Final Deliverable
Group 5: Wonder Women Tech

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1. Executive Summary

Wonder Women Tech is an organization that produces national and international conferences that celebrate and educate women and diversity in STEAM (Science, Technology, Engineering, Arts, Math).

Currently, the biggest problem for Wonder Women Tech is is maintaining strategic partners (defined as anyone that has invested and/or wants to collaborate). They need to be properly placed into 4 categories: sponsors, strategic partners, exhibitors and speakers. It is difficult right now to track each partner as they are either an inbox or floating in a google drive. Currently, Lisa (the founder of Wonder Women Tech) is the main person that negotiates contracts (usually through phone) and it the not the best use of her time.

The USC Wonder Women Tech Team has created multiple business process strategies that will improve organization process, documentation (through the integration of CRM), and more formalized templates and database for future use.

2. Business Case

2.1 Project Purpose

The project purpose is to suggest new improvement to their communication and documentation of their as-is process by effectively integrating new technology, CRM and new process strategies. The main focus is maintaining strategic partners, properly categorizing them and communicating it to the team.

Our business case:

- Identify organizational needs
- Identify strategic goals for stakeholders
- Analyse cost and benefits of each implementation and how they can meet organizational goals
- Recommend which technology to be best implemented

We derived this form by identifying opportunities for improvement while investigating the current system that Wonder Women Tech uses to interact with their clients. The goal of this system request form is to define what the organization needs for sustainability and growth. We believe improving Wonder Women Tech's communication with their strategic partners will improve the quality of their relationships and client retention for future business opportunities. This improvement can transform the business by allowing Wonder Women Tech to allocate resources and efforts to exploring new ideas and markets. We had aimed to identify what may lead to such growth and what value it may have to Wonder Women Tech, hoping to motivate business change with this form.

2.2 Strategic Approach

We used a variety of requirements-gathering techniques to gather information for identifying business requirements. The techniques used were interviews, document analysis, and online research.

We performed a total of five interviews with different stakeholders in the company. In the first interview, we asked the business managers to walk us through the current as-is from the start of communication to the end of a conference and thereafter. We took notes throughout this method, and reiterated our understanding of what was said in order to ensure our information was accurate. The subsequent interviews were talking with different individuals in the organization in order to verify, change and complete a brief business requirement list, along with other information needed to continue the project. In each of these interviews, the parts completed were discussed with the business managers to verify that the project was going in the right direction. We used the information from this to create a BPMN of the current as-is and draft a potential to-be system.

From our document analysis, we were able to analyze the as-is from the perspective of both the business users and client. Because the contracts and forms follow a template, we identified an opportunity to standardize contracting partners and minimize opportunities for error. Here, we looked for overarching themes necessary to meet client and business need.

Through online research, we were able to discover HubSpot and CRM services. First, we searched to understand best management practices for organizations like Wonder Women Tech, to do for building and maintaining relationships. Next, we looked for tools that would aid in carrying out these practices, furthering the search into online CRM softwares: what they are, what kind exist and what services they offer. We compared and contrast our findings, eventually deciding that HubSpot was the best solution to meet the to-be's business requirement.

The analysis techniques we used to identify improvement opportunities were process mapping, gap analysis, and value-added analysis. We mapped the current process and performed a gap analysis to identify missing or redundant connections between activities. We sequenced the activities and asked who is involved, what is they doing, where are they doing it, how are they doing it, and why. We aimed to determine the value of the activity and carefully examined if it supports the stakeholders' requirement or need. The objective was to optimize the value-added steps and non-value steps. For example, instead of the user writing a new contract for each partner, the to-be can automate this with templates and include automated thank you emails at the end of the business process.

2.3 Project Description and Objectives

System Request Form

- Business need:
  - Better communication with client for lasting relationships and retention so that Wonder Women Tech may focus on business strategy
- Business Requirements
  - Manage documentation so that errors with clients are minimized
  - Manage interactions with clients so that client relationships are relevant and up-to-date
  - Manage deadlines so that deliverables are on-time
- Business Value:
  - Total visibility throughout the business process
  - Increased likelihood of meeting client needs
  - Increased likelihood of meeting business need

2.4 Strategic Alignment

Our project perfectly aligns with Wonder Women Tech's goal of programming conferences that celebrate women and diversity in STEAM innovation and entrepreneurialism. By helping to streamline and manage the strategic partners process, they can continue providing speakers, funding coding classes, and offer community inclusion activities. The CRM system will only become a support for Wonder Women Tech primary goals.

2.5 Stakeholders

2.5.1 Wonder Women Tech Stakeholders and their roles

- Lisa Mae Brunson: sponsorship and strategic partnership
- Melissa Guy: sponsorship and strategic partnership
- Essa Assery: special projects and strategic partnership
- April Barnes: exhibitors
- Stephanie Baker: manage all projects, strategic partnerships and tasks
- Brianna Machado: assist everything
- Kim Perkins: deadline enforcer
- Alina Tubman: exhibitors and strategic partnership
- Justines Trone: speakers

2.5.2 Project Sponsor

- Sonya: ensuring efficiency and effectiveness of change project

2.5.3 Clients

- Sponsors: provide monetary sponsorship to Wonder Women Tech
- Strategic Partners: provide media broadcast of Wonder Women Tech
- Exhibitors: manage a booth at the conference
- Speakers: present at the conference

2.6 To-Be Options Analysis

2.6.1 Options

- Perfex CRM
- HubSpot CRM
- 17hats

2.6.2 Feasibility Analysis

2.6.2.1 Technical Feasibility

- Familiarity with functional area: all of the skills required for the to-be process are already included within the employees of Wonder Women Tech. This will not provide any risks regarding the change.
- Familiarity with the technology: Perfex CRM has already been used by one person in the Wonder Women Tech team which will provide assistance in easing the transition. On the other hand, HubSpot has never been used by anyone in the team, which could provide some time to learn. Nevertheless, HubSpot CRM is much more simplified than Perfex CRM leading to an easier daily usability. 17hats hasn't been used by anyone in the company still it is very intuitive. Furthermore, all three platforms provide a low technology risk associated with the change.
- Project Size: the change will be fairly simple and will require mostly importing unorganized data previously kept by the organization. This therefore leads to a low risk.
- Compatibility: All three platforms provide great compatibility with existing technologies. HubSpot even provides the technology necessary for replacing the call system they have in place. If necessary and wanted, this could lead to a more comprehensive and unified process.

2.6.2.2 Economic Feasibility

- Development costs: Perfex CRM requires the company to buy the software for $54. HubSpot is free, requiring no initial costs. 17hats comes at a price of 25 monthly.
- Annual Operating Costs: 17hats costs 25 a month. The other two softwares don't require annual costs.
- Annual Benefits: either software will provide great economic benefit for the company. It will allow the company to be more organized allowing its employees to work more efficiently and giving them time to grow (in ways like finding new customers) or even transform (giving them time to think of new ideas in new markets to extend their reach) the company.

- Intangible Benefits: the new platforms will provide the availability of employee time to attract new customers therefore increasing their market share. Also, since the information will be better organized and deadlines will be formally implemented, the company will be able to provide better customer service.

2.6.2.3 Organizational Feasibility

- Stakeholder Analysis:

Stakeholder Name	Impact: How much does the project impact them?	Influence: How much influence do they have over project?	What is important to stakeholder?	How could stakeholder contribute to the project?	How could the stakeholder block the project?	Strategy for engaging stakeholder
Wonder Women Tech	High	High	Efficient and Effective use of time	Actively engaging in learning software	Not agreeing to change	Providing compelling information
Sonya	Low	High	To ensure smooth process between us and WWT	Offering other alternatives	Not agreeing to the ideas between us and WWT	Provide updates on the project
Clients	Medium	Low	Receiving all information and deliverables on a timely manner and good customer service	Keeping an open mind for the time between the change	Complaining about changes	Providing more organized deliverables and greater support during change

2.6.3 Options Conclusion

Options	Perfex	HubSpot	17hats
Business Requirements	+	++	+
Functional Requirements	++	++	-
Feasibility Requirements	+	++	-
Risks	-	+	-

