Getting started with business processes

How do we dance to the beat of our customers' business processes?

TWO TO TANGO

Getting started with business processes

At Cegeka, we're convinced of **the importance of thinking in business processes**. That's why we're using a business process modeling tool to document all our processes. We leverage **Mavim** as a platform to **structure all our business processes** in different layers up until a visual representation of each business process.

Why are we doing this?

Because we're convinced that an image says more than words. **Don't you agree?**

TWO to TANGO

You can explain a process like this...

"The customer sends a request for quotation and sales back office elaborates the quotation. In certain cases, prior to sending the quotation to the customer, an approval by sales manager is required. If no such approval is required, sales back office sends the quotation to the customer. In case an approval is required, sales back office submits the elaborated quotation for approval to the sales manager. The sales manager takes the required approval actions, this can result in a request for change. In that case sales back office makes the required changes to the quotation and re-submits the quotation for approval to the sales manager. In case the sales manager agrees with the quotation, the sales manager approves. After this approval by management, sales back office sends the quotation to the customer...."

...or draw it like this!

TWO TO TANGO
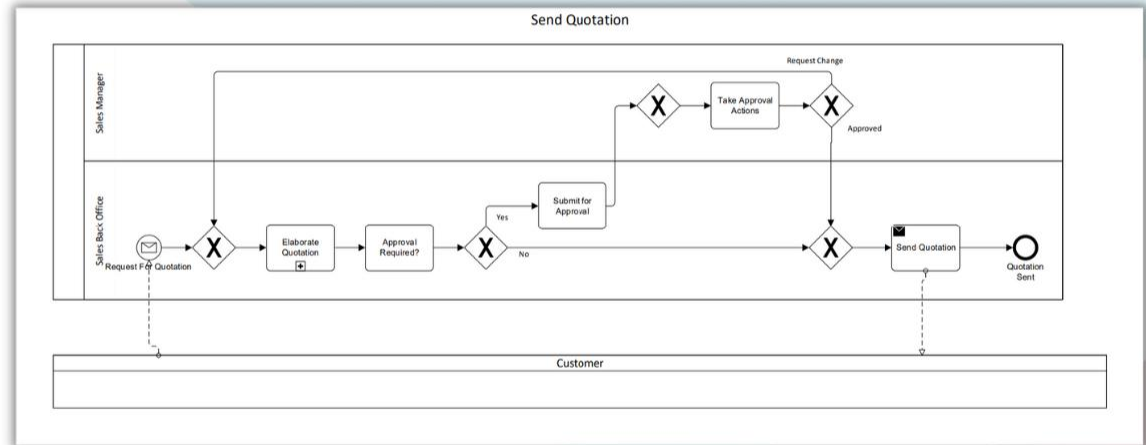
There are 2 angles to look at processes

On the one hand, processes can be categorized in **process areas** such as Manufacturing, Sales & Marketing or Planning. On the other hand, individual processes overarching multiple process areas can be structured logically to form **end-to-end processes**, think about Order-to-Cash or Procure-to-Pay.

The two angles to look at processes add value in different ways. The **process areas** help understand processes **on a department level,** whereas the **end-to-end processes** help aligning the processes **across departments,** connecting them in one connected company.

For example: we can navigate to a process within the process area *Sales & Marketing,* or we can look at the end-to-end process *Order to Cash* and zoom to that process from here.

→ *In the next pages, you can drill down to the process 'Invoice or Credit Sales Order' from those 2 angles.*

TWO to TANGO
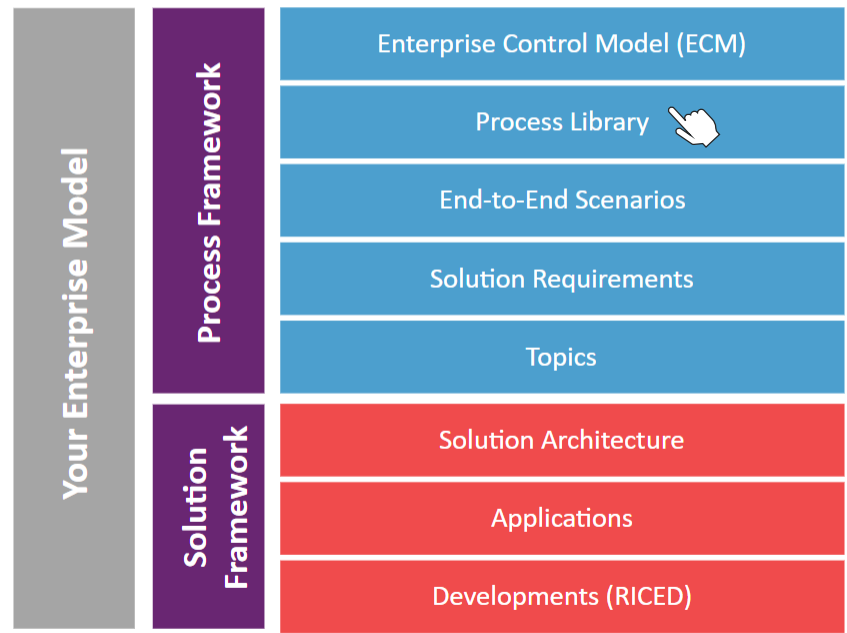
Breakdown within process area

