



Virginia Information Technologies Agency

VITA's Customer Relationship Management (CRM) Program – Valued Customer Experience Work Session

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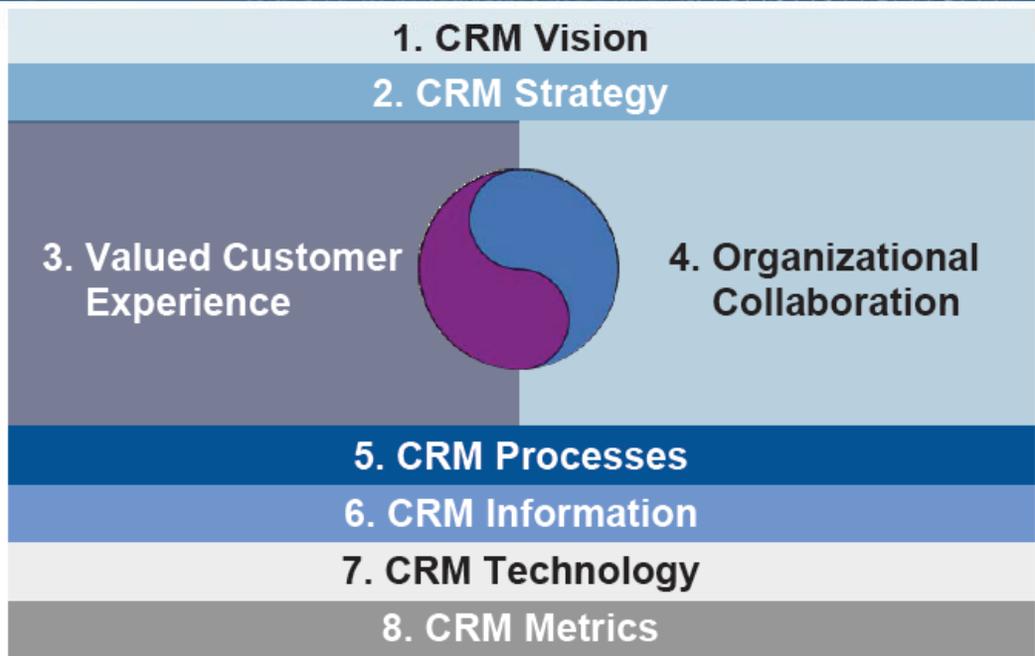
AITR Meeting
Dec. 12, 2012



Eight Building Blocks of CRM

CRM — It's Not Just Software; The Eight Building Blocks of CRM

Planning
and
Executing ●



Complete
Complete

Executing ●

Gartner.



Valued Customer Experience – How?

- Data collection: identify from all current feedback mechanisms and compile results
- *Identify key customer interactions*
- *Map interactions*
- *Identify “moments of truth” (those that shape the customer’s perception of the interaction)*
- Identify needs for improvement and successes to replicate:
 - Processes
 - Procedures
 - Communications
 - Tools
- Identify new feedback mechanisms for customers and staff



A "Key Customer Interaction" ...

- Is important to your ability to perform the business of your agency
- Is not necessarily the easiest or the hardest
- Is not necessarily the "best" or "worst"
- Answers "No" to at least one of the following questions:
 - Can my agency function without it?
 - Can my agency perform mandatory business reporting without it?
 - Can my agency meet its statutory obligations without it?



Identify Key Customer Interactions

- CIO Council identified initial list of most important interactions
- AITRs asked for additional input via email
- VITA compiled results of all input
- Phone participants voted before today
- Meeting attendees will vote today
- Results of phone and in-person voting tallied today to identify top five interactions



Map Interactions and Moments of Truth

- Once we have identified the top five interactions:
 - Break up into five work groups
 - Facilitator will lead discussion for each group (25 minutes)
 - Identify touch points with VITA; not what goes on behind the scenes, just what you as the customer see (and all that you see)
 - Rate each positive or negative in a range
 - Overall assessment at the end – positive or negative
 - Put contentious issues in “parking lot”