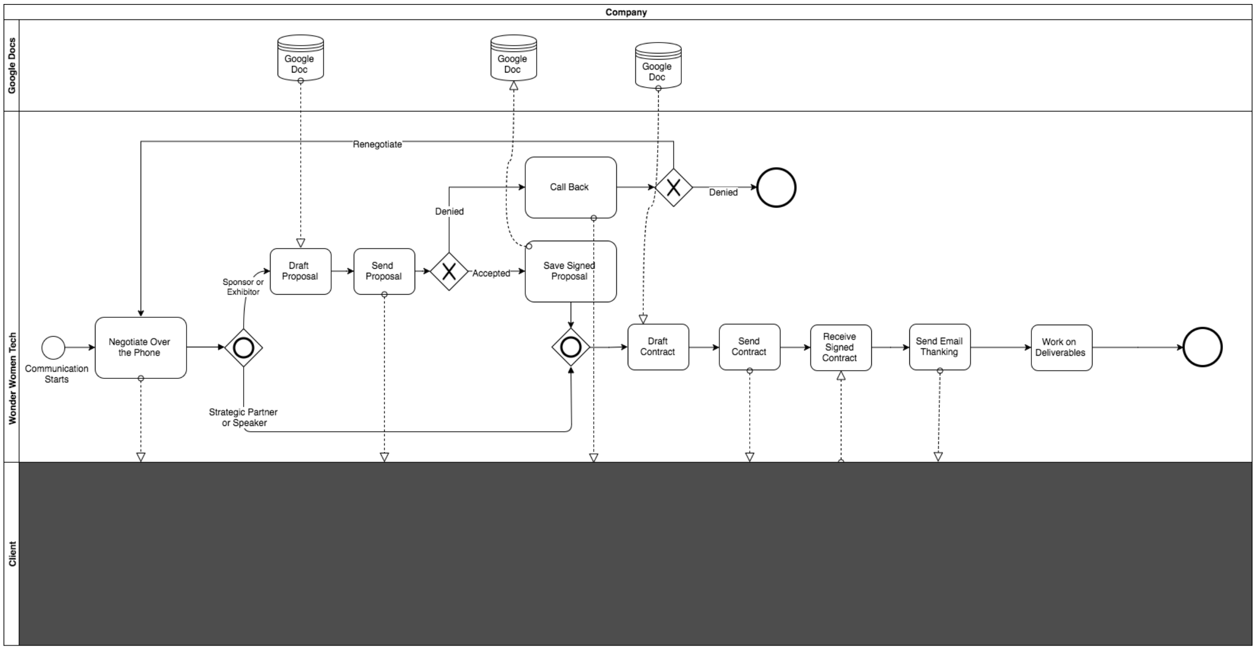
Stakeholder Objectives	+	++	-

3. User stories describing how the change you recommend would be used

1. As an employee, I would like to keep track of deliverables so I can be more effective and efficient.
    a. Deliverables by the company and by the client will be kept on the task view. This will allow employees to keep track of deliverables in a more organized manner and therefore reduce mistakes and improve information records.
2. As an employee, I would like to keep all the information in one platform si I can be more organized.
    a. All the information necessary by the user will be kept in one place. Furthermore, this system can be accesses through different devices, like cellphone apps, allowing employees to access data more easily. This allows for a more efficient use of their time.
3. As a manager, I would like to keep track of employee's' performance so I can have more control over the company.
    a. In the dashboard of the platform, managers will be able to see the performance of each employee both monetary and on amount of deals closed. This will allow them to focus their attention on employees that need more motivation and reward those who deserve it.
4. As an employee, I would like to have repetitive tasks automated so I can spend more time looking for new clients.
    a. Many tasks will be automated by HubSpot. One example is when inputting the information of a new client, the software looks at the email's domain, automatically creates a record of the company belonging to that domain, and links the client and the company record. This allows for a more comprehensive database while reducing the information an employee needs to input.
5. As an employee, I would like a more organized job structure so I can waste less time on figuring out what to do.
    a. The as-is of the company relies solely on Google Docs. This makes it hard for employees to keep track of all the information they need to manage their clients. Also, it is not specific what procedure employees need to follow under certain conditions. The new BPMN created will give employees all the Standard Operating Procedures (SOP) son that it is completely clear to them what task they should perform depending on the situation.

4. To-Be business process part of the change using rules for BPR

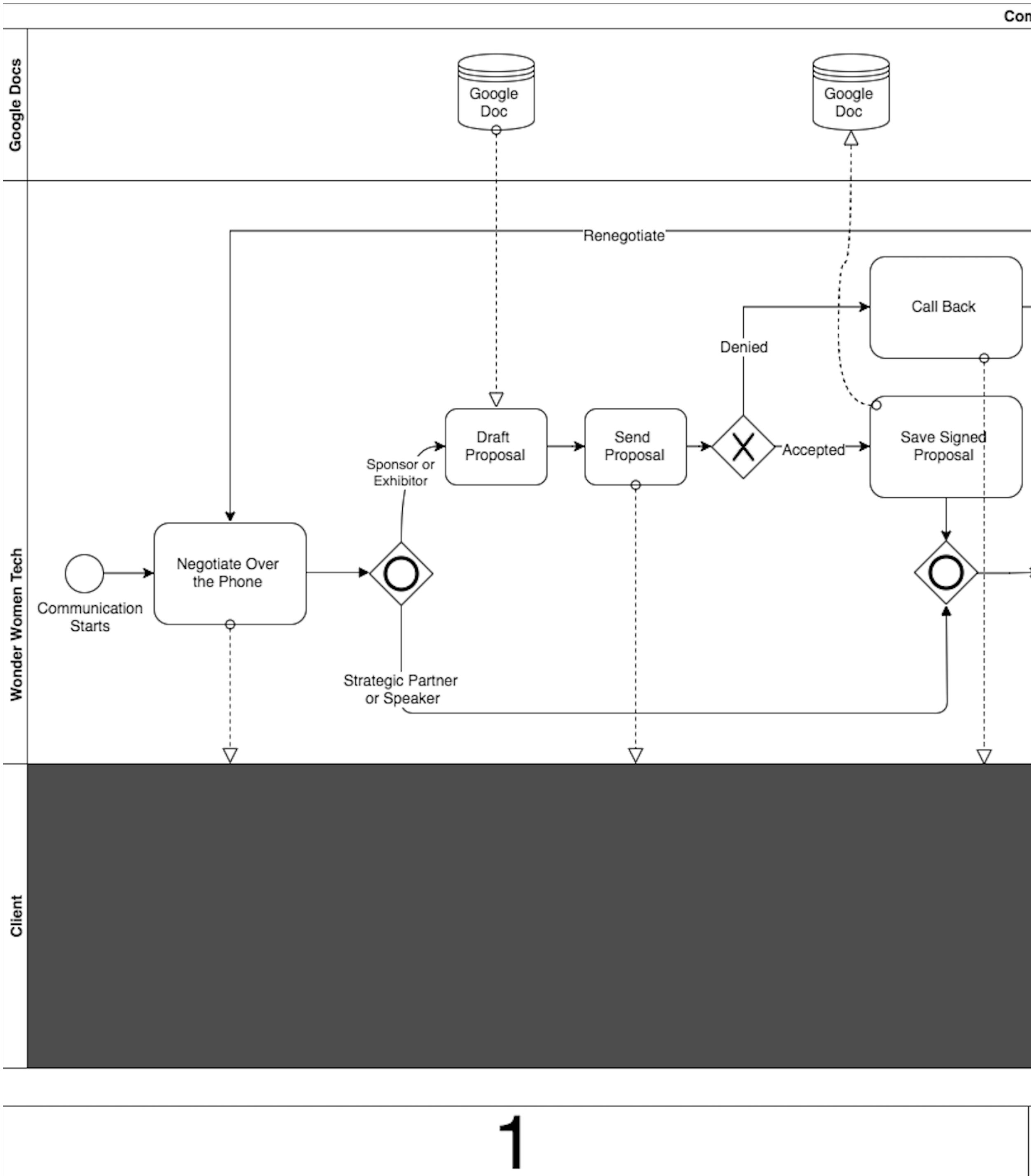
4.1 As-Is BPMN:

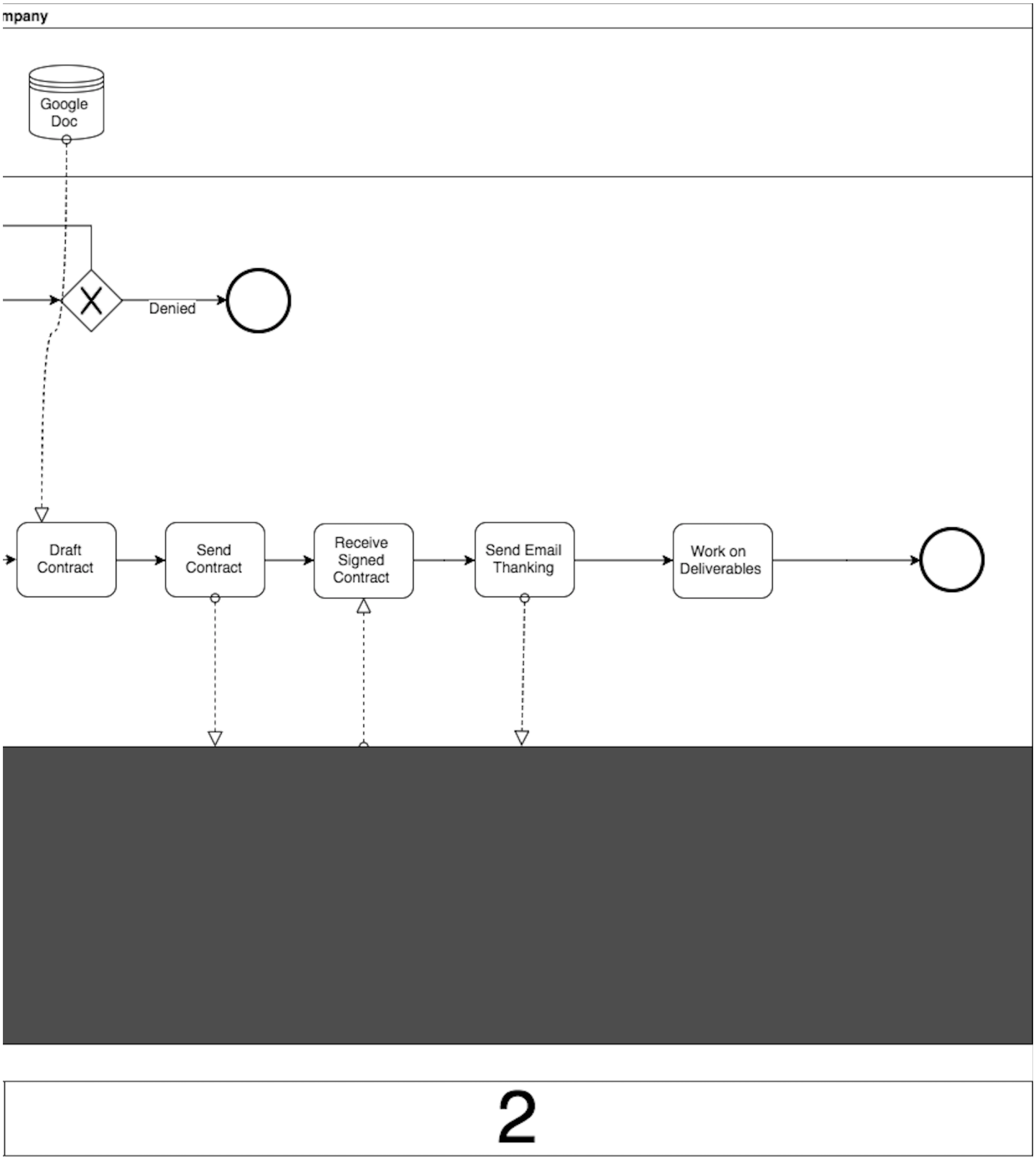


1	2

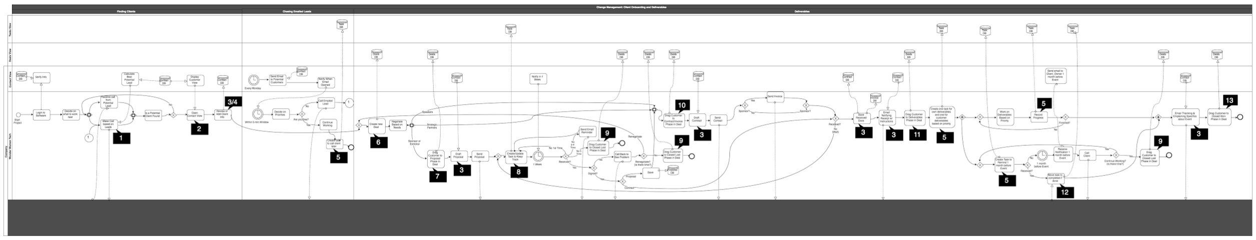
The zoomed sections are divided by the ranges shown below the BPMN

