

**Framework 12
Product Conformance
Certification Report**

**Comverse
Comverse ONE® Billing & Active Customer
Management V3.5**

March 2013

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1 Introduction

1.1 Executive Summary

This document provides details of Comverse’s self-assessment and TM Forum’s Conformance Assessment of **Comverse ONE® Billing & Active Customer Management V3.5 Product**, against the following Framework 12 components:

- Business Process Framework Version 12

The assessment included a review of:

- The methodology approach to process modeling against the TM Forum’s Business Process Framework Release 12 according to the specific processes submitted in scope for the Assessment.

2 Product Functionality/Capability Overview

2.1 Comverse ONE Billing & Active Customer Management – Product Description

A production-ready, carrier-class software application, the Comverse ONE Billing & Active Customer Management solution enables comprehensive monetization for any payment type (prepaid, postpaid or hybrid) on any type of network (mobile, fixed, cable or satellite).

Covering functionality from the network (real-time charging) to the customer (customer management, order management and service fulfillment) to the bank (invoicing, collection, top-up), this solution answers today's challenge for operators to rapidly design, configure and introduce new multi-play service bundles across multiple channels and offer customers a choice of payment types. Real-time, targeted promotions enhance customer loyalty and reduce churn. Operators can remove the cost and complexity of multiple legacy systems and increase operational efficiency with a single solution.

Comverse ONE is the first product-based offering on the market that unifies complete BSS functionality around one data model and one product catalog. It accelerates time to revenue and enhances business agility by employing a unified architecture that removes complexity and lowers deployment time and cost.

The solution is scalable to suit any size network, from new operators up to the largest global service providers with tens of millions of customers.

Comverse ONE offers the converged billing essentials to optimize the customer experience while increasing the profitability associated with new growth strategies such as machine-to-machine (M2M) communications, cloud computing and convergent data-centric business models.

Comverse ONE also offers operator's telco-specific CRM to address order entry, account management, service fulfillment, self-service, charging and billing functionality – all unified around a single data model – rather than a collection of systems each with their own data model. With a single service-agnostic marketing-focused product catalog that spans the entire solution, the full power of the system is made accessible to promote segmentation, policy-driven advanced monetization, personalization and customer experience consistency.

By leveraging one data model, Operators benefit from a panoramic single view of product, prospect and customer information. This information, blended with in-network capabilities that can be extended to policy management and enforcement, provides powerful business benefits: real-time marketing (real-time promotions, targeted campaigns), subscriber- and network-aware traffic management, smart charging for any service (specifically mobile data) and tight prospect-to-cash cycles.

3 Business Process Framework Assessment Overview

3.1 Mapping Technique Employed

Comverse used eTOM Release 12.0 for this certification process. The Release 12.0 process decomposition model is documented at a Level 3 and in some cases further decomposed to a Level 4. Within this and subsequent documents, Comverse presents evidence to demonstrate how the Comverse ONE product suite supports the eTOM model through BPMN process flow diagrams and references to Comverse ONE standard documentation.

In cases where the standard eTOM model is defined to a Level 4, we present evidence at that level, providing Level 4 and Level 5 sub-processes which describe support within Comverse ONE. Each sub-process is a business step/activity which can be performed within Comverse ONE.

In cases where the eTOM model is decomposed to a Level 3, Comverse uses the extended description/brief description of the eTOM Level 3, interpreting it and defining Comverse ONE Level 4 and Level 5 processes. Each Level 4/5 process is supported using one or more Comverse ONE applications and in many cases it also describes the steps or integrations needed to be performed outside of Comverse ONE (As a suggestion).

There are use cases/scenario definitions associated to each Level 4/5 process and hence for each mapped eTOM Level 3 and Level 4 process in this document.

Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 3 process implied task:

- **GREEN** is used to highlight key words or key statements that are fully supported
- **YELLOW** is used to highlight key words/key statements that are partially supported
- **GREY** is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

Manual and Automated Support

It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, “A”, “M”, or “AM” is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (AM).

Each Comverse Level 4/5 has a diagram and each process box with Green fill color identifies an automatic process and orange boxes identify either the steps needed to be performed manually outside of Comverse ONE or manual steps needed to be performed within the Comverse ONE application.



Apart from this, wherever we have references to Comverse L4/L5 processes – following conventions are used to describe if the overall process is automated/partially automated /manual.

- Automated [A]: Means to complete whole process / supported activities within Comverse ONE domain without human intervention – It may require manual triggering or expect its output to be used/communicated by a person or external process.
- Manual [M]: Means to complete whole process/supported activities within Comverse ONE domain requires human intervention like to capture data and save it. There is no activity automated in whole path of process.
- Partial Automated [AM]: means to complete whole process/supported activities within Comverse ONE domain, some human intervention is required but there are some activities which execute automatically.

TM Forum Note 1: When process mappings are presented against Level 4 processes, the mappings are provided against the text in the “Mandatory” field for the process. In the event of the Mandatory field not being used, the process mappings are in that case provided against the Level 4 Brief/Extended descriptions.

TM Forum Note 2: Note that if a Level 3 process has not been decomposed to Level 4 processes in the Business Process Framework, in such cases the process mapping support is provided against the Level 4 process descriptions (Brief & Extended).

3.2 Submission of information

As part of the Conformance exercise, the following information was furnished for each certified eTOM level 3 or level 4 process:

- Level 3/4 ID and Description
- Highlight the ETOM conformance using Brief/Extended description of eTOM level 3/4 in following manner.
 - **GREEN** : Highlight key Words/ key statements which are fully supported
 - **Yellow** : Highlight key words/key statements which are partially supported
 - **Grey** : Highlight key words/key statements which are not supported
 - **No Highlight**: Word/statement Not relevant and it is just for reference or to complete the sentence [No Process mapping is expected for those statement or words]
- Associated Level -4/5 diagrams, Descriptions, Use Case Description.

3.3 Business Process Framework Level 2 Process Scope

This section outlines the Business Process Framework Level 2 processes that were presented in scope for the assessment.

3.3.1 Business Process Framework - Scope

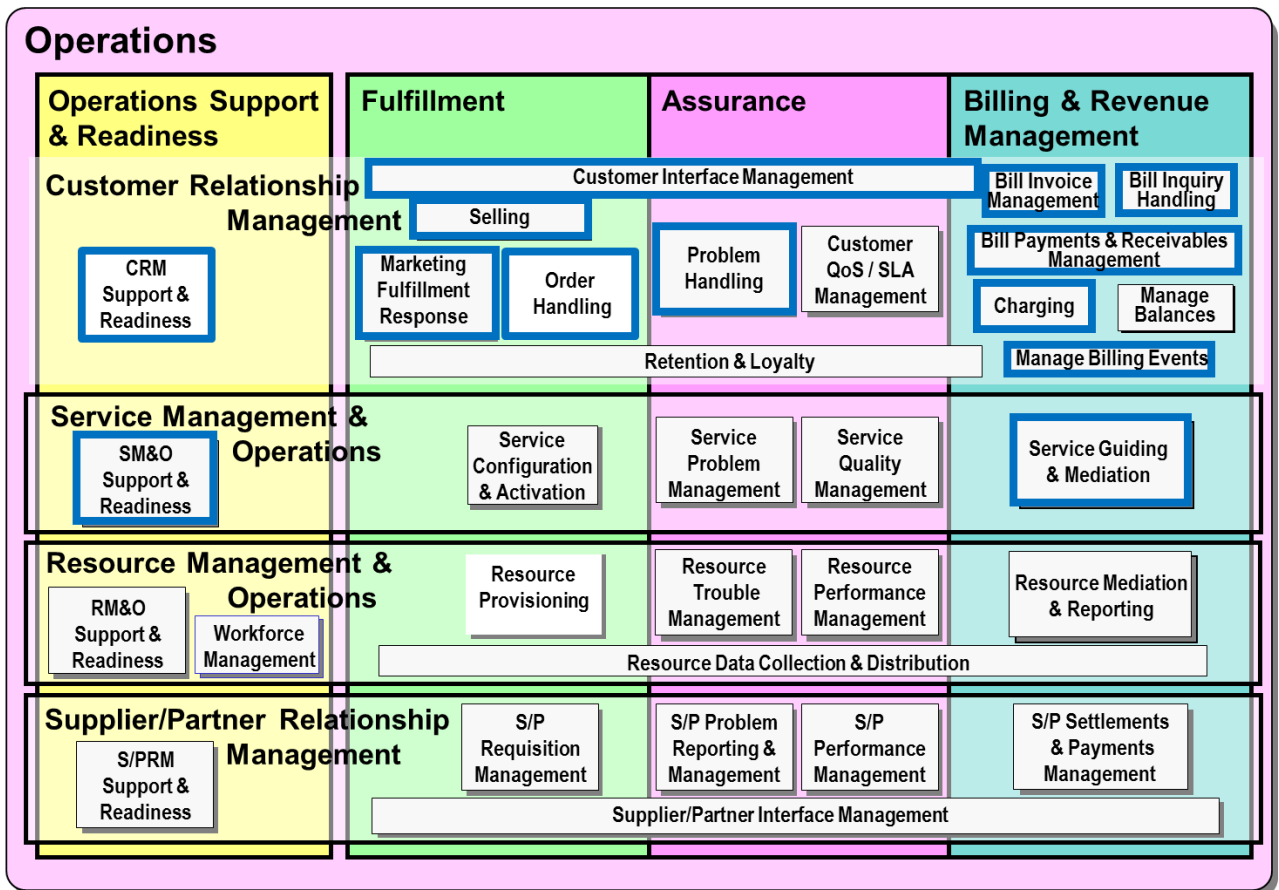


Figure 3.1 - Comverse: Level 2 Processes in scope



The following table provides a high-level overview of the mappings of the Comverse ONE product to the Level 2 processes in scope for this assessment.

Table 3.1 - Comverse ONE High-Level Mappings to Business Process Framework Level 2 Processes

Business Process Framework R12.0 Level 2 Process	Comverse ONE Mapping
1.1.1.1 - CRM - Support & Readiness	Capture Customer Request - Customer Center, Self-Service, IVR Maintain Customer Inventory & Order Handling Facilities Maintain Customer Inventory through Customer Center (CC), IVR, Self-Service, CSR Portal, Channel, API/Third Party Maintain Order Handling through Self-Service, API/Third Party, IVR/USSD, Bulk Processing, CSR Add Account via CSS, CC, CSR Portal/Channel; Validate Product and Inventory Selections Add Customer Account to Customer Inventory Provide Access to Customer Profile, Customer Interactions Identify Contact via CSR Portal, CC, IVR, Self-Service, Customer Inventory Select Disconnect Options for Fees, Charges, and Refinance Plan Remove Account via CSR Portal, CC Remove Customer Account from Customer Inventory Swap Account Bundle in Customer Inventory Add Account Offer via CSR Portal, CSS, CC, in Customer Inventor Disconnect Account Offer & Bundle via CSR Portal, CSS, CC, Customer Inventory Manage Account Attributes via CSR Portal, CC, Customer Inventory Retrieve Customer via CSS, CSM, CRM, Invoice, from Inventory Define Security Policy, Security Rules, Password Policies Manage User Roles, Audit Records Generate Reports for Auditing Maintain and Expose Security Policy/Rules



	<p>Manage User Realm, Grouping, Outbound Marketing, Users (non-OM) via command Line, Bulk Load, Security Admin UI</p> <p>Authenticate User via Back-Office GUI, Customer Center, OM UI, Product Catalog, Sales UI, Services UI</p> <p>Authorize Outbound and Non-Outbound-Management User</p> <p>Manage Account/Subscriber Extended Attributes, Inventory ID Extended Attributes, extended Attributes in Customer Inventory</p> <p>Creating New Offering in the system</p> <p>Assigning Offer/Product to Dealers</p> <p>Bulk Load - Configuration Entities</p> <p>Maintain the Offering information up-to-date</p> <p>Expire the available Offering</p> <p>Report the changes of offering</p> <p>Assign & Manage Resellers, Regions</p> <p>Order Handling Through CSR</p> <p>Configure/Customize Workflow</p> <p>Plan Campaign</p> <p>Configure and Execute Campaign</p> <p>Manage Campaign Instances, Feed, Results</p>
1.1.1.2 - Customer Interface Management	<p>Create Request or Report Problem - Customer Center, Self-Service</p> <p>Monitor due date of request for jeopardy situations - Customer Center, Service UI</p> <p>Update task status to reflect completed tasks - Customer Center, Service UI</p> <p>Create new interaction - Customer Center, IVR</p> <p>Create new interaction Including Registration - Self-Service</p> <p>Create Automatic Notes Up On user actions</p> <p>Add Manual Notes to Contact - Customer Center</p> <p>View & Update Interaction Session - Customer Center</p> <p>Generate Report on Interactions</p> <p>Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center, Service UI</p> <p>Update request with additional information - Customer Center, Service UI</p> <p>Update request status to complete / closed - Customer Center, Service UI</p> <p>Cancel Request/Problem - Customer Center, Service UI</p>
1.1.1.3 - Marketing Fulfillment Response	<p>Create Prospect B2B</p> <p>Create Lead B2C (Import Job)</p> <p>Create Lead B2B (Sales UI)</p> <p>View Lead - Sales UI</p> <p>View Lead B2C - Customer Center</p> <p>Report Lead (Sales UI)</p>



1.1.1.4 - Selling	<p>Qualify Lead Cancel Lead - Customer Center, Sales UI Create B2B Opportunity Manage Opportunity Using Defined Sales Process (Update Task and Stage) Update Opportunity to Reflect Deal Outcome Update Organization Billing Accounts Convert B2C Lead to Order - - Customer Center Report On Opportunity Review Opportunity (including Proposal Information) Finalize the opportunity Create and Manage Product Requests for Custom Products Update Opportunity Products and Pricing Prepare and Export Proposal Promote Products to Customers - B2B, B2C</p>
1.1.1.5 - Order Handling	<p>Evaluate eligibility/Pre-requisite/Exclusion/Transition rules against subscriber/account Evaluate Compatibility templates against existing offering Evaluate Serviceability rules Order Fulfillment Complete Customer Order Create Request or report Problem Cancel Order, Service Order or Order Item Modify Order, Service Order Track Order Status (through OIU, CSS, Customer Center, Worklist Handler) Perform Workflow for account Level Service Order Issue Customer Orders Processes Subscriber Change - Swap Primary Offer, Disconnect Supplementary Offer - Customer Center Subscriber Disconnect - Disconnect Subscriber Customer Center Subscriber Resume Customer Center Manage Extended Attributes at Account/Subscriber/Order - Customer Center Add New subscriber with Primary Offer (or one or more Supplementary Offer along with it) - Customer Center Subscriber Change - Add Supplementary Offer - Customer Center Authenticate User - Back Office UI, Customer Center, Sales UI, Services UI</p>



<p>1.1.1.6 - Problem Handling</p>	<p>Create Request or Report Problem - Customer Center, Self-Service Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center, Service UI Cancel Request/Problem - Customer Center, Service UI 1.1.1.6 Generate Reports for Cases/Requests List and View Requests/Problems - Customer Center, Service UI Monitor due date of request for jeopardy situations - Customer Center, Service UI Update request status to complete / closed - Service UI Update request with additional information - Customer Center, Service UI Update task status to reflect completed tasks - Customer Center, Service UI Update request status to complete / closed - Customer Center</p>
<p>1.1.1.10 - Bill Invoice Management</p>	<p>Collect Billable Transactions Create Invoice Data Structure - Production, Cyclical, Interim Apply Bill-Time Discounts, Promotions, Late Fees, Bill-Time Taxes Calculate Loyalty Points Apply Historic Discounts Apply (Non-)Recurring Charges and Awards- Online, Batch Create Invoice Data Structure - Proforma Create/Format On-Demand Invoice Format Invoice Create Bill Format Electronic Invoice Distribution Invoice QA/QC Reissue Invoice Back Out Invoice Physical Invoice Distribution Create Distribution Process</p>
<p>1.1.1.11 - Bill Payments & Receivables Management</p>	<p>Bill Payment and Receivables Management – Process Payments (LBX) Journaling Financial Transactions Bill Payment and Receivables Management – Process Payments (CPM, EFT) - Outbound, Inbound Bill Payment and Receivables Management – Process Payments (LBX, CPM, EFT) - Process Errored Payments Create Payment for Invoices Using Payment Profile - Customer Center Create Payment for Invoices - CSS Create Promise to Pay Manage Promise to Pay Remove Account from Collections Write off Account Assign Collections Scenario Process Collections Events Manage Collection Events</p>

1.1.1.12 - Bill Inquiry Handling	Review Above-Threshold Adjustment Reverse Adjustment Record Below-Threshold Adjustment
1.1.1.13 - Charging	Rate Online via Call Processor, Camel 3 GPRS/SMS, Diameter, Event Charging Interface, Open Service Access Rate Online Activity Rate Offline Activity Re-rate DB Inaccessible for Customer Lookup DB Inaccessible for Direct Debit Request Rate With Inaccessible Database Rate With Outage Record Processor Rate using OR Processor Apply discount as % off of Rate - Currency, Usage, Event Apply discount as fixed amount off rate - Currency, Usage, Event Apply discount as charge to non-monetary balance
1.1.1.14 - Manage Billing Events	Transfer usage to Customer DB Transfer usage to Campaign Translate usage into Rating input format
1.1.2.1 - SM&O Support & Readiness	Configure Basic System Infrastructure Objects Emergency PC Version Fallback Configure Basic Offering Configure Discount and Promotion Offering Configure Network Service Offering Perform PC Propagation Maintain Multiple Resellers Versions Purge and Restore PC Version Revert PC Version Close and Complete Service Order Authenticate User - Product catalog
1.1.2.5 - Service Guiding & Mediation	COM - Process Inbound Records CMCAP Input Usage Records to a Specific Rating Server

3.3.2 Business Process Framework: Level 3 Process Coverage

The following diagram identifies the number of Level 3 processes that were submitted for assessment, for each Level 2 process that was submitted in scope for the Assessment.

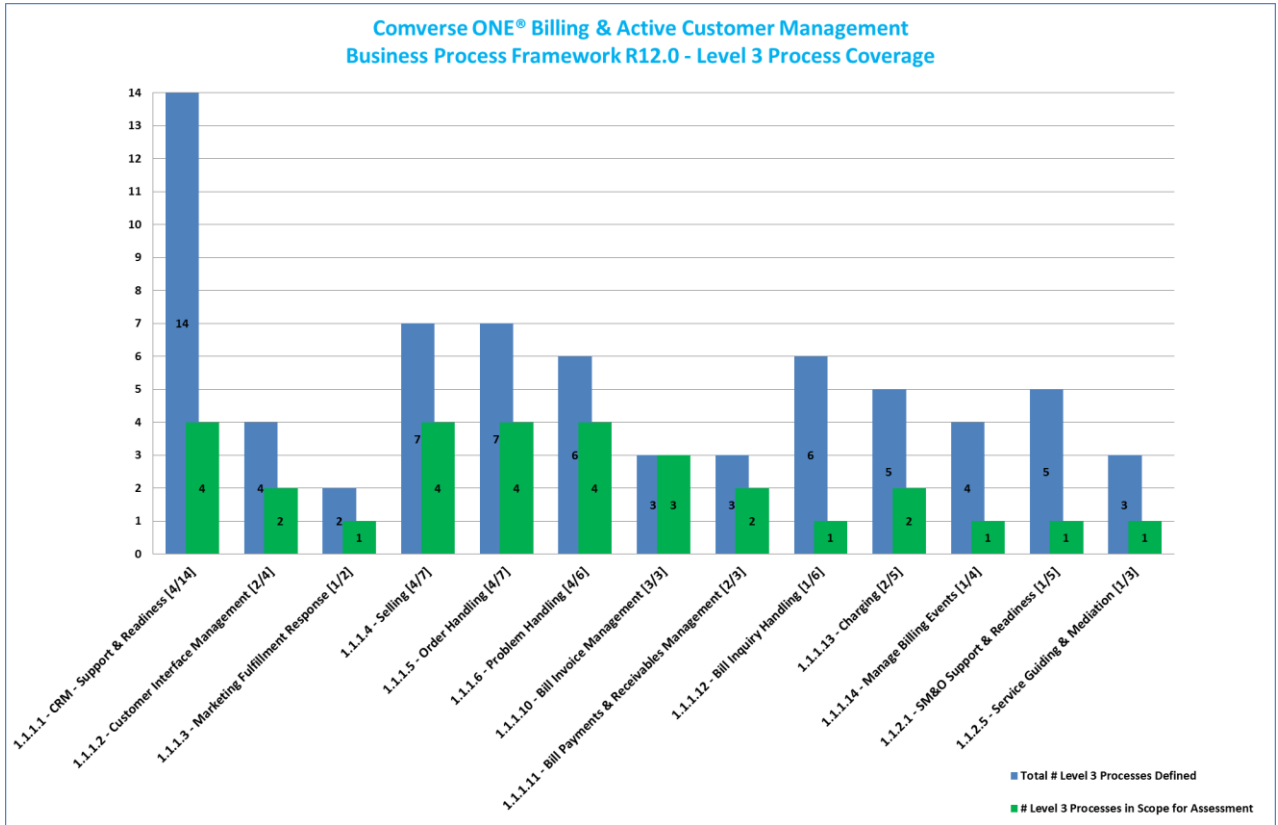


Figure 3.2 - Level 3 process coverage for Comverse ONE Product Assessment

3.4 Product Scope

The diagram in Figure 3.3 represents the Comverse ONE and how it is mapped to the Business Process Framework processes that were assessed as part of this Framework Conformance Assessment.