Your Enterprise Model
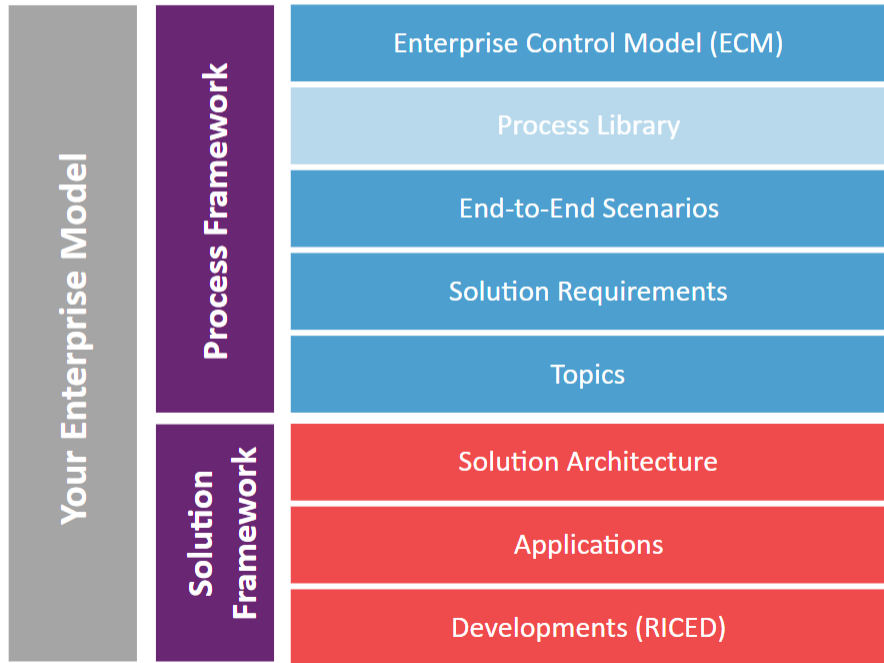
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Description | Charts | Matrices | Reports

Chart: Page Mavim

Your Enterprise Model

Process Framework

- Enterprise Control Model (ECM)
- Process Library
- End-to-End Scenarios
- Solution Requirements
- Topics

Solution Framework

- Solution Architecture
- Applications
- Developments (RICED)

mav:m

Your Enterprise Model

Description | Charts | Matrices | Reports

Chart: Page Mavim

Left chart:

Your Enterprise Model

- Process Framework
  - Enterprise Control Model (ECM)
  - Process Library
  - End-to-End Scenarios
  - Solution Requirements
  - Topics
- Solution Framework
  - Solution Architecture
  - Applications
  - Developments (RICED)

Right chart:

Your Enterprise Model

- Process Library
  - Management Process Areas
    - ... Under Construction ...
    - ...
    - ...
  - Operating Process Areas
    - Sales and Marketing
    - Logistics, Warehouse and Distribution
    - Planning
    - Sourcing and Procurement
    - Manufacturing
  - Support Process Areas
    - Finance Controlling & Reporting
    - Indirect Purchase
    - Product Life Cycle Management
    - Quality Management
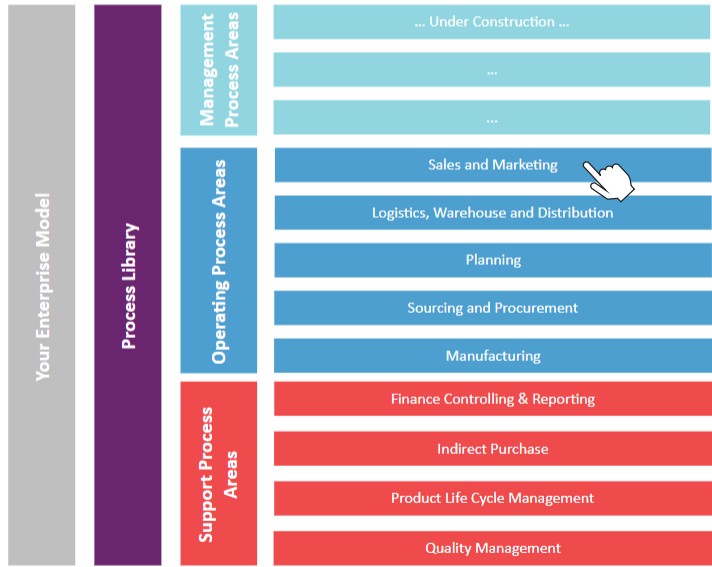
Process Library

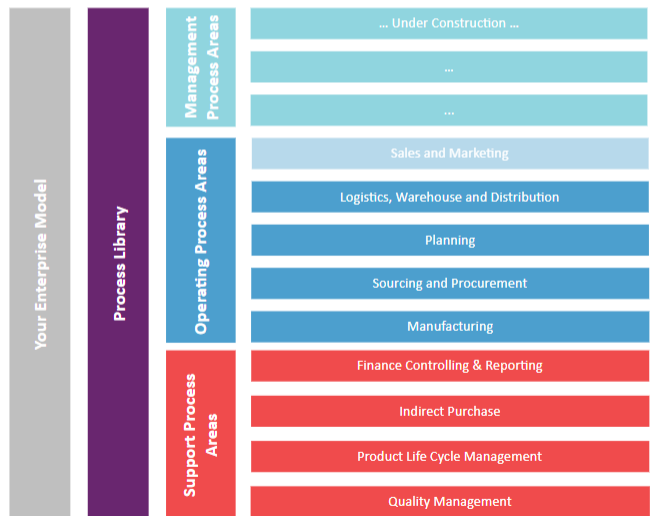Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports

