

International Data Provider - Business Process Analysis

understand. collaborate. implement.

A business process engineering project to document and define new service-related processes associated with the migration from PeopleSoft Financials' billing, invoicing and related CRM historical subscription transaction data and live subscription management to a Salesforce.com and Oracle Financials platform supplemented by Zuora billing and invoicing suite for a large international data provider based in Norcross, Georgia.

Overview

- Prepare the Sales Operations and Financial Services business units for the implementation of a cloud-based enterprise-wide software application
- Align new activities that support the end-to-end processes associated with the software implementation
- Define business requirements and translate them into technical requirements for development of system and end user interfaces

Participants

- Chief Financial Officer
- Chief Customer Officer
- Vice President, Finance
- Director: Finance (2), Sales Operations, Sales, Customer Relations, Collections, Software Development

Approach

- Identify gaps, constraints, dependencies, priorities, and issues / risks for impacted functional areas (Sales, Financial Services, Collections, Reporting)
- Determine technical capabilities and challenges and potential impacts to the business
- Develop and execute communication plan to ensure key stakeholders are kept abreast of system development effort
- Develop future-state processes associated with capabilities of new software application
- Document future-state business processes for each functional area that require software development
- Develop action plans to move system development from unit test through user acceptance test and executive sponsor sign-off
- Schedule and facilitate change management system development sessions with key stakeholders and executive leadership team members
- Establish a centralized project artifact repository (SharePoint site) to store all documentation
- Prepare each functional area for the system implementation

Results

- Conducted data gathering sessions to capture "as is" information on each process touched by current PeopleSoft Financials system
- Mapped "to be" processes and identified 73 gaps, constraints, dependencies, and issues for closure prior to UAT
- Developed 46 User Stories with the following objectives:
 - Provide a mechanism to document the business requirements for each functional process
 - Provide the development team with the direction to implement a solution for the specific process
 - Provide the implementation team with a basis to develop system and user acceptance scenarios
- Developed and facilitated two separate week long User Acceptance Testing (UAT) sessions to demonstrate all end-to-end processes associated with the system migration to Salesforce.com, Zuora, and Oracle Financials