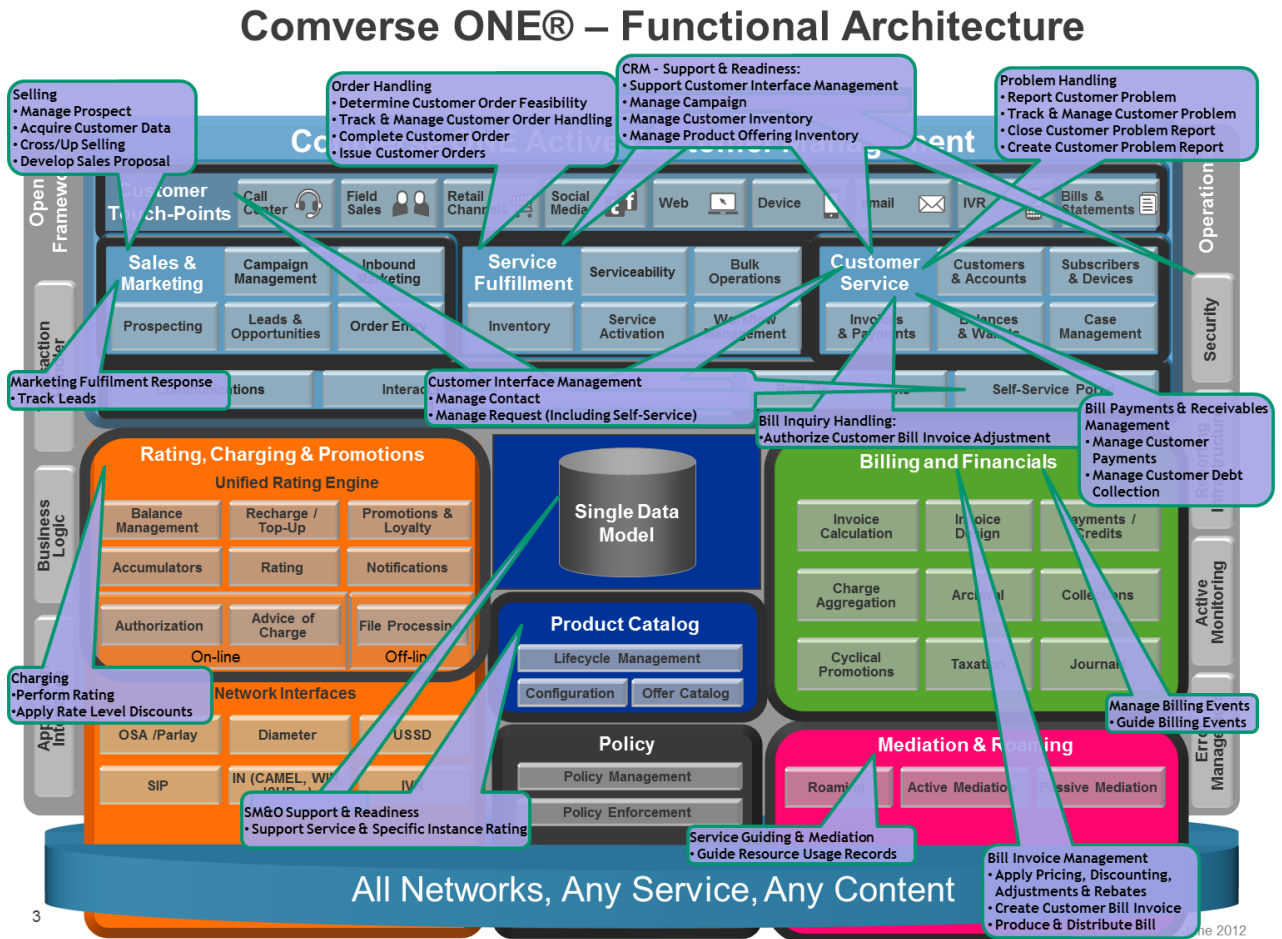


Figure 3.3 - Comverse ONE V3.5 Product Footprint



4 Business Process Framework – Process Mapping Descriptions

This section provides the Process Mapping output from Comverse’ Self-Assessment which was reviewed by TM Forum Subject Matter Experts alongside supporting documentation for the Comverse ONE Billing & Active Customer Management V3.5 Product.

4.1 Level 1: 1.1.1 - Customer Relationship Management

4.1.1 Level 2: 1.1.1.1 - CRM - Support & Readiness

4.1.1.1 Level 3: 1.1.1.1.1 - Support Customer Interface Management

Table 4.1 - Level 3: 1.1.1.1.1 Support Customer Interface Management

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.1.1 Support Customer Interface Management
<p>Extended Description</p> <p>The purpose of the Support Customer Interface Management processes is to ensure that there is capability (for example, information, materials, systems and resource) so that the Customer Interface Management processes can operate effectively when a contact with a customer occurs.</p> <p>1.1.1.1.1.1 Ability to Capture Customer Requests and Contact (Customer Center)[M] 1.1.1.1.1.2 Ability to Capture Customer Request and Contact (IVR)[M] 1.1.1.1.1.3 Ability to Capture Customer Request and Contact (Self-Service)[M]</p> <p>Examples are information on how to handle unusual requests based on temporary situations, systems needed to accept and track customer contacts, requests for the provisioning of additional resources where it has been identified that current levels will impact on timely contact handling.</p> <p>These processes are responsible for implementing generic and specific changes to customer interfaces. This support could be in updating agent scripts, IVR announcements, Web pages.</p> <p>1.1.1.1.1.1 Ability to Capture Customer Requests and Contact (Customer Center) [M] 1.1.1.1.1.2 Ability to Capture Customer Request and Contact (IVR)[M] 1.1.1.1.1.3 Ability to Capture Customer Request and Contact (Self-Service)[M]</p> <p>These processes undertake trend analysis on customer contacts, e.g. type, frequency, duration, outcome.</p> <p>1.1.1.2.1.6 View & Update Interaction Session (Customer Center) [AM] 1.1.1.2.1.7 Generate Report on Interactions[AM]</p>



- 4.1.1.2 Level 3: 1.1.1.1.2 - Support Order Handling [not assessed]
- 4.1.1.3 Level 3: 1.1.1.1.3 - Support Problem Handling [not assessed]
- 4.1.1.4 Level 3: 1.1.1.1.5 - Support Retention & Loyalty [not assessed]
- 4.1.1.5 Level 3: 1.1.1.1.6 - Support Marketing Fulfillment [not assessed]
- 4.1.1.6 Level 3: 1.1.1.1.7 - Support Selling [not assessed]
- 4.1.1.7 Level 3: 1.1.1.1.8 - Support Customer QoS/SLA [not assessed]
- 4.1.1.8 Level 3: 1.1.1.1.9 - Manage Campaign

Table 4.2 - Level 3: 1.1.1.1.9 Manage Campaign

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.1.9 Manage Campaign
<p>Extended Description</p> <p>The purpose of the Manage Campaign processes is to manage individual Marketing Campaigns developed by Product Marketing Communications & Promotion processes.</p> <p>1.1.1.1.9.5 Manage Campaign Instances and Feed. [AM] 1.1.1.1.9.3 Configure and Execute Campaign[AM]</p> <p>These processes monitor and undertake trend analysis on the effectiveness of the campaigns</p> <p>1.1.1.1.9.2 Plan Campaign[AM] 1.1.1.1.9.4 Manage Campaign Results[AM]</p> <p>make modifications and report results.</p> <p>1.1.1.1.9.3 Configure and Execute Campaign[AM] 1.1.1.1.9.5 Manage Campaign Instances and Feed[AM] 1.1.1.1.9.4 Manage Campaign Results[AM]</p> <p>Manage Campaign processes ensure that Marketing Fulfillment Response is staffed, trained and equipped appropriately to support the specific campaign, whether direct mail, TV ad, etc</p> <p>1.1.1.1.9.2 Plan Campaign[AM] 1.1.1.1.9.3 Configure and Execute Campaign[AM]</p>

4.1.1.9 Level 3: 1.1.1.1.10 - Manage Customer Inventory

Table 4.3 - Level 4: 1.1.1.1.10.1 Identify Relevant Customer Inventory Information

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.1 Identify Relevant Customer Inventory Information
<p>Identifying the inventory-relevant information requirements to be captured for customers ; [AM]</p> <p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p>



The process for identifying inventory-relevant information is two-fold:

- Where possible, client-required Customer attributes are mapped to standard attributes of the core Comverse ONE Customer data model, in particular to Accounts attributes and Account hierarchy entities such as contacts, offers, bundles, addresses, payment profiles, etc. etc. etc. as described in the Comverse ONE user documentation. See 2.1.1.1.10.3.8.CMV Manage Account Attributes in Customer Inventory and its children (2.1.1.1.10.3.8.1.CMV Manage Account Attributes via CSR Portal and 2.1.1.1.10.3.8.2.CMV Manage Account Attributes via Customer Center) for more information about Account creation. See API Guide Table of Contents for an overview of relevant information provided in the Comverse ONE API documentation.
- Where no such mapping is possible, client-required Customer attributes are mapped to extended attributes of the Comverse ONE Customer data model. See 2.1.1.1.10.7.1.CMV Manage Extended Attributes in Customer Inventory and its children (2.1.1.1.10.7.1.1.CMV Manage Account/Subscriber Extended Attributes and 2.1.1.1.10.7.1.2.CMV Manage Inventory ID Extended Attributes).

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Reserved for future use.

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.4 - Level 4: 1.1.1.1.10.2 Maintain Customer Inventory Facilities

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.2 Maintain Customer Inventory Facilities
<p>Identifying, establishing and maintaining customer inventory repository facilities;[AM]</p> <p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>The customer inventory repository facilities in Comverse ONE comprise the Customer/Dynamic database, other databases that support and extend that database (such as the Product Catalog DB which defines entities which can be assigned to Customer Accounts, or the CRM DB which manages leads and opportunities which can eventually be added to the customer inventory), and the Single API that exposes those databases in a single coherent data model. See API Guide Table of Contents</i></p>



for more background on the Single API. These facilities are established and maintained as part of Comverse ONE installation, initial configuration, and system administration. Initial operations are typically performed by Comverse personnel, though subsequent maintenance is often performed by client personnel. Instructions for installing and maintaining these databases and APIs are documented in Comverse ONE user documentation, in particular the Release Description Document. See

Release Description Document Sample Table of Contents Excerpt for more background about this document.

Although the process involves many scripts and other automated tools, coordinating the entire installation, configuration, and maintenance is fundamentally a manual process.

Note that the same underlying unified databases and APIs support the entire Comverse ONE application and therefore all Comverse ONE supported process elements, not just the Customer Inventory process elements.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Not used for this process element

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.5 - Level 4: 1.1.1.1.10.3 Manage Customer Inventory Capture

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.3 Manage Customer Inventory Capture
Establishing and managing the customer inventory management and information capture processes;
[AM]
<p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>A major subset of the Comverse ONE GUIs and APIs are devoted to the capture and management of customer inventory – creating customer Accounts and Account hierarchy entities such as subscribers, offers, bundles, contracts, and so forth. The majority of these processes involve a combination of manual operations initiated or performed by CSRs or other service provider personnel, and</i></p>

automated operations instantiated by GUI and API code. Ctrl-Click on the following for details:

- 2.1.1.1.10.2.1.1.CMV Maintain Customer Inventory through Customer Center
- 2.1.1.1.10.2.1.2.CMV Maintain Customer Inventory through IVR
- 2.1.1.1.10.2.1.3.CMV Maintain Customer Inventory through Self-Service
- 2.1.1.1.10.2.1.4.CMV Maintain Customer Inventory through CSR Portal
- 2.1.1.1.10.2.1.5.CMV Maintain Customer Inventory through Channel
- 2.1.1.1.10.2.1.6.CMV Maintain Customer Inventory through API/Third Party
- 2.1.1.1.10.2.2.1.CMV Maintain Order Handling through Self-Service
- 2.1.1.1.10.2.2.2.CMV Maintain Order Handling through API/Third Party
- 2.1.1.1.10.2.2.3.CMV Maintain Order Handling through IVR/USSD
- 2.1.1.1.10.2.2.4.CMV Maintain Order Handling through Bulk Processing
- 2.1.1.1.10.2.2.5.CMV Maintain Order Handling through CSR
- 2.1.1.1.10.3.1.1.CMV Add Account via CSS
- 2.1.1.1.10.3.1.2.CMV Add Account via Customer Center
- 2.1.1.1.10.3.1.3.CMV Add Account via CSR Portal/Channel
- 2.1.1.1.10.3.1.4.CMV Validate Product and Inventory Selections
- 2.1.1.1.10.3.10.CMV Provide Access to Customer Profile
- 2.1.1.1.10.3.11.1.CMV Identify Contact via CSR Portal
- 2.1.1.1.10.3.11.2.CMV Identify Contact via Customer Center
- 2.1.1.1.10.3.11.3.CMV Identify Contact via IVR
- 2.1.1.1.10.3.11.4.CMV Identify Contact via Self-Service
- 2.1.1.1.10.3.11.CMV Identify Contact in Customer Inventory
- 2.1.1.1.10.3.12.CMV Provide Access to Customer Interactions
- 2.1.1.1.10.3.2.1.CMV Select Disconnect Options for Fees, Charges, and Refinance Plan
- 2.1.1.1.10.3.2.2.CMV Remove Account via CSR Portal
- 2.1.1.1.10.3.2.3.CMV Remove Account via Customer Center
- 2.1.1.1.10.3.3.CMV Swap Account Bundle in Customer Inventory
- 2.1.1.1.10.3.4.1.CMV Add Account Offer via CSR Portal
- 2.1.1.1.10.3.4.2.CMV Add Account Offer via CSS
- 2.1.1.1.10.3.4.3.CMV Add Account Offer via Customer Center
- 2.1.1.1.10.3.5.1.CMV Disconnect Account Offer via CSR Portal
- 2.1.1.1.10.3.5.2.CMV Disconnect Account Offer via CSS
- 2.1.1.1.10.3.5.3.CMV Disconnect Account Offer via Customer Center
- 2.1.1.1.10.3.5.CMV Disconnect Account Offer in Customer Inventory
- 2.1.1.1.10.3.6.1.CMV Disconnect Account Bundle via Customer Center
- 2.1.1.1.10.3.6.2.CMV Disconnect Account Bundle via CSR Portal
- 2.1.1.1.10.3.6.CMV Disconnect Account Bundle in Customer Inventory
- 2.1.1.1.10.3.8.1.CMV Manage Account Attributes via CSR Portal
- 2.1.1.1.10.3.8.2.CMV Manage Account Attributes via Customer Center
- 2.1.1.1.10.3.8.CMV Manage Account Attributes in Customer Inventory
- 2.1.1.1.10.3.9.1.CMV Retrieve Customer via CSS
- 2.1.1.1.10.3.9.2.CMV Retrieve Customer via CSM
- 2.1.1.1.10.3.9.3.CMV Retrieve Customer via CRM

<ul style="list-style-type: none"> • 2.1.1.1.10.3.9.4.CMV Retrieve Customer via Invoice • 2.1.1.1.10.3.9.CMV Retrieve Customer from Inventory <p>Extended Description</p> <p>Not used for this process element</p> <p>Explanatory</p> <p>Not used for this process element</p> <p>Mandatory</p> <p>Not used for this process element</p> <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>

Table 4.6 - Level 4: 1.1.1.1.10.4 Control Customer Inventory Access

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.4 Control Customer Inventory Access
<p style="background-color: #00FF00; padding: 2px;">Managing the registration and access control processes that enable processes to create, modify, update, delete and/or download customer data to and from the customer inventory; [AM]</p> <p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>As noted above, Comverse ONE is built around a common database and API that expose a unified data model, including but not limited to Customer inventory, and associated methods. Part of that common model is a Security Server that manages security policy and user authentication and authorization for all of Comverse ONE. See the following for more details:</i></p> <ul style="list-style-type: none"> • 2.1.1.1.10.4.1.CMV Define Security Policy • 2.1.1.1.10.4.10.CMV Manage User Roles • 2.1.1.1.10.4.11.CMV Manage Audit Records • 2.1.1.1.10.4.12.CMV Generate Reports for Auditing • 2.1.1.1.10.4.2.CMV Define Security Rules • 2.1.1.1.10.4.3.CMV Maintain and Expose Security Policy/Rules • 2.1.1.1.10.4.4.CMV Manage Password Policies

- *2.1.1.1.10.4.5.CMV Manage User Realm*
- *2.1.1.1.10.4.6.CMV Manage User Grouping*
- *2.1.1.1.10.4.7.1.CMV Manage Users - Outbound Marketing*
- *2.1.1.1.10.4.7.2.CMV Manage Users (non-OM) via Command Line*
- *2.1.1.1.10.4.7.3.CMV Manage Users (non-OM) via Bulk Load*
- *2.1.1.1.10.4.7.4.CMV Manage Users (non-OM) via Security Admin UI*
- *2.1.1.1.10.4.7.CMV Manage Users*
- *2.1.1.1.10.4.8.1.CMV Authenticate User via Back-Office GUI*
- *2.1.1.1.10.4.8.2.CMV Authenticate User via Customer Center*
- *2.1.1.1.10.4.8.3.CMV Authenticate User via OM UI*
- *2.1.1.1.10.4.8.4.CMV Authenticate User via Product Catalog*
- *2.1.1.1.10.4.8.5.CMV Authenticate User via Sales UI*
- *2.1.1.1.10.4.8.6.CMV Authenticate User via Services UI*
- *2.1.1.1.10.4.8.CMV Authenticate User*
- *2.1.1.1.10.4.9.1.CMV Authorize Non-Outbound-Management User*
- *2.1.1.1.10.4.9.2.CMV Authorize Outbound Management UI User*
- *2.1.1.1.10.4.9.CMV Authorize User*

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Not used for this process element

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.7 - Level 4: 1.1.1.1.10.5 Ensure Customer Inventory Data Quality

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.5 Ensure Customer Inventory Data Quality
<p>Ensuring the customer inventory repository accurately captures and records all identified customer details, through use of automated or manual audits. Monitoring and reporting on the quality of the data maintained in the inventory. The customer inventory maintains records of all customers, their interactions with the enterprise, any contracts established, and any other customer related-information, required to support CRM and other processes. [AM]</p> <p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>The Customer data model in which the Comverse ONE Customer Inventory resides is instantiated in an Oracle database system, which automatically maintains records of all customer accounts and all transactions against those accounts, of any sort.</i></p> <p><i>Each customer is represented within a Customer Database using a Customer Master File record, which also includes associated contact information and other details. Interactions with the customer are tracked through Orders; in some cases they are also tracked through Interactions stored in the Sales&Service Database. Contracts are represented as Items within Offers within Bundles attached to either the customer or to Services/Subscriptions attached to the customer. Other customer-related information such as additional Contacts, generated Invoices, received Payments, open and closed Balances, Payment Profiles, etc. etc. etc. are similarly maintained within the Customer Database (and in some cases also within the Sales&Service Database).</i></p> <p><i>The records representing Customers, Orders, Interactions, Items, Offers, Bundles, Services/Subscriptions, Contacts, Invoices, Payments, Balances, Payment Profiles, and other customer-related entities are stored within corresponding tables in the Customer (and in some cases Sales&Service) Database. For example, each Customer Master File record is stored in the CMF table with a unique account_no, each Service/Subscription is stored in the SERVICES table with a unique subscr_no/subscr_no_resets combination, and so on and so forth. Associations among records are stored as relational database joins using these unique identifiers.</i></p> <p><i>These records are exposed via a common API. For example, each record in the CMF table is exposed as an Account object in the API, which supports methods for searching, selecting, updating, disconnecting, and performing other customer-related operations. Each SERVICES record is similarly exposed as a Service object in the API, which includes a reference to the parent Account. And so on and so forth.</i></p> <p><i>Although both the database and the API support various kinds of manual and automatic reporting as required, the integrity of the Customer Inventory is primarily maintained on an ongoing basis through database triggers and business logic within API objects, as well as additional business logic within the CRM processes, that either enforce or automatically create requisite relationships – for example, making sure that when a Customer Account is created or modified, the child objects and key attributes on which downstream processes depend are properly set, and marking the Account in error (and thus refusing to allow it into the Customer Inventory) otherwise. There are therefore no specific processes for ensuring data quality; ensuring data quality is an ongoing distributed process</i></p>



implemented as part of the validation steps performed in all the other Customer Inventory processes.

