

Design Services

SERVICES OVERVIEW

**Make the Intricate Seem Intuitive with
Innovative Quote-to-Cash Solutions**



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Introduction

WHAT SETS OUR DESIGN SERVICES APART?

Designing an effective quote-to-cash system is no small endeavor, and selecting the right partner to guide your journey is paramount. At the heart of our Design Services is our commitment to listening to your needs and delivering innovative solutions that address them. While many firms claim proficiency in the design and architecture of quote-to-cash systems, our approach is rooted in domain expertise and a deep understanding of each client's unique challenges, aspirations, and objectives.

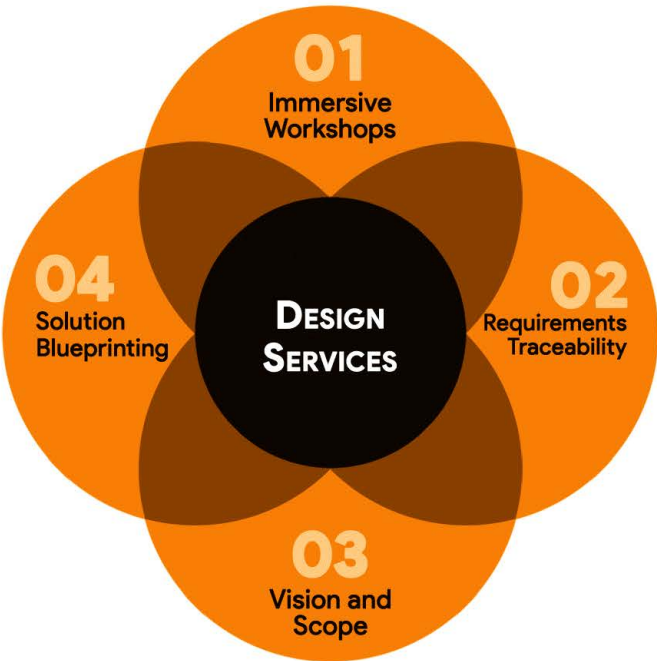
Our uniqueness is not just in what we do but in how we do it. We recognize that each client has its distinct competitive edge. Our team devotes significant time to developing a holistic understanding of your products and services to ensure the effectiveness and relevance of the planned solution. Moreover, this deep knowledge ensures that the solution captures all necessary variables, such as pricing models, discount structures, customization options, and service terms. Only with thorough insight can a system be molded to resonate with your unique business needs.

In some cases, the demand for a tailored solution can surpass the allure of a generic implementation. We're acutely aware of the pitfalls of over-customization; while it might seem advantageous initially, it can result in future support challenges. We seek to strike a balance between a custom-tailored solution and one that is sustainable and adaptive to future changes.

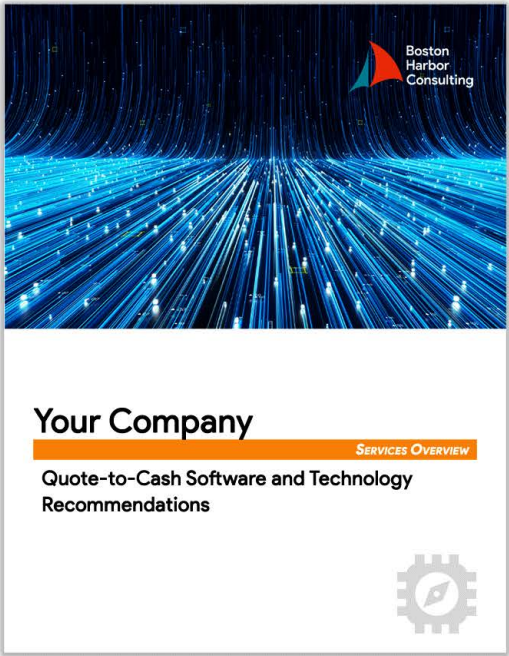
In this whitepaper, we highlight our comprehensive approach to Design Services. Our immersive workshop approach to gathering requirements ensures stakeholder alignment from the outset. After understanding your project requirements, we prepare a Vision and Scope document encompassing a detailed product backlog with the user stories sequenced in development sprints. We prepare a Requirements Traceability Matrix to map the project deliverables to the foundational requirements. To help visualize the future-state solution, we provide a blueprint for the user experience and system workflows for clarity and alignment. At Boston Harbor Consulting, our approach to design isn't just about crafting solutions; it's about forging partnerships. Dive into our whitepaper for a deeper understanding of how we make the intricate seem intuitive.

