

Customer Visit Workflow - User's Guide

Main Target and Benefits :

The new e-desk approach offers multiple benefits :

- a unified Eramet Alliances approach, whatever the (European) plant¹
- no more sending of documents / emails
- a detailed check-list, to provide all information in one-shot
- approvals are automatically managed
- information is automatically disseminated
- possibility to review/sort the history of visits, e.g. by BU or by Plant

Main principles

- 1) The visit is well framed with an Applicant, a Host and a Visit Pilot :
 - a. the Applicant (generally the Customer Service Officer – CCL) fulfills the edesk request with all necessary information, and interfaces with the customer
 - b. the Host (if different from the applicant) is generally the sales person (KAM, Sales Engineer) in charge of this customer's follow-up, and supporting the expenses
 - c. the Visit Pilot (generally nominated by the Plant) will make sure safety rules are obeyed, and will continuously shepherd the customer around the plant
- 2) Before an official invitation is sent, the visit must be simultaneously approved² by :
 - a. the BU Director
 - b. the Site Director
- 3) Information to be documented in the workflow is that where the site help is needed, such as meeting room, transportation, PPE size, workshop access and visit, etc. All information such as outside the plant organisation, detailed agenda, sales history, etc. can always be attached to the visit workflow. Therefore the storage of useful information in other places is to be avoided

¹ other plants can be easily added upon request

² the absence of answer 72 hours after the initial request is understood as an approval

- 4) Once the visit is approved, 2 kinds of colleagues are automatically informed by the system :
 - a. persons identified by the Applicant as due to attend the visit, partially or in full
 - b. site-by-site, persons systematically informed of all the local visits. See the current list attached.
- 5) Updates are also managed by the system, and all initial addressees' attention will be automatically drawn by the update

Presentation of the Edesk

The Site Visit page is hosted by [I-Catcher](#) and is accessible by a larger range of Eramet Alliances personnel. It is made of :

- 1) a header, with a number of 'Readme' documents referring to
 - general procedures, such as this very document, the golden rules for customers' interface, safety measures for visitors, how to host an intercultural meeting, etc.
 - rules specific to each site, such as safety rules, accommodation addresses or suggested routes for standard workshop visits
- 2) a summary table listing the latest visit requests, with their status
- 3) an 'add new item' link for the creation of a new request

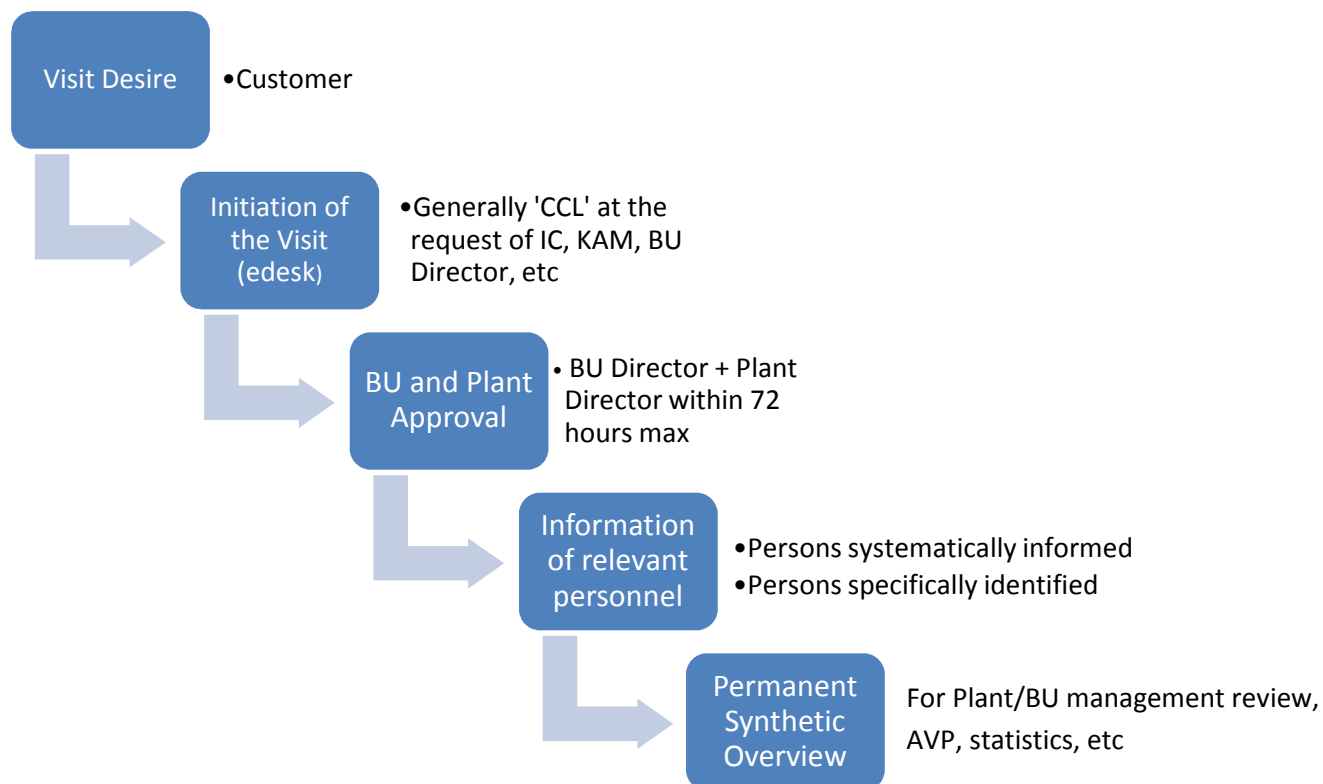
Additional information

For BU and Site Directors, approval/refusal can be given through smartphones. Answers like 'OK' (acceptance) and 'KO' (refusal) are accepted.

Normally the workflow is self-explanatory. Additional guidance on 2 issues :

- for audits and technical visits, approval from the BU Director is also requested
- in case of visits spreading over more than one day, just document the first day, and attach the program schedule for the other days

Overall flowchart for the organization of Customer Visits through the edesk



List of persons systematically informed through the edesk

Plant / Site	Site Director (for Approval)	Person(s) systematically informed
Les Ancizes	Dominique Hannicque	Claudine Julien
Pamiers	Joseph Bertin	Jean-Philippe Huc Laure Latour Valerie Cohadon Pascale Gautier
Issoire	Laurent Bourrouilh	Fabienne Brun
Interforge	Louis-Marie Rabbe	Muriel Falempin
Firminy	Herve Heimen	Valerie Vettore Laurence Paret
Imphy	Jean-Charles Evon	
Heyrieux	Olivier Pire	
La Pardieu	Bertrand Matherat	Helene Romain
Paris-TMM	Stéphane Roux	Accueil - TMM – Alliages Isabelle Aracil
UKAD	Benoit Delvincourt	Chantal Verger Patrick Delaborde
Commentry	Fabien Cordier	Murielle Fras
Champagnole	Olivier Luce	Emmanuelle Voinet Philippe Michel
Kloster-Söderfors	Frank Björklund	Thomas Hogblad Ingela Lindstrom
Kloster-Langsh./Vikm.	Frank Björklund	Linn Plogeus Lillebil Brus
Stubs- Warrington	Eric Bastien	Diane Doodson