

## 320.02 Universal Parcel Lockers

**Timing**

- 180 min Preparation
- 45 min Presentation
- 30 min QA

**Checklist:**Before the preparation (No time constraints):

- Complete Prerequisites and store in Google Drive
- Check your calendar and timezone
- Print out scenario
- Tooling setup (paper,pens, markers, etc)
- Make sure equipment is loaded and working
- Review personal feedback from previous sessions
- Set your intention for the session
- Recall preparation & presentation structure
- Visualize preparation & presentation

Before the 1to1

- Prepare the solution **with time constraints incl. all artefacts**
- Upload solution PDFs (annotations, drawings, deck) to your mock folder (no time constraints)

After the 1to1 session:

- Log personal feedback in the scenarios tab of your tracker sheet
- Compare solution with your Accountability Partner
- Possibly solve and present again to Accountability Partner

**Remember:**

- Visualize how it is going to work
- Tell a story
- Pick a definite solution
- Justify your solution
- Beware of the domino effect
- Sections (*System Architecture, Security, Data, Solution Architecture, Integration, DevLifeCycle, Data, Communication*)

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### Notes on your performance

Capture notes on your performance for Preparation, Presentation and QA. What did you do well? What can you improve? What should you change?

### Project Overview

Universal Parcel Lockers (UPL) is a multinational company, providing services in ten European countries. Their competitive advantage is a system of innovative parcel lockers: postal deposit boxes, which can be used to collect packages 24 hours a day, 7 days a week - conveniently, along the way, at a convenient time. These machines can contain three kinds of lockers: for small, medium and big parcels. For a long time, the company focused on private senders, who send the parcels directly from the parcel machines. Now, they decided to expand their business to the commercial senders market.

Sales for each country are done by Account Managers organized in geographical regions such as North, East, South, West. Larger regions might also be subdivided by postal codes. Key accounts in each country are looked after by a designated team of Key Account Managers. They all report to their regional Sales Manager and in addition in some cases to Category Managers (e.g. e-commerce category).

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Internal Users:

- **Account Managers** - onboard new customers and negotiate the contracts conditions.
- **Complaint analyst** - they work in a cross-regional team, responsible for solving complaint requests related to UPL services.
- **Couriers** - receive parcels from Business Customers Offices and deliver them to regional hubs.
- **Delivery staff** - transfer parcels between hubs and deliver them to the destination parcel machines
- **Executives and sales managers** - analyze sales and support data to make strategic decisions for the organization.

In addition, the following external users have been identified during initial requirement analysis:

- 100k **Customer Manager** - one per customer's company, who can order the pick up, submit and track parcels, and administer other contacts at the customer company,
- 400k **Pick up point Manager** - who can order the pick up, submit and track parcels from pick up points assigned to them by Customer Manager.
- 25 M **Parcel Recipient** - who can collect package from the parcel machine

## Current Systems

Currently, UPL uses several systems to run their business:

- **Sender Portal:** Currently, it is used by both Private and Commercial customers to send parcels. The commercial part of the system is going to be decommissioned and replaced by Salesforce in the first phase of the project. UPL is going to make a decision about a potential Private Sender Portal replacement after evaluation of phase one.
- **Parcel Tracking System:** An on-premise application that contains all information about a parcel's status and security codes, which the Recipients use to unlock the parcel machines. Whitelisted applications can interact through a dedicated SOAP API gateway which enforces high-security restrictions.

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- **Financial System:** Legacy Financial Systems provides a set of standard REST APIs to exchange data and will remain in place.
- **Route Optimization System:** delivery staff use an in-house developed engine for Route Optimization, which generates the route for upcoming day on a nightly basis. UPL is concerned that B2B pickups may require more flexibility, due to potential last minute cancelations.
- **LDAP:** UPL utilizes an LDAP-based store to manage credentials for internal users. As new employees are hired and terminated, they should automatically be granted access to the new system and have their access revoked.

## Business Process Requirements

### New customer onboarding

UPL would like to use Salesforce to quickly onboard new customers.

1. Prospective customers can submit a form on UPL website, in which case local Account Managers Team will be notified to contact them.
  - a. The form should contain details about the prospect’s company, such as name, address and Tax ID.
  - b. The system should automatically send a standard welcome message to the customer in his preferred language.
  - c. UPL expects 1000 new forms to be submitted monthly.
  - d. Prospect should be automatically validated in regional government Central Registration and Information on Business System based on the company Tax ID. If it is not correct, the form should be marked as requiring manual check.
2. Account Manager should be able to call a prospect directly from Salesforce, by clicking on his phone number provided on the form.
3. UPL is going to negotiate terms of monthly services. Each customer agrees to the monthly lump sum fee. The fee covers sending a number of small, medium and big parcels to recipients from a given country. It also covers a limited number of courier pick ups in the customer’s office. If a customer sends more parcels of any type or requests more visits during the month, then he is going to be

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charged additionally for each of them based on the standard price. UPL does not provide international shipments.

- a. The Account Manager usually prepares a few terms propositions and sends them to Prospect via email.
  - b. If the customer accepts the presented terms, the Account Manager generates the contract and sends it to the customer for electronic signature.
  - c. Upon signature, automatically grant the new Customer access to Customer’s Portal and notify the Account Manager.
4. Customer Manager can manage his company's pick up points, but each new point and any change must be approved by the Account Manager before the pick up point can be used. Each point has an assigned Pick up point Manager, who can use it for ordering the pick up.

### Parcels’ pick ups

Customer users can order the parcel’s pick up from an approved pick up point, one day in advance.