<u>4.2 As-Is BPMN Zoomed Sections:</u>




Google Doc
Denied
Draft Contract
Send Contract
Receive Signed Contract
Send Email Thanking
Work on Deliverables
2

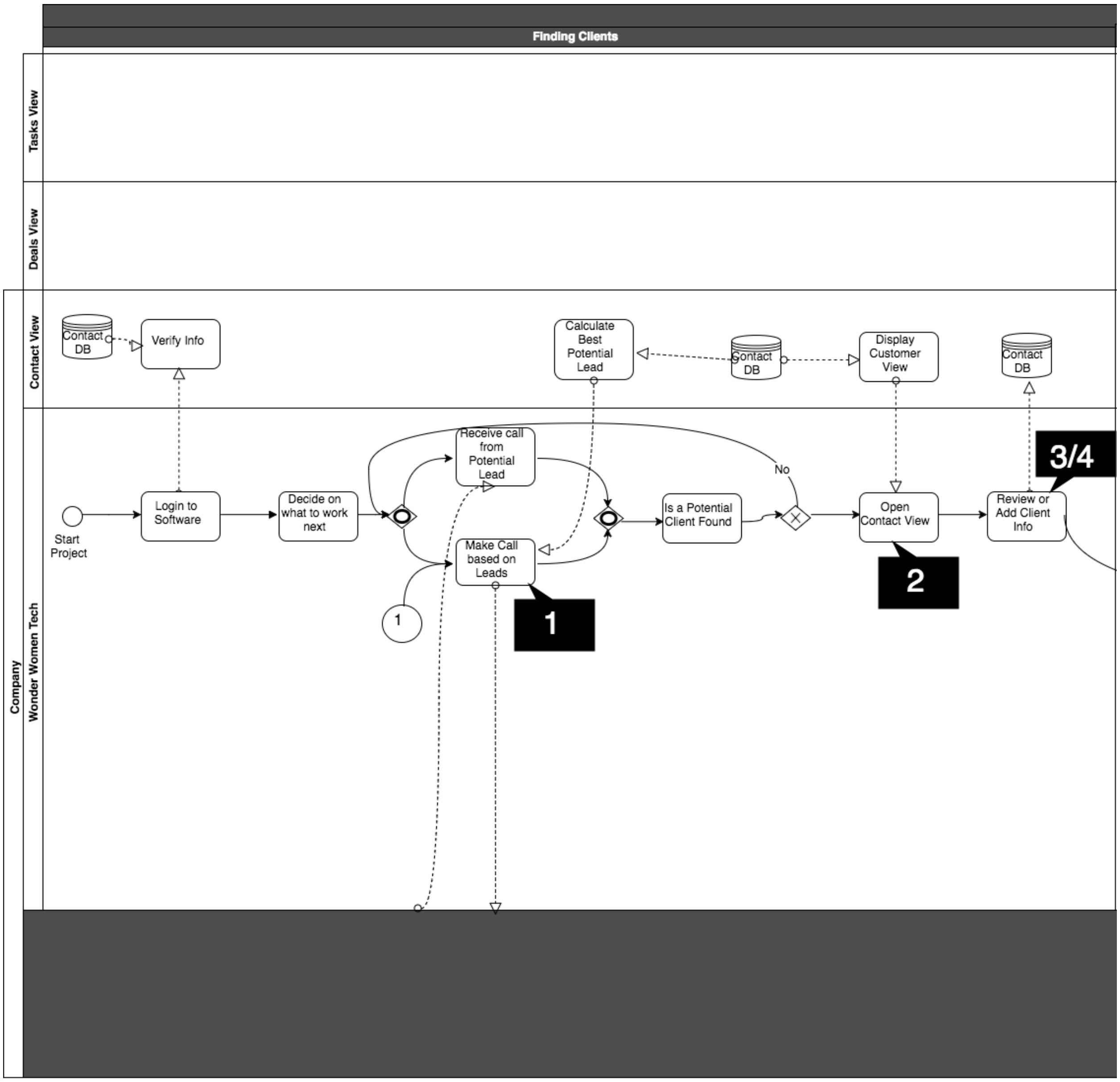
4.3 To-Be BPMN:



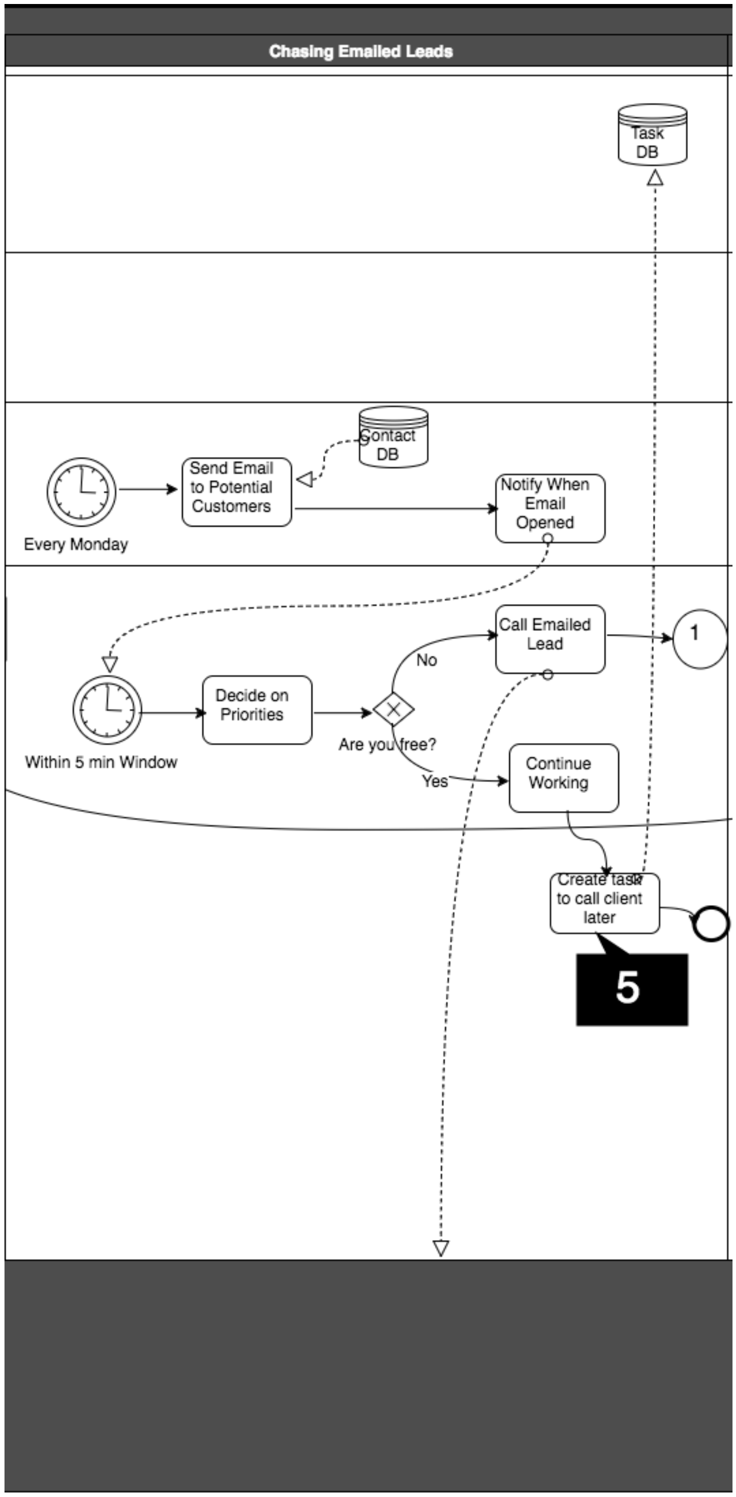
1	2	3	4	5	6	7

The zoomed sections are divided by the ranges shown below the BPMN.

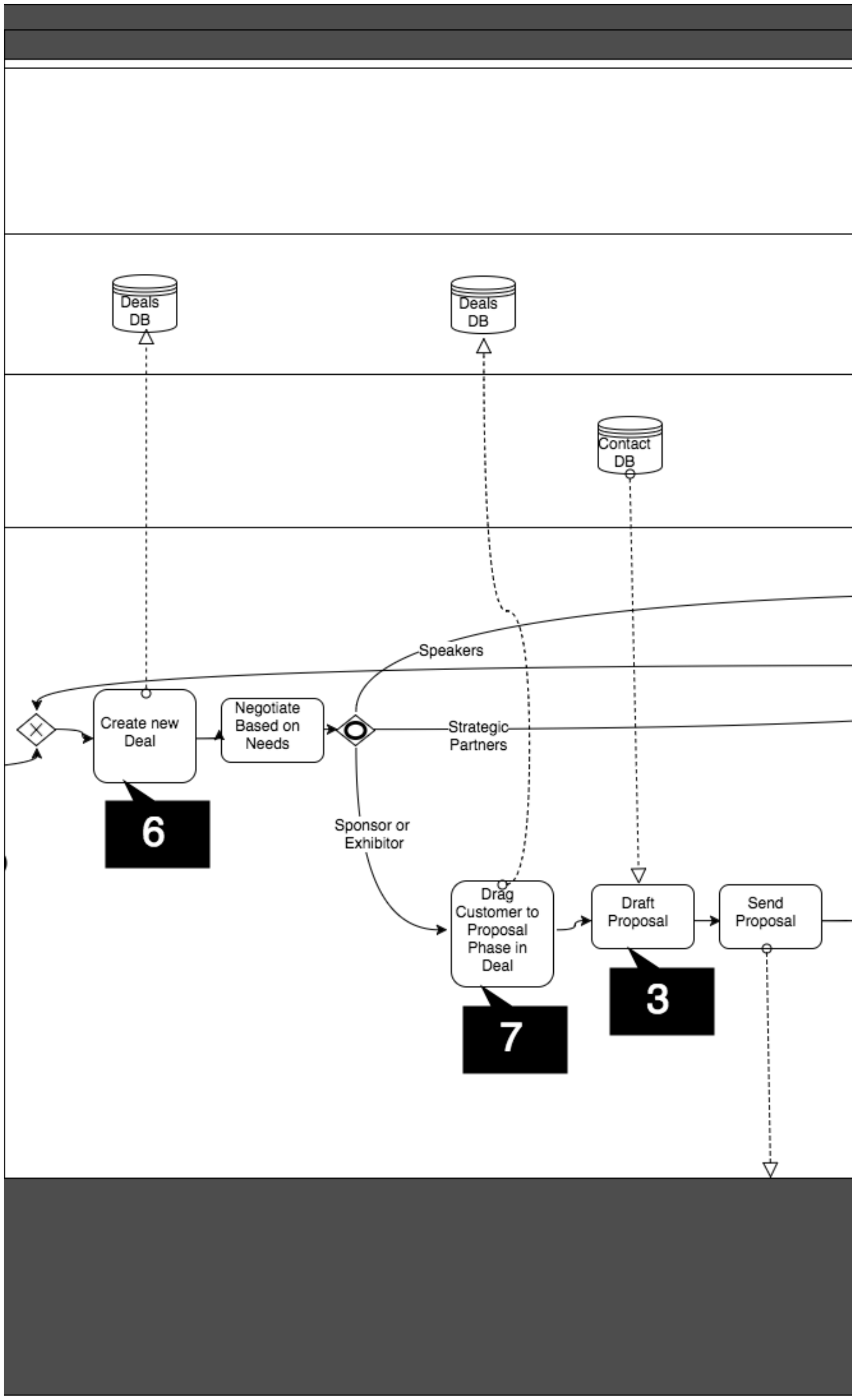
4.4 To-Be BPMN Zoomed Sections:


Finding Clients
Tasks View
Deals View
Contact View
Company
Wonder Women Tech
Contact DB
Verify Info
Calculate Best Potential Lead
Contact DB
Display Customer View
Contact DB
Receive call from Potential Lead
No
3/4
Start Project
Login to Software
Decide on what to work next
Is a Potential Client Found
Open Contact View
Review or Add Client Info
Make Call based on Leads
1
1
2

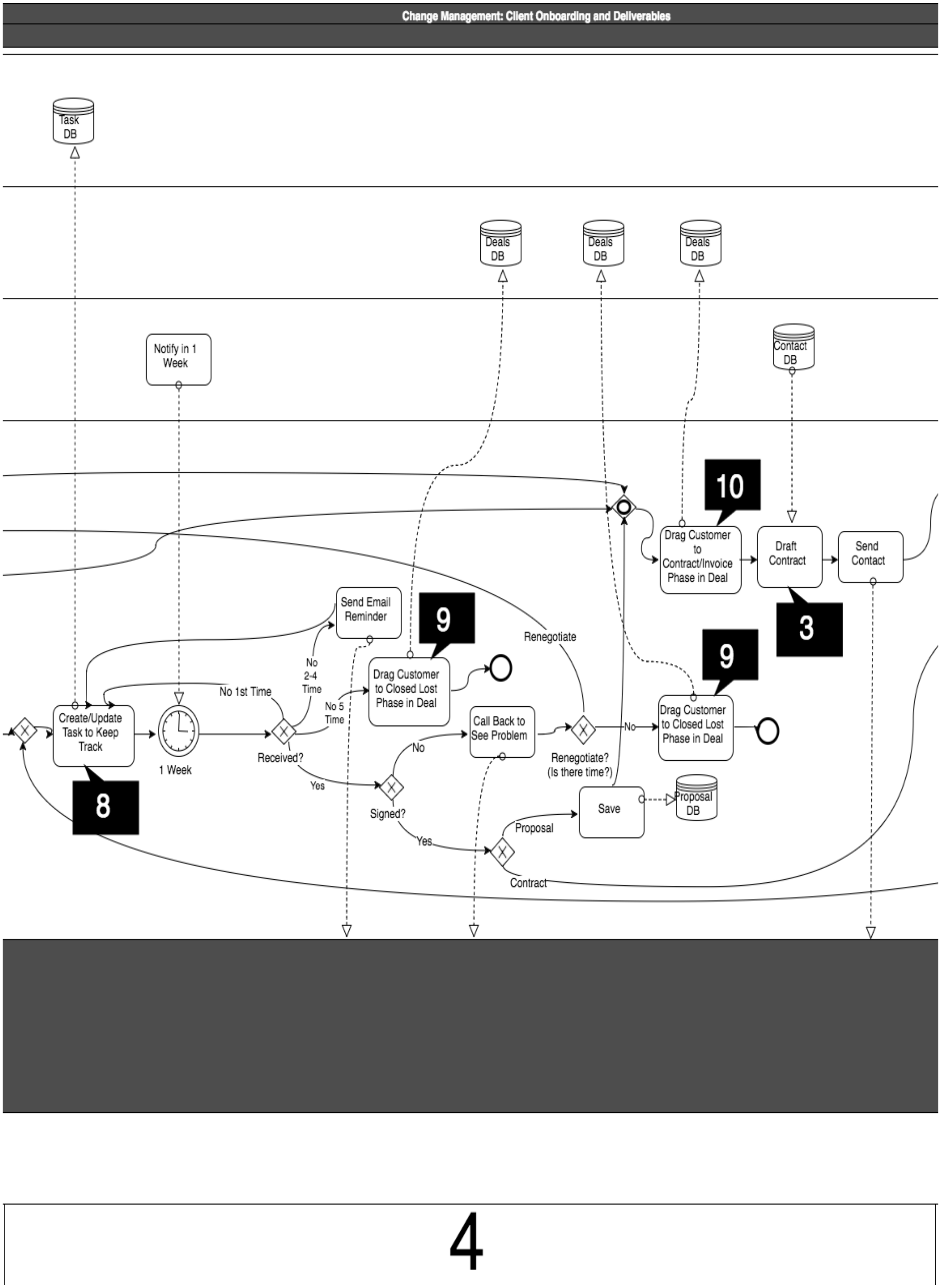
1

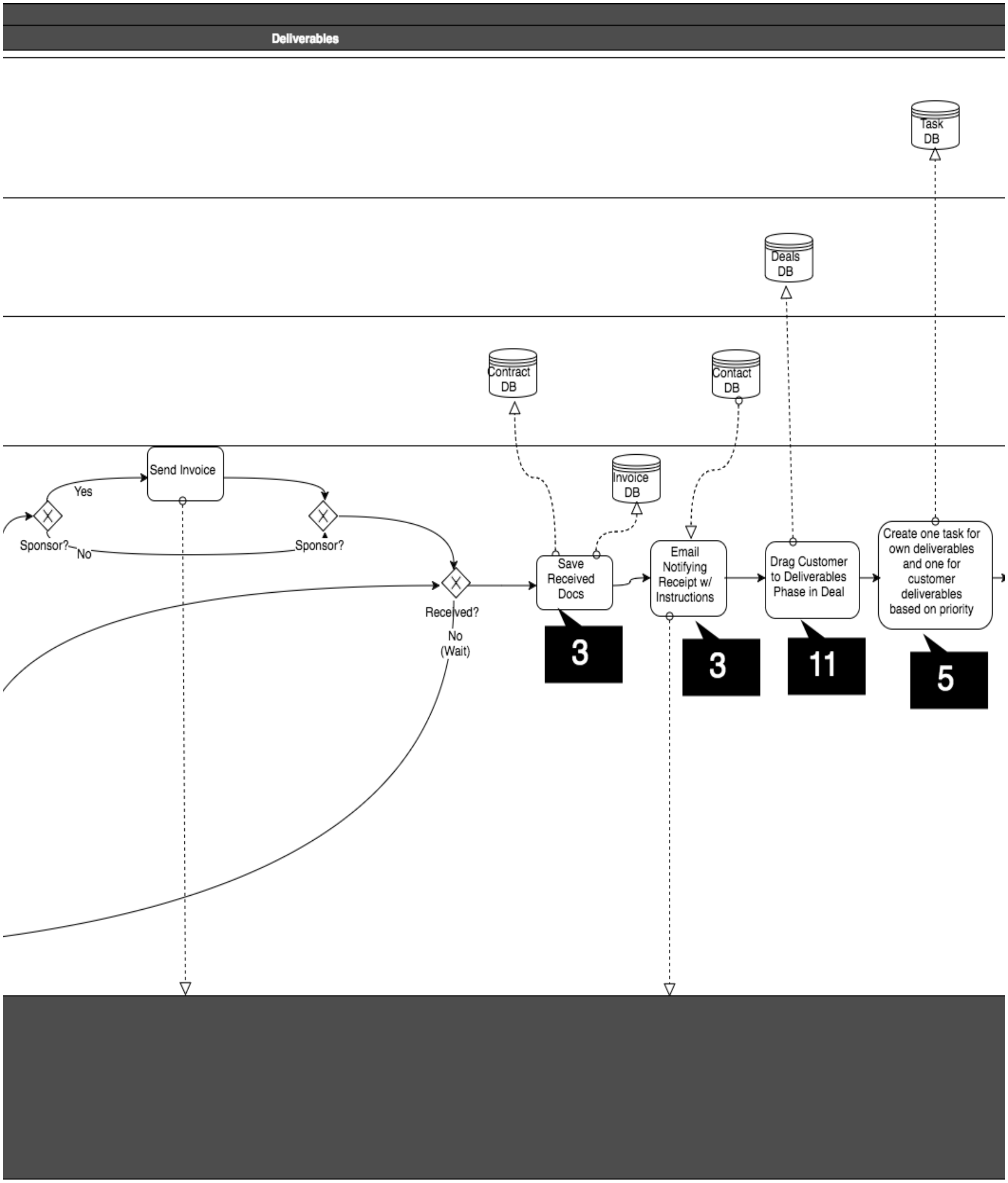

Chasing Emailed Leads
Task DB
Contact DB
Send Email to Potential Customers
Notify When Email Opened
Every Monday
Call Emailed Lead
1
No
Decide on Priorities
Are you free?
Within 5 min Window
Yes
Continue Working
Create task to call client later
5