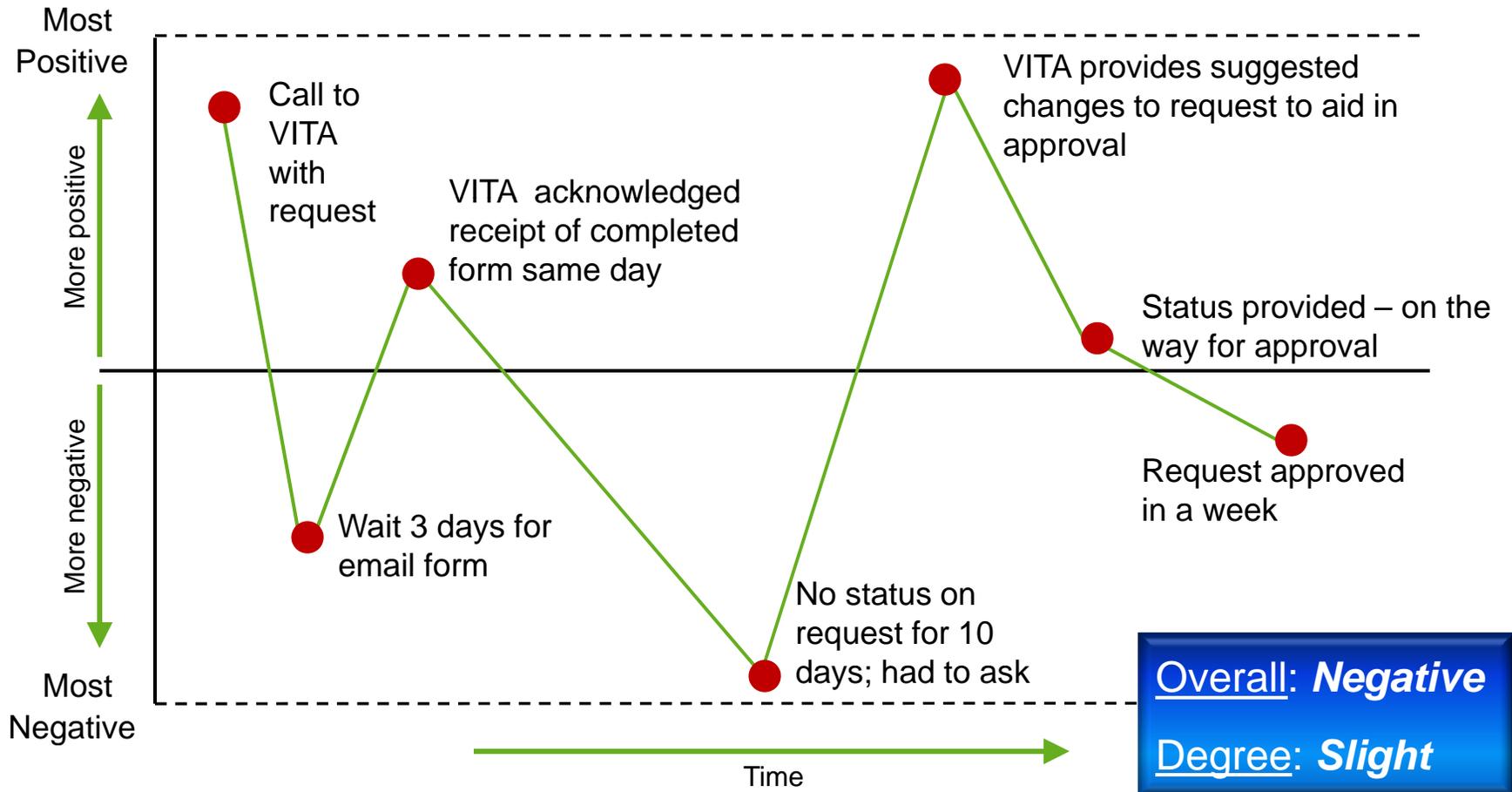


Rating Touch Points

- This is entirely subjective – please be honest!
- This is about how you feel when you are interacting with VITA – don't over-think
- At each touch point, take into consideration not just the courtesy of the individual but how you actually feel at the end of that touch point
- Do try to articulate why you feel a touch point is positive or negative
- The overall rating should not just be an average of all the touch point values – it should reflect how you feel about the interaction overall



Discussion Output - Example





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Vote on Top Five Interactions



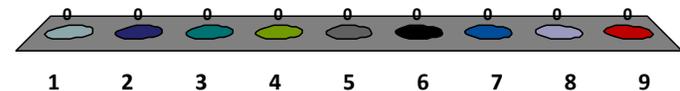
Voting process

- Will vote on top three operational interactions
 - Vote three separate times
 - Top vote-getter each time selected
- Will vote on top two governance interactions
 - Vote two separate times
 - Top vote-getter each time selected
- Focus now is on the top five; we will get to the others



The operational interaction most critical for your business is ...

1. End-user Help Desk – issue resolution, consistent procedures
2. Service delivery involving multiple towers; consistent service delivery
3. Issue resolution involving the CAM and AOM
4. Work requests
5. Status reporting during issue resolution
6. Status reporting of efforts related to problem resolution
7. Billing disputes
8. Expectation of what a partnership is
9. Staff augmentation, IT contingent labor procurement

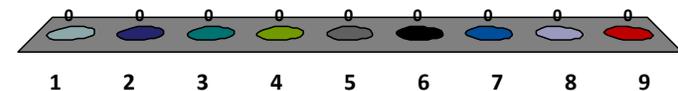


Answer Now



The operational interaction next most critical for your business is ...

1. End-user Help Desk – issue resolution, consistent procedures
2. Service delivery involving multiple towers; consistent service delivery
3. Issue resolution involving the CAM and AOM
4. Work requests
5. Status reporting during issue resolution
6. Status reporting of efforts related to problem resolution
7. Billing disputes
8. Expectation of what a partnership is
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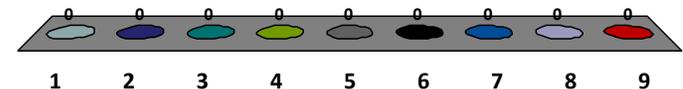


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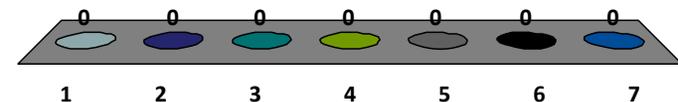


Answer Now



The governance interaction most critical for your business is ...

1. Architecture (hardware and software) oversight and coordination – enterprise approach
2. Enterprise applications – selection process
3. IT strategic planning
4. Project oversight
5. Planning interactions with the IT infrastructure program
6. Process used for defining new services
7. Process used to establish state contracts

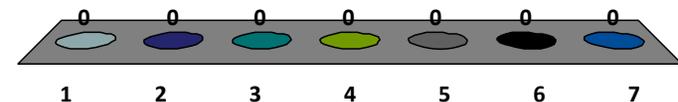


Answer Now



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Answer Now



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Break into Five Groups



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Wrap-up



Wrap-up and Next Steps

- Compile results of today and for each interaction evaluate to identify:
 - What we do right
 - What we could do better
 - How we can leverage what we do right
 - Changes needed to processes, procedures, communications and tools to improve what we could do better
- Report on progress at the February meeting
- Focus now is on the top five; we will get to the others