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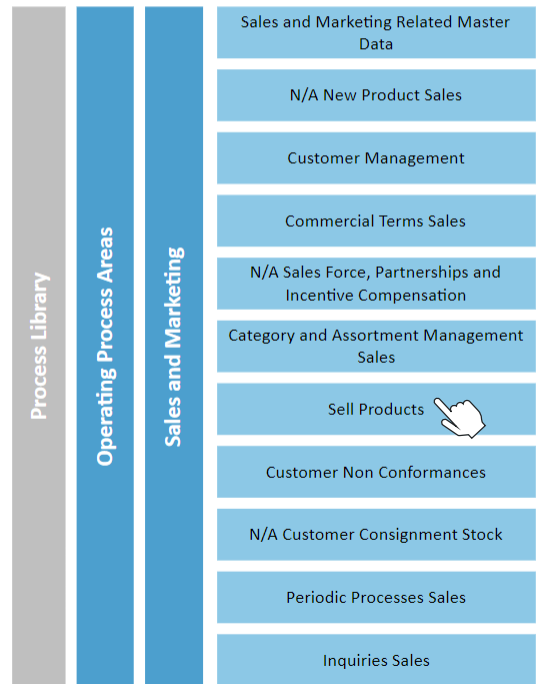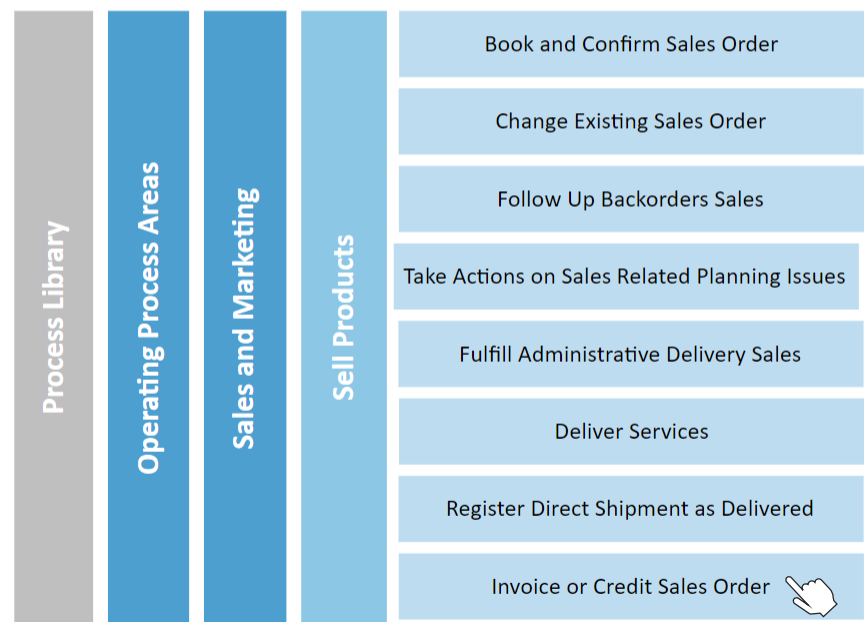| Management Process Areas | ... Under Construction ... |
	...
	...
Operating Process Areas	Sales and Marketing
	Logistics, Warehouse and Distribution
	Planning
	Sourcing and Procurement
	Manufacturing
Support Process Areas	Finance Controlling & Reporting
	Indirect Purchase
	Product Life Cycle Management
	Quality Management

Sales and Marketing

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Description | Charts | Matrices | Reports

