Case Study: Company Creation Form

Client Implementation Process: he 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 fills 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):

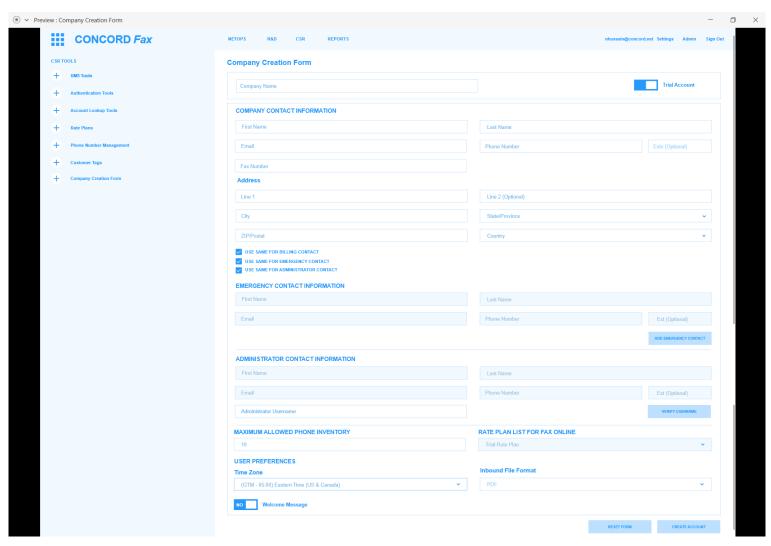
- 1. As a Sales representative responsible for selling Concord services, I can provision a Fax Online trial or commercial account for a named administrator by entering the required fields in the web base company creation form.
- 2. As a Client Implementation representative responsible for customer onboarding, 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



Wire Frame for the Company Creation Confirmation Page



Mock-up