2

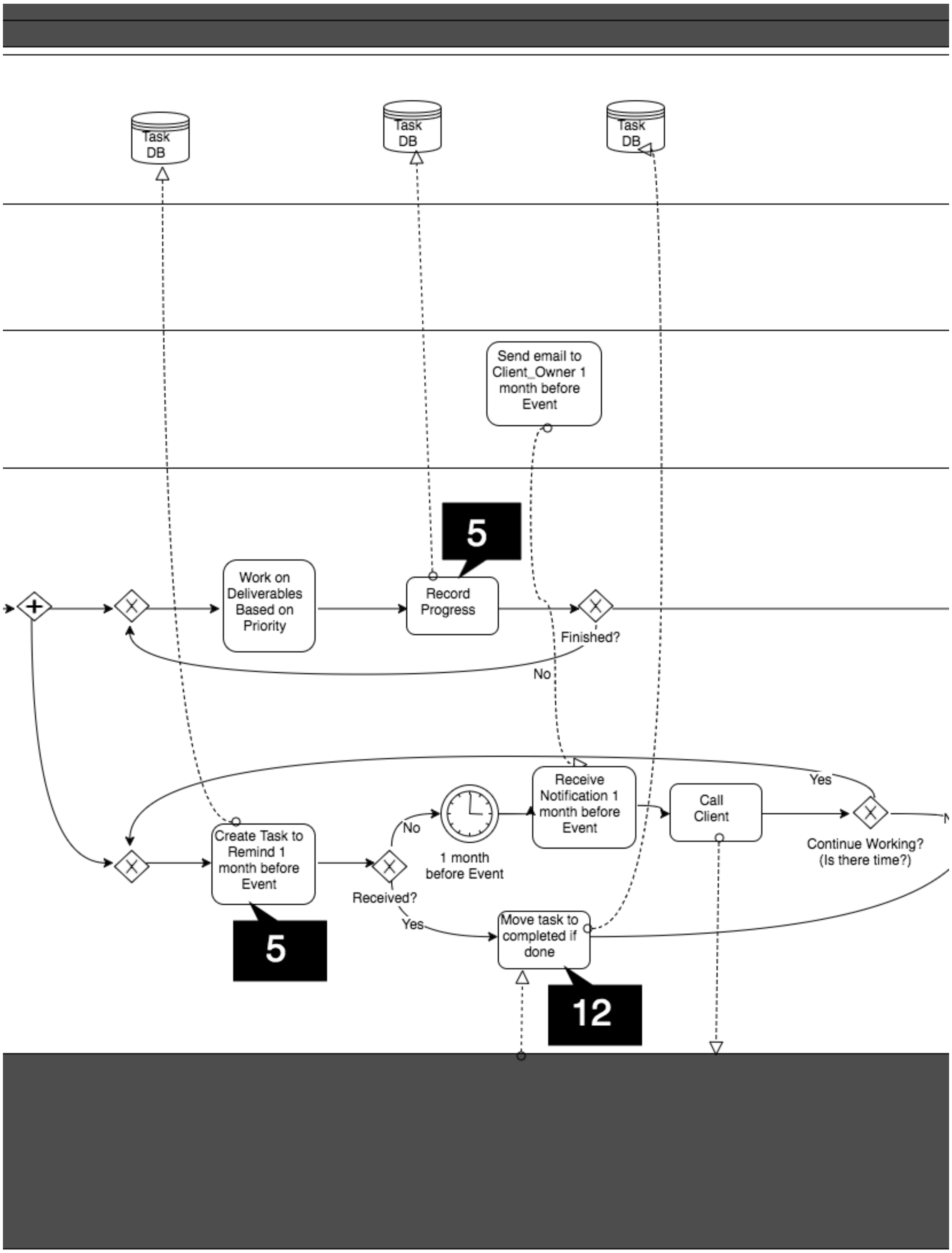

Deals DB
Deals DB
Contact DB
Speakers
Create new Deal
Negotiate Based on Needs
Strategic Partners
6
Sponsor or Exhibitor
Drag Customer to Proposal Phase in Deal
Draft Proposal
Send Proposal
3
7

3

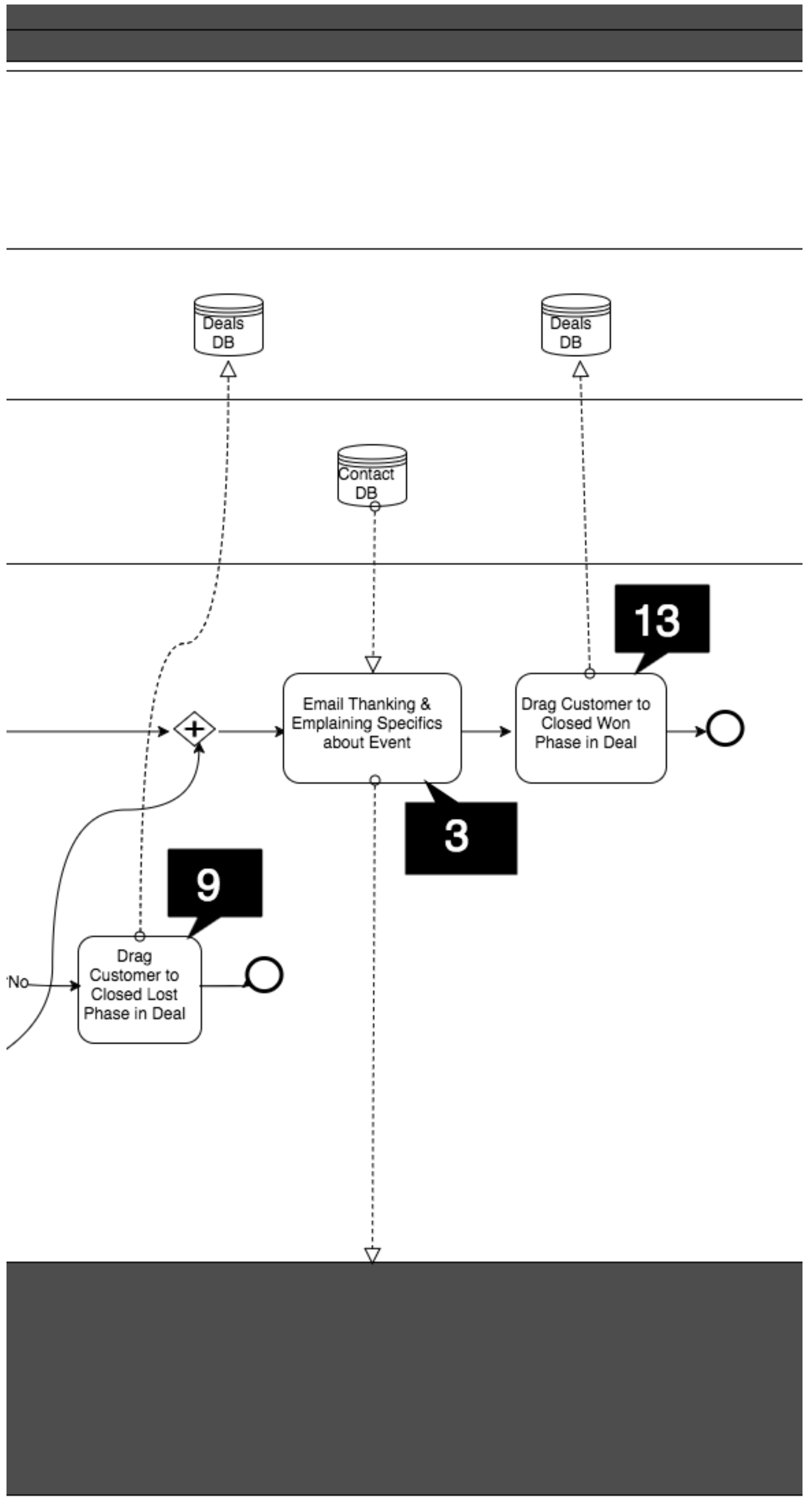

Change Management: Client Onboarding and Deliverables
Task DB
Deals DB
Deals DB
Deals DB
Notify in 1 Week
Contact DB
10
Drag Customer to Contract/Invoice Phase in Deal
Draft Contract
Send Contact
3
Send Email Reminder
9
Renegotiate
9
No 2-4 Time
Drag Customer to Closed Lost Phase in Deal
No 1st Time
No 5 Time
Call Back to See Problem
No
Drag Customer to Closed Lost Phase in Deal
Create/Update Task to Keep Track
1 Week
Received?
No
Renegotiate? (Is there time?)
Yes
Signed?
Save
Proposal DB
8
Proposal
Yes
Contract
4


Deliverables
Task DB
Deals DB
Contract DB
Contact DB
Invoice DB
Send Invoice
Yes
No
Sponsor?
Sponsor?
Received?
No (Wait)
Save Received Docs
Email Notifying Receipt w/ Instructions
Drag Customer to Deliverables Phase in Deal
Create one task for own deliverables and one for customer deliverables based on priority
3
3
11
5

5


Task DB
Task DB
Task DB
Send email to Client_Owner 1 month before Event
5
Work on Deliverables Based on Priority
Record Progress
Finished?
No
Receive Notification 1 month before Event
Call Client
Yes
Continue Working? (Is there time?)
Create Task to Remind 1 month before Event
No
1 month before Event
Received?
Yes
Move task to completed if done
5
12

6

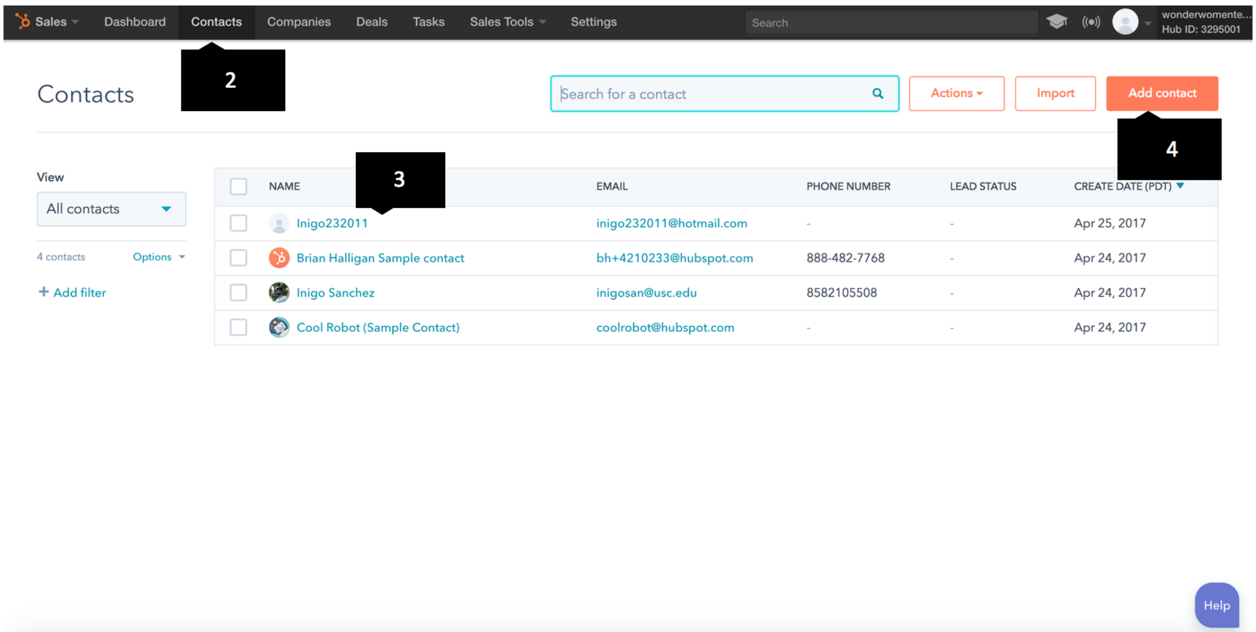

Deals DB
Deals DB
Contact DB
13
Email Thanking & Emplaining Specifics about Event
Drag Customer to Closed Won Phase in Deal
3
9
No
Drag Customer to Closed Lost Phase in Deal