Chart: Page Mavim

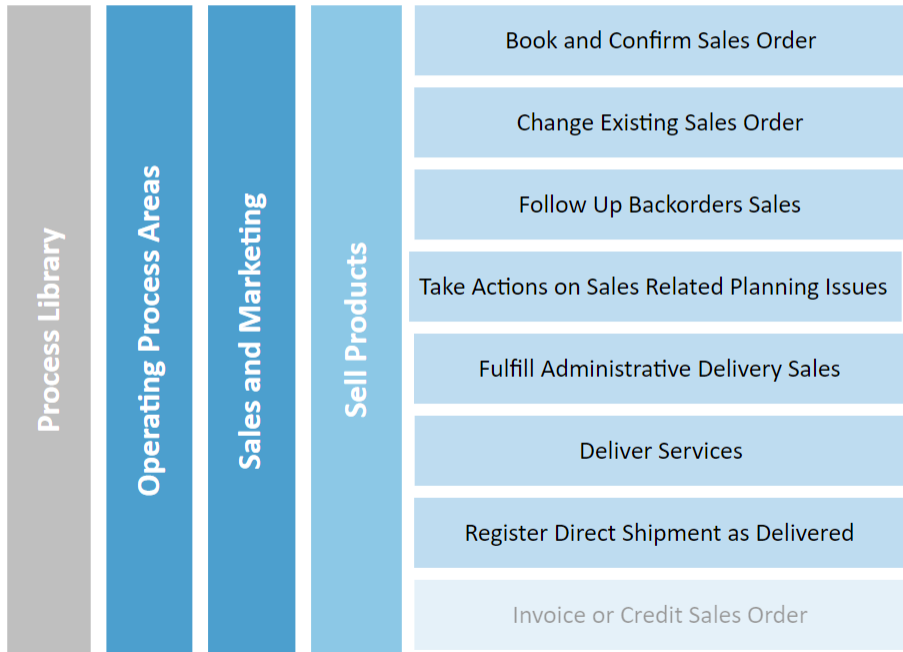| Operating Process Areas | Sales and Marketing | Sales and Marketing Related Master Data |
		N/A New Product Sales
		Customer Management
		Commercial Terms Sales
		N/A Sales Force, Partnerships and Incentive Compensation
		Category and Assortment Management Sales
		Sell Products
		Customer Non Conformances
		N/A Customer Consignment Stock
		Periodic Processes Sales
		Inquiries Sales

Sales and Marketing

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Description | Charts | Matrices | Reports

Chart: Page Mavim

Process Library | Operating Process Areas | Sales and Marketing

- Sales and Marketing Related Master Data
- N/A New Product Sales
- Customer Management
- Commercial Terms Sales
- N/A Sales Force, Partnerships and Incentive Compensation
- Category and Assortment Management Sales
- Sell Products
- Customer Non Conformances
- N/A Customer Consignment Stock
- Periodic Processes Sales
- Inquiries Sales

Sell Products

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Description | Charts | Matrices | Reports
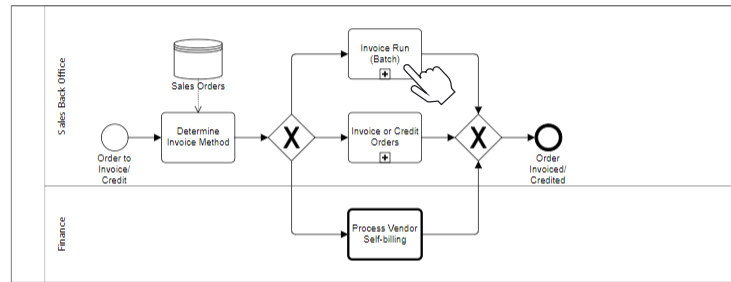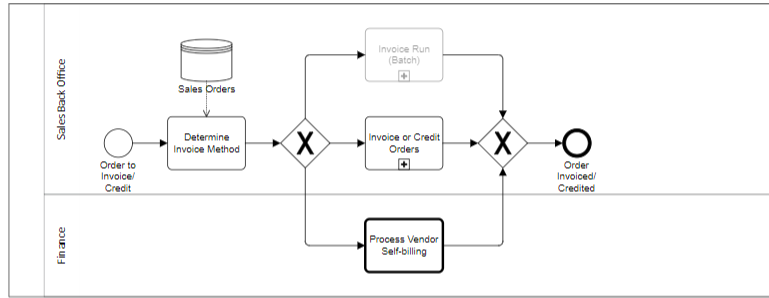
Chart: Page Mavim

Process Library | Operating Process Areas | Sales and Marketing | Sell Products

- Book and Confirm Sales Order
- Change Existing Sales Order
- Follow Up Backorders Sales
- Take Actions on Sales Related Planning Issues
- Fulfill Administrative Delivery Sales
- Deliver Services
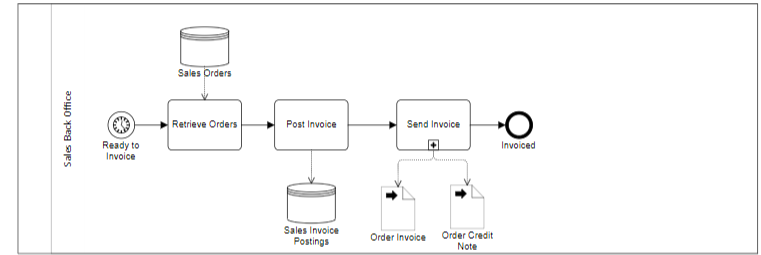- Register Direct Shipment as Delivered
- Invoice or Credit Sales Order

Sell Products

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Description | Charts | Matrices | Reports

Chart: Page Mavim

Process Library

Operating Process Areas

Sales and Marketing

Sell Products

- Book and Confirm Sales Order
- Change Existing Sales Order
- Follow Up Backorders Sales
- Take Actions on Sales Related Planning Issues
- Fulfill Administrative Delivery Sales
- Deliver Services
- Register Direct Shipment as Delivered
- Invoice or Credit Sales Order

Invoice or Credit Sales Order

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Description | Charts | Matrices | Reports

Chart: Invoice or Credit Sales Order

Invoice or Credit Sales Order

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| Description | Charts | Matrices | Reports |

Chart: Invoice or Credit Sales Order

Invoice Run (Batch)

