# IBM WebSphere Portal 4.1 in Dynamic Workplaces ™

## Industrial Sector: ManuCo Demonstration
## Scenario and Background

This static demonstration is intended to showcase the potential value of IBM's Dynamic Workplaces™ for an IBM customer.  The design highlights the need for IBM's customers to address employee self-service as a significant and tangible investment, while paving the way for much more sophisticated applications that are now possible with advanced products such as IBM's Websphere Portal 4.1.

This example uses an industrial sector scenario, though most of the concepts and functions would be relevant to all industries.  We are now crafting similar models for other industry segments, and application areas.

The following **four** roles are used in this demonstration:

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| **CustCo** | Ponda Taylor is a customer of ManuCo's and primarily works with one of ManuCo's distributors, DistCo. |
| **DistCo** | Don Majors works at DistCo, which is one of ManuCo's largest distributors. |
| **ManuCo Direct** | William Tate is a direct sales representative for ManuCo. |
| **ManuCo Inside Sales** | Laura Ward works in this area and handles administrative work, as well as simple orders for repeat customers. |

**This is the opening scenario for the script:**

Here we have a manufacturing company that is working hard to sell their products to end customers thru distributors.  Like most firms, ManuCo operates with both direct sales force selling to large fleet opportunities and OEM markets and a distributor team team selling to consumers.  Over time they have implemented an Inside Sales team to offload their highly paid direct sales reps from both direct sales and distributor operations of re-orders and other administrative concerns.

In the 80's and early 90's, the sales process for OEM markets was typically a much more complex sale, involving engineer-to-order, and other custom considerations.  Distributor markets and sales processes were relatively homogenous.  In the last ten years or so however, major "super-distributors" have changed the landscape.  These channels have been demanding significantly increased service levels.  Many of the sales teams for these super-distributors are seeing issues and requests never encountered before.

Here we find ManuCo has already implemented extranet web sites for its customers to buy commodities from the Inside sales operations Manuco.COM.  Two other web sites were built for the Direct Sales team and for the Distributors.  Inside sales has also been using a call

management system.  Customers were increasingly confused by the mixed messages from the three customer facing teams reps, inside sales, distributor.  As well, the sales process for most of their revenue the 20% of the deals that make up 80% of the revenue is still just as cumbersome as in 1980.  The teams must manage several customer stakeholders to close a deal, and the customer participants do not always communicate.

Now however, ManuCo has implemented a consistent Enterprise Portal Framework...using IBM's Dynamic Workplaces... Let's take a look at how they are operating now.

Here we find Ponda Taylor, the Project Manager at CustCo, who is responsible for installing a new "800X" power generator manufactured by ManuCo.  DistCo, their local distributor, has been engaged in the sales effort from the beginning, as they are closer to the customer, have local presence, and possess a services team that can meet on-going support requirements.

**To Begin Demo:**
1. Click on **default.htm** in your Manuco folder.
2. Click on **CustCo Project Lead** from Main Page

## CustCo : Ponda Taylor

| Instructions | Suggested Dialogue |
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| . | Ponda opens her Desktop.  Here she finds everything she needs in her working releationship with ManuCo. |
| Describe the screen orientation. Start menu on the left, work area and information in the middle, synchronization with community on the right | |
| Point to News portlet | "We also have the news content personalized for CustCo and Ponda.  In the News portlet, we see on the right side a notice that CustCo's special discount pricing for the month will expire shortly.  We even see news that is particular to where Ponda is located: Atlanta, GA."<br><br>This capability not only allows receipt of information, but allows Ponda to work with her team and act on it to process. |
| | "Oh, what's this…an alert from my good friend Don Majors.  Don has been a distributor for ManuCo's products for some time, we like his local service." |
| Point to Alert portlet. | "Uh Oh - Looks like Don's team is having problems with their local inventory again.  I hope this doesn't upset the project." |
| Click **Late Shipment** link in Alert portlet. | "The date has slipped, let's look take a look at the project dates" |
| Click **Install 800x** in the note. The screen now goes to the Project Workspace.<br><br>In the project workspace now, describe how the workspace supports Ponda's primary work as a | |

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| Project Manager. And how ManuCo found that customers are more apt to use a portal if it supports their processes. | |
| Click **TEAM** tab, discuss how she can see who is on-line or not..discretely for each project, discuss how she has been able to build a team to include her suppliers, and her team-mates at ManuCo.<br><br>Click **Process** tab, review how processes can be formed across virtual teams.  Mention that this process is entirely visible to all participants and that it can be measured and managed for continuous improvement ..unlike today's e-mail and phonecall based communications. | "Hmm… looking at the project I can see that a September date will not work." |
| | "Scanning Sametime…I see that Don is online.. I guess I will give him a piece of my mind…" |
| Point to Sametime and show how Don is online (but away from his computer). | "I could ping Don right now, but since Sametime indicates that he is away, I want to make sure he gets the message on this..so I will send him an urgent message". |
| Inside Alert Portlet, click on **New Alert**.  Lotus Note Messagebox appears.<br><br>In messagebox, type: **Don, I must have original delivery date, September shipment is unacceptable.**<br><br>Click **Send**. | "Now let's see how Don, from DistCo, is affected by this." |
| Close by clicking on **Sign out** in top right | |

