Source2Pay Project

Process – Customer Service
Current State
Focus Group Meeting
July 2017

Agenda

- Welcome/Introductions
- Source-to-Pay Project Overview
- Project's Process Details
- Process Current State
- Current State Identify Issues
- Next in the project's process
- Questions

Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group

Source2Pay Project

Our current source-to-pay procedures at the University has significant opportunities for improvement and impact every department within the University system.

Project Purpose/Goal

- Identify process improvements throughout source to pay process

- Develop RFP

- Ultimate goal is to minimize, improve & standardize IT platforms

Project Process

Capture Current State

- Map process
- Current state document
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize current state
- Present to Director Council

Project Process

Create Future State

- Map process
- Identify Issues
- Brainstorm recommendations
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize proposed solutions
- Present to Director Council

Process – Customer Service

Purpose of the process

The process 'Customer Service' exist to:

'Provide University faculty, staff, students, and external customers of the University of Illinois with answers to questions or resolve issues regarding the procurement services supported on behalf of the University.'

Process – Customer Service

Process Boundaries

Begins:

University or vendor contacts procurement services or purchasing with a customer service question or issue

Ends:

The question or issue presented is answered or resolved, and the customer understands the answer with no additional questions.

Process – Customer Service

Initiate Customer Request → Assign Request → Research Request → Provide Response → Close Request → Evaluate Service

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Initiate Customer Request	Assign Request	Research Request	Provide Response	Close Request	Evaluate Service

UNIVERSITY OF ILLINOIS SYSTEM

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Process – Customer Service

| Initiate Customer Request | Assign Request | Research Request | Provide Response | Close Request | Evaluate Service |

Process – Customer Service

Initiate Customer Request	Assign Request	Research Request	Provide Response	Close Request	Evaluate Service

Process – Customer Service

Initiate Customer Request	Assign Request	Research Request	Provide Response	Close Request	Evaluate Service

What do you do to submit a Customer Service request?

Issues with the current process to submit a Customer Service Request?

Next Steps

- Present feedback to Project's process Team

- Finalize current state

- Begin future state

- Present future state to each University

Contact Information

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Thank you!