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Not used for this process element

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.8 - Level 4: 1.1.1.1.10.6 Track Customer Inventory Usage

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.6 Track Customer Inventory Usage
<p>Tracking and monitoring of the usage of, and access to, the customer inventory repository and associated costs, and reporting on the findings [M]</p> <p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>The Customer data model in which the Comverse ONE Customer Inventory resides is instantiated in an Oracle database and exposed via a common API. The primary costs associated with usage of and access to the customer inventory repository are therefore those associated with storage and backup of customer data, and with maintaining the requisite database connections.</i></p> <p><i>The process for determining these costs is built around a Sizing Profile (ctrl-click to see Input Sizing Profile – Sample Excerpt and Output Sizing Profile – Sample Excerpt). As the parameters that contribute to the required sizing change, or as normal system administration processes determine that available space or available connections are becoming an operationally constraining factor, the Sizing Profile is adjusted to reflect the new parameters and sizing recommendations are revised accordingly. The Sizing Profile and similar tools also take these parameters into consideration to recommend staffing levels based on expected customer base, expected costs based on platform properties (e.g., high-availability platforms are typically significantly more expensive than other platforms, but are required for certain operations such as call authorization), and other related factors.</i></p> <p>Extended Description</p>



Not used for this process element
Explanatory
Not used for this process element
Mandatory
Not used for this process element
Optional
Not used for this process element
Interactions
Not used for this process element

Table 4.9 – Level 4: 1.1.1.1.10.7 Identify Customer Inventory Shortcomings

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.1.10.7 Identify Customer Inventory Shortcomings
Identifying any technical driven shortcomings of the customer inventory repository, and providing input to Resource Development & Management processes to rectify these issues. [M]
<p><i>Note: since this element has no other attributes defined, we are mapping to the Brief Description.</i></p> <p><i>Where possible, client-required Customer attributes are mapped to standard attributes of the core Comverse ONE Customer data model. However, where no such mapping is possible, client-required Customer attributes are mapped to extended attributes of the Comverse ONE Customer data model. See 2.1.1.1.10.7.1.CMV Manage Extended Attributes in Customer Inventory and children. This allows shortcomings in the core customer inventory to be identified and resolved as part of the initial configuration of Comverse ONE for a deployment.</i></p> <p><i>Note that extended data attributes can be added to the customer data model even after a deployment has gone live, if shortcomings are discovered later (or if the provider’s needs change).</i></p> <p><i>It’s perhaps also worth noting that the single API can be extended through dynamic linkage with other data stores to supplement the information in the Comverse ONE customer repository, although the specifics of this process is highly dependent on the specifics of a service provider’s needs and their existing information systems.</i></p> <p><i>Other technical driven shortcomings related to throughput, latency, availability, security, auditability, usability, and other functional and non-functional considerations do not have a specialized handling process for customer inventory. They are instead handled as a subset of the more general process for raising and resolving defects against the Comverse ONE code base, or requesting and implementing features against it. This is because, since the customer inventory is implemented as a subset of the database and APIs, such defects tend not to be localized to customer inventory, nor do their solutions.</i></p>

Extended Description

Not used for this process element

Explanatory

Not used for this process element

Mandatory

Not used for this process element

Optional

Not used for this process element

Interactions

Not used for this process element

4.1.1.10 Level 3: 1.1.1.1.11 - Manage Product Offering Inventory

Table 4.10 - Level 3: 1.1.1.1.11 Manage Product Offering Inventory

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.1.11 Manage Product Offering Inventory
<p>Extended Description</p> <p>The purpose of the Manage Product Offering Inventory processes are twofold - establish, manage and administer the enterprise's product offering inventory, as embodied in the Product Offering Inventory Database.</p> <p>1.1.1.1.11.1 Creating New Offering in the system [AM] 1.1.1.1.11.11 Bulk Load - Configuration Entities [A] 1.1.1.1.11.2 Maintain the Offering information up-to-date [AM] 1.1.1.1.11.3 Expire the available Offering [AM] 1.1.1.1.11.10 Assigning Offer/Product to Dealers[AM] 1.1.1.1.11.5 Managing Resellers [AM] 1.1.1.1.11.7 Managing Region [AM] 1.1.1.1.11.8 Assigning Reseller-Region relationship [AM] 1.1.1.1.11.9 Assigning Region-Product Relationship [AM] 1.1.2.1.5.1 Configure Basic System Infrastructure Objects [AM] 1.1.2.1.5.2 Configure Basic Offering [AM] 1.1.2.1.5.3 Configure Discount and Promotion Offering [AM] 1.1.2.1.5.4 Configure Network Service Offering [AM] 1.1.2.1.5.5 Perform PC Propagation [A]</p> <p>and monitor and report on the usage and access to the product offering inventory, and the quality of the data maintained in it.</p>

1.1.1.1.11.4 Report the changes of offering[A]
Comverse.2.1.1.2.2.4 Authenticate User - Product Catalog [A]

The product offering inventory maintains records of all product offerings, their interactions with the enterprise, and any other product offering related- information, required to support CRM and other processes.

1.1.1.1.11.1 Creating New Offering in the system [AM]
1.1.1.1.11.11 Bulk Load - Configuration Entities [A]
1.1.1.1.11.2 Maintain the Offering information up-to-date [AM]
1.1.1.1.11.3 Expire the available Offering [AM]
1.1.1.1.11.10 Assigning Offer/Product to Dealers[AM]
1.1.1.1.11.5 Managing Resellers [AM]
1.1.1.1.11.7 Managing Region [AM]
1.1.1.1.11.8 Assigning Reseller-Region relationship [AM]
1.1.1.1.11.9 Assigning Region-Product Relationship [AM]
1.1.2.1.5.1 Configure Basic System Infrastructure Objects [AM]
1.1.2.1.5.2 Configure Basic Offering [AM]
1.1.2.1.5.3 Configure Discount and Promotion Offering [AM]
1.1.2.1.5.4 Configure Network Service Offering [AM]
1.1.2.1.5.5 Perform PC Propagation [A]

The product offering inventory is also responsible for maintaining the association between customers and purchased product offering instances, created as a result of the Order Handling processes.

1.1.1.5.6.2 Add Account-Level Offer Customer Center[AM]
1.1.1.5.6.4 Add New subscriber with Primary Offer (or one or more Supplementary Offer along with it) - Customer Center [AM]
1.1.1.5.6.12 Subscriber Change - Swap Primary Offer - Customer Center[AM]
1.1.1.5.6.17 Account Change - Disconnect Account Offer - CSR [AM]
1.1.1.5.6.19 Subscriber Change - Disconnect Supplementary Offer - Customer Center[AM]
1.1.1.5.6.2 Add Account-Level Offer Customer Center[AM]

Responsibilities of these processes include, but are not limited to:

- Identifying the inventory-relevant information requirements to be captured for product offerings ;

1.1.2.1.5.1 Configure Basic System Infrastructure Objects [AM]
1.1.2.1.5.2 Configure Basic Offering [AM]
1.1.2.1.5.3 Configure Discount and Promotion Offering [AM]
1.1.2.1.5.4 Configure Network Service Offering [AM]
1.1.1.1.11.11 Bulk Load - Configuration Entities [A]

- Identifying, establishing and maintaining product offering inventory repository facilities;

1.1.1.1.11.10 Assigning Offer/Product to Dealers[AM]
1.1.1.1.11.5 Managing Resellers [AM]
1.1.1.1.11.7 Managing Region [AM]
1.1.1.1.11.8 Assigning Reseller-Region relationship [AM]
1.1.1.1.11.9 Assigning Region-Product Relationship [AM]
1.1.2.1.5.5 Perform PC Propagation [A]
1.1.1.1.11.1 Creating New Offering in the system [AM]
1.1.1.1.11.13 - Set-up Product Catalog and maintain [AM]

- Establishing and managing the product offering inventory management and information capture processes;

- Managing the registration and access control processes that enable processes to create, modify, update, delete and/or download product offering data to and from the product offering inventory;

1.1.1.1.11.1 Creating New Offering in the system [AM]
1.1.1.1.11.11 Bulk Load - Configuration Entities [A]
1.1.1.1.11.2 Maintain the Offering information up-to-date [AM]
1.1.1.1.11.3 Expire the available Offering [AM]
Comverse.2.1.1.2.2.4 Authenticate User - Product Catalog [A]
1.1.2.1.5.5 Perform PC Propagation [A]

- Ensuring the product offering inventory repository accurately captures and records all identified product offering details, through use of automated or manual audits;

1.1.1.1.11.1 Creating New Offering in the system [AM]
1.1.1.1.11.11 Bulk Load - Configuration Entities [A]
1.1.2.1.5.5 Perform PC Propagation [AM]

Tracking and monitoring of the usage of, and access to, the product offering inventory repository and associated costs, and reporting on the findings; and

1.1.1.1.11.4 Report the changes of offering[A]
Comverse.2.1.1.2.2.4 Authenticate User - Product Catalog [A]

Identifying any technical driven shortcomings of the product offering inventory repository, and providing input to Resource Development & Management processes to rectify these issues.

1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM]

4.1.1.11 Level 3: 1.1.1.1.12 - Manage Sales Inventory [not assessed]

4.1.1.12 Level 3: 1.1.1.1.13 - Support Bill Invoice Management [not assessed]

4.1.1.13 Level 3: 1.1.1.1.14 - Support Bill Payments & Receivables Management [not assessed]

4.1.1.14 Level 3: 1.1.1.1.15 - Support Bill Inquiry Handling [not assessed]

4.1.1.15 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.1.16 Level 2: 1.1.1.1 - CRM - Support & Readiness - Scores

Table 4.11 - Level 2: 1.1.1.1 - CRM - Support & Readiness - Scores

Level 2: 1.1.1.1 - CRM - Support & Readiness [4/14]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
1.1.1.1.1 - Support Customer Interface Management [4/14]		5
	1.1.1.1.1.1 Ensure Customer Interface Capability	100%
	1.1.1.1.1.2 Undertake Customer Contacts Trend Analysis	100%
1.1.1.1.2 - Support Order Handling		0
1.1.1.1.3 - Support Problem Handling		0
1.1.1.1.5 - Support Retention & Loyalty		0
1.1.1.1.6 - Support Marketing Fulfillment		0
1.1.1.1.7 - Support Selling		0
1.1.1.1.8 - Support Customer QoS/SLA		0
1.1.1.1.9 - Manage Campaign		5
	1.1.1.1.9.1 Ensure Campaign Support	100%
	1.1.1.1.9.2 Undertake Campaign Trend Analysis	100%
	1.1.1.1.9.3 Modify Campaign	100%
	1.1.1.1.9.4 Report Campaign Effectiveness	100%
1.1.1.1.10 - Manage Customer Inventory		5
	1.1.1.1.10.1 Identify Relevant Customer Inventory Information	100%
	1.1.1.1.10.2 Maintain Customer Inventory facilities	100%
	1.1.1.1.10.3 Manage Customer Inventory Capture	100%
	1.1.1.1.10.4 Control Customer Inventory Access	100%
	1.1.1.1.10.5 Ensure Customer Inventory Data Quality	100%
	1.1.1.1.10.6 Track Customer Inventory Usage	100%
	1.1.1.1.10.7 Identify Customer Inventory Shortcomings	100%
1.1.1.1.11 - Manage Product Offering Inventory		5
	1.1.1.1.11.1 Identify Relevant Product Offering Inventory Information	100%
	1.1.1.1.11.2 Maintain Product Offering Inventory facilities	100%
	1.1.1.1.11.3 Manage Product Offering Inventory Capture	100%
	1.1.1.1.11.4 Control Product Offering Inventory Access	100%
	1.1.1.1.11.5 Ensure Product Offering Inventory Data Quality	100%
	1.1.1.1.11.6 Track Product Offering Inventory Usage	100%
	1.1.1.1.11.7 Identify Product Offering Inventory Shortcomings	100%
1.1.1.1.12 - Manage Sales Inventory		0
1.1.1.1.13 - Support Bill Invoice Management		0
1.1.1.1.14 - Support Bill Payments & Receivables Management		0

1.1.1.1.15 - Support Bill Inquiry Handling	0
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4.1.2 Level 2: 1.1.1.2 - Customer Interface Management**4.1.2.1 Level 3: 1.1.1.2.1 - Manage Contact****Table 4.12 - Level 3: 1.1.1.2.1 - Manage Contact**

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.2.1 - Manage Contact
<p>Extended Description</p> <p>The purpose of this process is to manage all contacts between potential or existing customers and the enterprise.</p> <p>1.1.1.2.1.1 Create new interaction (Customer Center)[AM] 1.1.1.2.1.1 Create new interaction (IVR)[A] 1.1.1.2.1.1 Create new interaction Including Registration (Self-Service)[AM]</p> <p>It deals with the identification of the contact, its development, enhancement and update</p> <p>1.1.1.2.1.1 Create new interaction (Customer Center)[AM] 1.1.1.2.1.1 Create new interaction (IVR)[A] 1.1.1.2.1.1 Create new interaction Including Registration (Self-Service)[AM] 1.1.1.2.1.2 Create Automatic Notes Up On user actions[A] 1.1.1.2.1.3 - Add Manual Notes to Contact - Customer Center[AM] 1.1.1.2.1.6 View & Update Interaction Session (Customer Center)[AM]</p>

4.1.2.2 Level 3: 1.1.1.2.2 - Manage Request (Including Self Service)**Table 4.13 - Level 3: 1.1.1.2.2 - Manage Request (Including Self Service)**

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.2.2 - Manage Request (Including Self Service)
<p>Extended Description</p> <p>The purpose of this process is to manage all requests (inbound and outbound) made by potential and existing customers. It receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request; it manages the status of the request and is able to provide status information at any moment in which the request is active; it formally closes the request when all related activities have been terminated.</p> <p>1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Service UI [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center [AM] 1.1.1.2.2.4 Update task and request status to reflect in progress work activities - Service UI [AM] 1.1.1.2.2.4 Update task information to reflect in progress work activities - Customer Center [AM] 1.1.1.2.2.7 Update request with additional information - Service UI [AM] 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM]</p>

1.1.1.2.2.10 List and View Requests/Problems - Service UI [AM]
1.1.1.2.2.8 Update request status to complete / closed - Customer Center [AM]
1.1.1.2.2.8 Update request status to complete / closed - Service UI [AM]
1.1.1.2.2.7 Update request with additional information - Customer Center [AM]
1.1.1.2.2.7 Update request with additional information - Service UI [AM]
1.1.1.2.2.9 Cancel Request/Problem - Customer Center [AM]
1.1.1.2.2.9 Cancel Request/Problem - Service UI [AM]

4.1.2.3 Level 3: 1.1.1.2.3 - Analyze & Report on Customer [not assessed]

4.1.2.4 Level 3: 1.1.1.2.4 - Mediate & Orchestrate Customer Interactions [not assessed]

4.1.2.5 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.2.6 Level 2: 1.1.1.2 - Customer Interface Management - Scores

Table 4.14 - Level 2: 1.1.1.2 - Customer Interface Management - Scores

Level 2: 1.1.1.2 - Customer Interface Management [2/4]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.2.1 - Manage Contact	5
	1.1.1.2.1.1 Identify Contact	100%
	1.1.1.2.1.2 Develop Contact	100%
	1.1.1.2.2 - Manage Request (Including Self Service)	5
	1.1.1.2.2.1 Handle Request	100%
	1.1.1.2.2.2 Provide Request Status	100%
	1.1.1.2.2.3 Close Request	100%
	1.1.1.2.3 - Analyze & Report on Customer	0
	1.1.1.2.4 - Mediate & Orchestrate Customer Interactions	0



4.1.3 Level 2: 1.1.1.3 - Marketing Fulfillment Response

4.1.3.1 Level 3: 1.1.1.3.1 - Issue & Distribute Marketing Collaterals [not assessed]

4.1.3.2 Level 3: 1.1.1.3.2 - Track Leads

Table 4.15 - Level 3: 1.1.1.3.2 Track Leads

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.3.2 Track Leads
<p>Extended Description</p> <p>The purpose of this process is to identify leads following on from marketing campaign advertising, or those that arise otherwise in the course of business and are collected here.</p> <p>1.1.1.3.2.3 Create Lead B2C (Import Job) [A]</p> <p>1.1.1.3.2.1 Create Prospect B2B [AM]</p> <p>1.1.1.3.2.4 Create Lead B2B (Sales UI) [AM]</p> <p>1.1.1.1.9.3 Configure and Execute Campaign [AM]</p> <p>Leads are tracked,</p> <p>1.1.1.3.2.5 View Lead - Sales UI [AM]</p> <p>1.1.1.3.2.5 View Lead B2C - Customer Center [AM]</p> <p>1.1.1.3.2.8 Report Lead (Sales UI) [AM]</p> <p>1.1.1.4.1.1 Qualify Lead [AM]</p> <p>1.1.1.4.1.2 Cancel Lead (Customer Center) [AM]</p> <p>1.1.1.4.1.2 Cancel Lead (Sales UI) [AM]</p> <p>evaluated and notified to other processes (e.g. Selling) for further action.</p> <p>1.1.1.4.1.1 Qualify Lead [AM]</p> <p>1.1.1.4.1.2 Cancel Lead (Customer Center) [AM]</p> <p>1.1.1.4.1.2 Cancel Lead (Sales UI) [AM]</p>

4.1.4 Level 2: 1.1.1.4 - Selling

4.1.4.1 Level 3: 1.1.1.4.1 - Manage Prospect

Table 4.16 - Level 3: 1.1.1.4.1 - Manage Prospect

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.1 Manage Prospect
<p>Extended Description</p> <p>The purpose of this process is to match assigned leads with the most appropriate products</p> <p>1.1.1.4.1.3 Create B2B Opportunity [AM] 1.1.1.3.2.3 Create Lead B2C (Import Job) [A] 1.1.1.3.2.1 Create Prospect B2B [AM] 1.1.1.3.2.4 Create Lead B2B (Sales UI) [AM] 1.1.1.1.9.3 Configure and Execute Campaign 1.1.1.4.1.1 Qualify Lead</p> <p>and ensure that these prospects are handled appropriately</p> <p>1.1.1.4.1.5 Manage Opportunity Using Defined Sales Process (Update Task and Stage) [AM]</p> <p>These prospects represent a “pipeline” of potential sales, each of which is expressed in terms of the probability of successful sales closure and an estimate of the total attainable revenue</p> <p>The needs of each potential prospect are analyzed</p> <p>1.1.1.4.1.1 Qualify Lead [AM] 1.1.1.4.1.2 Cancel Lead (Customer Center) [AM] 1.1.1.4.1.2 Cancel Lead (Sales UI) [AM]</p> <p>Based on these needs, potential solutions are identified from the service provider’s product portfolio.</p> <p>1.1.1.4.1.3 Create B2B Opportunity [AM]</p> <p>Each prospect is tracked through these processes</p> <p>1.1.1.4.1.5 Manage Opportunity Using Defined Sales Process (Update Task and Stage) [AM]</p> <p>and the outcome (win or loss) of each prospect is reported</p> <p>1.1.1.4.1.6 Update Opportunity to Reflect Deal Outcome [AM] 1.1.1.4.1.7 Update Organization Billing Accounts [AM] 1.1.1.4.1.8 Convert B2C Lead to Order - - Customer Center [AM] 1.1.1.4.1.2 Cancel Lead (Sales UI) [AM] 1.1.1.4.1.2 Cancel Lead (Customer Center) [AM] 1.1.1.4.1.9 Report On Opportunity [AM]</p> <p>Prospects are assigned to the appropriate sales channel</p>

1.1.1.3.2.1 Create Prospect B2B [AM]
 1.1.1.3.2.3 Create Lead B2C (Import Job) [A]
 1.1.1.3.2.1 Create Prospect B2B[AM]
 1.1.1.3.2.4 Create Lead B2B (Sales UI) [AM]

4.1.4.2 Level 3: 1.1.1.4.2 - Qualify Opportunity [not assessed]

4.1.4.3 Level 3: 1.1.1.4.3 - Negotiate Sales/Contract [not assessed]

4.1.4.4 Level 3: 1.1.1.4.4 - Acquire Customer Data

Table 4.17 - Level 3: 1.1.1.4.4 Acquire Customer Data

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.4 Acquire Customer Data
<p>Extended Description</p> <p>The purpose of this process is to capture and record all pertinent customer data required for the initiation, realization and deployment of the agreed sales proposal.</p> <p>1.1.1.3.2.3 Create Lead B2C (Import Job) – [A] 1.1.1.3.2.1 Create Prospect B2B [AM] 1.1.1.4.1.3 Create B2B Opportunity [AM] 1.1.1.3.2.4 Create Lead B2B (Sales UI) [AM] 1.1.1.4.4.6 Finalize the opportunity [AM] 1.1.1.4.1.8 Convert B2C Lead to Order - - Customer Center [AM] 1.1.1.4.6.4 Prepare and Export Proposal [AM]</p> <p>In most standard offerings the necessary customer data is often captured on the sales proposal agreement form associated with the standard offerings.</p> <p>1.1.1.4.6.4 Prepare and Export Proposal [AM] 1.1.1.4.1.1 Qualify Lead [AM]</p> <p>For non-standard and/or complex sales agreements associated, for instance, with a customer RFP, extensive customer information may be required to plan and roll-out the agreed solution. For example, Centrex designs require extensive capture of details surrounding deployment of handsets, features associated with each handset, customer Centrex groups, etc.</p> <p>In some cases the necessary level of precise detail may be available from the Develop Sales Proposal.</p> <p>1.1.1.4.6.4 Prepare and Export Proposal [AM]</p> <p>Where this is not the case, this process is responsible for determining the precise customer information required to support the agreed proposal, capturing (through forms, or customer interviews, etc.) the required customer information, and storing the details in a form required by other processes.]</p> <p>1.1.1.4.1.1 Qualify Lead [AM] 1.1.1.4.1.8 Convert B2C Lead to Order - - Customer Center [AM] 1.1.1.4.4.6 Finalize the opportunity [AM] 1.1.1.4.1.3 Create B2B Opportunity [AM] 1.1.1.4.6.3 Update Opportunity Products and Pricing[AM]</p>



1.1.1.4.4 Review Opportunity (including Proposal Information) [AM]

4.1.4.5 Level 3: 1.1.1.4.5 - Cross/Up Selling

Table 4.18 - Level 3: 1.1.1.4.5 - Cross/Up Selling

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.5 - Cross/Up Selling
<p>Extended Description</p> <p>The purpose of this process is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.</p> <p>1.1.1.4.7.2 Promote Products to Customers - B2B [AM] 1.1.1.4.7.3 Promote Products to Customers - B2C [AM]</p> <p>The ongoing analysis of customer trends (e.g. usage, problems, and complaints) is used to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises.</p> <p>1.1.1.1.9.2 Plan Campaign[AM] . Based on the data collected, more appropriate offerings should be recommended to the customer.</p> <p>1.1.1.1.9.3 Configure and Execute Campaign [AM]</p>

4.1.4.6 Level 3: 1.1.1.4.6 - Develop Sales Proposal

Table 4.19 - Level 3: 1.1.1.4.6 - Develop Sales Proposal

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.6 - Develop Sales Proposal
<p>Extended Description</p> <p>The purpose of this process is to develop a sales proposal to respond to the customer's requirement</p> <p>1.1.1.4.6.4 Prepare and Export Proposal [AM]</p> <p>This process commences following approval by the Qualify Customer process.</p> <p>1.1.1.4.1.1 Qualify Lead [AM] 1.1.1.4.1.5 Manage Opportunity Using Defined Sales Process (Update Task and Stage) [AM]</p> <p>The development of a sales proposal may require the selection of a standard product offering, . 1.1.1.4.6.4 Prepare and Export Proposal [AM] may require the development of a non-standard offering, or</p> <p>1.1.1.4.6.3 Update Opportunity Products and Pricing [AM]</p> <p>may require the creation of a project team to construct an offering in response to a customer's Request For Proposal</p> <p>1.1.1.4.6.1 Create and Manage Product Requests for Custom Products [AM]</p>

In all cases, the processes are responsible for ascertaining the customer's requirements..

