach back out to Concord Sales or Client Implementation for answers before proceeding with creating the company account.

The above process can take 1-2 days to turn around a new company account. We need a process to improve the time to create a company from days to minutes. The initial approach will be focused on solving the most common use case which we believe to be 80% of the request.

Persona: Client Implementation/Premium Support

Scenarios (on behalf of Client Implementation/Premium Support):

1. As a Sales representative responsible for selling Concord services, I can provision a Fax Online trial or commercial account for a named administrator by entering the required fields in the web base company creation form.
2. As a Client Implementation representative responsible for customer onboarding, I can provision a Fax Online trial or commercial account for a named administrator by entering the required fields in the web base company creation form.
3. As a Premium Support representative, I can provision a Fax Online trial or commercial account for a named administrator by entering the required fields in the web base company creation form.
4. Accounts that have a custom rate plan will be set up as trial accounts. Member of Premium Support will be able to assign the pricing schedule as per the signed agreement during the trial account to the commercial account conversation process.

Ideating the flow :

1. The form will be a webpage and not in Order Entry
2. Required fields to create the company account are required for both the Fax Online trial account and Fax Online commercial account

3. Default General Account Settings are set for both Fax Online trial account and Fax Online commercial account
4. Default Company Level Settings are set for both Fax Online trial account and Fax Online commercial account
5. Default Inbound Company Level Settings are set for both Fax Online trial account and Fax Online commercial account
6. Allow account provisioning as a trial account for custom rate plan, Premium Support must be able to assign the custom rates manually at a later time during the trial account to the commercial account conversation.
7. Once the trial account/commercial account is created, Premium Support is notified by sending the notification through Samanage, noting the CUST NAME and CUST ID.
8. Once the trial account/commercial account is created, Billing (billing@concord.net) is notified by sending the notification through email, noting the CUST NAME and CUST ID.

Wire Frame for the Company Creation Form - Trial Account

Preview : Company Creation Form

+

UMI Tools

+

Authentication Tools

+

Account Lookup Tools

+

Rate Plans

+

Phone Number Management

+

Customer Tags

+

Company Creation Form

NETOPS

R&D

CSR

REPORTS

nhussain@concord.net

Settings

Admin

Sign Out

Company Creation Form

Company Name

☐ Trial Account

COMPANY CONTACT INFORMATION

First Name

Last Name

Email

Phone Number

Extn (Optional)

Fax Number

Address

Line 1

Line 2 (Optional)

City

State/Province

ZIP/Postal

Country

☒ USE SAME FOR BILLING CONTACT

☒ USE SAME FOR EMERGENCY CONTACT

☒ USE SAME FOR ADMINISTRATOR CONTACT

EMERGENCY CONTACT INFORMATION

First Name

Last Name

Email

Phone Number

Ext (Optional)

ADD EMERGENCY CONTACT

ADMINISTRATOR CONTACT INFORMATION

First Name

Last Name

Email

Phone Number

Ext (Optional)

Administrator Username

VERIFY USERNAME

MAXIMUM ALLOWED PHONE INVENTORY

10

RATE PLAN LIST FOR FAX ONLINE

Trial Rate Plan

USER PREFERENCES

Time Zone

(GMT - 05:00) Eastern Time (US & Canada)

Inbound File Format

PDF

☐ NO

☐ Welcome Message

RESET FORM

CREATE ACCOUNT

Preview : Company Creation Form

CONCORD Fax

CSR TOOLS

+ UM3 Tools

+ Authentication Tools

+ Account Lookup Tools

+ Rate Plans

+ Phone Number Management

+ Customer Tags

+ Company Creation Form

NETOPS R&D CSR REPORTS

nhusain@concord.net Settings Admin Sign Out

Congratulations! Company Account has been created Successfully.

Company ID:

XXX000XXX000

Company Name:

Test Company

Account Type:

Trial

COMPANY CONTACT INFORMATION

First Name:

Nazia

Last Name:

Hussain

Email:

nhusain@concord.net

Phone:

000111000 - 321

Fax Number:

111000111

Address

Line 1:

Line 1- Line 1

Line 2:

Line 2 - Line 2

City:

Seattle

State/Province:

Washington

ZIP/Postal:

98101

Country:

USA

BILLING CONTACT SAME AS CONTACT INFORMATION

EMERGENCY CONTACT SAME AS CONTACT INFORMRMATION

ADMINISTRATOR CONTACT SAME AS CONTACT INFORMRMATION

Administrator Username:

John Doe

MAXIMUM ALLOWED PHONE INVENTORY: 10

RATE PLAN LIST FOR FAX ONLINE: Trial Rate Plan

USER PREFERENCES

Time Zone:

(GTM - 05:00) Eastern Time (US & Canada)


Inbound File Format:

PDF

Welcome Message:

NO

Mock-up

 CONCORD*Fax*

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[Settings](#)
[Admin](#)
[Sign Out](#)

CSR Tools

- UMQ Tools
- Message Events
- Email To Fax Lookup
- EntryPoint By Email
- Partial Fax Lookup
- Partial Percentages
- Fax Size Monitor
- Platform Status
- Remote Monitor
- IVR Call Lookup
- Forwarding Failures
- Bounced Emails
- System Holds
- TLS Validator

Authentication Tools

- Check Login Credentials
- Email to Fax
- Fax Web Services
- Inbound Fax Web Services

Account Lookup Tools

- Phone Number Management
- Import Public Numbers
- Import Private Numbers
- Public Inventory Group
- Private Inventory Pool
- Remove Public Numbers
- Remove Private Numbers

Reports

- Number Status
- Enterprise Inventory
- Public Inventory
- Inventory Availability

Rate Plans

- Rate Lookup
- Rate Creation
- Delete Partial
- Volume Discount Creation

SIA Monitoring

- Receipts
- Search Events

Customer Tags

- Customer Tags
- Customer Tags
- Customer Tags
- Company Creation Form

Company Creation Form

Company Name*

Sales Org Concord Staging Trial Accounts Sales Agent* --Select from list--

☒ Trial Account

Company Contact Information

First Name* Last Name*

Email* Phone Number* Ext#

Fax Number

Address

Line 1* Line 2

City* State/Province* Alaska

Zip/Postal* Country* USA

☒ Use same for Billing Contact
☒ Use same for Emergency Contact
☐ Use same for Administrator Details

Emergency Contact Information Add

First Name* Last Name*

Email* Phone Number Ext#

Administrator Details

First Name* Last Name*

Email*

Username* ☐ Use email address as Username Verify Username

Others

Maximum Allowed Phone Inventory* 10

Rate Plan List for Fax Online --Select from list--

NEXTSTEP Application Settings

☒ Make Fax Inbox available to the users within this Company Account

☒ Make NEXTSTEP available to the users within this Company Account

Choose which application will be selected, by default, for new user Account created in Order Entry or the Portal. This choice can be deselected during the creation process

NOTE: This does not apply to the users created through Bulk Create or Account Mgmt Web Services

Default Application None

No application (Fax Inbox/NEXTSTEP) will be selected by default for new users

User Preferences

Time Zone* --Select from list-- Inbound File Format* PDF

Sender CSID

NOTE: CSID is limited to 20 characters. Blank CSID defaults to "Fax Services"

☐ No Welcome Message

Cover Page Management

Default Cover Page Concord Default Add Cover Page

Cover Page Inclusion ☒ On Demand ☐ No Cover Page Upload Cover Page Browse No file chosen

☐ Automatic ☐ With Body Text Cover Page Name

Save Cover Page

Reset Create Account