Office Oracle Customer journey…

New customer

1st order complete

1a. Office Oracle: (Client Relations Assistant):
- Campaign
- Act
- Simple KPI; Task list, Group audit and Call stats

1b.
- Store correctly
- Remove data

2. Office Oracle, (Client Services):
- Audit review
- Act & Prima
- Simple KPI; Audits completed

3a. Office Oracle: (Client Relations Manager):
- Present audit
- Act (opportunities)
- Simple KPI; Audits closed = New client

N.B. Ask to meet if can't = over phone

3b.
- OO to improve price points

4. Office Oracle, (Client Services):
- 1st order
- Prima
- Simple KPI; Detail confirmed

5. Office Oracle: (Supply Chain)
- Shop order
- Prima
- Simple KPI
- Shortages

6. Office Oracle (Logistics)
- Delivery
- DTrack
- Simple KPI; Delivery, Delivery 3rd party & Returns

7. Office Oracle: (Client Services)
- Day after 1st order delivered
- Prima
- Simple KPI; Call complete

8. Office Oracle (Finance)
- Raise invoice
- Prima
- Simple KPI; Invoice's raised

Existing process

Client Relations Manager

9. OO Intro call:
- Act
- Simple KPI; Intro call complete

10. OO Re-order outbound:
- Re-order outbound
- Act/Prima
- Simple KPI; Re-orders & Gap analysis

11. OO Upsell:
- Prima insight
- Act
- Need report

12. OO Catalogue cross sell:
- Prima
- Prima; Product sales analysis

Client Services

13. OO Inbound re-order:
- Prima
- Simple KPI; Inbound order

14. OO General Queries:
- Prima
- Simple KPI; Client issues raised

OO Account Maintenance
- Prima

N.B. Prima detail correct, Reports

OO Corrective Action Reports:
- Prima
- Simple KPI; Client under report

Finance

17. OO Intro call & confirm:
- Sage
- Manual processes

18. OO Age dept:
- Sage
- Simple KPI; Calls made

19. OO Client Queries:
- Sage
- Simple KPI; Credits

Supply Chain Management

20. OO Shop Order:
- Prima
- Simple KPI; Orders loaded

21. OO Prep DTrack:
- DTrack
- KPI; OO delivery

22. OO Special sourcing
- Prima
- Dapulse issues

23. OO Returns
- Prima
- Simple KPI; collections

24. OO Supplier Maintenance:
- Prima
- Dapulse issues

Logistics

25. OO Collect/ Prep Stock:
- DTrack
- KPI; Shortages

26. Delivery
- DTrack
- KPI; OO delivery

27. OO Photos of buildings
- Phone
- KPI
- Tick list

28. OO Collection
- Prima
- DTrack
- KPI; Collection