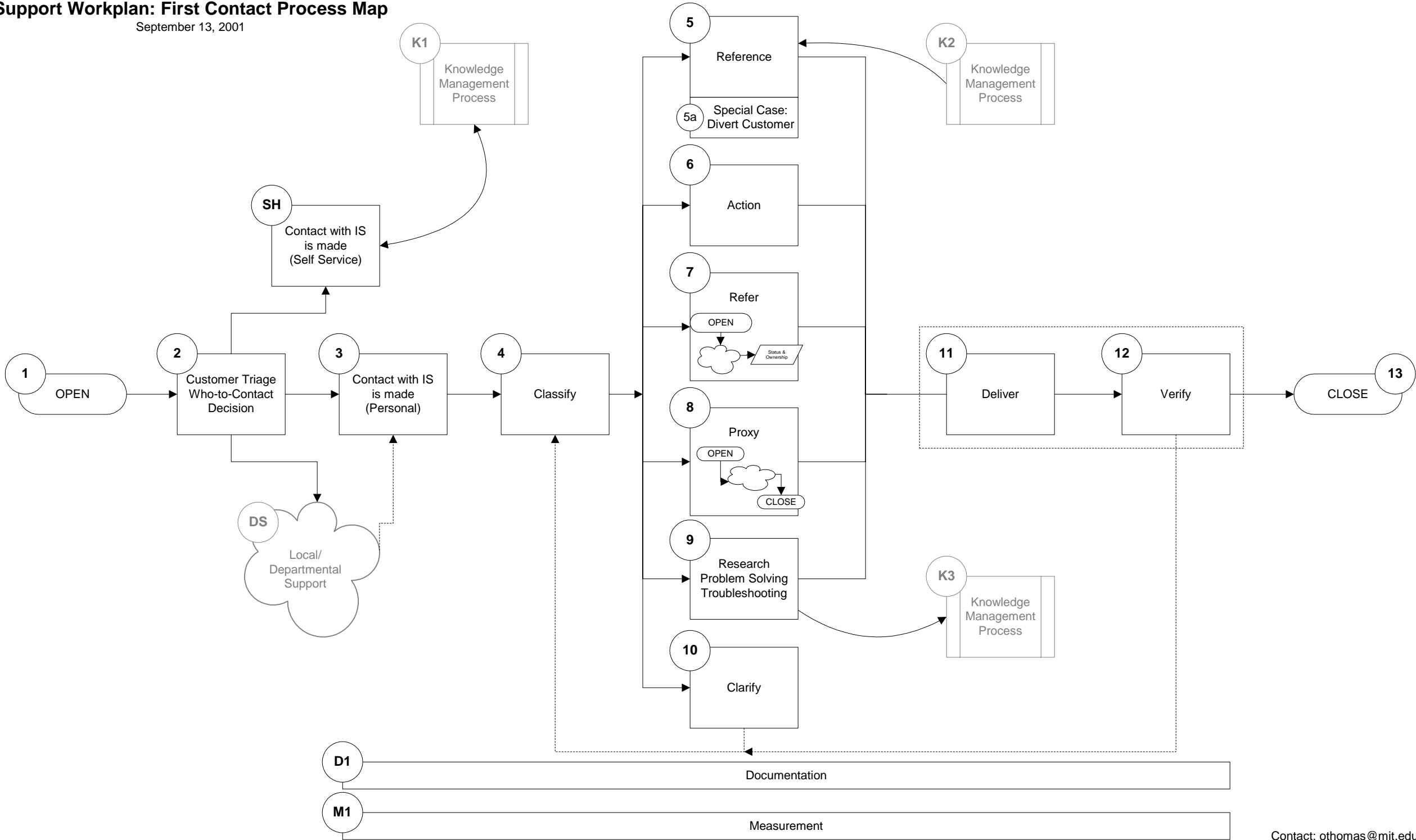


Support Workplan: First Contact Process Map

September 13, 2001



Support Workplan: First Contact Process Map Notes

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Main Thread

1: OPEN

Definition: A {case|request for action|problem|need} springs into existence, either through customer action or an external trigger.