What's Included

KEY BENEFITS OF OUR SERVICE



SERVICE DELIVERABLE



SERVICES TASKS AND TIMELINE

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Project Kickoff	★							
Requirements Workshops								
Vendor Presentations								
Fit and Alignment Scoring								
Readout Preparation								
Project Readout								

Immersive Workshops

01

HARMONIZING VISION: ENCOURAGE COLLABORATION FOR THE BEST IDEAS

Unifying diverse viewpoints into a coherent design strategy is crucial for the success of any enterprise initiative, especially in the complex realm of quote-to-cash systems. Our approach to facilitating immersive workshops during the design phase is tailored to bring 360-degree alignment among all parties involved in your project.

Quote-to-cash systems typically require the coordination of several departments, business and technology teams, and the sponsorship of key executives for the project to succeed. Every touchpoint has a unique perspective and set of needs, from product marketing to sales, finance, and contract operations. As part of our Design Services, our immersive workshops act as a melting pot for these varied insights and provide a forum for collaboration.

These workshops create an open, inclusive environment that fosters communication among your decision-makers, project team, and even end-users. Through a series of structured discussions, interactive exercises, and real-time analysis, our team will guide design efforts and prioritize critical requirements, challenges, and opportunities. Our collaborative approach not only brings clarity and focus to the project but also ensures that the future-state solution is holistic, feasible, and closely aligned with the overarching goals and objectives of the project.

The focus on alignment with our Design Services goes beyond merely keeping everyone on the same page. It infuses the project with collective insight and expertise, promoting informed decisions and innovative solutions that resonate with your organizational objectives. The result is a quote-to-cash system design that stands as a robust, responsive, and efficient tool, poised to elevate your sales operations to new heights of operational excellence.



Requirements Traceability

02

DEFINING THE ASK: LINK DELIVERABLES TO REQUIREMENTS FOR ACCOUNTABILITY

Requirements are the lifeblood of any project as they define the expectations, needs, and objectives the solution must realize. However, they can become sources of confusion, misinterpretation, or oversight without a systematic management approach. During the Immersive Workshops, our team will capture the functional expectations of the planned quote-to-cash solution, and post-workshop, we undertake the task of collating the array of inputs, with careful attention to recording all data points. We then categorize these inputs based on thematic similarities, urgency, and strategic relevance, distilling them into preliminary project requirements.

The design team's next step is to review the requirements for clarity and completeness. It's common to encounter ambiguities or contradictions in stakeholder inputs, given the diverse perspectives they come from. Our team pinpoints such ambiguities during this phase and identifies any evident gaps. Armed with identified ambiguities, we convene targeted follow-up sessions with the concerned stakeholders. The aim is to dive deeper into specific areas of concern, seeking clarity and resolving contradictions. This iterative feedback process ensures that each requirement is clear and aligned with the project objectives.

With a refined list, the next step is requirement prioritization. We sequence the requirements using business value, feasibility, dependencies, and stakeholder urgency criteria. Once sequenced, our design team will enumerate and structure the final requirements into a Requirements Traceability Matrix (RTM) and provide a framework to map all user stories prepared in the product backlog to an originating requirement. The RTM provides a vital project governance tool to guide future project phases, enhance quality control, and minimize scope creep.