1.1.1.4.6.4 Prepare and Export Proposal [AM]

determining the ability of the enterprise to support the customer requirements, and developing a proposal (or proposals) for the customer which meets the stated requirements

1.1.1.4.1.5 Manage Opportunity Using Defined Sales Process (Update Task and Stage) [AM]

These processes assess the extent of enterprise support required to develop the sales proposal, marshal the necessary support across the enterprise and

1.1.1.4.6.1 Create and Manage Product Requests for Custom Products [AM]

administer the sales proposal development activity to ensure that any timing constraints associated with the customer requirements are achieved.

1.1.1.4.1.5 Manage Opportunity Using Defined Sales Process (Update Task and Stage) [AM]

Note that development of a non-standard sales proposal or the response to a customer's RFP may require the development of unique solution designs

1.1.1.4.6.1 Create and Manage Product Requests for Custom Products [AM]

The development of unique solutions, within the context of current deployed capabilities, uses the Design Solutions process within Service Management & Operations to undertake the necessary feasibility studies.

1.1.1.1.11.1 Creating New Offering in the system [AM]

Where current capabilities are not able to support customer's requirements, the Product & Offer Capability Delivery processes are invoked

1.1.1.4.6.1 Create and Manage Product Requests for Custom Products [AM]

to undertake any necessary assessment and business case development.

1.1.1.4.6.1 Create and Manage Product Requests for Custom Products [AM]

1.1.1.1.11.1 Creating New Offering in the system [AM]

4.1.4.7 Level 3: 1.1.1.4.7 - Manage Sales Accounts [not assessed]

4.1.4.8 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.4.9 Level 2: 1.1.1.4 - Selling - Scores

Table 4.20 - Level 2: 1.1.1.4 - Selling - Scores

Level 2: 1.1.1.4 - Selling [4/7]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.4.1 - Manage Prospect	5
	1.1.1.4.3.1 Negotiate Standard Terms & Conditions	100%
	1.1.1.4.3.2 Develop & Negotiate Non-standard Terms & Conditions	100%
	1.1.1.4.3.3 Obtain Customer Agreement	100%
	1.1.1.4.2 - Qualify Opportunity	0
	1.1.1.4.3 - Negotiate Sales/Contract	0
	1.1.1.4.4 - Acquire Customer Data	5
	1.1.1.4.4.1 Determine Required Customer Data	100%
	1.1.1.4.4.2 Capture & Record Customer Data	100%
	1.1.1.4.5 - Cross/Up Selling	5
	1.1.1.4.5.1 Analyze Customer Trends	100%
	1.1.1.4.5.2 Recommend Appropriate Offerings	100%
	1.1.1.4.6 - Develop Sales Proposal	4.3
	1.1.1.4.6.1 - Ascertain Customer Requirements	100%
	1.1.1.4.6.2 - Determine Support for Customer Requirements	50%
	1.1.1.4.6.3 - Develop Proposal against Customer Requirements	50%
	1.1.1.4.7 - Manage Sales Accounts	0

4.1.5 Level 2: 1.1.1.5 - Order Handling

4.1.5.1 Level 3: 1.1.1.5.1 - Determine Customer Order Feasibility

Table 4.21 - Level 3: 1.1.1.5.1 - Determine Customer Order Feasibility

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.5.1 Determine Customer Order Feasibility
<p>Brief description</p> <p>Check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified to a customer. [AM]</p> <p><i>Comverse ONE evaluates a variety of configurable rules (Eligibility, Prerequisite, Exclusion, Transition, Serviceability, Compatibility) in the customer context to determine the availability and feasibility of offerings to that customer.</i></p> <p>Extended description</p> <p>The purpose of the Determine Customer Order Feasibility process is to check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified as part of the standard product offering process flow, to a customer. [AM]</p> <p>These processes invoke requests to SM&O provisioning processes to determine the availability and supportability of product offerings to a customer. [AM]</p> <p>These processes are also responsible for determining whether the offering can be supported by other CRM processes. [AM]</p> <p><i>Comverse ONE implements the above as shown in the following detailed process flows :</i></p> <p>2.1.1.5.1.1.CMV Evaluate eligibility /Pre-requisite/Exclusion/Transition rules against subscriber/account [A]</p> <p>2.1.1.5.1.2.CMV - Evaluate Compatibility templates against existing offering [A]</p> <p>2.1.1.5.1.3.CMV Evaluate Serviceability Rules [A]</p>



4.1.5.2 Level 3: 1.1.1.5.2 - Authorize Credit [not assessed]

4.1.5.3 Level 3: 1.1.1.5.4 - Track & Manage Customer Order Handling

Table 4.22 - Level 3: 1.1.1.5.4 Track & Manage Customer Order Handling

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.5.4.1 Manage Customer Order
<p>Brief Description</p> <p>Schedule, assign and coordinate customer provisioning related activities. Generate the respective service order creation request(s) to Issue Service Orders based on specific customer orders. [AM]</p> <p>Comverse ONE implements the above as shown in the following detailed process flows :</p> <p>2.1.1.5.4.1.1.CMV Order Fulfillment [AM]</p> <p>2.1.1.5.5.2.1.CMV Complete Customer Order [A]</p> <p>Escalate status of customer orders in accordance with local policy. [AM]</p> <p>Comverse ONE implements the above as shown in the following detailed process flows :</p> <p>2.1.1.2.2.1.1.CMV Create Request or Report Problem [AM]</p> <p>2.1.1.5.4.1.2.CMV Cancel Order [AM]</p> <p>2.1.1.5.4.1.3.CMV Cancel Service Order or Order Item [AM]</p> <p>2.1.1.5.4.1.4.CMV Modify Order [AM]</p> <p>2.1.1.5.4.1.5.CMV Modify Service Order [AM]</p> <p>Add additional information to an existing customer order. Modify information in an existing customer order. Cancel a customer order when the initiating sales request is cancelled. [AM]</p> <p>Comverse ONE implements the above as shown in the following detailed process flows :</p> <p>2.1.1.5.4.1.2.CMV Cancel Order [AM]</p> <p>2.1.1.5.4.1.3.CMV Cancel Service Order or Order Item [AM]</p> <p>2.1.1.5.4.1.4.CMV Modify Order [AM]</p> <p>2.1.1.5.4.1.5.CMV Modify Service Order [AM]</p> <p>If some specific product components are delivered directly by suppliers/partners, initiate requests, through S/P Requisition Management, for the delivery by the supplier/partner of the specific product components. [AM]</p> <p>Comverse ONE implements the above as shown in the following detailed process flows :</p> <p>2.1.1.5.4.1.1.CMV Order Fulfillment [AM]</p> <p>Extended Description</p> <p>Not used for this process element</p>



Table 4.23 - Level 3: 1.1.1.5.4.2 Track Customer Order

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.5.4.2 Track Customer Order
<p>Brief Description Undertake necessary tracking of the execution process. Modify the customer order status. Monitor the jeopardy status of customer orders, escalating customer orders as necessary [AM]</p> <p><i>Comverse ONE implements the above as shown in the following detailed process flows :</i></p> <ul style="list-style-type: none"> 2.1.1.5.4.2.1.CMV Track order status through OIU [AM] 2.1.1.5.4.2.2.CMV Track order status through CSS [AM] 2.1.1.5.4.2.3.CMV Track order status through Customer Center [AM] 2.1.1.5.4.2.4.CMV Track order status through Worklist Handler [AM] 2.1.1.5.5.2.2.CMV Perform Workflow (Example Workflow Template) for Account Level Service Order [AM] 2.1.1.5.4.1.4.CMV Modify Order [AM] 2.1.1.5.4.1.5.CMV Modify Service Order [AM] <p>Extended Description Not used for this process element</p>

4.1.5.4 Level 3: 1.1.1.5.5 - Complete Customer Order

Table 4.24 - Level 3: 1.1.1.5.5 Complete Customer Order

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.5.5 Complete Customer Order
<p>Extended Description The purpose of the Complete Customer Order processes is to manage customer information and interactions after customer contracts or associated service orders have been finalized and during the order completion phase. The customer may participate in commissioning or end-to-end testing and then satisfactory delivery. The customer is trained in the functionality and benefits of the solution. These processes are responsible for ensuring that any customer information required by other CRM processes is updated as part of the customer order completion.</p> <ul style="list-style-type: none"> 1.1.1.5.4.1 Order Fulfillment [AM] 1.1.1.5.5.1 Complete Customer Order [A]

4.1.5.5 Level 3: 1.1.1.5.6 - Issue Customer Orders

Table 4.25 - Level 3: 1.1.1.5.6 Issue Customer Order

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.5.6 Issue Customer Order
<p>1.1.1.5.1.1 Evaluate eligibility /Pre-requisite/Exclusion rules/Transition Rules against subscriber/account [A]</p>

- 1.1.1.5.1.2 Evaluate Up-Sell templates against existing offering [A]
- 1.1.1.5.1.3 Evaluate Serviceability Rules [A]
- 1.1.1.5.4.1 Order Fulfillment [A]
- 1.1.1.5.6.36 Manage Extended Attributes at Account/Subscriber/Order [AM]
- 1.1.1.5.5.1 Complete Customer Order [A]

The orchestration, if required, and tracking of the customer order progress is the responsibility of the Track & Manage Customer Order Handling processes.

- 1.1.1.5.4.1 Order Fulfillment [A]
- 1.1.1.5.4.3 Cancel or Modify Order or Order Item – Modify Order [AM]
- 1.1.1.5.4.3 Cancel or Modify Order or Order Item – Modify Service Order [AM]
- 1.1.1.5.4.2 Tracking the Order Status – OIU [AM]
- 1.1.1.5.4.2 Tracking the Order Status – Customer Center [AM]
- 1.1.1.5.4.2 Tracking the Order Status – CSS [AM]
- 1.1.1.5.4.2 Tracking the Order Status – Worklist Handler [AM]
- 1.1.1.5.4.3 Cancel or Modify Order or Order Item – Cancel Order [AM]
- 1.1.1.5.4.3 Cancel or Modify Order or Order Item – Cancel Service Order or Order Item [AM]

4.1.5.6 Level 3: 1.1.1.5.7 - Report Customer Order Handling [not assessed]

4.1.5.7 Level 3: 1.1.1.5.8 - Close Customer Order [not assessed]

4.1.5.8 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.5.9 Level 2: 1.1.1.5 - Order Handling - Scores

Table 4.26 - Level 2: 1.1.1.5 - Order Handling – Scores

Level 2: 1.1.1.5 - Order Handling [7/7]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.5.1 - Determine Customer Order Feasibility	5
	1.1.1.5.2 - Authorize Credit	0
	1.1.1.5.4 - Track & Manage Customer Order Handling	5
	1.1.1.5.4.1 Manage Customer Order	100%
	1.1.1.5.4.2 Track Customer Order	100%
	1.1.1.5.5 - Complete Customer Order	5
	1.1.1.5.5.1 Manage Customer Information	100%
	1.1.1.5.5.2 Manage Customer Interaction	100%
	1.1.1.5.6 - Issue Customer Orders	5
	1.1.1.5.6.1 Assess Customer Order	100%
	1.1.1.5.6.2 Issue Customer Order	100%
	1.1.1.5.7 - Report Customer Order Handling	0
	1.1.1.5.8 - Close Customer Order	0

4.1.6 Level 2: 1.1.1.6 - Problem Handling

4.1.6.1 Level 3: 1.1.1.6.1 - Isolate Customer Problem [not assessed]

4.1.6.2 Level 3: 1.1.1.6.2 - Report Customer Problem

Table 4.27 - Level 3: 1.1.1.6.2 - Report Customer Problem

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.6.2 - Report Customer Problem
<p>Extended Description</p> <p>The objective of the Report Customer Problem processes is to monitor the status of customer problem reports, provide notifications of any changes and provide management reports. These processes are responsible for continuously monitoring the status of customer problem reports and managing notifications to processes and other parties registered to receive notifications of any status changes.</p> <p>1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Customer Center [AM] 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Service UI [AM] 1.1.1.2.2.4 Update task and request status to reflect in progress work activities - Service UI [AM] 1.1.1.2.2.4 Update task information to reflect in progress work activities - Customer Center [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Customer Center [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Service UI [AM] 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM] 1.1.1.2.2.10 List and View Requests/Problems - Service UI [AM] 1.1.1.2.2.12 Generate Report on Request/Problem [AM]</p> <p>Notification lists are managed and maintained by the Support Problem Handling processes. carried out for recovery of normal operation.</p> <p>These processes record, analyze and assess the customer problem report status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Problem Handling process.</p> <p>1.1.1.2.2.12 Generate Report on Request/Problem [AM] 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM] 1.1.1.2.2.10 List and View Requests/Problems - Service UI [AM]</p> <p>These specialized summaries could be creation of specific reports required by customers and/or other specific audiences.</p> <p>These processes will make the necessary reports about the problem that occurred, the root cause and the activities c</p> <p>1.1.1.2.2.12 Generate Report on Request/Problem [AM] 1.1.1.2.2.12 Generate Report on Request/Problem [AM] 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM]</p>

4.1.6.3 Level 3: 1.1.1.6.3 - Track & Manage Customer Problem

Table 4.28 - Level 3: 1.1.1.6.3 - Track & Manage Customer Problem

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.6.3 Track & Manage Customer Problem
<p>Extended Description</p> <p>The purpose of the Track & Manage Customer Problem processes is to ensure that recovery activities are assigned, coordinated and tracked efficiently, and that escalation is invoked as required for any open customer problem reports in jeopardy. Responsibilities of these processes include, but are not limited to</p> <ul style="list-style-type: none"> - Scheduling, assigning and coordinating tracking any recovery activities, and any repair and restoration activities delegated to other processes; <p>1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Service UI [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM] 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Customer Center [AM] 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Service UI [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Customer Center [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Service UI [AM]</p> <ul style="list-style-type: none"> - Generating the respective service trouble report creation request(s) to Create Service Trouble Report based on specific customer problem reports; <p>1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM]</p> <ul style="list-style-type: none"> - Undertake necessary tracking of the execution progress; <p>1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Customer Center [AM] 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Service UI [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Customer Center [AM] 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Service UI [AM] 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM] 1.1.1.2.2.10 List and View Requests/Problems - Service UI [AM] 1.1.1.2.2.12 Generate Report on Request/Problem [AM]</p> <ul style="list-style-type: none"> - Modifying information in an existing customer problem report based on assignments; - Modifying the customer problem report status; <p>1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Service UI [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center [AM] 1.1.1.2.2.7 Update request with additional information - Customer Center [AM]</p>



- 1.1.1.2.2.7 Update request with additional information - Service UI [AM]
- 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Customer Center [AM]
- 1.1.1.2.2.6 Update Task Status to reflect completed tasks – Service UI [AM]
- 1.1.1.2.2.8 Update request status to complete / closed - Customer Center [AM]
- 1.1.1.2.2.8 Update request status to complete / closed - Service UI [AM]
- 1.1.1.2.2.9 Cancel Request/Problem - Customer Center [AM]
- 1.1.1.2.2.9 Cancel Request/Problem - Service UI [AM]

· Canceling a customer problem report when the specific problem was related to an incorrect customer problem report; and

- 1.1.1.2.2.9 Cancel Request/Problem - Customer Center [AM]
- 1.1.1.2.2.9 Cancel Request/Problem - Service UI [AM]

· Monitoring the jeopardy status of open customer problem reports, and escalating customer problem reports as necessary.

- 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Customer Center [AM]
- 1.1.1.2.2.3 Monitor due date of request for jeopardy situations – Service UI [AM]

Note that some specific product and/or service components may be owned and managed by suppliers/partners.

In these cases the Track & Manage Customer Problem process is responsible for initiating requests, through S/P Problem Reporting & Management processes for restoration and recovery by the supplier/partner of the specific service components. These processes will co-ordinate all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence. The Track & Manage Customer Problem processes will also inform the Close Customer Problem processes by modifying the customer problem report status to cleared when the customer problem has been resolved.

- 1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM]
- 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM]
- 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Service UI [AM]
- 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center [AM]

4.1.6.4 Level 3: 1.1.1.6.4 - Close Customer Problem Report

Table 4.29 - Level 3: 1.1.1.6.4 - Close Customer Problem Report

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.6.4 - Close Customer Problem Report
Extended Description
The purpose of the Close Customer Problem Report processes is to close a customer problem report



when the problem affecting the customer is solved. These processes are also responsible for possibly contacting the customer to inquire about the customer's satisfaction with resolution of the problem. These processes monitor the status of all open customer problem reports and recognize that a customer problem report is ready to be closed when the status is changed to cleared.

- 1.1.1.2.2.8 Update request status to complete / closed - Customer Center [AM]
- 1.1.1.2.2.8 Update request status to complete / closed - Service UI [AM]
- 1.1.1.2.2.10 List and View Requests/Problems - Customer Center [AM]
- 1.1.1.2.2.10 List and View Requests/Problems - Service UI [AM]
- 1.1.1.2.2.12 Generate Report on Request/Problem [AM]

4.1.6.5 Level 3: 1.1.1.6.5 - Create Customer Problem Report

Table 4.30 - Level 3: 1.1.1.6.5 - Create Customer Problem Report

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.6.5 - Create Customer Problem Report
<p>Extended Description</p> <p>The objective of the Create Customer Problem Report process is to create a new customer problem report.</p> <ul style="list-style-type: none"> 1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Service UI [AM] 1.1.1.2.2.2 Instantiate and assign tasks to appropriate resource(s) for completion - Customer Center [AM] <p>A new customer problem report may be created as a result of customer contacts indicating a problem with their purchased product offerings or, at the request of analysis undertaken by other processes in the CRM or SM&O horizontal process layers, which detect a failure or degradation which may be impacting customers.</p> <ul style="list-style-type: none"> 1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM] <p>These processes are responsible for capturing all the necessary customer information to be included in the new Customer Problem Report.</p> <ul style="list-style-type: none"> 1.1.1.2.2.1 - Create Request or Report Problem (Customer Center) [AM] 1.1.1.2.2.1 - Create Request or Report Problem (Self-Service) [AM]

4.1.6.6 Level 3: 1.1.1.6.6 - Correct & Recover Customer Problem [not assessed]

4.1.6.7 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.



4.1.6.8 Level 2: 1.1.1.6 - Problem Handling - Scores

Table 4.31 - Level 2: 1.1.1.6 - Problem Handling - Scores



4.1.7 Level 2: 1.1.1.10 - Bill Invoice Management

4.1.7.1 Level 3: 1.1.1.10.1 - Apply Pricing, Discounting, Adjustments & Rebates

Table 4.32 - Level 4: 1.1.1.10.1.1 – Obtain Billing Events

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.1.1 Obtain Billing Events
<p>Brief Description</p> <p>Accept billing events that have been collected, translated, correlated, assembled, guided and service rated before determining the information would be applied to the customer’s bill invoice(s).</p>
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of the Obtain Billing Events process is to ensure that all billing events for services delivered to the customer by the Service Provider are available for processing. This includes events that have been collected, translated, correlated, assembled, guided and service rated.</p>
<p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>This includes events that have been collected, translated, correlated, assembled, guided and service rated.</p>
<p>Mandatory</p> <p>The purpose of the Obtain Billing Events process is to ensure that all billing events for services delivered to the customer by the Service Provider are available for processing. [AM]</p> <p>0[A]</p> <p>2.1.1.10.1.2.2.CMV Apply Late Fees[A]</p> <p>2.1.1.10.1.2.6.CMV Apply (Non-)Recurring Charges and Awards- Online[A]</p> <p>2.1.1.10.1.2.7.CMV Apply (Non-)Recurring Charges and Awards- Batch[A]</p>
<p>Optional</p> <p>Not used for this process element</p>
<p>Interactions</p> <p>Not used for this process element</p>

Table 4.33 - Level 4: 1.1.1.10.1.2 Apply Pricing, Discounting, Adjustments & Rebates to Customer Account

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.1.2 Apply Pricing, Discounting, Adjustments & Rebates to Customer Account
<p>Brief Description</p> <p>Determine the customer account or customer specific pricing, charges, discounts, and taxation that should be delivered to the invoice(s) for the customer.</p>
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping UNLESS “Mandatory” field is not supported.</i></p> <p>The purpose of Determine Customer Account process is to determine the customer account or customer specific pricing, charges, discounts, and taxation that should be delivered to the invoice(s) for the customer and ensure that the each cost item included in customer bill invoice(s) can correspond to a correct account through which customer will pay for the cost item. It ensures that the appropriate taxes, rebates (i.e. missed customer commitments) and credits are applied to the customer’s bill invoice(s). A customer who may have multiple accounts can pay different cost item with different account.</p>
<p>Explanatory</p> <p>It ensures that the appropriate taxes, rebates (i.e. missed customer commitments) and credits are applied to the customer’s bill invoice(s).</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p>
<p>Mandatory</p> <p>The purpose of Determine Customer Account process is to determine the customer account or customer specific pricing, charges, discounts, and taxation that should be delivered to the invoice(s) for the customer and ensure that the each cost item included in customer bill invoice(s) can correspond to a correct account through which customer will pay for the cost item. [AM]</p> <p>2.1.1.10.1.2.1.CMV Apply Bill-Time Promotions [A]</p> <p>2.1.1.10.1.2.2.CMV Apply Late Fees [A]</p> <p>2.1.1.10.1.2.3.CMV Apply Bill-Time Taxes [A]</p> <p>2.1.1.10.1.2.4.CMV Calculate Loyalty Points [A]</p> <p>2.1.1.10.1.2.5.CMV Apply Historic Discounts [A]</p> <p>2.1.1.10.1.2.6.CMV Apply (Non-)Recurring Charges and Awards- Online [A]</p> <p>2.1.1.10.1.2.7.CMV Apply (Non-)Recurring Charges and Awards- Batch [A]</p>



<p>Optional</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>A customer who may have multiple accounts can pay different cost item with different account.</p> <p>Interactions</p> <p>Not used for this process element</p>
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Table 4.34 - Level 4: 1.1.1.10.1.3 Apply Agreed Customer Bill Adjustment

