



INNOVATE 2018

Customer Conversations Made SMARTer

Building Smarter Customer Service Outcomes through SmartCORR™

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Pre SmartCORR™ Implementation at EE/BT



Driving Efficiency – Success and Shortfall

Our aim back in 2014 was to utilize Salesforce and its integration partners to go beyond Order to Cash:

“To Deliver seamless functionality, efficiency and a great CX.”

Our strategy over the last 4 years has been to develop a complete view of the customer from order to cash.

Ensure every business process, word document, spreadsheet, and over used SharePoint site is **fully** integrated into Salesforce.com.

Streamline Order to Contract and Beyond



Lead-to-Pricing Efficiency



EE was the first Telecommunications provider to get from Lead-to-Quote preparation all within the Salesforce CRM platform.

Quote-to-Contract Implementation

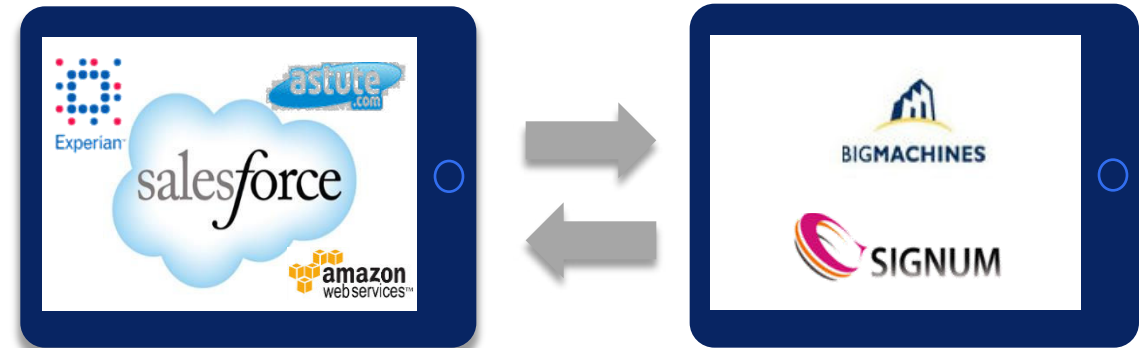


We were still struggling from an overly manual process to get from financial sign-off through to signed contract and then implementation, support and future growth.

Order-to-Price – Our Success

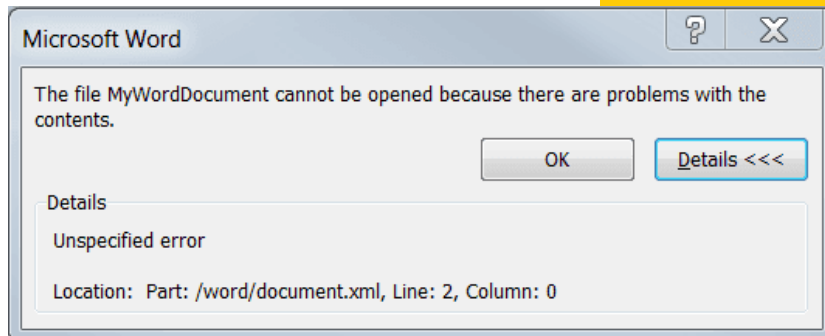
EE / BT Successes:

- All business users fully engaged and using SFDC
- Integrated CPQ platform – to build and financially model all deals
- An agreed standard contract document for all contracts
- Introducing the concept of digital signature to our customers
- Opportunity – contract time reduce from an average of 3 weeks to 3 days.
- Approximate **63** step process for sales to get from Order-to-Contract signature.





- One code heavy inflexible Business Agreement Template from a Word-based contract author
- Internal documents managed by Word and Email
- Reduced SFDC development roadmap due to document generation restrictions
- Not all customer facing collateral on brand and consistent
- Slow to make core contract changes – therefore slower to market with new products and propositions.
- E-mail heavy work stacks



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Post SmartCORR™ Implementation

Confidential



Seamless Functionality, Efficiency and a Great CX



- On-brand, personalised and governed documents with ease and efficiency for both users and administrators
- Data Models in SmartCORR™ map Salesforce.com data avoiding re-key or copy/paste risks
- Integrated with EchoSign for one-step document approval and signature
- Templates designed to control both static pre-determined and dynamic content; general T&Cs plus terms for deal-level products etc.
- Document Settings control who can generate and edit a document; can vary between Sales and Support
- Reduction in Email traffic

Shortfalls to Efficient Growth

A Salesforce.com instance incorporating 90% of core business processes with dynamic document generation, email templates and all integrated with our CPQ and Signature journeys.