7

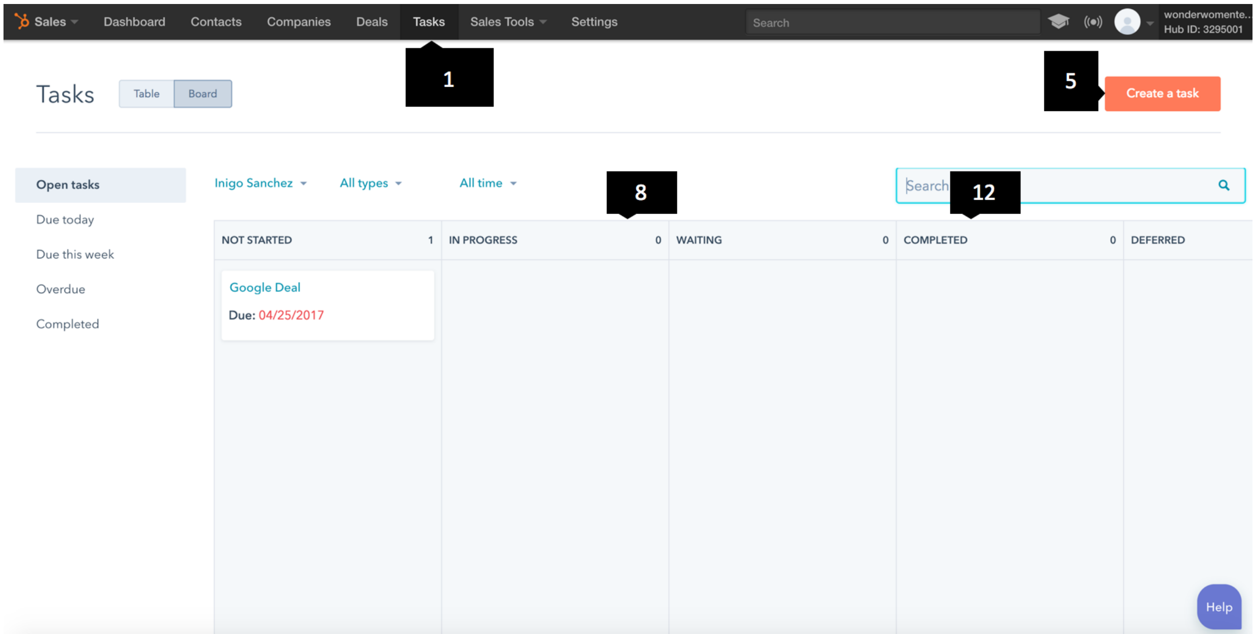
4.5 To-Be CRM Template Screenshots:

The comment symbols made on the To-Be BPMN Zoomed Sections are in relation to the corresponding comment symbols made directly on the CRM screenshots. This will allow used to see where exactly on the CRM they should be in order to perform the actions.

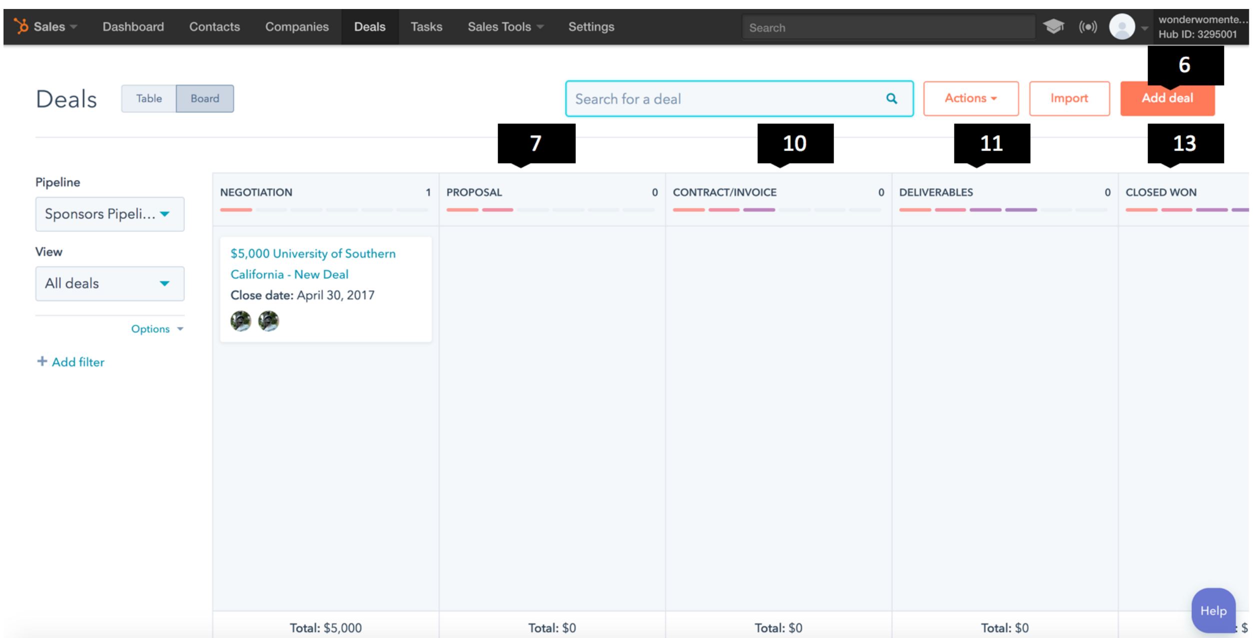
4.5.1 Contacts View:



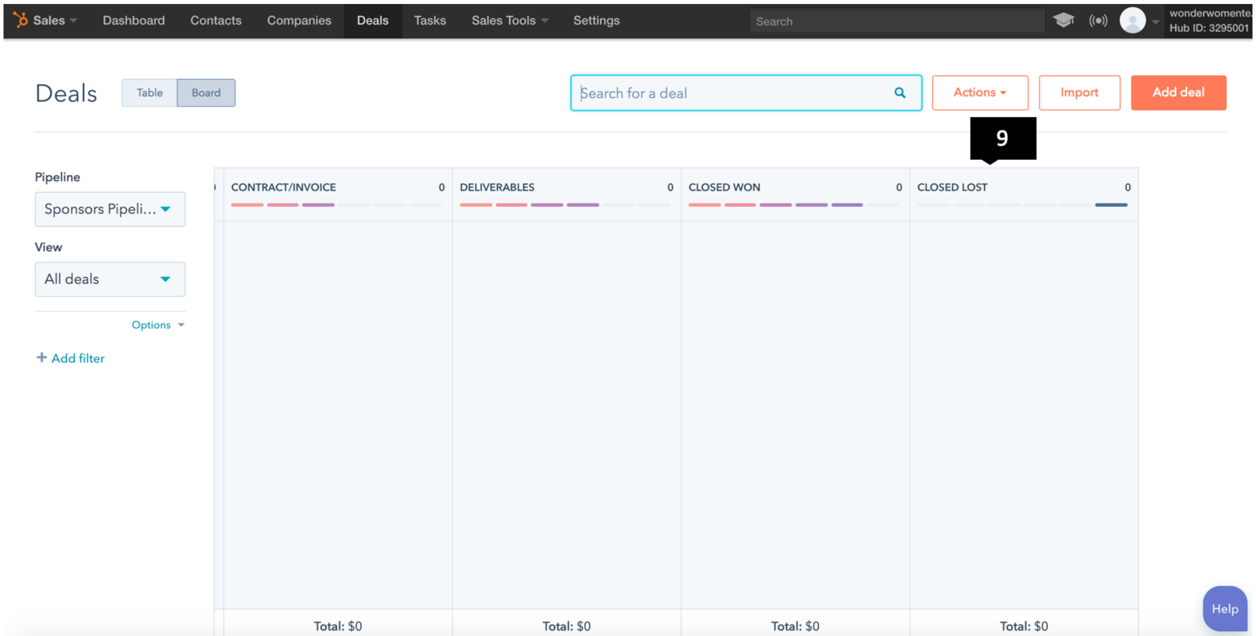
4.5.2 Tasks View:



