APQC

Financial Management: Sales and Order Management

There is a fee associated with participation in APQC's Open Standards Research. If you have any questions about the fee, please contact the APQC helpdesk for more information.

This document should be used as a guide in the offline collection of data. APQC cannot accept submissions using this file. Please contact the APQC helpdesk on helpdesk@apqc.org for more information about offline submission.

OSBC DATABASE PRIVACY AND PROTECTION OF PERSONAL INFORMATION
Please refer to APQC's privacy statement for disclosures relating to the collection and use of your personal information.

Instructions

Research project structure
APQC OSBC research projects are designed to collect a wide variety of information about your entire organization, with a specific emphasis on the particular business entity for which the research is being collected.

Each survey is divided into a number of sections, separated by a block of introductory text. Each section of the research project presents questions about specific processes and activities in your business entity. Each of these process-specific sections corresponds to APQC's Process Classification Framework.

The last two sections contain questions about your organization as a whole and your particular business entity, respectively. Before each section containing process-specific questions, you are presented with a list of components of the PCF. This list identifies which components of the PCF are addressed by this particular section of the research project. The numbers in the list correspond to the PCF's unique numbering scheme. Questions within the section will address specific activities for the stated component of the PCF.

Navigation, Saving Results, and Submitting a Survey
The survey is presented in pages. Each page may have one to many questions on it. Each question on each page must be answered. Use the buttons at the bottom of each page to navigate throughout the survey. To avoid data loss, do not use the browser "back" and "forward" buttons to navigate through the survey. As you navigate through the survey using the "Previous" and "Next" buttons, your data are saved to APQC's secure servers.

The progress indicator at the bottom of each page displays a bar graph and a percentage which indicate your progress in navigating through the survey. The progress indicator does not account for completed questions, only for your relative position in the survey.

To exit the survey while you have not yet completed all questions, click the "Save" button at the bottom of the survey page, then close your browser. The system will present you a link to your particular instance of the survey. Use that link to return to the survey at any time.

Once you have completed the survey, click the "Submit" button on the last survey page. By submitting your survey results, you will notify APQC that your data are ready for validation. You will not be able to create, review, update or delete your answers after you have submitted the survey, so ensure that you have accurately documented your answers before you submit it.

Cookies, One Browser
The APQC OSBC survey tool uses a "cookie" to associate you to a particular survey instance. Your "cookie" is unique to the computer you used to start the survey, and is the only key that you have to access your data. Should you lose your "cookie", you will be unable to complete the survey and will need special assistance from APQC. Do not delete your APQC cookies until after you have submitted your survey data.

Because this "cookie" is unique to the computer you used to start the survey, other users will be unable to contribute results and data to the survey unless they have physical access to the browser which you used to start the survey.

Visit the Browser Setup page for more information about configuring your browser to use cookies.

JavaScript
The APQC survey application uses JavaScript for enhanced validation and usability features. In order to complete these surveys, you must use a browser that supports JavaScript, and you must have JavaScript enabled. Visit the Browser Setup page for more information.

Printing
To print a copy of the entire survey, you should use the "Preview" version of the survey. This view consolidates all of the questions associated with the particular survey onto a single printable browser page. No answers or personal data are contained on the "Preview" version of the survey.

As you navigate through the survey, you may print each page to record your answers. There is no facility to review all of your answers on one page.

Definitions
Each survey has a set of definitions associated with it that are unique to the process grouping covered by the survey. Throughout the survey, questions may have links to survey definitions.

Accurate results depend on a common understanding of the terminology used across survey respondents, so take special care to review the definitions in the glossary thoroughly. Common terms may be defined differently than you expect. When in doubt, contact APQC for guidance.

Reasonable Numbers

The survey asks for a number of detailed pieces of information. If you do not have the exact information that a question asks for, please provide a reasonable approximation. If you cannot provide a
reasonable approximation, please leave the answer blank. If you are not sure, contact APQC for guidance.

Reporting period

All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk (contact information is provided below.)

Question numbers may skip

Occasional changes to the survey may result in the addition or removal of questions. Due to this activity, the question numbers in the survey may occasionally skip one or more numbers. Furthermore, some surveys will hide questions depending upon answers to previous questions. If you have any questions about the order of questions in the survey, please contact the OSBC help desk.

Contacting APQC with Questions

For any questions regarding the survey mechanics, the survey content, or general survey inquiries, please contact the OSBC helpdesk via telephone on +1.800.776.9676 (toll free, US only) or +1.713.681.4020, or via email on osbc@apqc.org.

This survey covers the sales and sales order management processes.

Please direct all survey related questions to the OSBC Helpdesk at (800) 776-9676 or Email the OSBC Helpdesk at OSBC Helpdesk.

General Background Questions
Regarding this entire data collection effort

Questions on this page deal with specific details about **this data collection effort**.