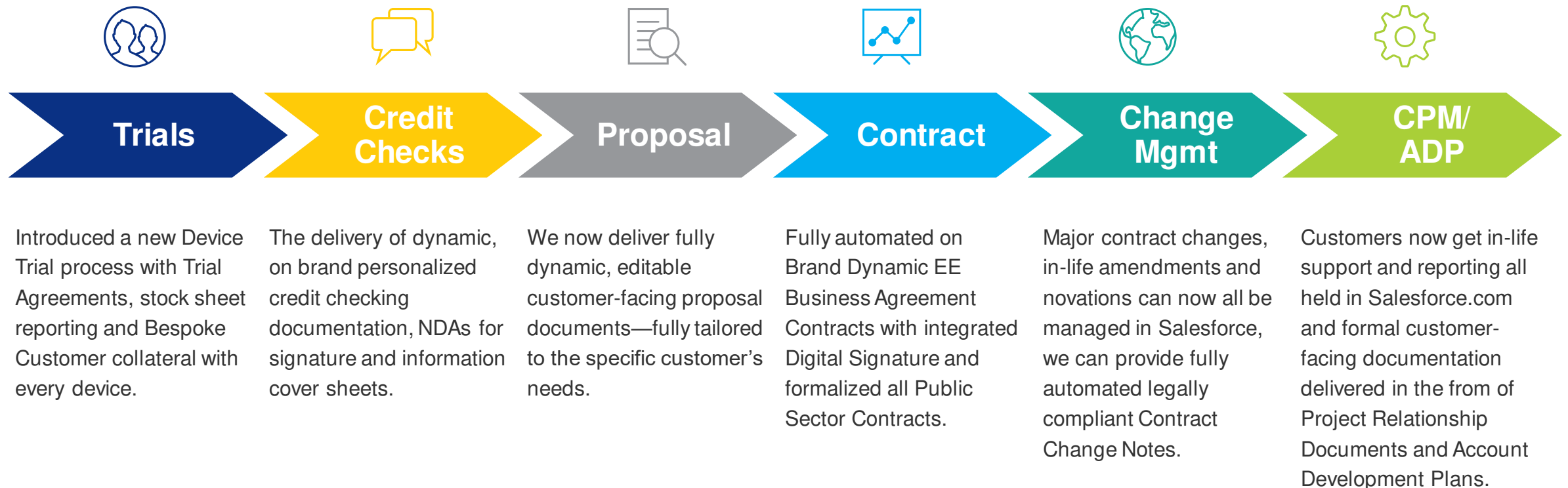
- Full on brand dynamic documentation generation, delivery and storage across 40+ different documents in both our Corporate and SME business units.
- Corporate Order-to-Contract process reduced from 63 to a **36** step process.
- Quickest Order-to-Contract timeline reduced from 3 days to 18 mins on a recent low connection deal.
- 15 + customer facing documents with allowed editable content and dynamic Shared Content.
- Quick and easy integration with new CPQ software
- Legal teams becoming a fully engaged stakeholder and manage their own shared legal T&Cs across customer facing documents – free up developers time to focus on process development.
- Seamless Digital Signature Integration.



Smart CORR™ Implementation

What Has SmartCORR™ Enabled for BT/EE?

We have continued to achieve our aim: “To Deliver seamless functionality, efficiency and a great CX”



Real Efficient Growth – Trials Case Study

Before SmartCORR™ EE ran a small trials process for acquisition customers to trial devices via an Access Database.



24%
Pre-Trial Win Rate



36%
Post-Trial Win Rate

Real Efficient Growth – Trials Case Study

- Opportunity win rate increased from 26% to 32% when a customer received a trial.
- 2016 figures show an average of 251 trials per month
- £240k annual budget for trials (cost of devices, call/data charges, warehouse and couriers) BUT there was an additional £90k of devices provided by Samsung as they saw the benefit of getting their devices into the hands of customers to trial.
- The average time taken from a sales user raising a trial request to that trial being dispatched from the warehouse pre automation was 2 working days.
- Dropped to **4 working hours** upon SmartCORR™ Implementation.
 - There have been many occasions where sales have raised a trial request during a customer meeting and the trial has been approved, signed by the customer and dispatched from the warehouse in less than 15 minutes.
 - **7 minutes** was once quoted back to us from a customer who was really impressed with the speed and efficiency of our trials system (whether he loved the network/device as much is a different matter).
- Pre-automation there was an average of 8 trials per day. Within 6 months post automation this figure had risen to 13 per day.



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