- Customer issues vary from "trivial" to "substantive" (e.g. MIT-business-related vs. listening to FM radio in Real Player)
- Expectations
- Each group deals with different sets of customers
- Customer Outreach

2: Customer Triage; Who-to-Contact Decision

Definition: The customer does triage; this can take the form of formal triage and problem analysis, or be a simple who-to-contact decision based on historical or other available data.

- Difficult for customers to triage; may misdirect themselves; frustration builds up during this part of process
- Should the customer have to do triage at all?
- What makes a customer choose a particular avenue of support?
- How hard is Information Systems to navigate (i.e. who do I contact for what)?
- Customers build an affinity towards particular groups or people who have served them well in the past
- Certain groups also proactively seek out certain customers
- Process is relationship-driven
- Willingness to hand off varies due to differing expectations around the results of doing so
- Lack of formal expectations across teams and interfaces

3: Contact with Information Systems is made (Personal)

Definition: Contact with Information Systems is made; this contact may be with a first-contact team or with someone in a first-contact role but outside the formal first-contact teams.

- Customer sets own context, picks a contact to make
- Initial contact with I.S. is an area rife with improvement opportunities
- Some customers prefer non-interactive methods (email); in Athena Consulting and Accounts, 95% electronic
- Some customers really want to *talk* to someone
- Electronic contact works better for I.S., as it forces more (up front) clarification from the customer
- We are often not as available during off-hours (home users, students, etc.)
- Broad spectrum of customers and customer diversity demand diverse, parallel, and efficient ways to contact IS
- Improvement opportunities exist in areas of: support technologies, consistency, training

4: Classify

Definition: The case is classified into one of six (following) buckets; this is currently often not a formal step in the process, but would benefit from being a formal, explicit step.

- Reference (Request for information; status; solution to known and documented problem)
- Customer was misdirected: Divert (give customer info; really sub-set of Reference)
- Consulting / Real-Time
- Request for Action / Transaction / Resources
- Problem-Solving
- Referral / handoff (how do we define these terms?)
- Escalation
- A single request may move through multiple classification iterations

- Not everyone explicitly classifies the problem before embarking on handling it; this is an improvement opportunity
- Different question sets linked to “Classify” vs. “Solve”
- Technology/tool opportunity: current tools don’t require classification
- No reward/recognition for classification behavior
- Communication competency possibility
- Customer perspective: value in doing just once; setting appropriate expectations; capturing information once; agreement on the information necessary to capture; tool facilitating collection of it

5: Reference

Definition: A type “Reference” case involves the lookup, retrieval, and transmission of existing, managed information; it does not involve problem solving or extensive research.

- Technology not integrated (Casetracker-KB link)
- No knowledge-base tool that includes all [knowledge]
- Problem Queue
- Tighter feedback loop between problem solving and reference
- First contact based on who you know
- Potential improvement opportunity: everyone does lookups/is able to do lookups [in the knowledge base]
- "Lookups" can also mean getting info from another person (the knowledge in people's heads)

5a: Special Case of Reference; Divert Customer

Definition: A customer calls the wrong place, a referral or hand-off is not appropriate, and correct contact information is simply relayed to the customer. The key here is that ownership of the case is handed back to the customer.

- Availability of info on who to redirect to
- Based on who you know/relationships
- Clients don't always appreciate [being redirected]
- Adds another step
- What if the person/group [redirect target] is not available?
- No reward for documenting knowledge for others or for training others/mentoring
- Difficult to build constructive relationships if you seldom see others

6: Action

Definition: A task or set of tasks is performed to meet the customer’s need. There is no further collaboration, research, or problem solving required. This is often referred to as transactional work.

- What we do well: Completing the transaction
- Where things fall down: passing requests between groups, referrals

7: Refer

Definition: A customer calls the wrong place, but it is appropriate for the consultant to refer the customer to the appropriate service/support provider. A basic set of information is collected, the case is referred to the appropriate group, and status and contact information are relayed to the customer. The key here is that ownership of the case is not handed back to the customer.

- Steps can link or loop back to any other steps
- No consistency in how referrals are made
- No control on other end; no expectations set on response time
- No consistent follow-up
- Priorities not equal
- No shared responsibility for customer service across IS

8: Proxy

Definition: The first contact team acts as an interface between the customer and second tier support or service teams. All contact with the customer is

funneled through the first contact team, which retains primary responsibility for managing the case and relaying status information to the customer.