1. Per each parcel, the Pick up point manager fills the recipient details (name, email, phone number), selects the parcel size and the target parcel locker.
  - a. Each parcel locker has an unique 8 digit code and geolocation fields. The sender either can provide the code or pick the parcel from the map.
  - b. The ordering flow should be simple and require as little steps as possible. UPL is looking for recommendations on how to optimize the user experience.
  - c. It should be possible to upload a CSV file, which prepopulates the form.
2. The new parcels should be registered in the Shipping System. Per each registered parcel, the shipping system generates a PDF file with label (receiver and pick up point details, QR code), which must then be printed and stuck on packages by Pick up point Managers before the parcel’s pick up. The PDF files are usually generated and are ready 60 seconds after the parcel’s registration.
3. During the next business day, the courier is going to collect all parcels from all pick up points belonging to his geographical area. UPL estimates that each courier is going to visit every day between 10 and 20 locations.
4. When a courier takes the parcels, he scans QR codes from labels via the mobile application. After the QR code has been scanned, Sender cannot cancel the parcel anymore.

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- a. In case of internet issues, the courier should anyway be able to scan the packages, and the application synchronize their status whenever it will be back online.
5. The Senders Employee should be able to check the tracking status of each parcel directly in their portal, for each parcel from the last five years. An average company sends between 100 and 150 parcels per month from each pick up point.

### Complaints

1. In case of any problems with the parcel (i.e. it has been received damaged), either the Sender can create a complaint directly in the portal or the Receiver can create it via form available on the public page, by providing the parcel's unique code.
  - a. The form should contains a mechanism to reduce spam
  - b. Regardless of the source, the complaint should be visible for Sender's employees in the portal.
  - c. In a very rare case, when a package has been lost, the complaint should be created automatically based on the notification from the Shipping System.
2. The complainant request should be assigned to the Regional Compliance Team
3. The compliance process depends on local regulatory: for example, required first response time or the maximum resolution time may vary depending on the customer's country.
4. If the claim was justified, the Claim Analyst grants a compensation to the Customer. This compensation is going to be automatically settled as a part of the next invoice.
5. If the investigation shows that the courier is responsible for the incident, the courier's supervisor should get access to the complaint.

### Invoices and Payments

1. At the end of the month the Financial System should receive for each active customer his contracted monthly fee, any surplus in sent parcels or ordered pickups, customer's negotiated fee for surpluses and any compensations granted in the current month.
2. The invoice PDF generated by the Financial System should be available for Customer Manager directly in the portal.
3. Customer Managers should be able to save the company payment information directly in the portal. Either this information can be used to perform automatic payment after the invoice has been created or each payment can be made manually in the portal.

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- a. If automatic payment has not been performed successfully, the Customer Manager and the Account Manager should be notified. The Customer Manager can retry the payment manually.
4. If the invoice has not been paid on time, the ability to create new parcels is going to be blocked.

### Migration Requirements

1. Information about Companies, Locations and Contacts should be migrated from Sender Portal to Salesforce. Due to Sender Portal architecture, all these information are currently stored in a single data table: each record contains information about unique location and potentially duplicated information about the company and contact person.
2. Based on the Financial System data, UPL would like to create an opportunity for signing a contract for each customer, who had at least one invoice in the last 12 months. The Opportunity should contain information about average monthly usage of small, medium and big parcels.
3. All invoices from the last 12 months should be visible in the customer's portal. Customers should be able to pay for unpaid historical invoices in the same way as for the new invoices.
4. Parcel Lockers information needs to be duplicated in Salesforce from Parcel Tracking System. UPL is aware that Parcel Locker's locations in different countries are stored in different data formats, some of them use latitude and longitude, another just a locker's address.

### Accessibility/Visibility Requirements

1. UPL would like to enable customers to log in to the portal with their LinkedIn credentials.
2. Compliance Analyst should be able to view and Edit all Compliant requests related to their country, as well as view all Customers from this country.
3. Couriers should have only access to relevant accounts and pick up locations based on the account geographical characteristics. The courier's structure is updated frequently to balance the workload and maximize the courier's capacity.
4. Couriers supervisors should have access to compensations granted to satisfy their subordinate's fault, but without access to any other compensations nor complainant requests details.
5. Account Managers can see all customers from his country, but they are only able to modify their own Customer's Account details. Salesforce is going to be a source of truth about Commercial Accounts, so any changes must be replicated into the Financial system.

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6. If the Account Manager tries to export a report with more than 25 rows, the action should be blocked and the system administrator should be notified about this incident.

### Reporting Requirements

1. Customer Managers should be able to see their usage of small/medium/big parcels and ordered pickups in the current month compared to the contract agreement.
2. VP of HR would like to see the list of couriers with the total cost of compensations generated by them.
3. Monthly trend of the number of packages addressed to the Parcel Locker in the last year by parcel type.
4. Courier’s should see on their homepage a “Wall of Fame” report: top 10 best Couriers in their country, defined by the biggest number of picked parcels and without any complaints in the previous quarter.
5. Category Managers need to report on the expected revenue of account managers in their category and region.
6. Account Managers need a report of all their customers with unpaid invoices, and they would be able to predict the likelihood of a customer making a late invoice payment.

### Project and Development Requirements

1. UPL had in the past an incident with leaks of customers' data, which probably were extracted from their UAT org. They are looking for recommendations on how to prevent this kind of situation.
2. UPL would like to engage with a design agency to design the UI for the customer's mobile app. The app should be available from day one in Apple Store and Google Store.
3. The IT Department raised concerns about a size of the backlog of potential tasks, but without clear priorities nor details required to start development.
4. UPL would like recommendations on how to increase system adoption, manage changes developed by local Administrators and avoid hitting Salesforce limits due to country-specific changes
5. UPL would like to outsource the custom development to one of the consulting companies, so the high resource turnover can be expected.