Source2Pay Project

Process – Customer Service
Future State
Focus Group Meeting
August 2017
Agenda

- Welcome/Introductions
- Current State Process Overview
- Current State Identified Issues
- Future State Recommendation
- Next in the project’s process
- Questions
Welcome!

Introductions

- Name
- Department
- Current Job
- Goal for being participating on a Focus Group
Customer Service
Current State Overview

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

Current State Identified Issues

- Delays in receiving a response to a voice mail message left at the general number
- Delays in receiving a response to an email message sent to the general email address
- Inconsistent responses in an urgent situation, some departments receive an immediate response in an emergency situation when a person is directly called, others receive delays resulting in the need to pursue other avenues to reach a person to discuss the issue with.
Future State Recommendations

Create a Standards of Service when responding to questions and inquiries regarding procurement at the University of Illinois.
Customer Service

Future State Recommendations

Review the functionality of the Service Desk Manager applications and incorporate the Standard of Service.
Customer Service

Future State Recommendations

Redesign the OBFS Website to make it easy to be used by each University, customers, and vendors of the University of Illinois.
Customer Service
Future State Recommendations

Create a Procurement Certification Program
Customer Service
Future State Recommendations

Hire additional staff within Purchasing of each University and within Procurement Services
Customer Service
Future State Recommendations

Have a system that provides the ability to host all information for the procedures it supports.
Customer Service
Future State Requirements

- Ability to have a workflow for submitted questions/issues to Purchasing and Procurement Services
- Ability for a Customer can see where their submitted request is real time
  - Status
  - Assigned to
  - Notes
- Ability to communicate within system, eliminate the need for separate email
Customer Service
Future State Requirements

- Ability to identify who is working on a specific transaction and be able to contract the person directly
- Ability to route a question to the relevant processing office within the system
- Ability to set reminders to make sure the submitted question/issue is moving forward and system will automatically email the customer
- Ability to provide pop up ‘Help Boxes” on forms/screens
Customer Service

Future State Requirements

- Ability to leave notes in request/transaction, both by the customer and on Procurement Services/Payables
- Ability to have a wizard to guide a user through the steps to provide information to allow for routing the request to the correct department/person and provide enough information to resolve the issue with reduced back-and-forth contact.
- Ability to setup a tracking of requests and provide metrics
- Ability to have a knowledge database to allow for questions to be ‘googled’ by the customer
Customer Service

Future State Requirements

- Ability to search easily
- Ability to conduct a Live Chat with a support staff
- Ability to have a Customer Service Center dashboard
  - Search capabilities
  - Dropdown with filters
  - Ability to define display option to view
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
Contact Information

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Thank you!