Vision and Scope

03

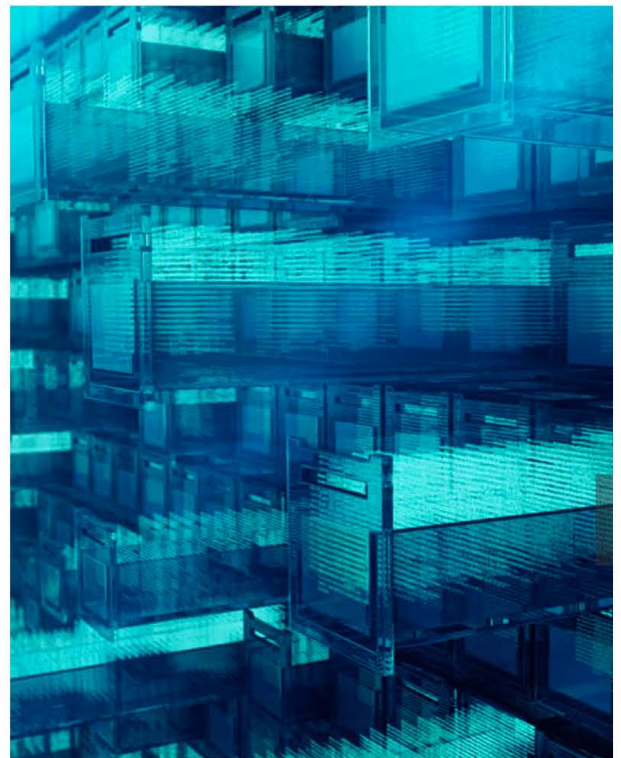
TELLING THE STORY: SCOPE YOUR VISION WITH A PRODUCT BACKLOG

Measuring twice and cutting once is a time-tested philosophy for approaching tasks with little margin for error. In the context of enterprise quote-to-cash projects, this philosophy speaks volumes about the importance of proper design. The primary deliverable of our firm's Design Services is developing a Vision and Scope document laying the development foundation for your quote-to-cash project.

The Vision and Scope document is a comprehensive guide that outlines your project's objectives, goals, and boundaries. It offers a clear picture of what the project aims to achieve (the vision) and the parameters it must operate (the scope). Preparing this document during the design phase ensures that all stakeholders have a unified understanding from the outset, reducing the risk of costly missteps and course corrections later in the project's lifecycle.

Central to the Vision and Scope document is the product backlog, a collection of user stories that describe each feature and capability planned for the project. The user stories, drawn from an extensive library curated over scores of projects, are detailed narratives that include stringent acceptance criteria. This acceptance criteria simultaneously guides development and gauges user story completion.

The product backlog isn't merely a list; it's a roadmap for development and the backbone of the vision and scope. We sequence every user story in a series of development epics and sprints, considering longer lead-time items being actioned earlier in the project. We map each user story back to a requirement listed in the RTM. Our systematic approach to Design Services will help you articulate your project plan to each target audience and ensure that nothing gets lost in translation from design to development.



Solution Blueprinting

04

VISUALIZING THE FUTURE: CRAFT A COMPREHENSIVE SYSTEM SCHEMATIC

We understand that the devil is in the details when building enterprise solutions, and quote-to-cash systems are certainly no exception. As an integral component of our Design Services, solution blueprinting goes beyond mere wire-frame sketches and includes a detailed design of the future state of your system. Solution blueprinting is about crafting a clear and transparent plan, a schematic of the entire solution that's comprehensive and understandable to all stakeholders.

Utilizing the industry-leading user experience design tool, Figma, we carefully craft the user experience. This process builds on the abstract concepts defined in the product backlog. It breathes life into the user stories with pixel-perfect screens to allow stakeholders to visualize the future-state solution tangibly. It's one thing to explain how a solution will function; it's another to see it on the simulated screens.

But we continue beyond user interfaces. The solution blueprinting process extends into designing intricate workflows—integration data flows, scripting logic, or complex approval processes—that are pivotal to achieving accuracy with the planned functionality. This dual focus—on user experience and workflow logic—creates a comprehensive, visually rich blueprint to communicate the project vision to all stakeholders.

As a critical part of design phase activities, our focus on solution blueprinting is not merely a process; it's a promise of clarity, collaboration, and foresight. For clients in the early stages of their quote-to-cash journey, our approach assures that every screen, script, and process included in the blueprint will be thoughtfully planned and documented for optimal success.



Recommendations & Next Steps

WHAT YOU WILL RECEIVE AFTER THE ASSESSMENT



After our *Software Selection Rapid Assessment* engagement, we will provide you with our *Quote-to-Cash Software and Technology Recommendations* report. The document will summarize our findings with recommendations tailored to your enterprise's unique objectives. We will provide the vendor scorecard results and an evaluation of options detailing their alignment with your unique business processes. Additionally, the report will include a prioritized roadmap of suggested next steps and potential pitfalls or challenges to be aware of. Our objective is to equip you with a holistic, actionable blueprint that informs and empowers your team to move forward with clarity and confidence with your quote-to-cash initiative.

CONTACT US, AND TAKE THE NEXT STEP IN YOUR QUOTE-TO-CASH JOURNEY.

Navigating quote-to-cash software selection is no small feat. Throughout my tenure, I've witnessed many QTC implementation challenges and understand the significance of making the right software decision. But beyond the spreadsheets and systems, what truly resonates with me is the people: passionate professionals who are unwavering in their quest for excellence. If you are seeking a partner in this journey—a firm that values precision and personal touch—please consider reaching out at services@bostonharborconsulting.com. My team and I are here to listen, understand, and co-create a brilliant solution for you. Let's embark on this journey together and make the story of your organization's transformation one of enduring success.



