Case Study: Business Process Mapping, Requirements Gathering, and Implementation

CHALLENGE

A subsidiary of a major distributor of branded sportswear needed to upgrade its ordering and inventory system to provide better service to its primary business partner, a company managing more than 700 bookstores on college campuses nationwide.

PROBLEM

The client, in a complex business arrangement involving a retailer, a web fulfillment company, and product vendors, was experiencing failures within various business processes, causing dissatisfaction for all parties. Issues included incorrect and late product shipments, missing order data, and invalid / incorrect data being sent to vendors and customers.

In addition, data feeds to the various parties using Electronic Data Interchange (EDI) were not fully implemented and did not properly identify or resolve problems. The EDI issues impacted the retailer's ability to add items to their Point of Sale (POS) system, which caused a buildup of unaccounted for merchandise that the retailer was unable to offer for sale. To resolve these issues, the client needed to identify where the breakdowns in their current business processes were occurring.

SOLUTION

Phase One:

In order to address the problems with processing of orders from inception to entry, product ordering, inventory receipts, and input into the customer Point of Sale (POS) system, netlogx was engaged to document current business processes, identify issues with each process, and develop recommendations for resolving them.

To accomplish this, netlogx conducted a series of combined workshops with our client, its parent company, and its business partners to review and document the current business processes. By focusing on the need to solve the problem and maintaining emphasis on the issues and risks, netlogx was able to develop accurate maps of existing processes and identity the specific areas causing problems. The outcome of this process was a list of 80 recommendations that were categorized and prioritized into "quick wins," recommended system modifications, and business process changes.

Phase Two:

The client realized that the technical staff did not have the project knowledge to determine the system requirements needed to satisfy the recommendations. As a result, the client re-engaged netlogx to assist in detailing four (4) major recommendations identified in Phase One. Using knowledge of the business process, netlogx was able to work through each of the identified processes. The netlogx team:

- Defined the Scope of Work for High-Level Requirements
- Developed detailed Requirements
- Created Development and Implementation plans

Based on staffing availability, the client opted to focus on developing an "Item and Customer Order Entry" (ICOE) buyer workbook with these capabilities:

- Ease of data entry (information only needed to be entered one time)
- Data validation
- Data interfaces with internal business systems
- Ability to interface with the business partner's external system

netlogx developed the detailed requirements and a prototype workbook that mimicked the existing order entry process. In addition, we developed the requirements necessary to lock down areas that were causing problems, identified areas where additional data validation and data formatting were required, and determined ways to automate the interfaces with other systems in anticipation of a soon-to-be-implemented technical solution.

Phase Three:

Newly hired IT staff did not have the project/business knowledge to develop the new system. The client asked netlogx to assist by developing an automated process for entering orders without manual manipulation, automating interfaces to other systems, and validating data to ensure accuracy, which reduced the number of errors and expedited order processing.

netlogx created a new ICOE workbook ordering system that provided additional controls, data validation, and automation of data import and export procedures. In addition, netlogx developed a master database as the source of truth for all order validation data. netlogx documented the changes and created the training material necessary to enable the client's IT staff and business staff to maintain the system moving forward and train new buyers.

ADVANTAGES

- Extensive project management experience enabled the Project Manager to direct the client, their parent company, and their business partner to focus on resolving the issues, not on assigning blame

- netlogx' experienced business analysts were able to create detailed process maps efficiently and rapidly, enabling the development of prioritized recommendations

- Our extensive understanding of the client's business processes enabled netlogx to define robust system requirements

- Extensive knowledge of Excel capabilities enabled the netlogx Project Manager to reconfigure the existing ordering system with Validated Order Entry, Data Validation, and Data Import/Export capabilities

- By incorporating Macros into the existing Excel worksheets, netlogx was able to provide the necessary functionality without impacting the client's existing enterprise systems

- Replacing multiple spreadsheets with a complete validation database provided a single source of truth to ensure that the Buyer Workbook was always up to date

- Accurate system documentation allowed the client's IT staff to appropriately maintain the new system

- netlogx developed materials that fully explained the ordering process, making it easy to train new buyers to use the system

RESULTS

netlogx resolved the problems with the client's ordering and inventory system by developing an automated Buyer Workbook that allowed order entry, data validation, and data imports and exports. As a result, the client was able to provide improved service to its business partner, including correct product ordering, on-time delivery, and accurate information necessary for end-to-end order processing.