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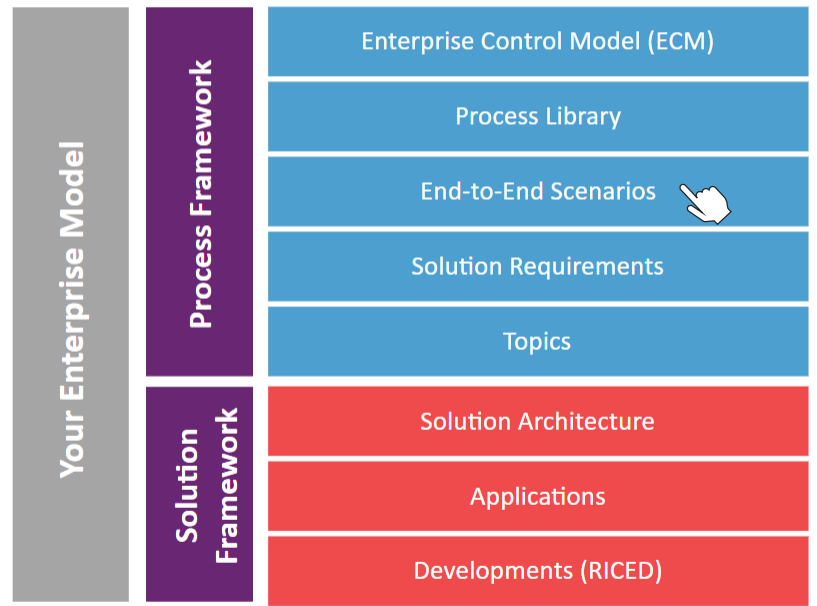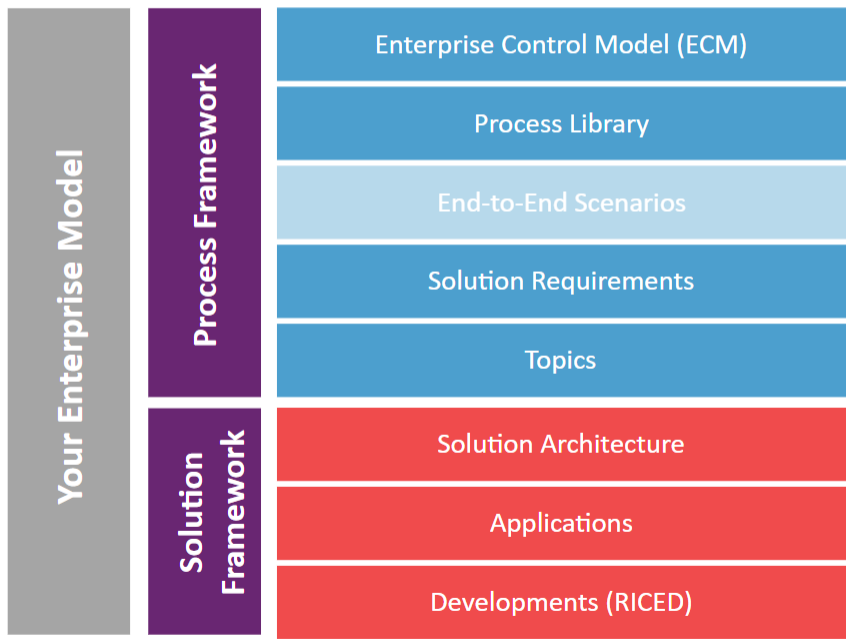| Description | Charts | Matrices | Reports |

Chart: Invoice Run (Batch)

Breakdown End-to-End scenario

Your Enterprise Model

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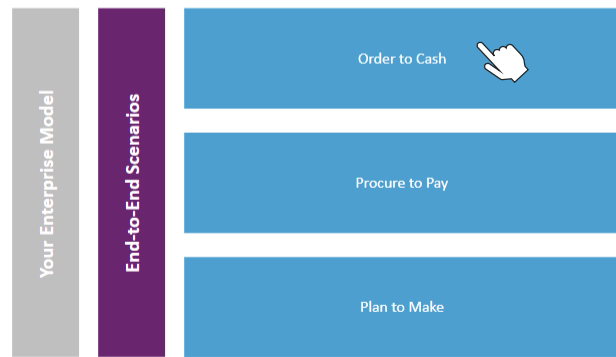Description | **Charts** | Matrices | Reports

Chart: Page Mavim

End-to-End Scenarios

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021
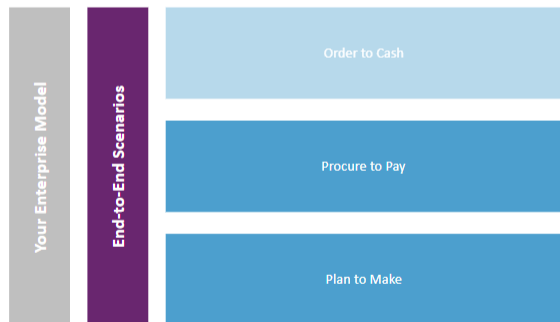
Description | Charts | Matrices | Reports