4.5.3 Deals View 1:

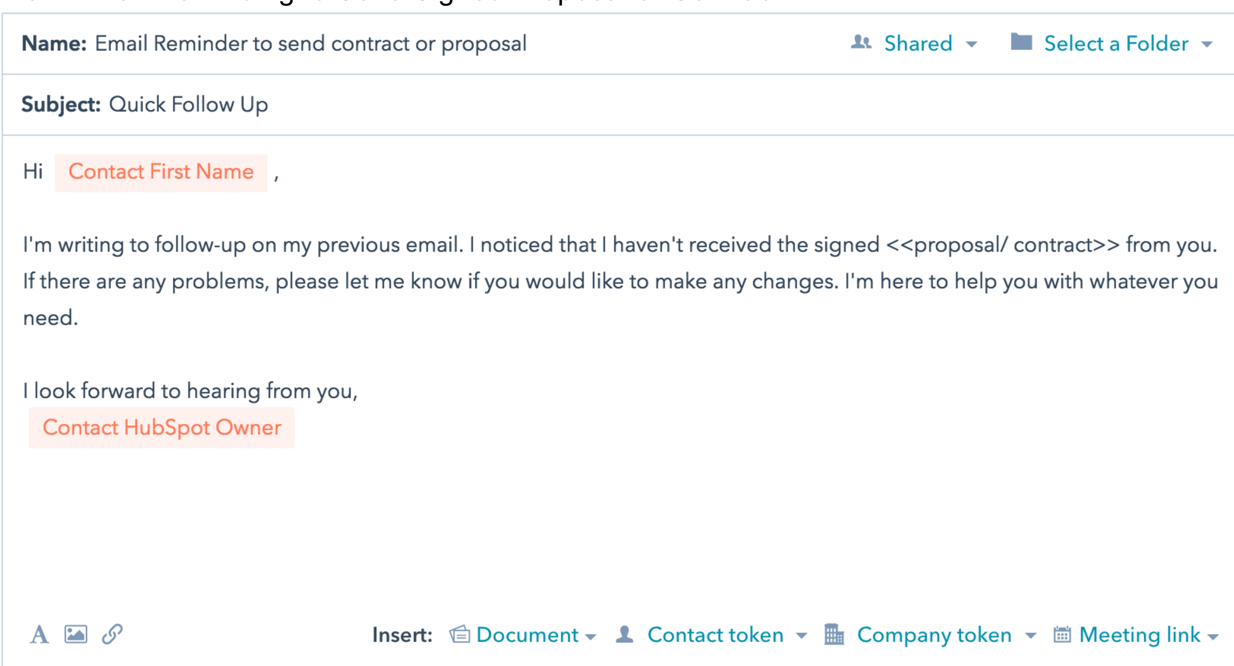


4.5.4 Deals View 2: Same as previous, but the pipeline was dragged to the left.

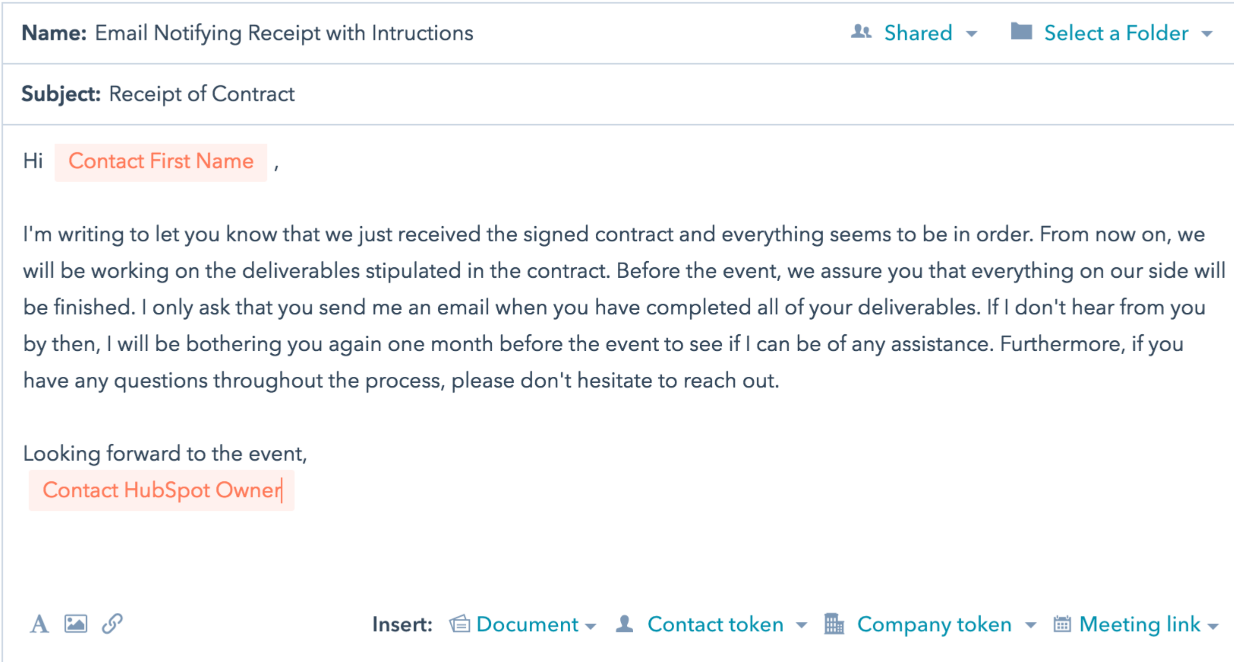


4.5 To-Be Email Template Screenshots

4.5.1 Email Reminding to Send Signed Proposal or Contract



4.5.2 Email Notifying Receipt with Instructions



Name: Email Notifying Receipt with Intructions — Shared — Select a Folder

Subject: Receipt of Contract

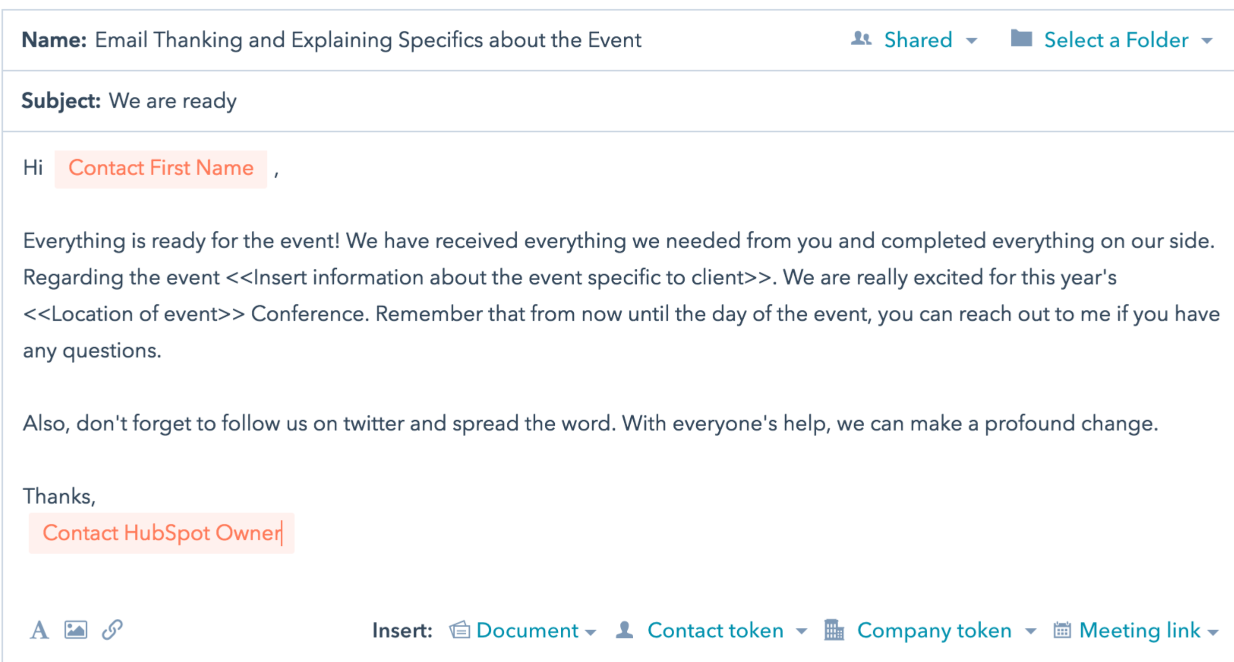
Hi Contact First Name ,

I'm writing to let you know that we just received the signed contract and everything seems to be in order. From now on, we will be working on the deliverables stipulated in the contract. Before the event, we assure you that everything on our side will be finished. I only ask that you send me an email when you have completed all of your deliverables. If I don't hear from you by then, I will be bothering you again one month before the event to see if I can be of any assistance. Furthermore, if you have any questions throughout the process, please don't hesitate to reach out.

Looking forward to the event,
Contact HubSpot Owner

Insert: Document Contact token Company token Meeting link

4.5.3 Email Thanking and Explaining Specifics about the Event



Name: Email Thanking and Explaining Specifics about the Event — Shared — Select a Folder

Subject: We are ready

Hi Contact First Name ,

Everything is ready for the event! We have received everything we needed from you and completed everything on our side. Regarding the event <<Insert information about the event specific to client>>. We are really excited for this year's <<Location of event>> Conference. Remember that from now until the day of the event, you can reach out to me if you have any questions.

Also, don't forget to follow us on twitter and spread the word. With everyone's help, we can make a profound change.

Thanks,
Contact HubSpot Owner

Insert: Document Contact token Company token Meeting link

4.6 To-Be Document Templates

All the documents, including the proposal, the contract, and the invoice, will be kept from the as-is. The reason is that they are legal documents which have already been reviewed and Wonder Women Tech is comfortable with the way they currently are.

5. How different from as-is is the TO-BE, and how are you planning on closing the gap

5.1 Differences from as-is to to-be:

- Reduced handovers between employees
- Formalized templates
- Personalized sequences
- Structured information system
- Added CRM (improved communication, tracking your pipeline with total visibility, better documentation, organized work space/book meeting,)
- Organized process
- TEDx like conferences (have videos online)
- Included deadlines in the system to track deliverables
- Standardized organization activity diagram
- Reduced waiting by clients due to increased employee performance
- Clients are organized by category so faster sorting capabilities which spends up the process
- Reduced unnecessary variations in procedures
- Comprehensive client information
- Introduction of parallelism on certain activities
- Early termination
- Exceptions isolated as a different process flow to implement stronger flow
- Automation of everyday repetitive tasks
- System that tracks tasks needed by each employee
- Report of employee and overall company performance
- Tech used to find new leads
- Email tracking

5.2 Migration Plan:

5.2.1 Conversion Plan:

Dimensions	Approach	Reason
Conversion Style	Direct Conversion	-Trusted SaaS meaning reduced risk of problems. -Easy and quick conversion preventing business disruption.
Conversion Location	Simultaneous Conversion	-All departments are located in the same office. -Relatively small amount of employees.

Conversion Modules	Whole-System Conversion	-System is not complex. -Data can be easily and quickly imported into new system.