Shalane Sheppard
Vice President, Services

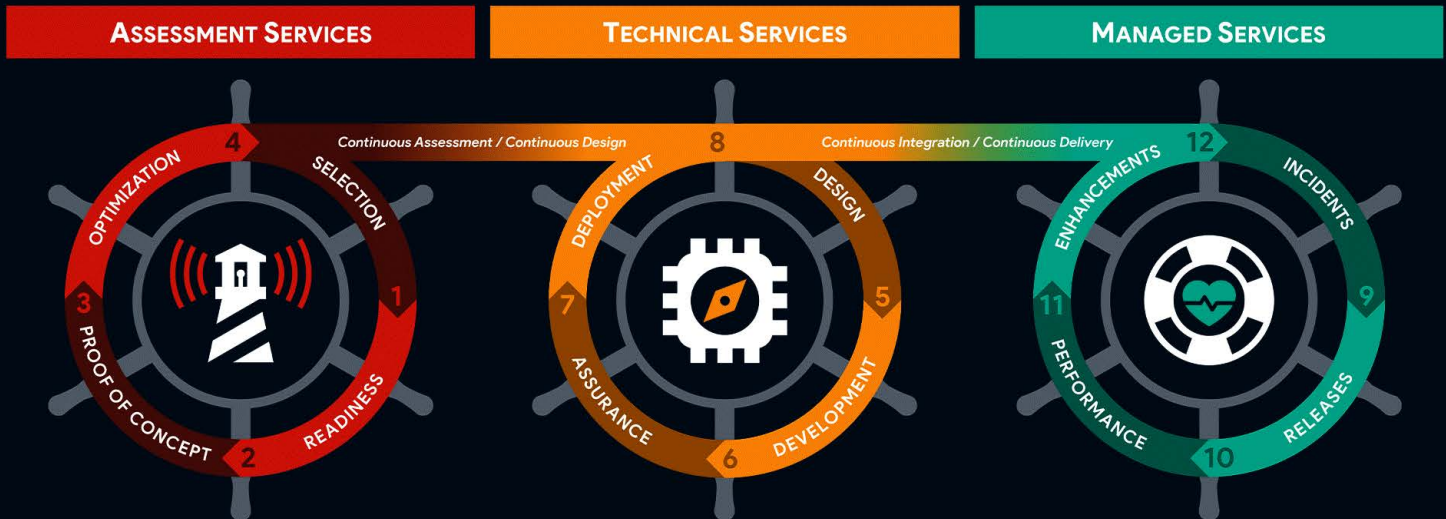
About Us



UNLOCKING SUCCESS IN SALES OPERATIONS: A JOURNEY WITH BOSTON HARBOR CONSULTING

With a rich history and a dedication to excellence, we have evolved into a trusted partner for organizations seeking transformative solutions in the quote-to-cash domain. Our story begins with a simple vision: to bridge the gap between business objectives and technical realities. In the dynamic landscape of Sales Operations, where efficiency, agility, and precision are paramount, we recognized the need for a partner who could seamlessly integrate technology and strategy. This realization fueled the inception of Boston Harbor Consulting, and our commitment to this vision has guided us ever since.

OUR COMPREHENSIVE SERVICE PORTFOLIO



OUR GUIDING PRINCIPLES: EXPERTISE AND INNOVATION

With over a decade of domain expertise in quote-to-cash solutions across various sectors and geographic regions, we know that true excellence lies in understanding the unique challenges and opportunities that each client brings to the table. Innovation is our driving force. We believe in the power of creative problem-solving and continually seek out innovative approaches to tackle complex challenges. Our specialization in SAP technology and low-code innovation ensures that we stay at the forefront of enterprise development. Innovation isn't just a buzzword for us; it's embedded in our DNA.

THE BOSTON HARBOR CONSULTING DIFFERENCE

Our distinction lies not only in what we do but in how we do it. We're not just a consulting firm; we're your partner in success. Our commitment to long-term growth, adaptable solutions, and unwavering support sets us apart. As you navigate the complexities of Sales Operations, choose Boston Harbor Consulting as your compass. Together, we'll embark on a journey of transformation, unlocking new horizons for your organization. Join us in shaping the future of Sales Operations. Welcome to Boston Harbor Consulting.