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.1.3 Apply Agreed Customer Bill Adjustment
<p>Brief Description</p> <p>Apply and review any adjustment agreed in the previous billing period and make these included to the bill invoice.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping UNLESS “Mandatory” field is not supported.</i></p> <p>The purpose of the Apply Agreed Customer Bill Adjustment process is to ensure that any adjustments which have been agreed between customer and Service Provider are included in the customer bill invoice. In general, the adjustments are due to errors in customer bill invoices in previous billing periods or problems related to products and services delivered to the customer by the Service Provider or partners.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>In general, the adjustments are due to errors in customer bill invoices in previous billing periods or problems related to products and services delivered to the customer by the Service Provider or partners.</p> <p>Mandatory</p> <p>The purpose of the Apply Agreed Customer Bill Adjustment process is to ensure that any adjustments which have been agreed between customer and Service Provider are included in the customer bill invoice. [AM]</p> <p><i>Note: adjustments due to errors or problems are typically modeled as a special type of billable (credit) transaction and collected alongside other transactions. Other kinds of adjustments (both credit and debit) can be modeled as promotions, discounts, late fees, or additional fees which can be represented as taxes.</i></p> <p>2.1.1.10.1.1.1.CMV Collect Billable Transactions [A]</p>



<p>2.1.1.10.1.2.1.CMV Apply Bill-Time Promotions [A]</p> <p>2.1.1.10.1.2.2.CMV Apply Late Fees [A]</p> <p>2.1.1.10.1.2.3.CMV Apply Bill-Time Taxes [A]</p> <p>2.1.1.10.1.2.5.CMV Apply Historic Discounts [A]</p> <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>

4.1.7.2 Level 3: 1.1.1.10.2 - Create Customer Bill Invoice

Table 4.35 - Level 4: 1.1.1.10.2.1 Render & Format Invoice

<p>LEVEL 4 PROCESS MAPPING DETAILS</p> <p>1.1.1.10.2.1 Render & Format Invoice</p>
<p>Brief Description</p> <p>Render and format the customer bill invoice.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>This process provides formatting of invoices in different ways and to achieve different publishing possibilities, and supports the creation of different invoice formats for different publication media. The process is further responsible for splitting and re-arranging invoices for customers (particularly customers with complex account structures) according to agreements made with these customers.</p> <p>Explanatory</p> <p>Not used for this process element</p> <p>Mandatory</p> <p style="background-color: #00FF00;">This process provides formatting of invoices in different ways and to achieve different publishing possibilities, and supports the creation of different invoice formats for different publication media. The process is further responsible for splitting and re-arranging invoices for customers (particularly customers with complex account structures) according to agreements made with these customers.</p> <p>[AM]</p> <p>2.1.1.10.2.1.4.CMV Create Bill Format [AM]</p> <p>2.1.1.10.2.1.3.CMV Format Invoice [A]</p> <p>Optional</p>



<p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>
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Table 4.36 - Level 4: 1.1.1.10.2.2 Deliver Electronic Invoice

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.2.2 Deliver Electronic Invoice
<p>Brief Description</p> <p>Deliver the electronic copy of an invoice to customers.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Deliver Electronic Invoice process is to deliver the electronic copy of an invoice to customers. The flow of this process can be viewed as an extension of the company’s e-business strategy. In this case, the Service Provider would render an invoice electronically, via the Internet for example.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The flow of this process can be viewed as an extension of the company’s e-business strategy. In this case, the Service Provider would render an invoice electronically, via the Internet for example.</p> <p>Mandatory</p> <p>The purpose of Deliver Electronic Invoice process is to deliver the electronic copy of an invoice to customers. [AM]</p> <p>2.1.1.10.3.4.1.CMV Create Distribution Process [AM]</p> <p>2.1.1.10.2.2.1.CMV Electronic Invoice Distribution [A]</p> <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>

Table 4.37 - Level 4: 1.1.1.10.2.3 Verify Invoice Quality

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.2.3 Verify Invoice Quality
<p>Brief Description</p> <p>Verify invoice quality before distribution to the customer in electronic form and the process responsible for physical invoice production and distribution.</p>
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Verify Invoice Quality process is to verify invoice quality prior to distribution to the customer in electronic form, or to the process responsible for physical invoice production and distribution. Verifying invoice quality is either a manual operation or an automatic behaviour. The process is responsible for ensuring the invoice format and content can meet customer requirements. When verifying invoice quality is failed, the process is also responsible for sending the invoice back to another process to reprocess.</p>
<p>Explanatory</p> <p>Not used for this process element</p>
<p>Mandatory</p> <p>The purpose of Verify Invoice Quality process is to verify invoice quality prior to distribution to the customer in electronic form, or to the process responsible for physical invoice production and distribution. Verifying invoice quality is either a manual operation or an automatic behaviour. The process is responsible for ensuring the invoice format and content can meet customer requirements. When verifying invoice quality is failed, the process is also responsible for sending the invoice back to another process to reprocess. [AM]</p> <p>2.1.1.10.2.3.1.CMV Invoice QA/QC [AM]</p> <p>2.1.1.10.2.4.2.CMV Back Out Invoice[AM]</p>
<p>Optional</p> <p>Not used for this process element</p>
<p>Interactions</p> <p>Not used for this process element</p>

Table 4.38 - Level 4: 1.1.1.10.2.4 Manage Customer Invoice Archive

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.2.4 Manage Customer Invoice Archive
<p>Brief Description</p> <p>Store the customer invoice for a period of time is to address regulation and/or internal requirements, during which they can be accessed to support any customer or regulator agency inquiries on bill invoices.</p>
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Management Customer Invoice Archive process is to store the customer invoice for a period of time, to perform regulation and/or serve internal requirements, during which they can be accessed to support any customer or regulator agency inquiries on bill invoices, and the process is further responsible for archiving the customer invoices to historical customer invoice after a period of time according to Service Provider's management requirements. Furthermore the process is responsible for managing and maintaining archiving cycle.</p>
<p>Explanatory</p> <p>Not used for this process element</p>
<p>Mandatory</p> <p>The purpose of Management Customer Invoice Archive process is to store the customer invoice for a period of time, to perform regulation and/or serve internal requirements, during which they can be accessed to support any customer or regulator agency inquiries on bill invoices, and the process is further responsible for archiving the customer invoices to historical customer invoice after a period of time according to Service Provider's management requirements. Furthermore the process is responsible for managing and maintaining archiving cycle. [AM]</p>
<p>2.1.1.10.2.4.1.CMV Reissue Invoice [AM]</p> <p>Clarification: Note that invoices, once stored in the database as described in 2.1.1.10.1.1.2.CMV Create Invoice Data Structure - Production, Cyclical and 2.1.1.10.1.1.3.CMV Create Invoice Data Structure - Production, Interim, remain in the database (and available for reissue and inquiry) until explicitly archived or purged. No additional steps to ensure continued storage are necessary; persistent storage is the default behavior.</p> <p>Archive Invoice [A]</p> <p>Restore Invoice [AM]</p> <p>Archiving invoices is handled automatically via the Comverse ONE Archiver, which maintains the archiving cycle, identifies invoice DB records eligible for archiving, creates ASCII archive files, ensures that all the DB records for a given invoice are archived into a single archive file set, and supports restoring of archived invoice records into temporary database storage for review. See the Comverse ONE Billing Technical Reference for more information about configuring and running the Comverse</p>

<p>ONE Archiver.</p> <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>
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4.1.7.3 Level 3: 1.1.1.10.3 - Produce & Distribute Bill

Table 4.39 - Level 4: 1.1.1.10.3.1 Co-ordinate Billing Insertion

<p>LEVEL 4 PROCESS MAPPING DETAILS</p> <p>1.1.1.10.3.1 Co-ordinate Billing Insertion</p>
<p>Brief Description</p> <p>Co-ordinate with promotional processes for any billing insertions to be included with the bill.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Co-ordinate Billing Insertion process is to co-ordinate with promotional processes for any billing insertions to be included with the bill. This process is responsible for determining the content of insertion and the position of insertion in invoice. The insertion can be the service information provided by Service Provider, advertisements and recommendation of billing for customers. This process is also responsible for ensuring the billing insertion attracting the customer interests and not leading to customer complaints. This process can base customer feedbacks on the insertion to adjust or remove the insertion.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Co-ordinate Billing Insertion process is to co-ordinate with promotional processes for any billing insertions to be included with the bill.</p> <p>Mandatory</p> <p>This process is responsible for determining the content of insertion and the position of insertion in invoice. The insertion can be the service information provided by Service Provider, advertisements and recommendation of billing for customers. This process is also responsible for ensuring the billing insertion attracting the customer interests and not leading to customer complaints. [AM]</p> <p>2.1.1.10.1.1.2.CMV Create Invoice Data Structure - Production, Cyclical[A]</p> <p>2.1.1.10.1.1.3.CMV Create Invoice Data Structure - Production, Interim[A]</p>



<p>2.1.1.10.2.1.3.CMV Format Invoice[A]</p> <p>2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]</p> <p>Clarification: <i>The Comverse ONE invoice creation process automatically adds appropriate insert codes to each unformatted invoice, which are then included on the formatted bill and can be used to control insertions by a third party.</i></p> <p>Optional</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>This process can base customer feedbacks on the insertion to adjust or remove the insertion.</p> <p>Interactions</p> <p>Not used for this process element</p>

Table 4.40 - Level 4: 1.1.1.10.3.2 Establish & Manage Bill Production Cycle

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.3.2 Establish & Manage Bill Production Cycle
<p>Brief Description</p> <p>Establish and manage the physical bill production cycle.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Establish & Manage Bill Production Cycle process is to establish and manage the physical bill production cycle. This process is responsible for identifying the deadline of the customer requiring physical bill productions, time cycle for producing and distributing to ensure that the physical bill production can be received by the customer on time. This process is responsible for ensuring that physical bills are produced in time to be received by customers on time. This process takes production and distribution cycle timing into account when establishing bill production schedules.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Establish & Manage Bill Production Cycle process is to establish and manage the physical bill production cycle.</p> <p>Mandatory</p> <p>This process is responsible for identifying the deadline of the customer requiring physical bill productions, time cycle for producing and distributing to ensure that the physical bill production can be received by the customer on time. This process is responsible for ensuring that physical bills are</p>



produced in time to be received by customers on time. This process takes production and distribution cycle timing into account when establishing bill production schedules. [AM]

2.1.1.10.1.1.2.CMV Create Invoice Data Structure - Production, Cyclical[A]

2.1.1.10.2.1.3.CMV Format Invoice[A]

2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]

Clarification: 2.1.1.10.1.1.2.CMV Create Invoice Data Structure - Production, Cyclical determines, as part of selecting billable accounts, which customers are due to be billed on that day based on the corresponding account bill cycle. The bill cycle also incorporates a collection delay period to account for network latency, and specifies the payment due date to ensure that payment-due schedules are consistent with distribution schedules. All of these dates and delay periods are separately configured for each scheduled bill in order to account for variations in schedules (e.g. holidays). Additionally, 2.1.1.10.2.1.3.CMV Format Invoice determines how long to wait before formatting (to account for automatic bill payments, if any, which are to be reported on the formatted invoice).

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.41 - Level 4: 1.1.1.10.3.3 Deliver Invoice Information

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.3.3 Deliver Invoice Information
<p>Brief Description</p> <p>Deliver the invoice information to the physical production processes.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of the Deliver Invoice Information process is to ensure that the invoice information can be delivered to invoice physical production process. The invoice information includes both billing information and insertion information. This process is also responsible for monitoring the status of information delivery channel and ensuring the channel availability.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The invoice information includes both billing information and insertion information.</p>



Mandatory

The purpose of the Deliver Invoice Information process is to ensure that the invoice information can be delivered to invoice physical production process. This process is also responsible for monitoring the status of information delivery channel and ensuring the channel availability. [AM]

2.1.1.10.2.1.3.CMV Format Invoice[A]

2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]

Clarification: Comverse ONE produces invoice files and provides integration points to distribute them to third-party interfaces so that they can complete physical production. Comverse ONE monitors the status of the invoice production and delivery to the third party; subsequent monitoring is the responsibility of the third party.

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.42 - Level 4: 1.1.1.10.3.4 Administer Commercial Arrangement for Production and Distribution Capability

LEVEL 4 PROCESS MAPPING DETAILS
1.1.1.10.3.4 Administer Commercial Arrangement for Production and Distribution Capability
<p>Brief Description</p> <p>Establish the requirements for, and manage the agreed commercial arrangements with, appropriate outsourced suppliers of the production and distribution capabilities.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Administer Commercial Arrangement for Production and Distribution Capability process is to establish the requirements for, and manage the agreed commercial arrangements with, appropriate outsourced suppliers of the production and distribution capabilities. This process is responsible for output of the production and distribution requirements to outsourced supplier and amending the requirements based on the negotiation between Service Provider and outsourced supplier. This process is also responsible for drafting commercial contracts terms, including the responsibilities, payment condition, payment type, SLA, and signing the commercial contract with outsource supplier.</p> <p>Explanatory</p> <p>Not used for this process element</p>



Mandatory

The purpose of Administer Commercial Arrangement for Production and Distribution Capability process is to establish the requirements for, and manage the agreed commercial arrangements with, appropriate outsourced suppliers of the production and distribution capabilities. This process is responsible for output of the production and distribution requirements to outsourced supplier and amending the requirements based on the negotiation between Service Provider and outsourced supplier. This process is also responsible for drafting commercial contracts terms, including the responsibilities, payment condition, payment type, SLA, and signing the commercial contract with outsource supplier. [AM]

2.1.1.10.2.1.3.CMV Format Invoice[A]

2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]

Clarification: Comverse ONE produces print-ready invoice files according to the commercial agreement between operator and third-party printing supplier, the details of which can be configured and amended through the Comverse ONE Product Catalog based on results of negotiations between the Service Provider and the outsourced supplier. Negotiating the details of the commercial agreement is part of the support processes between the Operator and the outsourced vendor with which Comverse ONE interacts.

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.43 - Level 4: 1.1.1.10.3.5 Manage Paper and Envelope Availability

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.3.5 Manage Paper and Envelope Availability
<p>Brief Description</p> <p>Manage availability of paper and envelope volumes to meet the needs of the physical production process, if internal processes are used.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of the Manage Paper and Envelope Availability process is to ensure the quantities of papers and envelopes are enough before starting invoice physical production. This process is responsible for ensuring the quality of paper and envelopes that fit the requirements from subsequent invoice physical production processes. For example the volume of envelope is suitable. If the requirements don't fit, this process is responsible for detecting the problems and reporting to</p>

other processes if required.

Explanatory

Not used for this process element

Mandatory

The purpose of the Manage Paper and Envelope Availability process is to ensure the quantities of papers and envelopes are enough before starting invoice physical production. This process is responsible for ensuring the quality of paper and envelopes that fit the requirements from subsequent invoice physical production processes. For example the volume of envelope is suitable. If the requirements don't fit, this process is responsible for detecting the problems and reporting to other processes if required. [M]

2.1.1.10.2.1.3.CMV Format Invoice[A]

2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]

Clarification: Ensuring the availability and quality of paper and envelopes is part of the support processes internal to Operator or outsourced vendor with which Comverse ONE interacts. Comverse ONE produces invoice files and provides integration points to distributes them to 3rd party interfaces so that they can fulfill the quality management requirements.

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.44 - Level 4: 1.1.1.10.3.6 Manage Production Run to Create Bill

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.3.6 Manage Production Run to Create Bill
<p>Brief Description</p> <p>Manage the production runs to create the bills, if internal production facilities are used.</p>
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Manage Production Run to Create Bill process is to manage the production runs to create the bills, if internal production facilities are used. This process is responsible for producing the physical bill based on the invoice information and, if necessary, wrapping bills into envelopes. The process also is responsible for monitoring that the produced bills are ready to be distributed.</p>

<p>Explanatory</p> <p>Not used for this process element</p> <p>Mandatory</p> <p>The purpose of Manage Production Run to Create Bill process is to manage the production runs to create the bills, if internal production facilities are used. This process is responsible for producing the physical bill based on the invoice information and, if necessary, wrapping bills into envelopes. The process also is responsible for monitoring that the produced bills are ready to be distributed.</p> <p>[AM]</p> <p>2.1.1.10.2.1.3.CMV Format Invoice[A]</p> <p>2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]</p> <p><i>Clarification: Ensuring the quality of production runs is part of the support processes internal to Operator. Comverse ONE produces invoice files and provides integration points to distributes them to 3rd party interfaces which are integrated with internal production facilities that control physical bill production such that they can fulfill the quality management requirements.</i></p> <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>
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Table 4.45 - Level 4: 1.1.1.10.3.7 Manage Physical Production & Distribution Quality

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.10.3.7 Manage Physical Production & Distribution Quality
<p>Brief Description</p> <p>Manage quality of the physical production and distribution processes, if internal production facilities are used.</p> <p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>The purpose of Manage Physical Production & Distribution Quality process is to manage quality of the physical production and distribution processes, if internal production facilities are used. This process is responsible for monitoring the whole physical production and distribution running, check the quality and validity of production and observing the distribution time cycle. The quality and validity of production can include correct association of customer, bill and time period of bill, printing quality, format of the production. This process is responsible for ensuring that the contents of production, including billing parts and</p>

insertion parts, are satisfied by customers and the productions can be delivered to customers' address on time and accurately.

This process is also responsible for monitoring the efficiency of production process to ensure that the production process can timely produce a large number of productions to avoid distribution delay.

Explanatory

Not used for this process element

Mandatory

The purpose of Manage Physical Production & Distribution Quality process is to manage quality of the physical production and distribution processes, if internal production facilities are used.

This process is responsible for monitoring the whole physical production and distribution running, check the quality and validity of production and observing the distribution time cycle.

This process is responsible for ensuring that the contents of production, including billing parts and insertion parts, are satisfied by customers and the productions can be delivered to customers' address on time and accurately.

This process is also responsible for monitoring the efficiency of production process to ensure that the production process can timely produce a large number of productions to avoid distribution delay. [AM]

2.1.1.10.2.1.3.CMV Format Invoice[A]

2.1.1.10.3.3.1.CMV Physical Invoice Distribution [AM]

Clarification: Ensuring the quality of production runs is part of the support processes internal to Operator. Comverse ONE produces invoice files and provides integration points to distributes them to 3rd party interfaces which are integrated with internal production facilities that control physical bill production such that they can fulfill the quality management requirements.

Optional

INSTRUCTION: Not required for process mapping.

The quality and validity of production can include correct association of customer, bill and time period of bill, printing quality, format of the production.

Interactions

Not used for this process element

4.1.7.4 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.7.5 Level 2: 1.1.1.10 - Bill Invoice Management - Scores

Table 4.46 - Level 2: 1.1.1.10 - Bill Invoice Management – Scores

Level 2: 1.1.1.10 - Bill Invoice Management [3/3]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.10.1 - Apply Pricing, Discounting, Adjustments & Rebates	5
	1.1.1.10.1.1 Obtain Billing Events	100%
	1.1.1.10.1.2 Apply Pricing, Discounting, Adjustments & Rebates to Customer Account	100%
	1.1.1.10.1.3 Apply Agreed Customer Bill Adjustment	100%
	1.1.1.10.2 - Create Customer Bill Invoice	5
	1.1.1.10.2.1 Render & Format Invoice	100%
	1.1.1.10.2.2 Deliver Electronic Invoice	100%
	1.1.1.10.2.3 Verify Invoice Quality	100%
	1.1.1.10.2.4 Manage Customer Invoice Archive	100%
	1.1.1.10.3 - Produce & Distribute Bill	5
	1.1.1.10.3.1 Co-ordinate Billing Insertion	100%
	1.1.1.10.3.2 Establish & Manage Bill Production Cycle	100%
	1.1.1.10.3.3 Deliver Invoice Information	100%
	1.1.1.10.3.4 Administer Commercial Arrangement for Production and Distribution Capability	100%
	1.1.1.10.3.5 Manage Paper and Envelope Availability	100%
	1.1.1.10.3.6 Manage Production Run to Create Bill	100%
	1.1.1.10.3.7 Manage Physical Production & Distribution Quality	100%

4.1.8 Level 2: 1.1.1.11 - Bill Payments & Receivables Management

4.1.8.1 Level 3: 1.1.1.11.1 - Manage Customer Billing [not assessed]

4.1.8.2 Level 3: 1.1.1.11.2 - Manage Customer Payments

Table 4.47 - Level 4: 1.1.1.11.2.1 – Manage Customer Payment Plan

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.2.1 – Manage Customer Payment Plan
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Manage Customer Payment Plan process is to establish new payment plans, modify or remove existing payment plans. Customer can decide payment plans to automatically pay bills from a designated account that can be credit card, back account, third party and etc. It also enables paying a bill in installment. For example, customer can apply make a payment \$20 per month for \$100 bill in 5 months.</p> <p>The payment plan can enable making a payment by pre-defined payment method. For example, customer defines paying mobile monthly line rental fee by direct debt and paying digital TV programmes by cash.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>Customer can decide payment plans to automatically pay bills from a designated account that can be credit card, back account, third party and etc. It also enables paying a bill in installment. For example, customer can apply make a payment \$20 per month for \$100 bill in 5 months.</p> <p>The payment plan can enable making a payment by pre-defined payment method. For example, customer defines paying mobile monthly line rental fee by direct debt and paying digital TV programmes by cash.</p> <p>Mandatory</p> <p>The purpose of Manage Customer Payment Plan process is to establish new payment plans, modify or remove existing payment plans. [AM]</p> <p><i>Every customer is associated with a Comverse ONE Account, which is in turn associated with one or more Payment Profiles, each of which captures the information required to collect (and in some cases request) payments. For example, a Payment Profile can represent a specific credit card or direct debit bank account, or can represent cash payments, or various other options. This information is captured during account creation and can be modified/extended during account</i></p>

modification; the 1.1.1.1.10 Manage Customer Inventory hierarchy (not included in this document) describes how customers are captured and represented. Additional information is available in the Comverse ONE 3.5 Converged Customer Center User Guide and other Comverse ONE user documentation.