- No say or clout in proxy process by delivering group
- No control on other end; no expectations set on response time
- No consistent follow-up
- Priorities not equal
- No shared responsibility for customer service across IS
- Lack of negotiated agreements in setting up channels
- Neither negotiation nor agreement exist currently
- Stats [per case] could record responsibility time outside of Support and within [not just how long case was open, but how it was open in the hands of each group that successively owned it]
- This Workplan process is an opportunity to renegotiate agreements over how cases are handed off
- Second/third tier often says wants to be shielded from customer contacts, but do take them
- Referrals often unknown to customer; appears to be a black hole

9: Research; Problem Solving; Troubleshooting

Definition: This is where real problem solving and troubleshooting as well as content-specific research happens. Content experts would operate primarily in this space. Problems which come here are primarily new problems or new twists on existing problems which have not been defined and tracked in the knowledge management system yet. This area is one of the primary content creators for the knowledge management system.

- Methods are often ad-hoc
- Varies from product to product
- Nothing reinforces methods
- Resources for Support don't match the diversity of things we support.
- Need discretionary time and resources to develop troubleshooting procedures
- "We're too busy fighting fires to fill the extinguishers"
- Constant updating necessary
- Often no control/influence over products

10: Clarify

Definition: This is not a true classification. If a case cannot be classified, it needs to be clarified. This step involves communication with the client, possible at the problem level but more often at a level other than that at which the problem appeared. Process consulting skills are useful at this step. A successful completion of this step will lead to one or more cases which can be properly classified into one or more of the above categories.

- Clients frustrated by being asked same questions again and again, or being asked questions they can't answer
- Not an explicit step
- No standardized customer problem solving methodology
- Problems are commonly clarified from technical perspective, not business or customer perspective

11: Deliver

Definition: Often done together with verify in a single interaction, but important to be acknowledged as a discrete step. This step delivers the results of the previous step or steps to the customer. Delivery mechanisms and venues can vary from electronic or voice to on-site and in-person.

- Follow-up is not consistent.
- Need an explicit step so we know if we did it or not
- Silence should not imply success
- Customer-preferred method of follow-up should be tracked
- Lag time in follow-up is an improvement opportunity, both in process and in technology/tools

12: Verify

Definition: After a product or solution has been delivered, it is critical to verify that the customer's need was met. This step often results in reclassification or the generation of a new case, as the customer thinks about next steps or new needs beyond the immediate solution she just received.

- Confirm that delivery work was done; this is not a consistent process
- Also customer-controlled; not all want explicit confirmation
- Multiple Casetracker cases: getting responses for each of many cases can be frustrating to customers
- Premature closing of a case comes back to haunt you

13: CLOSE

[No notes]

Other Threads

D1: Documentation

- Documentation should happen throughout the process
- Many tools that don't communicate with each other
- Could tools dump their info into a warehouse?
- Same tool is often not used the same/consistent way
- People/groups use tools in different ways affecting the quality of data
- Data not easily turned into a stock answer, not easily reused
- Customer: some tools available to them, some not
- Customer not familiar with internal processes
- Customer sometimes won't give info (don't want others to know what they don't know; fear of reprisal from management?)
- Customers sometimes question why they need to give info (anonymity)
- Different requirements at different points of customer contact (e.g. phone vs. online)
- Overhead of data collection is an issue
- We attribute value to data without context
- Data collection is a retroactive [or retrospective] look, not looking ahead at what to measure next
- Burden of data gathering is on front-line support
- If no name, case not logged [the practice of some teams]; miss data this way (not true in BLT for instance, log tagged "anonymous")
- Need thought around whose responsibility it is to collect data.
- Tools don't make it easy to collect

DS: Local/Departmental Support

[No notes]

K1: Knowledge Management Process, attached to Self Service

[No notes]

K2: Knowledge Management Process, feeding Reference

[No notes]

K3: Knowledge Management Process, fed by Research, Problem Solving, and Troubleshooting

[No notes]

M1: Measurement

[No notes]

SH: Contact with Information Systems is made (Self Service)

[No notes]