Chart: Page Mavim

Your Enterprise Model | End-to-End Scenarios

- Order to Cash
- Procure to Pay
- Plan to Make

Order to Cash

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports
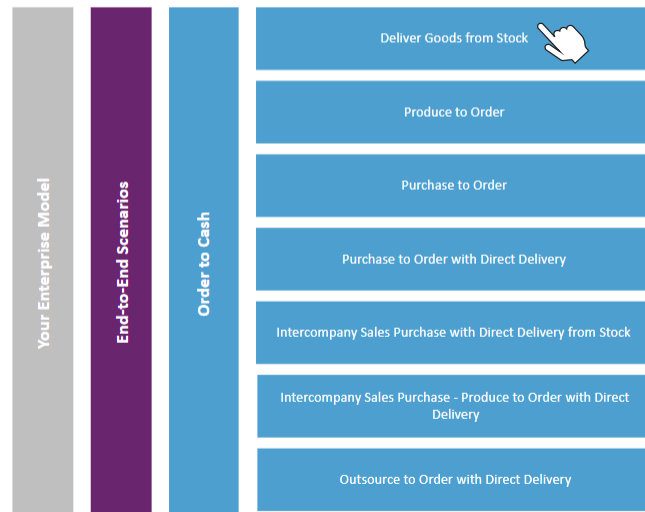
Chart: Page Mavim

Your Enterprise Model | End-to-End Scenarios | Order to Cash

- Deliver Goods from Stock
- Produce to Order
- Purchase to Order
- Purchase to Order with Direct Delivery
- Intercompany Sales Purchase with Direct Delivery from Stock
- Intercompany Sales Purchase - Produce to Order with Direct Delivery
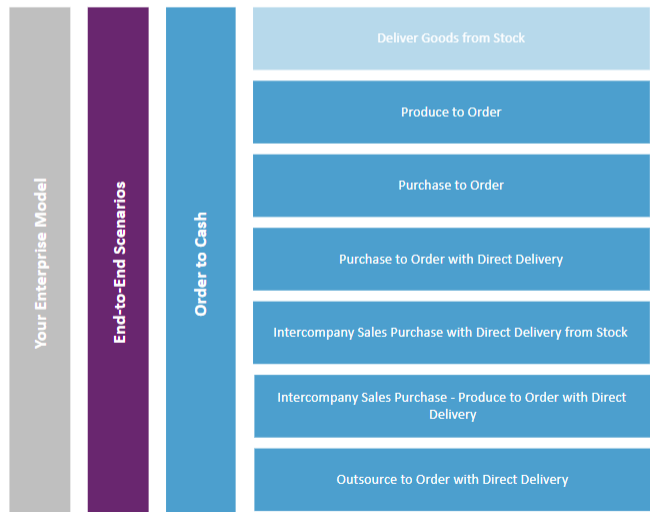- Outsource to Order with Direct Delivery

Order to Cash

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Description | Charts | Matrices | Reports

Chart: Page Mavim

Your Enterprise Model | **End-to-End Scenarios** | **Order to Cash**

- Deliver Goods from Stock
- Produce to Order
- Purchase to Order
- Purchase to Order with Direct Delivery
- Intercompany Sales Purchase with Direct Delivery from Stock
- Intercompany Sales Purchase - Produce to Order with Direct Delivery
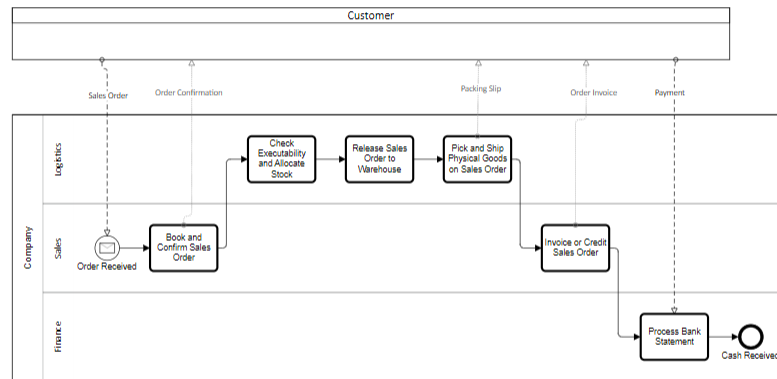- Outsource to Order with Direct Delivery