Every Account is associated with a Preferred Payment Method, which is automatically selected by default for Payment Methods that support automatic payment requests (e.g., Credit Card or Direct Debit Payment Methods) when payment for a new invoice balance is initiated. For more information, see (Ctrl-click to follow link):

- 2.1.1.11.2.6.1.CMV Initiate Automatic Payment - Credit Card
- 2.1.1.11.2.6.2.CMV Initiate Automatic Payment - Direct Debit

Non-automatically requested payments (e.g. Bank Lockbox) have a Payment Profile selected when collected, based on Customer defaults or on payment transaction attributes. For more information, see (Ctrl-click to follow link):

- 1.1.1.11.2.2 Collect Customer Payment
- 2.1.1.11.2.2.1.CMV Collect Customer Payment - Lockbox
- 2.1.1.11.2.2.2.CMV Collect Customer Payment - Credit Card
- 2.1.1.11.2.2.3.CMV Collect Customer Payment - Direct Debit
- 2.1.1.11.2.2.6.CMV Collect Customer Payment via Customer Center
- 2.1.1.11.2.2.7.CMV Collect Customer Payment via IVR
- 2.1.1.11.2.2.8.CMV Collect Customer Payment via CSS

Every unpaid Balance can be associated with an Installment Plan, which allows payment in installments. For example a Customer can make a \$20/month payment per month over 5 months to pay a \$100 bill. For more information, see (Ctrl-click to follow link):

- 2.1.1.11.2.1.1.CMV Refinance Customer Balances

An outstanding Balance can also be associated with a Promise to Pay, which behaves similarly to an Installment Plan but is intended as part of debt recovery for balances marked for Collections. For more information, see (Ctrl-click to follow link):

- 2.1.1.11.3.3.1.CMV Create Promise to Pay
- 2.1.1.11.3.3.2.CMV Manage Promise to Pay

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.48 - Level 4: 1.1.1.11.2.2 Collect Customer Payment

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.11.2.2 Collect Customer Payment

Extended Description

INSTRUCTION: Not required for process mapping

The purpose of Collect Customer Payment process is to collect the payments from the customer. These processes can include credit/debit/EFT payments using various channels, either directly or through third parties, and cash or check payments, either directly or through third parties. To the extent that processing of any payments is undertaken internally, i.e. check processing, these processes are responsible for managing the operation and quality of the internal processing. Note that the Establish Back-End Bank Account process is used to create the link to collection customer payment via bank.

Explanatory

INSTRUCTION: Not required for process mapping.

Note that the Establish Back-End Bank Account process is used to create the link to collection customer payment via bank.

Mandatory

The purpose of Collect Customer Payment process is to collect the payments from the customer. To the extent that processing of any payments is undertaken internally, i.e. check processing, these processes are responsible for managing the operation and quality of the internal processing. [AM]

When a customer makes a payment (whether initiated automatically, as for Credit Card or Direct Debit, or initiated manually by the customer, as for Lockbox or one-time payments) the payment is collected via one of several processes, depending on the associated channel. For more information, see (Ctrl-click to follow link):

- [1.1.1.11.2.2 Collect Customer Payment](#)
- [2.1.1.11.2.2.1.CMV Collect Customer Payment - Lockbox](#)
- [2.1.1.11.2.2.2.CMV Collect Customer Payment - Credit Card](#)
- [2.1.1.11.2.2.3.CMV Collect Customer Payment - Direct Debit](#)
- [2.1.1.11.2.2.6.CMV Collect Customer Payment via Customer Center](#)
- [2.1.1.11.2.2.7.CMV Collect Customer Payment via IVR](#)
- [2.1.1.11.2.2.8.CMV Collect Customer Payment via CSS](#)

Review (and correction, where applicable) of payments that cannot be automatically processed due to transaction errors or other reasons is handled manually through Investigation Units. For more information, see (Ctrl-click to follow link):



- 2.1.1.11.2.2.4.CMV Process Errored Payment - Lockbox
- 2.1.1.11.2.2.5.CMV Process Errored Payment - Direct Debit
- 2.1.1.11.2.2.9.CMV Process Errored Payment - Credit Card

Optional

INSTRUCTION: Not required for process mapping.

These processes can include credit/debit/EFT payments using various channels, either directly or through third parties, and cash or check payments, either directly or through third parties.

Interactions

Not used for this process element

Table 4.49 - Level 4: 1.1.1.11.2.3 Reconcile Customer Payment

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.2.3 Reconcile Customer Payment
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Reconcile Customer Payment process is to reconcile the payments to the invoices. This process is meant to match these payments with the services/invoices delivered to this customer. Where payments do not match invoices, this process is responsible for informing the Manage Customer Debt Collection processes of any underpayments, and the Bill Inquiry Handling processes for any over-payments. Underpayments and overpayments are handled appropriately by these separate processes. These processes are responsible for reconciling the money received into the bank accounts against the payments expected in the invoices. Additionally these processes inform the Financial Management on all those payments for updating the ledger.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>Underpayments and overpayments are handled appropriately by Manage Customer Debt Collection and Bill Inquiry Handling processes.</p> <p>Mandatory</p> <p>The purpose of Reconcile Customer Payment process is to reconcile the payments to the invoices. This process is meant to match these payments with the services/invoices delivered to this customer. Where payments do not match invoices, this process is responsible for informing the</p>

Manage Customer Debt Collection processes of any underpayments, and the Bill Inquiry Handling processes for any over-payments. These processes are responsible for reconciling the money received into the bank accounts against the payments expected in the invoices. Additionally these processes inform the Financial Management on all those payments for updating the ledger. [\[AM\]](#)

Payment reconciliation to invoice balances is handled automatically as part of the payment collection process, as follows:

- *Where a payment has been automatically requested for an invoice balance, the corresponding payment is automatically assigned to that invoice balance.*
- *Where a payment is provided with an invoice balance specified, the payment is assigned to that invoice balance.*
- *Where a payment is provided with no invoice balance specified, the payment is automatically assigned to an invoice balance based on preconfigured rules and balance attributes (for example, “oldest balance first”).*
- *Where a payment is assigned to an already paid (or partly paid) invoice balance, the overpayment amount is automatically reassigned to other outstanding balances (if they exist, and if the Payment Type configuration allows this) or to the Suspense Account Balance (if not).*

All of these steps are performed automatically during the payment collection process. For more information, about the payment collection process, see [\(Ctrl-click to follow link\)](#):

- 1.1.1.11.2.2 Collect Customer Payment
- 2.1.1.11.2.2.1.CMV Collect Customer Payment - Lockbox
- 2.1.1.11.2.2.2.CMV Collect Customer Payment - Credit Card
- 2.1.1.11.2.2.3.CMV Collect Customer Payment - Direct Debit
- 2.1.1.11.2.2.6.CMV Collect Customer Payment via Customer Center
- 2.1.1.11.2.2.7.CMV Collect Customer Payment via IVR
- 2.1.1.11.2.2.8.CMV Collect Customer Payment via CSS

Automatic assignments can also be overridden manually, in whole or in part, either via payment redirection after collection or as part of manual payment collection.

As noted above, overpayment amounts can be automatically reassigned to the Suspense Account Balance where they are available for subsequent refund or manual allocation to other balances. The collection of such payments is part of the process of creating a new invoice, as described for [1.1.1.10.2 Create Customer Bill Invoice](#).

Notifying Manage Customer Debt Collection of underpayments is not performed during payment handling. Rather, when a balance goes unpaid (or incompletely paid) for a configured period, it is automatically treated as a debt to be collected. For more information, see [\(Ctrl-click to follow link\)](#):

- 2.1.1.11.3.2.1.CMV Assign Collections Scenario

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.50 - Level 4: 1.1.1.11.2.4 Manage Back-End Bank Account

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.11.2.4 Manage Back-End Bank Account

Extended Description

INSTRUCTION: Not required for process mapping

The purpose of Manage Back-End Bank Account process is to manage back-end bank accounts for receipt of the customer payments and for the transfer of funds collected by third parties. These processes are responsible for managing payment commercial agreement agreed with banks and the payment interfaces for collecting the customer payments.

Explanatory

INSTRUCTION: Not required for process mapping.

Not used for this process element

Mandatory

The purpose of Manage Back-End Bank Account process is to manage back-end bank accounts for receipt of the customer payments and for the transfer of funds collected by third parties. These processes are responsible for managing payment commercial agreement agreed with banks and the payment interfaces for collecting the customer payments. [AM]

This is a manual process for the most part, and varies significantly from deployment to deployment. However, once a bank account (or other external payment instrument, such as a credit card or PayPal or other financial clearinghouse account) has been established for the customer, details of that bank account can be captured within a Payment Profile for the Customer Account and maintained in Customer Inventory, as described for 1.1.1L4: 1.1.1.11.2.1 – Manage Customer Payment Plan Mapping Details.

EFT Prenotes can also be automatically sent as part of this process. See 1.1.1.1.10 Manage Customer Inventory for more details about how information about customers is captured and represented.



Payment profile details (including back-end bank account details) are automatically included in the appropriate payment requests and automatically verified to validate payment receipts, ensuring that commercial agreements governing the payment transactions are properly complied with. For more information, see (Ctrl-click to follow link):

- 1.1.1.11.2.2 Collect Customer Payment
- 2.1.1.11.2.2.1.CMV Collect Customer Payment - Lockbox
- 2.1.1.11.2.2.2.CMV Collect Customer Payment - Credit Card
- 2.1.1.11.2.2.3.CMV Collect Customer Payment - Direct Debit
- 2.1.1.11.2.2.6.CMV Collect Customer Payment via Customer Center
- 2.1.1.11.2.2.7.CMV Collect Customer Payment via IVR
- 2.1.1.11.2.2.8.CMV Collect Customer Payment via CSS

If the Payment Profile is not properly aligned with the back-end bank account (for example, if the account validation information has changed), the payment is flagged in error and can thereafter be manually investigated (and, if appropriate, repaired). For more information, see (Ctrl-click to follow link):

- 2.1.1.11.2.2.4.CMV Process Errored Payment - Lockbox
- 2.1.1.11.2.2.5.CMV Process Errored Payment - Direct Debit
- 2.1.1.11.2.2.9.CMV Process Errored Payment - Credit Card

Optional

INSTRUCTION: Not required for process mapping.

Not used for this process element

Interactions

INSTRUCTION: Not required for process mapping.

Not used for this process element

Table 4.51 - Level 4: 1.1.1.11.2.5 Administer Commercial Arrangement for Third Party Supplier

LEVEL 4 PROCESS MAPPING DETAILS
1.1.1.11.2.5 Administer Commercial Arrangement for Third Party Supplier
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Administer Commercial Arrangement for Third Party Supplier process is to establish</p>

the requirements for, and manage any commercial arrangements agreed with, third party suppliers of payment services. The requirements can include payment transfer cycle, payment interface requirements and payment methods requirements. After commercial arrangements are agreed, this process is responsible for monitor the execution of the commercial arrangements.

Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements.

Explanatory

INSTRUCTION: Not required for process mapping.

The requirements can include payment transfer cycle, payment interface requirements and payment methods requirements. Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements.

Mandatory

The purpose of Administer Commercial Arrangement for Third Party Supplier process is to establish the requirements for, and manage any commercial arrangements agreed with, third party suppliers of payment services. After commercial arrangements are agreed, this process is responsible for monitor the execution of the commercial arrangements. AM

As noted for L4: 1.1.1.11.2.4 Manage Back-End Bank Account – Mapping Details, managing commercial arrangements with financial clearinghouses and other suppliers of payment services is primarily a manual process and varies significantly from deployment to deployment.

However, also as noted for L4: 1.1.1.11.2.4 Manage Back-End Bank Account – Mapping Details, once such an arrangement has been established and corresponding details stored in Customer Inventory, the automatic verification of transaction attributes against those arrangements during payment collection and the automatic inclusion of transaction attributes based on those arrangements allows the execution of such arrangements (as they apply to payment transaction exchange) to be monitored automatically, and for transactions that fail such validation to be manually reviewed (and for the associated commercial arrangements to be revised or corrected where appropriate). For more information, see (Ctrl-click to follow link):

- 1.1.1.11.2.2 Collect Customer Payment
- 2.1.1.11.2.2.1.CMV Collect Customer Payment - Lockbox
- 2.1.1.11.2.2.2.CMV Collect Customer Payment - Credit Card
- 2.1.1.11.2.2.3.CMV Collect Customer Payment - Direct Debit
- 2.1.1.11.2.2.4.CMV Process Errored Payment - Lockbox
- 2.1.1.11.2.2.5.CMV Process Errored Payment - Direct Debit
- 2.1.1.11.2.2.6.CMV Collect Customer Payment via Customer Center
- 2.1.1.11.2.2.7.CMV Collect Customer Payment via IVR
- 2.1.1.11.2.2.8.CMV Collect Customer Payment via CSS

- 2.1.1.11.2.2.9.CMV Process Errored Payment - Credit Card

Optional

INSTRUCTION: Not required for process mapping.

Not used for this process element

Interactions

INSTRUCTION: Not required for process mapping.

Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements.

4.1.8.3 Level 3: 1.1.1.11.3 - Manage Customer Debt Collection

Table 4.52 - Level 4: 1.1.1.11.3.1 Identify Overdue

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.1 Identify Overdue
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Identify Overdue Invoice process is to identify invoices which are overdue for payment. It monitors the amount due from the customer, i.e. check whether the payments are made on time, and implements necessary activities and policies to recover amounts overdue.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>i.e. check whether the payments are made on time, and implements necessary activities and policies to recover amounts overdue.</p> <p>Mandatory</p> <p>The purpose of Identify Overdue Invoice process is to identify invoices which are overdue for payment. It monitors the amount due from the customer [A]</p> <p><i>Overdue invoices (and other overdue A/R balances, such as line-item sub-balances for an invoice) are identified automatically as part of the process of assigning Invoice or Balance collectibles to collections scenarios. See 2.1.1.11.3.2.1.CMV Assign Collections Scenario for more details.</i></p>

<p>Optional</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>Not used for this process element</p> <p>Interactions</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>Not used for this process element</p>
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Table 4.53 - Level 4: 1.1.1.11.3.2 Administer Overdue Invoice Follow-Up

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.2 Administer Overdue Invoice Follow-Up
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Administer Overdue Invoice Follow-Up process is to initiate and manage follow-up with customers having overdue amounts. These processes can be set up routinely or manually. This process is responsible for setting up the follow-ups based on the policies. The policies are associated to customer’s profile such as customer credit, customer group, overdue amounts, debt occurrence times, purchased products and etc. This process is also responsible for modifying or removing the designated follow-ups when the policies or situations are changed. The follow-ups can include overdue invoice reminding, customer credit control, service restriction, establishing customer debt profile, selling parts of debt portfolios to third party for debt recovery.</p> <p>Explanatory</p> <p><i>INSTRUCTION: Not required for process mapping.</i></p> <p>These processes can be set up routinely or manually. The follow-ups can include overdue invoice reminding, customer credit control, service restriction, establishing customer debt profile, selling parts of debt portfolios to third party for debt recovery.</p> <p>Mandatory</p> <p style="background-color: #00FF00;">The purpose of Administer Overdue Invoice Follow-Up process is to initiate and manage follow-up</p>



with customers having overdue amounts. This process is responsible for setting up the follow-ups based on the policies. The policies are associated to customer's profile such as customer credit, customer group, overdue amounts, debt occurrence times, purchased products and etc. This process is also responsible for modifying or removing the designated follow-ups when the policies or situations are changed. [AM]

The Collections process automatically identifies overdue amounts and creates associated collectibles, assigns those collectibles to collections scenarios based on various customer and debt attributes, evaluates the policies associated with those scenarios to determine the required follow-ups (Collections Events), and initiates those Events at the correct time. The Events themselves can be automatic (e.g., disconnecting/reducing service) or manual (e.g. re-evaluating the customer's status).

- 2.1.1.11.3.2.1.CMV Assign Collections Scenario
- 2.1.1.11.3.4.1.CMV Manage Collections Events
- 2.1.1.11.3.4.2.CMV Process Collections Events
- 2.1.1.11.3.4.3.CMV Skip Collections Event
- 2.1.1.11.3.4.4.CMV Reschedule Event via Customer Center
- 2.1.1.11.3.4.5.CMV Reschedule Event via Collections GUI
- 2.1.1.11.3.4.6.CMV Suspend Collections Scenario
- 2.1.1.11.3.4.8.CMV Resume Collections Event
- 2.1.1.11.3.4.9.CMV Approve Collections Event
- 2.1.1.11.3.4.12.CMV Complete Manual Event

In cases where debt recovery has failed or was not indicated by the policies defined for a particular customer (for example, for a high-value sensitive customer, or a deceased customer, or for various other reasons), follow-ups can also include writing off the customer balance:

- 2.1.1.11.3.7.1.CMV Write off Customer Balance

Optional

INSTRUCTION: Not required for process mapping.

Not used for this process element

Interactions

INSTRUCTION: Not required for process mapping.

Not used for this process element

Table 4.54 - Level 4: 1.1.1.11.3.3 Manage Overdue Invoice Payment

<p>LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.3 Manage Overdue Invoice Payment</p>

Extended Description

INSTRUCTION: Not required for process mapping

The purpose of Manage Overdue Invoice Payment process is to arrange and monitor payment plans to allow customers to pay overdue amounts in installments. This process arranges payment plans to allow customers to pay overdue amounts, leads to an agreement with the customers, and monitors the execution of the payment plans.

The payment plan is associated to customer's profile such as the customer's credit, payment history, customer group or purchased products. This process should consider the payment amounts in installment whether can be undertaken by the customer.

Explanatory

INSTRUCTION: Not required for process mapping.

The payment plan is associated to customer's profile such as the customer's credit, payment history, customer group or purchased products.

Mandatory

The purpose of Manage Overdue Invoice Payment process is to arrange and monitor payment plans to allow customers to pay overdue amounts in installments. This process arranges payment plans to allow customers to pay overdue amounts, leads to an agreement with the customers, and monitors the execution of the payment plans. This process should consider the payment amounts in installment whether can be undertaken by the customer. [AM]

The follow-ups (Collections Events) initiated as part of 1.1.1.11.3.2 Administer Overdue Invoice Follow-Up and the debt-recovery activities (Collections Events) initiated as part of 1.1.1.11.3.4 Initiate Customer Debt Recovery Activities can (depending on the policies associated with the corresponding Collections Scenario) include negotiating an agreement (Promise to Pay) to pay the overdue amount in installments. Once a Promise to Pay has been negotiated, Comverse ONE automatically monitors subsequent payments and flags the Promise as being broken if those payments are not made.

- 2.1.1.11.3.3.1.CMV Create Promise to Pay
- 2.1.1.11.3.3.2.CMV Manage Promise to Pay

Optional

INSTRUCTION: Not required for process mapping.

Not used for this process element

Interactions

Not used for this process element

Table 4.55 - Level 4: 1.1.1.11.3.4 Initiate Customer Debt Recovery Activities

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.4 Initiate Customer Debt Recovery Activities
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Initiate Customer Debt Recovery process is to initiate customer debt recovery activities in accordance with appropriate commercial practice and policies. This process includes deciding appropriate recovery activities based on debt recovery policies, launching debt recovery activities and monitoring the executions.</p> <p>The debt recovery policies are associated to the customer's profile such as payment history, customer group, purchased products, overdue amounts. This process includes overdue invoice reminding via phone call, SMS, email, by manually or automatically, by humans or applications. This process is also responsible for terminating customer debt recovery activities when the customer pays.</p> <p>Explanatory</p> <p>Not used for this process element</p> <p>Mandatory</p> <p>The purpose of Initiate Customer Debt Recovery process is to initiate customer debt recovery activities in accordance with appropriate commercial practice and policies. This process includes deciding appropriate recovery activities based on debt recovery policies, launching debt recovery activities and monitoring the executions.</p> <p>The debt recovery policies are associated to the customer's profile such as payment history, customer group, purchased products, overdue amounts. This process includes overdue invoice reminding via phone call, SMS, email, by manually or automatically, by humans or applications. This process is also responsible for terminating customer debt recovery activities when the customer pays. [AM]</p> <p><i>As described for L4: 1.1.1.11.3.2 Administer Overdue Invoice Follow-Up – Mapping Details, Comverse ONE automatically evaluates the policies associated with scenarios assigned to collectibles representing customer debt and initiates associated (automatic or manual) Events at the correct time. Such Events can (and typically do) include overdue invoice reminding and other debt recovery activities, both automatic and manual. (Note that the process for handling follow-ups and debt-recovery is identical, because both are implemented as Collections Events and managed via the same workflow system, but the Events themselves can differ.)</i></p> <ul style="list-style-type: none"> • 2.1.1.11.3.2.1.CMV Assign Collections Scenario • 2.1.1.11.3.4.1.CMV Manage Collections Events • 2.1.1.11.3.4.2.CMV Process Collections Events



<ul style="list-style-type: none"> • 2.1.1.11.3.4.12.CMV Complete Manual Event • 2.1.1.11.3.4.3.CMV Skip Collections Event • 2.1.1.11.3.4.4.CMV Reschedule Event via Customer Center • 2.1.1.11.3.4.5.CMV Reschedule Event via Collections GUI • 2.1.1.11.3.4.6.CMV Suspend Collections Scenario • 2.1.1.11.3.4.8.CMV Resume Collections Event • 2.1.1.11.3.4.9.CMV Approve Collections Event <p><i>Debt recovery can also include the sale of customer debt to Outside Collection Agencies, in which case the debt is typically written off within Comverse ONE to allow subsequent customer handling (for example, closing the customer account) to occur:</i></p> <p>2.1.1.11.3.7.1.CMV Write off Customer Balance</p> <p><i>Comverse ONE automatically removes collectibles from collections (thereby terminating customer debt recovery) when the balance has been paid. This can be triggered on receipt of payment or by scheduled re-evaluation of outstanding debt:</i></p> <ul style="list-style-type: none"> • 2.1.1.11.3.4.10.CMV Assertive Cure and Treatment • 2.1.1.11.3.4.11.CMV Remove Customer from Collections <p>Optional</p> <p>Not used for this process element</p> <p>Interactions</p> <p>Not used for this process element</p>

Table 4.56 - Level 4: 1.1.1.11.3.5 Manage Aged Customer Debt Portfolio

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.5 Manage Aged Customer Debt Portfolio
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Manage Aged Customer Debt Portfolio process is to manage the aged customer debt portfolio. When the customer debt can't be recovered in a period of time decided by Service Provider, this process is responsible to transform this customer debt to aged customer debt portfolio.</p> <p>This process is responsible for transforming the overdue invoice to the aged customer debt portfolio when it didn't be recovered after a time of period or based on other triggers according to the Service Provider's policies. The aged customer debt portfolio should include all the information of the customer debt profiles. The process is also responsible for managing and maintaining transforming cycle.</p>

When the overdue payment is recovered after transforming, this process is responsible to remove the aged customer debt portfolio and notice Establish & Manage Customer Debt Profiles process to update the customer debt profile.

