**Blinds 4 U**

**Scope Document**

**Team 7- Streamlining Operations**

**Statement of Purpose**

Blinds 4 U is a family owned and operated company providing a shop-at-home window treatment service across five counties in the greater Philadelphia area. Blinds 4 U, established in 2001, takes pride in providing excellent customer value through its everyday-low-pricing. The majority of Blinds 4 U’s clientele are residential customers, with few commercial customers. Howard and Arnold Voluck, the company’s owners and CEO’s, make sales calls and employ contractors to install products.  These contractors are hired on a per job basis and are compensated for each blind they install. Products are sourced from various manufacturers who deliver finished products to a Blinds 4 U warehouse. Installers pick blinds up from the warehouse and directly install for the customer. As a result of about $400,000 per year on advertising, Blinds 4 U schedules an average of 5 - 7 appointments a day per owner, totaling to a combined average of 50 - 70 appointments per week. Blinds 4 U focuses on customer interaction, closing an impressive 70% of sales after visiting a customer. The majority of Blinds 4 U’s customers are satisfied, leading to positive reviews on Angie’s List and customer referrals.

When customers call Blinds 4 U to schedule an appointment they speak with Howard, who controls the phone.  Customer data is initially recorded by hand in Howard’s appointment notebook, specifying the name and address of the customer, along with the scheduled time either Howard or Arnold are expected to arrive to the customer’s house. At the sales call, a customer invoice is generated with product information, measurements, and final price. If the customer decides to place an order, the invoice is sent as an order form to the appropriate suppliers. Due to personal preference, Howard processes orders by fax and Arnold processes orders through online supplier portals. Customer data is stored in multiple file cabinets among the owners houses. To obtain past price quotes, the owners must manually search through thousands of paper files; there are instances where files are lost or misplaced. We will focus on the storage, accessibility, and communication of customer order information to streamline data management.

To gather a complete understanding of the opportunities Blinds 4 U can obtain, we will formally interview three subject matter experts.  We will collect information from Blinds 4 U’s owner, Howard Voluck, who expressed his main streamlining concerns revolved around large amounts of unorganized customer data which are all on paper and pen. The second and third business interviews will be conducted with the other co-owner, Arnold Voluck, along with Steve Lambert, a Blinds 4 U installer. These interviews will help us document the as-is situation at Blinds 4 U.  Once this process is complete, we will develop and test a Justinmind prototype solution that streamlines business operations at Blinds 4 U.

**Objectives:**

* Decrease the amount of time owners spend on paperwork by 5% in month one, 10% in month two, and 20% within three months.
* Increase document storage efficiency by 80% within one year.
* Increase customer retention by 75% within one year.
* (% of successful sales calls)
* Increase retention of pending sales by creating an accessible customer data base

**Assumptions:**

* Blinds 4 U will continue to target its existing customer base.
* Blinds 4 U will not grow its staff during the duration of the project.
* The responsibilities of each Blinds 4 U staff member will not change during the duration of the project..
* Blinds 4 U will continue its current marketing mix.
* Blinds 4 U will continue to work with the same suppliers over the course of the project.

**Constraints:**

* Solution must be implemented by May 6, 2014.
* The solution must be integrated into company operations with no disruptions.
* The solution must cost less than $70,000 to implement.

**Data**

Entities

* Customer: Name, Address, Phone Number
* Supplier: Name, Phone Number, Fax Number
* Sales Associate: Name, Phone Number, Fax Number
* Installer: Name, Phone Number, Tax form (10-99)
* Product: Measurements, Type, Color, Cost, Quantity
* Payment: Type, Amount, Amount Remaining, Date
* Invoice: Amount, Supplier ID, Date, Price, Company Cost, Customer ID

**As-is Business Rules**

* Customer name, address, and phone number must be documented when appointment is made.
* Customers must live within driving range of Tri state area to use Blinds4U services.
* Customer information must be stored in invoice form at owners house after blind installation.
* Employee schedules must be sent out (faxed) at the beginning of the week.
* Changes to schedule must be communicated via telephone when necessary.
* Installers must be paid per blind for each installation.
* Orders must be sent to supplier through fax or online ordering system.
* Suppliers must deliver order to warehouse.
* Final price is presented to customer at sale date.
* Blind measurements are not to be given to the customer upon consultation.
* Blinds are to be ordered on a need base purpose.
* Installers must pick up blinds upon delivery to a warehouse.
* Installers must install the blinds within a week upon picking up from warehouse.
* Wrong orders must be returned and exchanged for the right order.-----
* Customers must pay at least in 33% when order is placed, remaining balance is due upon installation.
* All appointments are made by Howard and then forwarded to Arnold
* Customer calls must be

**To be Business Rules**

* If customer does not have email address, order form will be mailed or faxed to them
* Orders must be sent  via email to customer, supplier, and installer