Deliver Goods from Stock

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports
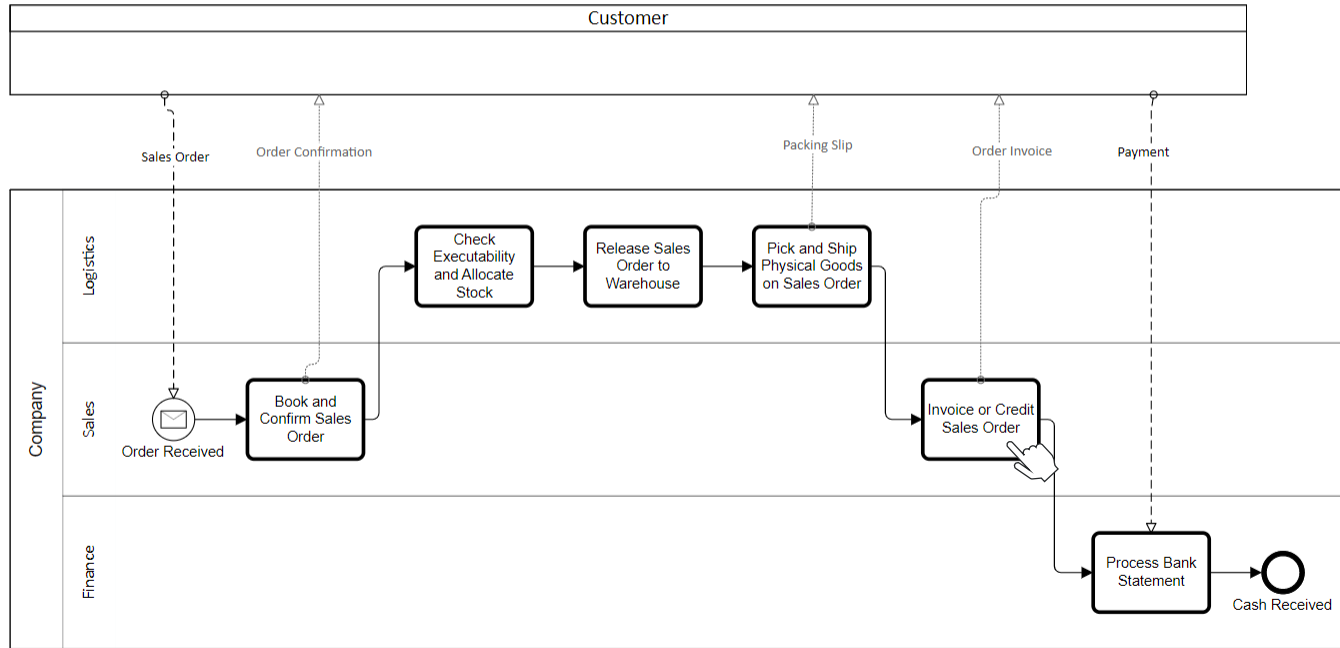
Chart: Deliver Goods from Stock

Deliver Goods from Stock

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports
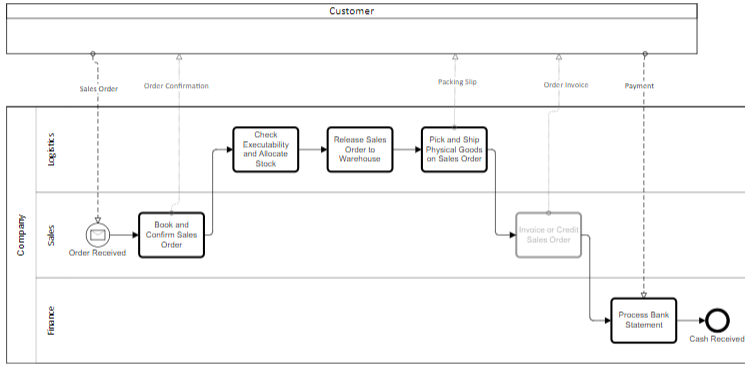
Chart: Deliver Goods from Stock

Deliver Goods from Stock

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports | 👤

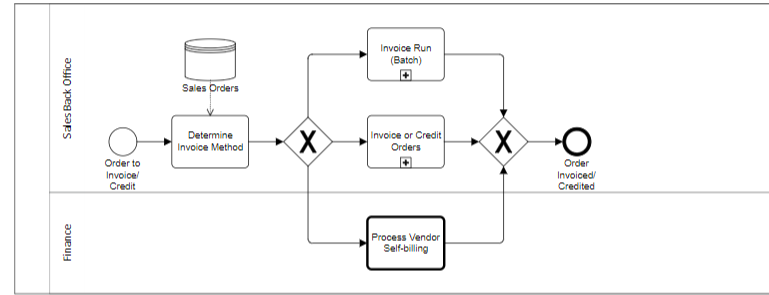Chart: Deliver Goods from Stock ▼ ＋ － ↔ ↕ ↺

Invoice or Credit Sales Order

Published on Thursday, September 30, 2021 in version Cegeka Enterprise Model Demo 10/2021

Description | Charts | Matrices | Reports

Chart: Invoice or Credit Sales Order ▼ ＋ － ↔ ↕ ↺

My processes are defined, now what?

Once all processes have been made comprehensible, it's time to **capture information** about those processes. Think about requirements, process owner, FIT or GAP in system, in which system is the process being used, is this requirement a 'must have' or a 'nice to have' by using the MoSCoW method... You could even **link user manuals, procedures or work instructions** to the processes.

A requirement can be linked to one or more processes. When all this information is captured in a tool such as Mavim, it becomes **clear that changes on a requirement in one process can have an impact on the other processes** too.

In brief, you end up with a thoroughly documented overview of your business processes with insights on the links between processes, their requirements and developments necessary for the proposed solution.