*199.0010 Please indicate the currency (e.g. U.S. Dollar, Euro, Japanese Yen, etc.) used for monetary responses in this survey. *This question must be answered in order to proceed to the next page.*

Currency

199.0020 Provide the end date of the twelve-month period for which your business entity will be providing data. *(All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Pro-rata data are not acceptable, only actual data should be submitted. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk on osbc@apqc.org.)*

Period end date

Year	Month
*	*

— Page Break —

General Background Questions
Regarding your entire organization

The question on this page should be answered for the company's entire organization, including **all business entities** as well as the corporate headquarters.

199.0030 What is the total annual revenue for your entire organization? (*Note that this question refers to the entire organization rather than the business entity defined for purposes of this survey effort. For example, the surveyed business entity could be a business unit of a publicly traded company, in which case this question should be answered as the corporate parent's total annual revenue. (E.g., your corporate parent))*

Less than $100 million US Dollars

$100 million to $499 million US Dollars

$500 million to $999 million US Dollars

$1 billion to $5 billion US Dollars

$6 billion to $10 billion US Dollars

More than $10 billion US Dollars

The remainder of this survey will refer to the surveyed entity as the "business entity." You may be responding for a subset of the entire organization with which you are most familiar (such as a business unit or product line) rather than the entire organization. If so, please ensure that all data provided is consistent with this business entity definition; for example, if the business entity is a combination of business units within the organization, then all metrics, revenue, cost, and FTE figures provided should be an allocation from those business units rather than the entire organization.

General Background Questions
Regarding the specific business entity completing the survey

Questions in the remainder of this survey should be answered for the **business entity completing this survey**.

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma *(e.g. **1325.23** not $1,325.23).*

199.0040 What is the total number of employees (temporary, part-time, and full-time) at your business entity?

Number of employees (headcount)

199.0050 What is the total number of FTEs at your business entity?

Number of FTEs

199.0060 What is your business entity's total annual revenue? *(If your business entity is a support unit such as a shared services center and therefore does not directly generate revenue, then provide the revenue amount for the units/business entities you support.)*

Total annual revenue

199.0070 What is your business entity's total annual cost of continuing operations? *(If your business entity is a support unit such as a shared services center, then include the costs for the units/business entities you support.)*

Total annual cost of continuing operations

199.0080 Which of the following best describes the customer strategy for your business entity? *(Select only one.)*

Cost leadership

Product/service differentiation

Focus on the customer

199.0090 Which of the following functions best describes the role your business entity performs in the corporate organization? *(Select only one.)*

Headquarters

Shared services center/centralized processing center

Manufacturing, operating, or business unit

199.0100 Does your organization use an enterprise resource planning (ERP) system to coordinate key business information, resources, and activities across the value chain?

Yes

No

199.0110 Which of the following best describes your organization's maturity with regards to information availability and analysis capabilities? *(Options are listed in increasing order of maturity; select the option that best describes your organization's maturity.)*

We don't have regular access to data beyond basic transactions. Data is stored in spreadsheets or system extracts. Analysis is not performed on a regular basis and decisions are based on instinct or anecdote.

Data is in department or line-of-business silos. Insight generation is only performed on an ad hoc or periodic basis. Decisions may be supported by data, but are primarily based on past experience.

Structured operational data is available and may include some basic external data. Insights are generated at department or line-of-business level. Decision making is focused on analyzing past actions and consequences.

Traditional and unstructured data is integrated and available from enterprise sources as well as some external data. While data is available to many people based on their roles and needs, using it might require some technical assistance. Decision making involves historic analysis and predictive algorithms.

Real-time, internal and external data is readily accessible across the enterprise based on need. Information is shared extensively across the enterprise. The data is integrated real-time and users can access, manipulate and visualize data on demand. Data-driven decision making is part of the organization's culture.

199.0120 Which of the following best describes your business entity's role for managing sales orders? *(Select only one. Managing sales orders includes accepting and validating orders, collecting and maintaining customer account information, determining availability and fulfillment process, entering orders into the system and cross-selling or up-selling activities, processing back orders and updates, and handling order inquiries and post-order fulfillment transactions.)*

Self-supporting; performs most aspects of this process

Relies on other business units for this process

Relies on shared services center for the process

Serves as a shared services center for the process

Outsourced to third party

199.0130 Which of the following best describes the system that your business entity uses for the process managing sales orders? *(Select only one.)*

Manual/Spreadsheet

Internally developed technology

SAP

Oracle (incl. Peoplesoft, J.D. Edwards and other Oracle products)

Infor (incl. GEAC and Baan)

Other system for managing sales orders

Not applicable / no system used for this process

Don't know

If you selected "Other," please specify.

