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
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
Process – Customer Service

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

1. Initiate Customer Request
2. Assign Request
3. Research Request
4. Provide Response
5. Close Request
6. 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!