



Widelity Case Study

Revenue Fulfillment: Re-engineering the “Quote to Cash” Process

Challenge/Opportunity

Once a sale is closed, revenue should be a guarantee. Right? More often than not, companies struggle to quickly move from sales “forecast” to actualized revenue and consequently spend immense time and effort acquiring leads for their sales staff and writing proposals in order to win deals. To compound matters, once a contract is signed the process of fulfilling the service order can be encumbered with confusion, misinformation, and tedious error-prone manual procedures which delay provisioning resulting in large backlogs. The end result is that the revenue which should be on the bottom-line is in limbo, stuck waiting in someone’s queue to be processed.

Solution

Processes are built around tools. Ordering and provisioning tools are based on software-systems, sometimes off the shelf, other times highly customized. Information Technology (IT) infrastructure strategies which touch ordering and provisioning systems involve capital expense, planning time, and usually garner quite a bit of senior leadership attention. One Widelity client had evolved their ordering and provisioning tools and systems to a point where it was perceived by internal IT staff as impossible to make near-term required fixes and changes and decrease the time to revenue. Therefore, Widelity consultants used a common sense and least-cost approach to re-engineer the “Quote to Cash” process. The Widelity consulting team immersed itself into client environment and through interviews and questionnaires gained knowledge about the:

- Complexities and interactions of the back office systems
- Limitations of those systems
- Current end-to-end process flow
- Key personnel who contribute to the process
- Road blocks and bottlenecks in the current process

Then using both macro and micro analysis, Widelity offered solutions which alleviated some of the pressure points in the pre-sales and order entry process flows. Widelity staff investigated the detail process needs of every functional group involved for each product and service impacted and in turn:

- Established a product prioritization list by pending revenue
- Designed pre-order service delivery (PSD) process guide templates
- Developed PSDs for over 80 service products,
- Retained multi-organizational buy-in of the processes
- Trained the process to sales, sales engineers, and care personnel
- Presented recommendations to management to establish a dedicated Order Services team
- Assisted in establishing that team when the support was granted
- Established performance metrics for both the team’s progress and the progress of the orders through the “Quote to Cash” process
- Established executive dashboards for weekly presentation of the metrics

Widely also served as subject matter experts (SMEs), serving as the “hotline” for service delivery process flows for each of the effected products as well as troubleshooting complex orders.

Benefits

The benefit of Widely’s contribution was felt immediately. In most cases, the client’s revenue for complex, high profile products was actualized three to six months sooner than it would have been without Widely’s support. In addition, the senior management team was given a revenue and order tracking mechanism which provided previously unattainable visibility into the process pipeline heightening an awareness of bottlenecks and allowing for preventative and corrective actions.

Widely Services Utilized for Re-engineering the Quote to Cash Process

- Project & Program Management
- IT Consulting Services
- Business Consulting Services

For more information

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