Explanatory

Not used for this process element

Mandatory

The purpose of Manage Aged Customer Debt Portfolio process is to manage the aged customer debt portfolio. When the customer debt can't be recovered in a period of time decided by Service Provider, this process is responsible to transform this customer debt to aged customer debt portfolio.

This process is responsible for transforming the overdue invoice to the aged customer debt portfolio when it didn't be recovered after a time of period or based on other triggers according to the Service Provider's policies. The aged customer debt portfolio should include all the information of the customer debt profiles. The process is also responsible for managing and maintaining transforming cycle.

When the overdue payment is recovered after transforming, this process is responsible to remove the aged customer debt portfolio and notice Establish & Manage Customer Debt Profiles process to update the customer debt profile. [AM]

When debt recovery is considered to have failed for a particular balance, that balance is written off:

- 2.1.1.11.3.7.1.CMV Write off Customer Balance

At that point, the outstanding debt is considered part of the aged customer debt portfolio and no longer contributes to the customer's "live" debt.

A write-off can be initiated manually at any time, and can also be scheduled and initiated automatically as a Collections Event. (Note that the process for scheduling write-offs and debt-recovery is identical, because both are implemented as Collections Events and managed via the same workflow system, but the Events themselves can differ.)

- 2.1.1.11.3.2.1.CMV Assign Collections Scenario
- 2.1.1.11.3.4.1.CMV Manage Collections Events
- 2.1.1.11.3.4.2.CMV Process Collections Events
- 2.1.1.11.3.4.12.CMV Complete Manual Event
- 2.1.1.11.3.4.3.CMV Skip Collections Event
- 2.1.1.11.3.4.4.CMV Reschedule Event via Customer Center
- 2.1.1.11.3.4.5.CMV Reschedule Event via Collections GUI
- 2.1.1.11.3.4.6.CMV Suspend Collections Scenario
- 2.1.1.11.3.4.8.CMV Resume Collections Event
- 2.1.1.11.3.4.9.CMV Approve Collections Event

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.57 - Level 4: 1.1.1.11.3.6 Establish & Manage Customer Debt Profiles

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.6 Establish & Manage Customer Debt Profiles
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Establish & Manage Customer Debt Profiles process is to establish and manage customer debt profiles to assist in managing debt recovery and debt risk on a customer, product or customer group basis. The customer debt profile is a part of customer’s profile, which can include customer credit, customer group, overdue date, overdue amounts, overdue occurring times, debt recovery means and occurring times, customer debt recovery response and etc. Other process can base the customer debt profile to upgrade or downgrade the customer credit or apply other controls. This process is responsible for keeping updates of the customer debt profiles according to results from Initiate Customer Debt Recovery Activities process.</p> <p>Explanatory</p> <p>Not used for this process element</p> <p>Mandatory</p> <p>The purpose of Establish & Manage Customer Debt Profiles process is to establish and manage customer debt profiles to assist in managing debt recovery and debt risk on a customer, product or customer group basis. The customer debt profile is a part of customer’s profile, which can include customer credit, customer group, overdue date, overdue amounts, overdue occurring times, debt recovery means and occurring times, customer debt recovery response and etc. This process is responsible for keeping updates of the customer debt profiles according to results from Initiate Customer Debt Recovery Activities process. [AM]</p> <p><i>As noted above, when debt recovery is considered to have failed for a particular balance (or not initiated in the first place as a matter of policy), that balance is typically written off, as described by 2.1.1.11.3.7.1.CMV Write off Customer Balance, and the outstanding debt no longer contributes to the customer’s “live” debt. That is, it is considered part of the aged customer debt portfolio.</i></p> <p><i>Also as noted above, the determination of when a write-off is called for can be a manual process or an automatic one (via Write-Off Collections Events, as described as part of 1.1.1.11.3.2 Administer Overdue Invoice Follow-Up and 1.1.1.11.3.4 Initiate Customer Debt Recovery Activities).</i></p> <p><i>Other than that, there is no <u>special</u> process for establishing and managing customer debt profiles. The debt profiles, including outstanding balances, the associated invoices, the associated write-off</i></p>

transactions, etc. etc. are all maintained and managed as required here, but they are maintained and managed as part of the Customer inventory, as described for the 1.1.1.1.10 Manage Customer Inventory hierarchy, rather than as a special separate entity.

Some elements of the customer's balances related to debt profiles are maintained manually, such as the customer group and credit rating (although these can of course be automated by custom or third-party systems and stored within the Customer Inventory). Other elements of the customer's balances related to debt profiles are maintained automatically by Comverse ONE. For example:

- *Overdue dates are automatically calculated for each balance based on due dates and grace periods. The grace periods are determined based on a systemwide default and can be specified for a customer during customer setup. The due dates associated with invoice payments are automatically assigned to the invoice debt when the bill is created, based on systemwide bill cycle dates defined during system setup.*
- *Overdue amounts are automatically calculated for each balance when debt is evaluated for collections, based on the base balance due and rules which determine effective collectible balance amount (for example, whether amounts in dispute contribute to the effective collectible balance or not). The base balance due is automatically calculated every time a financial transaction is applied to that balance.*
- *The history of steps taken to recover debt is automatically recorded, and the recovery response associated with automatic events (if any) is also recorded, and automatically associated with the collectible (which is in turn linked to the debt profile associated with that collectible).*

Put differently: Comverse ONE tracks all the invoice balances and sub-balances for a customer, and all the transactions that modify each balance, and calculates the outstanding amount due for each such balance whenever those are updated. Balances with zero amount due are considered closed, whether they reach this state via payments or write-offs or post-bill adjustments or because there were no outstanding charges to bill in the first place. The aged debt profile is just another set of balances, which can be filtered and searched for based on the nature of the transactions that closed them (that is, write-off transactions) and the events that initiated those transactions (that is, Write-Off Collections Events initiated as part of a failed debt recovery Collections Scenario). They can therefore be reviewed, reported on, audited, modified, un-written-off, re-written-off, and otherwise managed to reflect various aged-debt-related operations, but this is handled through the same processes used to manage any other balance in the Customer inventory, using standard systemwide attributes of the balance and of the write-off transaction... there are no aged-debt-specific business processes involved.

Optional

Not used for this process element

Interactions

INSTRUCTION: Not required for process mapping

Other process can base the customer debt profile to upgrade or downgrade the customer credit or apply other controls.

Table 4.58 - Level 4: 1.1.1.11.3.7 Establish & Manage Commercial Debt Recovery Arrangement

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.11.3.7 Establish & Manage Commercial Debt Recovery Arrangement
<p>Extended Description</p> <p><i>INSTRUCTION: Not required for process mapping</i></p> <p>The purpose of Establish & Manage Commercial Debt Recovery Arrangement process is to establish and manage commercial arrangements with third parties for the recovery of aged debt, and/or for the write-off and selling of parts of the debt portfolio to third parties. This process is responsible for filtering and packaging the aged customer debt portfolios based on the Service Provider's policies, deciding the third parties' action items and monitoring the status of the arrangements. Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements.</p>
<p>Explanatory</p> <p>Not used for this process element</p>
<p>Mandatory</p> <p>The purpose of Establish & Manage Commercial Debt Recovery Arrangement process is to establish and manage commercial arrangements with third parties for the recovery of aged debt, and/or for the write-off and selling of parts of the debt portfolio to third parties. This process is responsible for filtering and packaging the aged customer debt portfolios based on the Service Provider's policies, deciding the third parties' action items and monitoring the status of the arrangements. [M]</p> <p><i>As discussed above, Comverse ONE represents the policies governing the automatic initiation of write-offs within Collections Scenarios which govern the creation of Write-Off Collections Events (as described by 2.1.1.11.3.7.1.CMV Write off Customer Balance), and also supports manually initiated write-offs. However, the process of establishing arrangements with third parties for the purchase of written-off debt is not implemented by Comverse ONE, nor is managing or monitoring those arrangements. This process varies from client to client, depending on what third-party systems or vendors manage their aged customer debt.</i></p> <p><i>Comverse ONE <u>supports</u> these processes, as noted elsewhere, by writing off aged debt and flagging the associated balances/transactions within the Customer inventory in such a way that they can be easily identified, sorted, and filtered for auditing, reporting, and automated or manual transfer to third parties.</i></p>
<p>Optional</p> <p>Not used for this process element</p>

Interactions

INSTRUCTION: Not required for process mapping.

Note that the Supply Chain Capability Delivery process is used to deliver the commercial agreements.

4.1.8.4 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.8.5 Level 2: 1.1.1.11 Bill Payments and Receivables Management - Scores

Table 4.59 - Level 2: 1.1.1.11 Bill Payments and Receivables Management – Scores

Level 2: 1.1.1.11 - Bill Payments & Receivables Management [2/3]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.11.1 - Manage Customer Billing	0
	1.1.1.11.2 - Manage Customer Payments	5
	1.1.1.11.2.1 Manage Customer Payment Plan	100%
	1.1.1.11.2.2 Collect Customer Payment	100%
	1.1.1.11.2.3 Reconcile Customer Payment	100%
	1.1.1.11.2.4 Manage Back-End Bank Account	100%
	1.1.1.11.2.5 Administer Commercial Arrangement for Third Party Supplier	100%
	1.1.1.11.3 - Manage Customer Debt Collection	5
	1.1.1.11.3.1 Identify Overdue Invoice	100%
	1.1.1.11.3.2 Administer Overdue Invoice Follow-Up	100%
	1.1.1.11.3.3 Manage Overdue Invoice Payment	100%
	1.1.1.11.3.4 Initiate Customer Debt Recovery Activities	100%
	1.1.1.11.3.5 Manage Aged Customer Debt Portfolio	100%
	1.1.1.11.3.6 Establish & Manage Customer Debt Profiles	100%
	1.1.1.11.3.7 Establish & Manage Commercial Debt Recovery Arrangement	100%

4.1.9 Level 2: 1.1.1.12 - Bill Inquiry Handling

4.1.9.1 Level 3: 1.1.1.12.1 - Create Customer Bill Inquiry Report [not assessed]

4.1.9.2 Level 3: 1.1.1.12.2 - Assess Customer Bill Inquiry Report [not assessed]

4.1.9.3 Level 3: 1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment

Table 4.60 - Level 4: 1.1.1.12.3.1 Determine Automated Bill Adjustment

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.12.3.1 Determine Automated Bill Adjustment
<p>Determination of whether policy allows for automated adjustment of the customer bill invoice, and approving any resultant adjustments.</p> <p>Extended Description</p> <p><i>Not required for process mapping.</i></p> <p>The purpose of Determine Automated Bill Adjustment process is to determine whether policy allows for automated adjustment of the customer bill invoice and approving any resulting adjustments. When the authorization is approved, this process is responsible for notifying the relevant process to apply the adjustment</p> <p>Explanatory</p> <p>Not used for this process element.</p> <p>Mandatory</p> <p>The purpose of Determine Automated Bill Adjustment process is to determine whether policy allows for automated adjustment of the customer bill invoice and approving any resulting adjustments. When the authorization is approved, this process is responsible for notifying the relevant process to apply the adjustment [A]</p> <p><i>Although automated bill adjustment is not a core Comverse ONE capability, the same system resources (API methods and data model elements) which are used to support manual bill adjustments through Converse ONE front-end interfaces (as described in 2.1.1.12.3.3.1.CMV Record Below-Threshold Adjustment, for example) are also available to external programs and scripts created as part of Support Bill Inquiry Handling.</i></p> <p><i>How policy is specified, how specified policies are evaluated, and how and when policy evaluation is triggered (for example, as an automated response to service quality levels dropping below a predetermined threshold) varies radically from deployment to deployment, but the underlying mechanism for automatically initiating the adjustment is the same for all such mechanisms (see 2.1.1.12.3.3.1.CMV Record Below-Threshold Adjustment for an example), as is the mechanism for either automatically approving it or queuing it for manual approval (see 2.1.1.12.3.2.1.CMV Review Above-Threshold Adjustment) . The resulting adjustments are stored in the same transaction</i></p>

database and affect customer balances in the same way as CSR-issued adjustments.

Invoice adjustments can also be initiated by Customers themselves through the Self-Care GUI, if the Service Provider permits this; while not strictly automated this does not require any intervention on the part of the Service Provider.

Somewhat tangentially, the invoice back-out process (see 2.1.1.10.2.4.2.CMV Back Out Invoice) is implemented as a series of automatically recorded and approved system-generated bill invoice adjustments – all the transactions on the bill to be backed out are automatically adjusted to zero.

Optional

Not used for this process element

Interactions

Not used for this process element

Table 4.61 - Level 4: 1.1.1.12.3.2 Analyze Detailed Bill Inquiry

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.12.3.2 Analyze Detailed Bill Inquiry
<p>Analyse and investigate to determine whether a bill adjustment is acceptable.</p> <p>Extended Description</p> <p><i>Not required for process mapping.</i></p> <p>The purpose of Analyze Detailed Bill Inquiry process is to undertake more detailed analysis and investigation to determine whether a bill adjustment is acceptable, including gaining appropriate management authority to make the adjustment. These processes rely on the availability of appropriate adjustment policies, which are created within the Support Bill Inquiry Handling processes, for the timely resolution of major billing disputes.</p> <p>The resolution processes may require investigation of the billing processes themselves to determine whether the disputed bills are the result of quality errors within the Service Provider processes.</p> <p>Explanatory</p> <p>Not used for this process element.</p> <p>Mandatory</p> <p>The purpose of Analyze Detailed Bill Inquiry process is to undertake more detailed analysis and investigation to determine whether a bill adjustment is acceptable, including gaining appropriate management authority to make the adjustment. These processes rely on the availability of appropriate adjustment policies, which are created within the Support Bill Inquiry Handling processes, for the timely resolution of major billing disputes. [AM]</p>



When an adjustment is requested by a user (whether a CSR, a Customer, or a third-party automated system), Comverse ONE automatically compares the amount of the requested adjustment to the amount available to be adjusted for the transaction/balance being adjusted, as well as for aggregates to which the transaction contributes, in order to ensure that those transactions, balances, and aggregates are never adjusted below zero.

When an adjustment is requested by a user (whether a CSR, a Customer, or a third-party automated system), Comverse ONE automatically compares the amount of the requested adjustment to the maximum adjustment amount defined for the user (as part of Support Bill Inquiry Handling). If the requested amount exceeds that threshold, the adjustment is held pending approval by a supervisor or other user with a higher threshold, as described in 2.1.1.12.3.2.1.CMV Review Above-Threshold Adjustment.)

If an adjustment is initially approved (either automatically or after supervisor review), but after subsequent more detailed analysis is deemed unacceptable, Comverse ONE supports reversing the adjustment, undoing its effects on the balance. This is only necessary if a balance-reliant operation (for example, invoice generation) has already been performed; otherwise the adjustment can simply be modified. (Comverse ONE GUIs automatically determine whether modification is permissible or reversal is necessary and perform the appropriate operation.) See 2.1.1.12.3.2.2.CMV Reverse Adjustment for more information.

Optional

Not required for process mapping

The resolution processes may require investigation of the billing processes themselves to determine whether the disputed bills are the result of quality errors within the Service Provider processes.

Interactions

Not required for process mapping

These processes rely on the availability of appropriate adjustment policies, which are created within the Support Bill Inquiry Handling processes, for the timely resolution of major billing disputes.

Table 4.62 - Level 4: 1.1.1.12.3.3 Record Customer Bill Invoice Adjustment

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.12.3.3 Record Customer Bill Invoice Adjustment
Record the results of the adjustment if approved into the records relating to the customer’s bill invoice.
Extended Description
<i>Not required for process mapping.</i>
The purpose of Record Customer Bill Invoice Adjustment process is to record the results of the

adjustment if approved into the records relating to the customer’s bill invoice. This process is responsible for recording the entire adjustment events including adjustment operator, timestamp and detailed reason, for management purpose.

Explanatory

Not used for this process element.

Mandatory

The purpose of Record Customer Bill Invoice Adjustment process is to record the results of the adjustment if approved into the records relating to the customer’s bill invoice. This process is responsible for recording the entire adjustment events including adjustment operator, timestamp and detailed reason, for management purpose. [A]

This occurs automatically as part of the process of submitting the adjustment and applying it against the affected transaction and/or balance, as described for 2.1.1.12.3.3.1.CMV Record Below-Threshold Adjustment.

Optional

Not used for this process element.

Interactions

Not used for this process element.

4.1.9.4 Level 3: 1.1.1.12.4 - Track & Manage Customer Bill Inquiry Resolution [not assessed]

4.1.9.5 Level 3: 1.1.1.12.5 - Report Customer Bill Inquiry [not assessed]

4.1.9.6 Level 3: 1.1.1.12.6 - Close Customer Bill Inquiry Report [not assessed]

4.1.9.7 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.9.8 Level 2: 1.1.1.12 - Bill Inquiry Handling - Scores

Table 4.63 - Level 2: 1.1.1.12 - Bill Inquiry Handling - Scores

Level 2: 1.1.1.12 - Bill Inquiry Handling [1/6]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.12.1 - Create Customer Bill Inquiry Report	0
	1.1.1.12.2 - Assess Customer Bill Inquiry Report	0
	1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment	5
	1.1.1.12.3.1 Determine Automated Bill Adjustment	100%
	1.1.1.12.3.2 Analyze Detailed Bill Inquiry	100%
	1.1.1.12.3.3 Record Customer Bill Invoice Adjustment	100%
	1.1.1.12.4 - Track & Manage Customer Bill Inquiry Resolution	0
	1.1.1.12.5 - Report Customer Bill Inquiry	0
	1.1.1.12.6 - Close Customer Bill Inquiry Report	0

4.1.10 Level 2: 1.1.1.13 - Charging

4.1.10.1 Level 3: 1.1.1.13.1 - Perform Rating

Table 4.64 - Level 3: 1.1.1.13.1 - Perform Rating

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.13.1 Perform Rating
<p>Extended Description</p> <p>Process responsible for calculating the value of the service/product, before, during or after the rendering of the service, based on parameters of the request (type, quantity, etc.), parameters of the customer/subscriber (tariffs, price plans, accumulated usage, contracts, etc.) and other parameters (time-of-day, taxes, etc.). The same request maybe rated differently for different subscribers based on their purchased offers or service agreements. [AM]</p> <p><i>This process is mostly automated, but does have some minor manual aspects, such as initiating re-rating.</i></p> <p><i>This maps to the following processes (ctrl-click to follow links):</i></p> <ul style="list-style-type: none"> • 2.1.1.13.1.1.1.CMV Rate Online via Call Processor • 2.1.1.13.1.1.2.CMV Rate Online via Camel 3 GPRS/SMS • 2.1.1.13.1.1.3.CMV Rate Online via Diameter • 2.1.1.13.1.1.4.CMV Rate Online via Event Charging Interface • 2.1.1.13.1.1.5.CMV Rate Online via Open Service Access • 2.1.1.13.1.1.CMV Rate Online Activity • 2.1.1.13.1.2.CMV Rate Offline Activity • 2.1.1.13.1.3.CMV Re-rate • 2.1.1.13.1.4.1.CMV DB Inaccessible for Customer Lookup • 2.1.1.13.1.4.2.CMV DB Inaccessible for Direct Debit Request • 2.1.1.13.1.4.CMV Rate With Inaccessible Database • 2.1.1.13.1.5.CMV Rate With Outage Record Processor <p><i>In addition to the event rating processes described above, Comverse ONE also performs rating as part of billing activities for certain transactions, such as monthly recurring charges (see 1.1.1.10.1 Apply Pricing, Discounting, Adjustment & Rebates for more details).</i></p> <p>Explanatory</p> <p>Reserved for future use.</p> <p>Mandatory</p> <p>Reserved for future use.</p> <p>Optional</p> <p>Reserved for future use.</p>

Interactions

Reserved for future use.