5.2.2 Change Management:

5.2.2.1 Cost and Benefits of Change

Stakeholders	**Benefits**	**Costs**
Management	-Increased employee productivity. Increased employee efficiency. -Increased employee effectiveness. -Reduced Waste. -More time for employees to spend with existing and new clients. -Less errors. -Better client retention. -Improved client loyalty. -Better performance. -Improved organizational structure. -Deal forecast. -Higher lead-to-close ratio.	-Time to adopt new system. -Training employees. -Time to adapt to new organizational structure. -Implementing new policies.
Employees	-Formalized process leading to easier and more structured job. -Less waste of time. -Increased sales. -Increased wages. -Better and easier communication. -Multi-platform system to access information anywhere. -Automation of tasks. -New skills learned. -Everything in one place.	-Training time. -Energy to learn new system. -Energy to adopt new organizational structure. -Importing data to new system. -More competition due to more efficient co-workers. -Increased supervision from management.

5.2.2.2 Motivate adaption

Change management is the most difficult component of business change because it focuses on people, not technology, and because it is the least controllable aspect. Our approach to managing the change to the to-be is bringing the system users on-board. We will have to convince them that this is best option for organizational growth in order to motivate adoption. We have begun this step through our client meetings with the business users. We will be focusing on the benefits they will receive from adopting the new system and try to work on the costs that are too important to them in order to reduce them or even get rid of them. For this change we will use a purely informational strategy as it has been proved that the political strategy is not as effective. By showing them all the benefits and how easy the change is, we are certain that there will not be too much resistance to change. Nevertheless, we will be expecting the worse in order to be easy for every situation.

5.2.2.3 Conduct training

Once we get the business users' approval then we can begin conversion by installing the software. Once this occurs, we must train business users in the software and can do this by leading them into converting their current data into HubSpot. Being a company with a small amount of employees and all will be using the software is a similar manner, we believe it is not necessary to implement a one-on-one training in order to have a high impact. We will therefore hold a session in a conference room where all employees will be guided through the whole change and the to-be process.

5.2.2.4 Revise management policies

The formal Standard Operating Procedures will be updated to reflect the changed being enforced by the new system. The to-be BPMN thoroughly guides employees through their jobs so that all employees perform their jobs in a consistent manner and there are no mistakes due to lack of information. Furthermore, new metrics are created to inform employees in a consistent manner what is important for the organization. By tracking both the monetary amount and the amount of signed clients, employees will have a structured goal towards which they will work. This will allow management to track employee performance and take the necessary steps to motivate those who lack it and reward those who achieve the goals. Finally, not many resources will be needed for the change. This will allow management to continue business as usual without having to worry about the costs of the change.

6. Requirements document for software

6.1 Functional Requirements

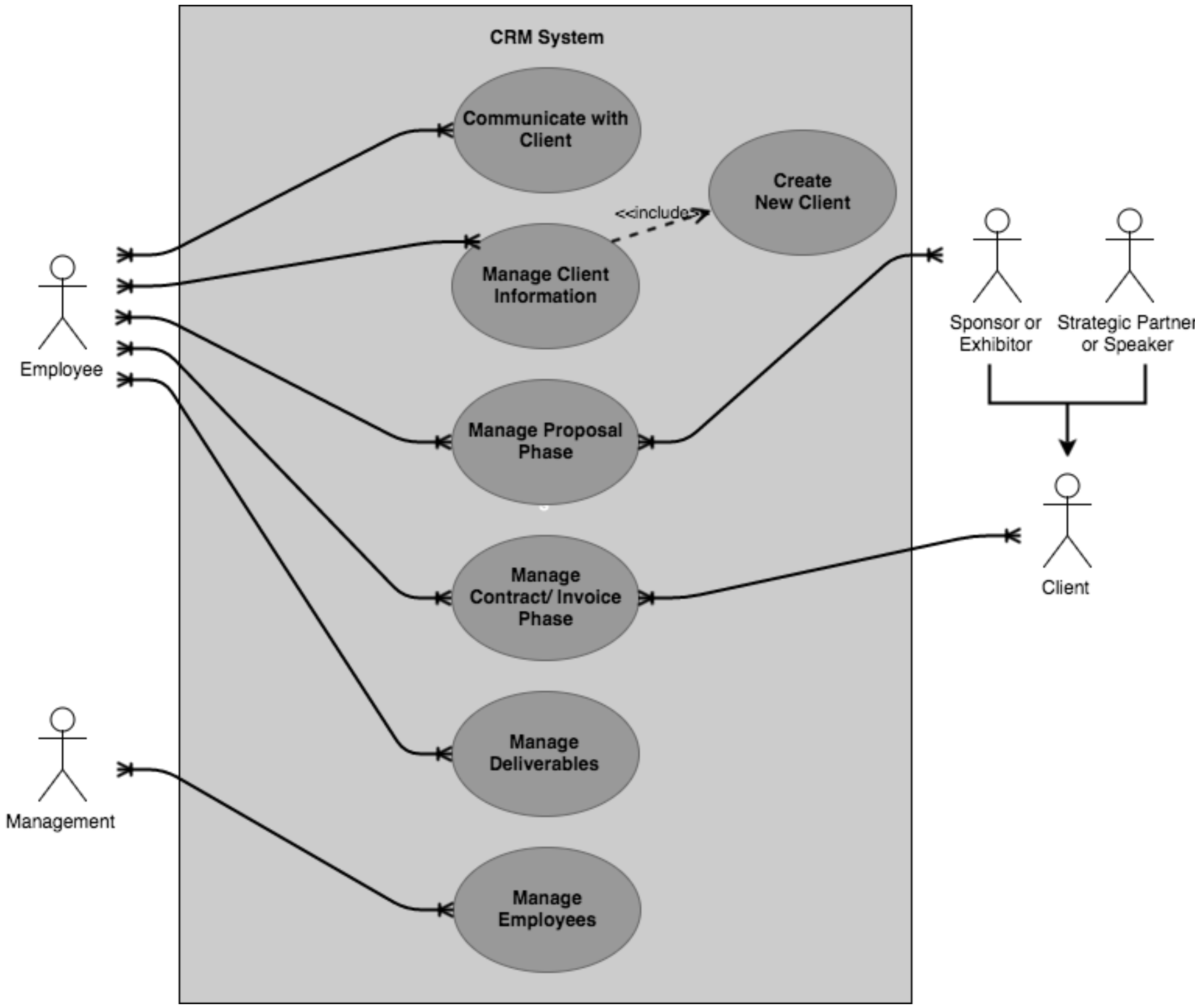
- Manage customer's deliverables
    - Add deliverables from previously set list
    - Delete deliverables
    - Customer finishes a deliverable
- Email customer
    - Follow-up email with negotiated points
    - Email thanking customer for finished deliverables
    - Email customer when everything is ready for conference
    - Email customer asking for feedback after conference
- Manage contracts
    - Create contract
    - Modify contract
    - Delete contract

- Locate contract
- Manage Invoices for Sponsors
  - Create invoice
  - Send invoice
- Track Wonder Women Tech's deliverables
  - Create deliverable based on negotiation
  - WWT finishes a deliverable
  - WWT wants to check missing deliverables before conference
- Orientation calls for strategic partners
  - Every friday the partner needs to attend an orientation call at noon
- Comprehensive and effective data storage
  - All data should be kept in one place
  - Users must have multi-platform access to data
  - Users must easily find the information necessary
- Track employee performance
  - Control employee sales
  - Control employee signed clients
- Automate tasks
  - Automatically send email at desired time
  - Keep track of emails
  - Remind employee of lead to follow

6.2 Non-Functional Requirements

- Usability Requirements
  - The system must be easy to learn
- Operational Requirements
  - The system must be able to work with call system
  - The system must have deadlines built into it
  - The system must allow the storage of email and contract templates
  - Employees must be easily able to use the system
- Security Requirements
  - Interns must not have access to financial information
  - Employees must be able to decide if they don't want to share their leads
  - Management must be able to maintain control of authorization measures
- Cost Requirements
  - Must not exceed over $100
  - Preferably free
- Capacity Requirements
  - The system must allow at least 10 users to be on the platform at the same time
- System Interface/ Integration
  - The system must be able to interface with other systems
  - Can integrate well with current applications they are using

7. Use Case Diagrams for software



8. SaaS Software Recommendation

A thorough analysis of the different options along with the recommendation was performed in subsection 2.6: Options Analysis.

In conclusion, we analyzed and recommended three softwares, which were Perfex, Hubspot and 17hats. Both Perfex and HubSpot were adequate to fulfill the business requirements, functional requirements, and stakeholder objectives for Wonder Women in Tech. 17hats didn’t completely satisfy their requirements.

Hubspot was an overall better choice because it provided better feasibility requirements and had less risks than Perfex. Not only was it free, it was able to be synced with email and google docs, which were both applications that the client was regularly using.

9. Rapid prototyping

After finding that Hubspot was a suitable option for the company, we installed and tested the application ourselves. Because of its intuitive interface, we were able to have a thorough analysis, design appropriate functions, and then implement these practices. Some of the functions we incorporated, included email, phone calls, and links to sponsorship forms. It was very easy to make simple adjustments, where all the employees could interact and make changes. After some more modifications, it would be ready for organizational use.

10. Joint Reflection Exercise

Joint Reflection - 10 practices

1. Coordinated and facilitated interactive sessions with business users to model and uncover the current as-is business process and critical process gaps
    a. This proved to be very helpful. At the beginning of this project we were having communicating issues with understanding each other. We decided to meet in person and go step-by-step the as-is.
2. Recognized reality of how much change an organization can take
    a. This practice is difficult to execute because there is no method to measure and determine how much change an organization can take. This comes from deep understanding of the organization.
3. Using Packaged Software for the organization
    a. These are usually very inexpensive and can be installed in a short amount of time. Most of them allow for some customization, which usually are enough to fit the customer’s needs.
4. Verifying and Validating the Business Processes and Functional Models
    a. Having a walkthrough or peer review of the product was useful.
5. Identifying the Stakeholders
    a. Pointing out fundamental key players was important in understanding how everyone affected the process
6. Analyzing Business Opportunities
    a. One of the most important parts is understanding different angles of the business process and the cost/benefits of each opportunities
7. Creating User Stories for the Client
    a. This is a great way of opening discussion and bridging the communication gap between client and development of the team
8. Drafting a System Request Form
    a. With System Request Forms, WWT will be able to manage inquiries and changes in the system with ease
9. Using Case Diagrams
    a. One of the biggests benefits of use case diagrams is figuring out all the things that might go wrong. Identifying these flaws early on will save time.

10. Starting a Root Cause Analysis
    a. Starting this analysis will solve issues at root itself and looks at relationship between causes and symptoms of the problems. Then, it provides evidence of cause and effect and solutions.