199.0140 Does your organization use tools for automated assessments and cleansing of customer and product master data (such as those provided by ERPs or vendors like Trillium)? *(Select only one.)*

No

Yes

199.0150 Does your business entity measure, track, and reward first-time data accuracy for quotes and order management? *(Select only one.)*

No

Yes

199.0160 What is the number of FTEs employed by your business entity during the year to perform sales order management (entering, processing, and tracking of sales orders)? *(Use a decimal if needed).*

FTEs

199.0170 What is your market share? *(Compute as the percentage of total value (not volume) sold, that you are capturing (in the product/service categories being benchmarked). I.e., your annual sales revenue from a specific market, divided by the total sales revenue in that market for the same year.)*

Market share

%

199.0180 What is the percentage of customers claiming to be satisfied in the most recent customer survey? *(Leave blank if you do not capture this data or if customer surveys are not used to determine satisfaction.)*

Percentage of customers

%

199.0190 What is the percentage of customers who say they would recommend your product or service to family and friends? *(Leave blank if you do not capture this data from customer surveys.)*

Percentage of customers

%

199.0200 What is your business entity's customer retention rate for all customers over the last three years? *(The customer retention rate is defined as the number of customers who were active three years ago and are still active, divided by the number of customers who were active three years ago.)*

Customer retention rate

199.0210 What is your business entity's growth in revenues over the past year as a percentage, from the top twenty percent of your customers? *Leave blank if you do not know.*

Growth in revenue

%

199.0220 What percentage of your active customers are profitable? *(Leave blank if you do not know.)*

Percentage of active customers

%

199.0230 What is your business entity's perfect order performance? *(Perfect order performance is the percentage of sales orders delivered on time, with all line items filled correctly, and with an accurate invoice.)*

Perfect order performance

%

199.0240 For primary products, what is the average customer order cycle time in days (including weekends)? *(The customer order cycle begins when the customer places an order and ends when the product/service has been delivered to the customer.)*

Days

199.0250 What is your average monthly sales forecast error within a product family?

Monthly sales forecast error

%

199.0260 What is your average cost per sales order for each of the following channels of order receipt?
(Leave blank if you do not offer the channel.)

Channel	Average cost per sales order
a. Traditional channels (such as face-to-face, phone calls, fax, post)	
b. "New" channels (digital/electronic channels)	

199.0270 What percentage of your total annual sales orders are received through each of the
following channels? *(Use a zero if a channel is not used. Please allocate to 100%.)*

Channel	Percentage of sales orders received
a. Traditional channels (such as face-to-face, phone calls, fax, post)	
b. "New" channels (digital/electronic channels)	
c. Total (*Must equal 100%*)	

199.0280 Of your total annual order inquiry contacts (inquiries on existing orders), what percentage is
received through each of the following channels? *(Use a zero if none, but leave blank if you do not know.
Please allocate to 100%.)*

Channel	Percentage of inquiries received
a. Traditional channels (such as face-to-face, phone calls, fax, post)	
b. "New" channels (digital/electronic channels)	
c. Total (*Must equal 100%*)	

199.0290 Of the total annual number of inbound contacts, for what percentage was an additional cross-sell or
up-sell sale completed?

Percentage of inbound contacts

%

199.0300 For inquiries on existing orders and service-after-sales requests, what is your first contact
resolution rate?

Percentage of inquiries

%

199.0310 What is your business entity's total annual cost to perform sales order management for each of the following cost categories?

Cost table (If your business entity does not have costs in a category, use a zero; if you do not know the cost, leave blank.)	Cost
a. Annual personnel costs *(including compensation and benefits)* for those classified as FTEs in question 199.0160.	
b. Annual systems costs *(direct and/or allocated to the business entity)*	
c. Annual overhead costs *(direct and/or allocated to the business entity)*	
d. Annual other costs	
e. Annual outsourced costs	
f. Total cost of the process *manage sales orders* (sum of a through e)	

199.0320 What is the total number of sales orders placed with your business entity annually?

Number of sales orders

199.0330 What is the total number of sales order line items placed with your business entity annually? *(If your business entity's system does not track sales order line items, then please approximate the annual number based on an average month.)*

Number of sales order line items

199.0340 Of your business entity's total annual number of sales orders, what percentage requires no manual intervention to create, modify, and fulfill?

Percentage of sales orders

%

199.0350 Thinking about your entire **manage sales orders** operation, what do you see as the key operational practices or management techniques that contribute to your organization's success, if any? *(Please list the top three.)*

You have reached the end of the survey. You can use the **previous** button to review your answers for accuracy and reasonableness. After pressing the **submit** button, you will no longer be able to directly edit your data in this survey form.

The next step will be review and validation of your responses. APQC will contact you to conduct a final review of your responses and verify that your responses were as you intended.

Please click the **Submit** button to complete the survey and transmit your data.

In order to obtain a printed version of your completed survey, you will need to print each page **before** submitting your responses. After you select "submit," you will be unable to print your completed survey.

Please direct all survey related questions to the OSBC Helpdesk at (800) 776-9676 or Email the OSBC Helpdesk at OSBC Helpdesk.