→ *The next couple of pages clearly show which information can be documented for all your processes.*
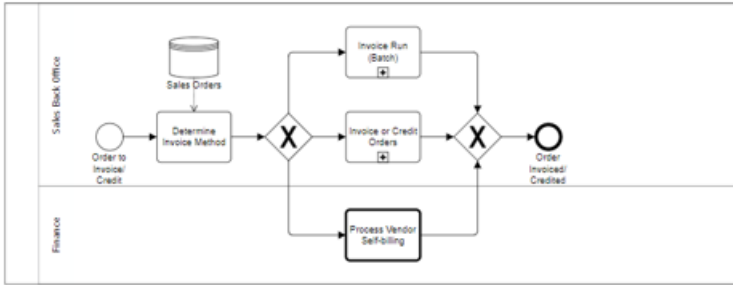
TWO TO TANGO

Invoice or Credit Sales Order

Published on Friday, May 6, 2022 in version Two to tango - test process

- Description
- Charts
- Matrices
- Reports

Chart: Invoice or Credit Sales Order

Invoice or Credit Sales Order

Published on Friday, May 6, 2022 in version Two to tango - test process

- Description
- Charts
- Matrices
- Reports

Fields

Project Fields	
Cegeka Owner	👤 Piet.Agoras@cegeka.com
Department	👥 Sales
Global BPO - Approver	👥 Peter Peters
Local BPOs	👥 Alain Vandam 👥 M. Van Ranst
Key users	👥 Kees Kaan
IN/OUT Scope	👥 IN
Lifecycle Status	👥 40 Validated
Approval Date	3 November 2021
Industry Standards	

Process Fields	
CEM Process ID	
ID of Customer Specific Process	

Workshops	
Workshops	📘 SLS_01
Workshop (relationship)	

Workshop Preparations	
Workshop Preparations	📄 Workshop Preparation - Invoice or Credit Sales Order

Applications	
Applications	

Requirements	
Requirements	📑 REQ.S&M.001 - Requirement 1 📑 REQ.S&M.002 - Requirement 2 📑 REQ.S&M.003 - Requirement 3

Invoice or Credit Sales Order

Published on Friday, May 6, 2022 in version Enterprise Model External 69016

Description | Charts | Matrices | Reports

Fields

Project Fields	
Cegeka Owner	👤 Piet.Agoras@cegeka.com
Department	👥 Sales
Global BPO - Approver	👤 Peter Peters
Local BPOs	👤 Alain Vandam
	👤 M. Van Ranst
Key users	👤 Kees Kaan
IN/OUT Scope	🔗 IN
Lifecycle Status	🔗 40 Validated
Approval Date	3 November 2021
Industry Standards	
Process Fields	
CEM Process ID	
ID of Customer Specific Process	
Workshops	
Workshops	📁 SLS_01
Workshop (relationship)	
Workshop Preparations	
Workshop Preparations	🔄 Workshop Preparation - Invoice or Credit Sales Order
Applications	
Applications	
Requirements	
Requirements	🔗 REQ.S&M.001 - Requirement 1
	🔗 REQ.S&M.002 - Requirement 2
	🔗 REQ.S&M.003 - Requirement 3

REQ.S&M.001 - Requirement 1

Published on Friday, May 6, 2022 in version Enterprise Model External 69016

Description | Charts | Matrices | Reports

Description of requirement

Fields

Requirement Fields	
ReqOrigin	🔗 Pre-Sales
Fit/gap/topic	🔗 GAP
MoSCoW	🔍 Must
Lifecycle Status	🔗 20 Under Review
Approval Date	6 May 2022
Global BPO - Approver	👤 Peter Peters
Applications	
Applications	
Developments RICED	
Developments RICED	🖥 Development 1
Change way of working	
Change current way of working	

REQ.S&M.001 - Requirement 1

Published on Friday, May 6, 2022 in version Enterprise Model External 69016

Description | Charts | Matrices | Reports

Description of requirement

Fields

Requirement Fields	
ReqOrigin	Pre-Sales
Fit/gap/topic	GAP
MoSCoW	Must
Lifecycle Status	20 Under Review
Approval Date	6 May 2022
Global BPO - Approver	Peter Peters
Applications	
Applications	
Developments RICED	
Developments RICED	Development 1
Change way of working	
Change current way of working	

Development 1

Published on Friday, May 6, 2022 in version Enterprise Model External 69016

Description | Charts | Matrices | Reports

Description of report

Fields

Project Fields	
Cegeka Owner	Piet.Agoras@cegeka.com
Department	Sales
Global BPO - Approver	Peter Peters
Local BPOs	M. Van Ranst
Key users	
IN/OUT Scope	IN
Lifecycle Status	20 Under Review
Approval Date	
Industry Standards	
Developments RICED Fields	
Description	TEST
Complexity	L
Main Process Area	Sales and Marketing
Applications	
Applications	
Report fields	
REP - Goal	KPI on sales performance
REP - Aging of Data	Updated twice a day
REP - Data Sources	
REP - Frequency	Daily
REP - Type	Dashboard / KPI's
REP - Data Entity	
REP - CBI Module	O2C
REP - Solution	CBI
REP - D365 Source Info	
REP - Comments	

Thanks for reading!

https://www.cegeka.com/en/be/solutions/dynamics365/contact

https://www.linkedin.com/showcase/cegeka-business-solutions

https://www.youtube.com/channel/UCtCvNNQxRgg1J7qeSdRSNIA