4.1.10.2 Level 3: 1.1.1.13.2 - Apply Rate Level Discounts**Table 4.65 - Level 3: 1.1.1.13.2 - Apply Rate Level Discounts**

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.13.2 - Apply Rate Level Discounts
<p>Extended Description</p> <p>This process applies discounts to product prices at an individual product level.</p> <p>A discount may be expressed as a monetary amount or percentage, and modifies a price for a product</p> <p>When a discount is expressed as a percentage, the discounting process determines the discount calculated in relation to the price for the product.</p> <p>1.1.1.13.2.1 - Apply discount as %ge off of Rate - Currency[A] 1.1.1.13.2.1 - Apply discount as %ge off of Rate - Usage and Event[A] 1.1.1.13.2.2 - Apply discount as fixed amount off of rate - Currency[A] 1.1.1.13.2.2 - Apply discount as fixed amount off of rate - Usage and Event[A] 1.1.1.13.2.3 - Apply discount as charge to non-monetary balance[A]</p> <p>The discount may be displayed as a separate entry on the bill or may be combined with the rate for the product to only show as one entry.</p> <p>1.1.1.10.2.2 - Format invoice [A] 1.1.1.10.2.5 – Create bill format [AM]</p>

4.1.10.3 Level 3: 1.1.1.13.3 - Aggregate Items For Charging [not assessed]**4.1.10.4 Level 3: 1.1.1.13.4 - Manage Customer Charging Hierarchy [not assessed]****4.1.10.5 Level 3: 1.1.1.13.5 - Provide Advice of Charge/Rate [not assessed]**

4.1.10.6 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.10.7 Level 2: 1.1.1.13 - Charging - Scores

Table 4.66 - Level 2: 1.1.1.13 - Charging - Scores

Level 2: 1.1.1.13 - Charging [2/5]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.13.1 - Perform Rating	5
	1.1.1.13.2 - Apply Rate Level Discounts	5
	1.1.1.13.3 - Aggregate Items For Charging	0
	1.1.1.13.4 - Manage Customer Charging Hierarchy	0
	1.1.1.13.5 - Provide Advice of Charge/Rate	0

4.1.11 Level 2: 1.1.1.14 - Manage Billing Events

4.1.11.1 Level 3: 1.1.1.14.1 - Enrich Billing Events [not assessed]

4.1.11.2 Level 3: 1.1.1.14.2 - Guide Billing Events

Table 4.67 - Level 3: 1.1.1.14.2 - Guide Billing Events

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.14.2 - Guide Billing Events
<p>Extended Description</p> <p>The Guide Billing Events processes ensure that the event records used in the billing process relate to the correct customer billing account and products</p> <p>1.1.1.13.1.1 - CallProcessor - Online Rating[A] 1.1.1.13.1.1 - Camel 3 GPRS and SMS - Online Rating[A] 1.1.1.13.1.1 - Diameter - Online Rating[A] 1.1.1.13.1.1 - Event Charging Interface - Online Rating[A] 1.1.1.13.1.1 - Open Service Access - Online Rating[A] 1.1.1.13.1.2 - Rate Offline Usage[A] 1.1.1.13.1.5 - Rate using OR Processor[A] 1.1.1.13.1.3 - Perform Re-rating [A]</p> <p>A specific event record may be related to multiple customer billing accounts and subscribed products Distribution of billing event records to other processes may also occur</p> <p>1.1.1.14.2.1 - Transfer usage to Customer DB[A] 1.1.1.14.2.2 - Transfer usage to Campaign[A]</p>

4.1.11.3 Level 3: 1.1.1.14.3 - Mediate Billing Events [not assessed]

4.1.11.4 Level 3: 1.1.1.14.4 - Report Billing Event Records [not assessed]

4.1.11.5 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.11.6 Level 2: 1.1.1.14 - Manage Billing Events - Scores

Table 4.68 - Level 2: 1.1.1.14 - Manage Billing Events - Scores

Level 2: 1.1.1.14 - Manage Billing Events [1/4]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.1.14.1 - Enrich Billing Events	0
	1.1.1.14.2 - Guide Billing Events	5
	1.1.1.14.2.1 Ensure Billing Event Usage	100%
	1.1.1.14.2.2 Distribute Billing Event	100%
	1.1.1.14.3 - Mediate Billing Events	0
	1.1.1.14.4 - Report Billing Event Records	0



4.1.12 Level 2: 1.1.2.1 - SM&O Support & Readiness

4.1.12.1 Level 3: 1.1.2.1.1 - Manage Service Inventory [not assessed]

4.1.12.2 Level 3: 1.1.2.1.2 - Enable Service Configuration & Activation [not assessed]

4.1.12.3 Level 3: 1.1.2.1.3 - Support Service Problem Management [not assessed]

4.1.12.4 Level 3: 1.1.2.1.4 - Enable Service Quality Management [not assessed]

4.1.12.5 Level 3: 1.1.2.1.5 - Support Service & Specific Instance Rating

Table 4.69 - Level 3: 1.1.2.1.5 - Support Service & Specific Instance Rating

LEVEL 3 PROCESS MAPPING DETAILS 1.1.2.1.5 - Support Service & Specific Instance Rating
<p>Extended Description</p> <p>The purpose of the Support Service and Specific Instance Rating Processes ensure that rating and tariff information is maintained for each service class, for use by Service and Specific Instance Rating. They are also responsible for the processing of this information related to administration of the services.</p> <ul style="list-style-type: none"> 1.1.2.1.5.1 Configure Basic System Infrastructure Objects[AM] 1.1.2.1.5.10 Emergency PC Version Fallback[AM] 1.1.2.1.5.2 Configure Basic Offering[AM] 1.1.2.1.5.3 Configure Discount and Promotion Offering[AM] 1.1.2.1.5.4 Configure Network Service Offering[AM] 1.1.2.1.5.5 Perform PC Propagation[A] 1.1.2.1.5.6 Maintain Multiple Resellers Versions[AM] 1.1.2.1.5.8 Purge and Restore PC Version[AM] 1.1.2.1.5.9 Revert PC Version[AM]

4.1.12.6 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.12.7 Level 2: 1.1.2.1 - SM&O Support & Readiness - Scores

Table 4.70 - Level 2: 1.1.2.1 - SM&O Support & Readiness - Scores

Level 2: 1.1.2.1 - SM&O Support & Readiness [1/5]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.2.1.1 - Manage Service Inventory	0
	1.1.2.1.2 - Enable Service Configuration & Activation	0
	1.1.2.1.3 - Support Service Problem Management	0
	1.1.2.1.4 - Enable Service Quality Management	0
	1.1.2.1.5 - Support Service & Specific Instance Rating	5

4.1.13 Level 2: 1.1.2.5 - Service Guiding & Mediation

4.1.13.1 Level 3: 1.1.2.5.1 - Mediate Service Usage Records [not assessed]

4.1.13.2 Level 3: 1.1.2.5.3 - Report Service Usage Records [not assessed]

4.1.13.3 Level 3: 1.1.2.5.4 - Guide Resource Usage Records

Table 4.71 - Level 3: 1.1.2.5.4 - Guide Resource Usage Records

LEVEL 3 PROCESS MAPPING DETAILS 1.1.2.5.4 - Guide Resource Usage Records
<p>Extended Description</p> <p>The Guide Resource Usage Records process converts/relates the record to the appropriate service. In many cases, this process is performed by a resource such as a network element</p> <p>1.1.2.5.4.1 - COM - Process Inbound Records[A] 1.1.2.5.4.2 - CMCAP Input Usage Records to a Specific Rating Server [A] 1.1.1.13.1.1 - CallProcessor - Online Rating[A] 1.1.1.13.1.1 - Camel 3 GPRS and SMS - Online Rating[A] 1.1.1.13.1.1 - Diameter - Online Rating[A] 1.1.1.13.1.1 - Event Charging Interface - Online Rating[A] 1.1.1.13.1.1 - Open Service Access - Online Rating[A] 1.1.1.14.3.1 - Translate usage into Rating input format [A] In case of Online Rating Network elements identifies the service and connects to correct rating interface from above [M]</p>

4.1.13.4 Supporting Evidence References (Works Cited)

Supporting evidence, as referenced in the above mapping tables, is described within the detailed Mapping document for the assessment.

4.1.13.5 Level 2: 1.1.2.5 - Service Guiding & Mediation - Scores

Table 4.72 - Level 2: 1.1.2.5 - Service Guiding & Mediation - Scores

Level 2: 1.1.2.5 - Service Guiding & Mediation [1/3]		
Level 3 Process	Level 4 Process	L4/L3 Process Score
	1.1.2.5.1 - Mediate Service Usage Records	0
	1.1.2.5.3 - Report Service Usage Records	0
	1.1.2.5.4 - Guide Resource Usage Records	5



5 Information Framework Assessment Overview

Not applicable for this Assessment.

6 Framework Conformance Result

This section details the Scores awarded to reflect Conformance of the Comverse ONE Billing & Active Customer Management V3.5 Product to the Business Process Framework & Information Framework components of Framework 12.

6.1 Business Process Framework – Scoring Rules

The conformance scores granted were based on the following TM Forum scoring rules:

Table 6.1 - TM Forum Business Process Framework: Conformance Scoring Rules

Framework 12.0 Conformance Certification (Product/Solution/Implementation)		
Business Process Framework (eTOM) - Conformance Level Descriptions (Level 3 processes)		
Process level	Conformance Score	Qualifier
Level 1	Not applicable	Conformance Assessment shall not be carried out at this process level - hence Conformance Level shall not be awarded at this level.
Level 2	Not applicable	A conformance level is not awarded to Level 2 processes in Framework 12.0 Assessments. The Certification Report shall highlight the coverage of a Level 2 process submitted in scope for an Assessment in terms of number of Level 3 processes submitted for assessment out of the total number defined for the Level 2 process.
Level 3	Score is awarded between 3.1 & 5.	The Conformance Score is awarded for each Level 3 processes submitted in scope for the Assessment. The Conformance Score awarded can be a value between 3.1 & 5 depending on the level of coverage & conformance to the Level 3 process based on the alignment to the level 3 Implied Tasks as decomposed in the Level 4 process definitions. <i>Any manual implementation of the process support shall be noted in the Conformance Report and Detailed Results Report.</i>



6.2 Business Process Framework - Conformance Result Summary

The graphs in this section provides an overview of the conformance levels granted to the Level 3 Processes presented in scope for the Comverse ONE Billing & Active Customer Management V3.5 Product Assessment. Each Level 3 process was measured using a Business Process Framework (eTOM) conformance score according to level of Conformance – Full Conformance or Partial Conformance as described in section 6.1 Business Process Framework – Scoring Rules.

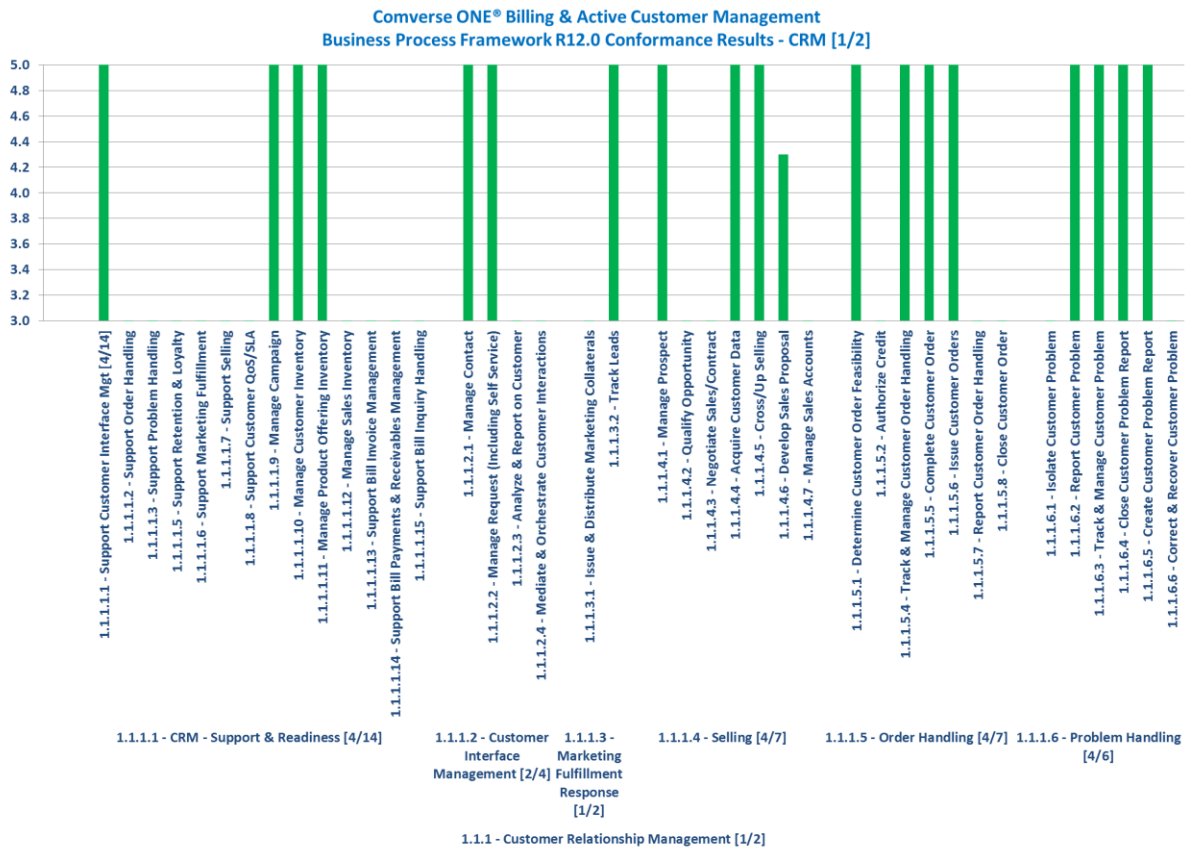


Figure 6.1 - Conformance Result Summary – CRM [1/2]

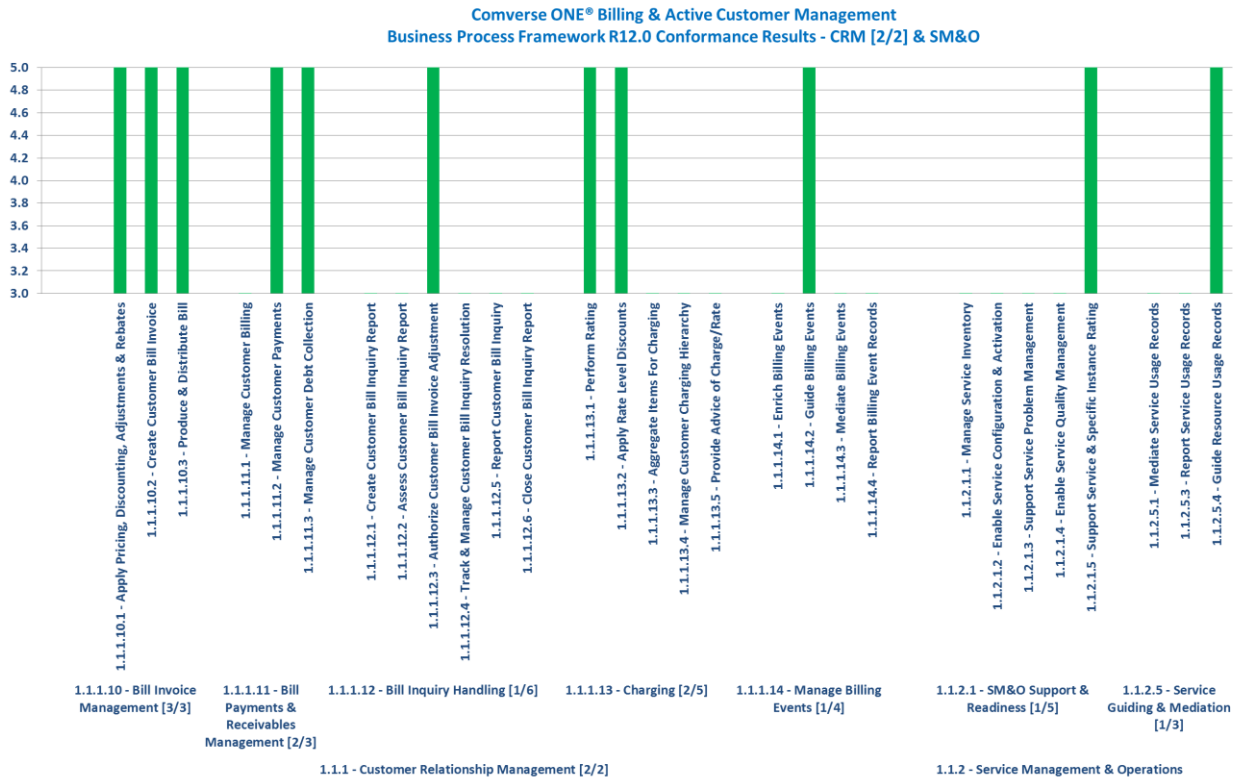


Figure 6.2 – Conformance Result Summary – CRM [2/2] & SM&O

6.3 Business Process Framework – Conformance Results Detailed

The following table provides a more detailed breakdown of the scores awarded with some additional commentary.

Table 6.2 - Business Process Framework: Detailed Conformance Result

Comverse ONE Billing & Active Customer Management V3.5 Framework 12.0 Product Assessment - Business Process Framework Conformance Results		
Business Process Framework Process	Conformance Score [Coverage]	Comment
Level 1: 1.1.1 - Customer Relationship Management	N/A	<i>Conformance Score not awarded for Level 1 processes.</i>
Level 2: 1.1.1.1 - CRM - Support & Readiness	[4/14]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.1.1 - Support Customer Interface Management	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.1.2 - Support Order Handling	0	This process was not submitted for assessment.
1.1.1.1.3 - Support Problem Handling	0	This process was not submitted for assessment.
1.1.1.1.5 - Support Retention & Loyalty	0	This process was not submitted for assessment.
1.1.1.1.6 - Support Marketing Fulfillment	0	This process was not submitted for assessment.
1.1.1.1.7 - Support Selling	0	This process was not submitted for assessment.
1.1.1.1.8 - Support Customer QoS/SLA	0	This process was not submitted for assessment.
1.1.1.1.9 - Manage Campaign	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.1.1.1.10 - Manage Customer Inventory	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.1.11 - Manage Product Offering Inventory	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.1.12 - Manage Sales Inventory	0	This process was not submitted for assessment.
1.1.1.1.13 - Support Bill Invoice Management	0	This process was not submitted for assessment.
1.1.1.1.14 - Support Bill Payments & Receivables Management	0	This process was not submitted for assessment.
1.1.1.1.15 - Support Bill Inquiry Handling	0	This process was not submitted for assessment.
Level 2: 1.1.1.2 - Customer Interface Management	[2/4]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.2.1 - Manage Contact	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.2.2 - Manage Request (Including Self Service)	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.2.3 - Analyze & Report on Customer	0	This process was not submitted for assessment.
1.1.1.2.4 - Mediate & Orchestrate Customer Interactions	0	This process was not submitted for assessment.

Level 2: 1.1.1.3 - Marketing Fulfillment Response	[1/2]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.3.1 - Issue & Distribute Marketing Collaterals	0	This process was not submitted for assessment.
1.1.1.3.2 - Track Leads	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.4 - Selling	[4/7]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.4.1 - Manage Prospect	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.4.2 - Qualify Opportunity	0	This process was not submitted for assessment.
1.1.1.4.3 - Negotiate Sales/Contract	0	This process was not submitted for assessment.
1.1.1.4.4 - Acquire Customer Data	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.4.5 - Cross/Up Selling	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.1.1.4.6 - Develop Sales Proposal	4.3	Partially Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process supported alignment criteria with the standard Business Process Framework (eTOM) but with some deviations.
1.1.1.4.7 - Manage Sales Accounts	0	This process was not submitted for assessment.
Level 2: 1.1.1.5 - Order Handling	[4/7]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.5.1 - Determine Customer Order Feasibility	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.5.2 - Authorize Credit	0	This process was not submitted for assessment.
1.1.1.5.4 - Track & Manage Customer Order Handling	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.5.5 - Complete Customer Order	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.5.6 - Issue Customer Orders	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.5.7 - Report Customer Order Handling	0	This process was not submitted for assessment.
1.1.1.5.8 - Close Customer Order	0	This process was not submitted for assessment.

Level 2: 1.1.1.6 - Problem Handling	[4/6]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.6.1 - Isolate Customer Problem	0	This process was not submitted for assessment.
1.1.1.6.2 - Report Customer Problem	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.6.3 - Track & Manage Customer Problem	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.6.4 - Close Customer Problem Report	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.6.5 - Create Customer Problem Report	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.6.6 - Correct & Recover Customer Problem	0	This process was not submitted for assessment.
Level 2: 1.1.1.10 - Bill Invoice Management	[3/3]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.10.1 - Apply Pricing, Discounting, Adjustments & Rebates	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.1.1.10.2 - Create Customer Bill Invoice	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.10.3 - Produce & Distribute Bill	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.11 - Bill Payments & Receivables Management	[2/3]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.11.1 - Manage Customer Billing	0	This process was not submitted for assessment.
1.1.1.11.2 - Manage Customer Payments	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.11.3 - Manage Customer Debt Collection	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.12 - Bill Inquiry Handling	[1/6]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.12.1 - Create Customer Bill Inquiry Report	0	This process was not submitted for assessment.
1.1.1.12.2 - Assess Customer Bill Inquiry Report	0	This process was not submitted for assessment.
1.1.1.12.3 - Authorize Customer Bill Invoice Adjustment	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework

		(eTOM).
1.1.1.12.4 - Track & Manage Customer Bill Inquiry Resolution	0	This process was not submitted for assessment.
1.1.1.12.5 - Report Customer Bill Inquiry	0	This process was not submitted for assessment.
1.1.1.12.6 - Close Customer Bill Inquiry Report	0	This process was not submitted for assessment.
Level 2: 1.1.1.13 - Charging	[2/5]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.13.1 - Perform Rating	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.13.2 - Apply Rate Level Discounts	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.13.3 - Aggregate Items For Charging	0	This process was not submitted for assessment.
1.1.1.13.4 - Manage Customer Charging Hierarchy	0	This process was not submitted for assessment.
1.1.1.13.5 - Provide Advice of Charge/Rate	0	This process was not submitted for assessment.
Level 2: 1.1.1.14 - Manage Billing Events	[1/4]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.1.14.1 - Enrich Billing Events	0	This process was not submitted for assessment.
1.1.1.14.2 - Guide Billing Events	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.1.1.14.3 - Mediate Billing Events	0	This process was not submitted for assessment.
1.1.1.14.4 - Report Billing Event Records	0	This process was not submitted for assessment.

Level 1: 1.1.2 – Service Management & Operations	N/A	<i>Conformance Score not awarded for Level 1 processes.</i>
Level 2: 1.1.2.1 - SM&O Support & Readiness	[1/5]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.2.1.1 - Manage Service Inventory	0	This process was not submitted for assessment.
1.1.2.1.2 - Enable Service Configuration & Activation	0	This process was not submitted for assessment.
1.1.2.1.3 - Support Service Problem Management	0	This process was not submitted for assessment.
1.1.2.1.4 - Enable Service Quality Management	0	This process was not submitted for assessment.
1.1.2.1.5 - Support Service & Specific Instance Rating	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.2.5 - Service Guiding & Mediation	[1/3]	<i>Conformance Score not awarded for Level 2 processes. Only scope coverage indicated.</i>
1.1.2.5.1 - Mediate Service Usage Records	0	This process was not submitted for assessment.
1.1.2.5.3 - Report Service Usage Records	0	This process was not submitted for assessment.
1.1.2.5.4 - Guide Resource Usage Records	5	Fully Conformant Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).



6.4 Information Framework – Scoring Rules

Not applicable for this assessment.



6.5 Information Framework – Conformance Result Summary

Not applicable for this assessment.