## DistCo: Don Majors

| Instructions | Suggested Dialogue |
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| Click **DistCo Inside Sales** from the main screen. | "Don sees an alert on his screen from his favorite customer, Ponda Taylor" |
| Point to Alert Portlet | |
| Open **Shipping Delay** Alert | "Don, I must have original delivery date, September shipment is unacceptable" |
| In the left naviagation panel, click **Work Activity**, then **Projects** | "Don looks at the project and sees original commitment of 08/15 and realizes there may be a problem.  Uh Oh" |
| Click **Discussion** in left navigation panel.<br><br>Click **Create a discussion** tab.<br><br>When Don selects users, he sees listbox of all users with the online status next to their names (matches Sametime in bottom right - use Laura Ward and William Tate to highlight this feature). **Note**: in this demo, you cannot actually hightlight and select users, just use as a speaking point. | |
| Explain benefits of Quickplace. | "To ensure everyone on the team sees this request, Don will create a discussion in the Quickplace for this project." |
| Type **ManuCo team: I am desperate here... CustCo project depends on 2 new 800X units, but our supply is depleted, can't get till mid-Sept. Can you help?** | |
| Click **Done**. | |
| Move over to Alert Portlet and click **New Alert** Send note to Laura Ward and in text, type:  **Please help. See discussion**… with link" | |
| Click **Sign Out.** This brings you back to main screen. | |

## ManuCo Inside Sales: Laura Ward

| Instructions | Suggested Dialogue |
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| Click **ManuCo Inside Sales** | "As we know, Laura works within Inside Sales for ManuCo.  Here, after signing in, she is opening her desktop and this is what she sees." |
| | "This morning during breakfast, Laura was reading an industry-related magazine and found a term with which she was unfamiliar.  Instead of asking someone else or searching through the web to find out the meaning of the term, Laura decides to use HelpLine Bots." |
| | "HelpLine bots are simple interfaces, accessible in the Sametime Instant Messaging community, that can provide you access to information. Quite simply, it provides a quick, alternative interface to grabbing data from the network the Web" |
| Click on any of the green buttons within the **Ask Your Questions** portlet. | "Laura is going to use the 'WhatIs' helpline bot to find out what a 'kip' is." |
| Type in **What is a kip** and click the **Send** button. | "Notice she never once left her workspace to hunt down this information, which provides even more efficiency as she performs her activities throughout the day" |
| | "This morning, Laura is anxious about her expense reports, so she quickly checks to see that her dispersals have been processed" |
| Click **Human Resource** tab - Review these tabs .. | "As you can see within this page group, Manuco implemented Employee Self-Service  within their corporate portal.  These functions enables employees to create, change and view their data in a personalized manner over the company intranet. Since ManuCo has implemented web-based functions such as these, they have been able to reduce their corporate human resource staff by over 50%, while making Laura more productive… and mobile." |
| Click **Expense Accounts** page<br>Click **Claims Fully Paid** | "Laura is relieved to see that her last expense report was fully paid" |
| Click **Manage Finances** page | "Laura decides to review her 401K plan to see if she should make any adjustments"<br>"Since she is not sure if she should make changes now or after this quarter, she can enlist assistance from the Human Resource department through SameTime." |
| Discuss this example of contextual collaboration | "Laura has already worked with Robert Billman before and sees that he is available to answer questions online." |

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| Click **Robert Billman**.<br><br>Type **Is it better to readjust my 401K before of after the quarter?** | |
| Click **Tech Support** | |
| Describe how each of the function points supports the needs of a mobile with Laptop employee, and other assets.  This solution is deployed across all of the employees, so that technical problems with the infrastructure can be readily identified and repaired..remotely...No more waiting on hold for the Helpdesk... and the IT staff was able to trim about 30% of its costs!  ManuCo has expanded this to now include all employee assets thru full lifecycle show asset management link. | |
| | "Notice that Don's alert is shown on the Alert Portlet.  Let's take a look at the message" |
| Click on Don's message in the Alert Portlet | "Uh Oh..looks like Don needs some help" |
| Click **Order Delay Issue**.  View moves to Projects. | "Notice that it links to our discussion thread" |
| | "Laura believes this can be handled.  She will reply to Don's note" |
| In reply text area, type in **Don, I'll handle it** .<br><br>Click **Reply**. | |
| In left navigation, click **Work Activity**, then **Projects**.<br><br>Click **Create Project** tab. | "Here we see a template that has been pre-created for supplier management issues.  Laura simply chooses the team members that she wishes to participate in the project  with her. " |
| Select a few of the names from the list boxes and mention that she would fill in her desired dates.<br><br>Discuss how the terms change from "Customer" to "Supplier" or vice-versa as the functions move across the value chain.<br><br>Discuss how a "sense and respond protocol" would be invoked to ensure that folks that had been pinged would respond within pre-set response times or else the requests will escalate. | |
| Now, click **Discussions** to see person most appropriate to handle situation. | "Laura needs to confirm this through Bill Tate that ManuCo has ordered 2 800X units for DirectCo Since she sees that Bill is online and ready to receive messages, she will send him a Sametime instant message" |

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| Right-click on **William Tate** in the Discussion Portlet and a context menu appears.<br><br>Click **Chat** on the context menu; messagebox appears.<br><br>Type **Do we have 2 extra 800x to ship to Custco**, and click **Send**.<br><br>A response from Bill appears. | "Laura is happy hearing this reponse from Bill, for this solves the situation for both their customer and their distributor." |
| | "Lunchtime for Laura, so she sign out for now." |
| Click on **Sign Out** | |

## ManuCo Direct: William Tate

| Instructions | Suggested Dialogue |
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| No need to click to ManuCo Direct - discuss from Main Menu | "Bill has already sent the good news to Ponda via an urgent message, so let's go back to CustCo and Ponda." |

BACK to
## CustCo: Ponda Taylor

| Instructions | Suggested Dialogue |
|---|---|
| | Ponda opens desktop. Sees an alert from William Tate. |
| Click on **CustCo Project Lead** in the Main Menu. Click on **Alert**. | Alert reads " Have addressed late shipments thru Distco, your unit will ship this Friday from ManuCo Direct." |
| | Ponda is so delighted she sends a word of thanks to the whole team via Sametime. |