



Virginia Information Technologies Agency

# Customer Relationship Management Valued Customer Experience

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AITR Meeting  
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[www.vita.virginia.gov](http://www.vita.virginia.gov)



## Valued Customer Experience Approach

### Completed and in progress

- Customer groups interviews
  - ✓ Agency information technology resources (AITR)
    - Information security officers (ISO) – in progress
- Process stakeholders/performers interviews
  - ✓ Customer account managers (CAMs)
  - ✓ Service leads
  - ✓ Leadership team
  - ✓ Executive team
  - ✓ Customer relationship management (CRM) champions
    - Agency operations managers (AOM) – in progress
- Current feedback mechanisms research, analysis
  - ✓ What are the existing survey mechanisms; what can we learn from them?
    - Where are there opportunities to increase feedback received from customers? – in progress



## Valued Customer Experience Approach

### Next steps

Outputs from interviews, research are being compiled

- AITR interaction projects
  - Feedback from customers/stakeholders groups and survey mechanisms will be shared with project teams focused on the priority AITR interactions
  - Structured methodology for the teams to follow for planning
  - Monitoring of execution
  - Remaining processes will be prioritized for future improvements
- Organization collaboration (Block 4 of *Gartner's Eight Building Blocks of Customer Relationship Management*)
  - All information collected will serve as input to the next phase of the CRM program



## Top Five Interactions

Five most critical interactions as determined by AITRs participating in the valued customer experience

- Operational
  - Service delivery involving multiple towers
  - Work requests
  - Expectations of what is a partnership
- Governance
  - Planning interactions with the IT infrastructure program
  - Process used for defining new services



## Interaction Observations

- Process mapping exercise allowed customers to voice perceptions of process
- Processes are combinations of highs and lows
- Lows impact customer perception more than highs
- Future state should seek to smooth process highs and lows



## Methodology

- Convene cross-functional teams to address the interactions
- Incorporate feedback from other areas and survey mechanisms, where feasible
- Conduct root cause analysis
- Brainstorm and prioritize solution options
- Recommend solutions for implementation
- Hand-off to implementation team
- Monitor implementation progress; provide progress reports to AITR community



## AITR Interactions Groups

- **Service delivery involving multiple towers**
  - Suresh Soundarajan, VDH
  - Mike Garner, DEQ
  - Matt Davis, SBE
  - Rob Jenkins, DJJ
  - Bill Turner, JYF
- **Work requests**
  - Jerry Jarvis, DOAV
  - David Simmons, DGIF
  - Bethann Canada, DOE
  - Johnny Thomas, VEC
  - Felicia Stretcher, DOC
  - Steve McCauley, DSS
- **Expectations of what is a partnership**
  - Steve Arthur, DPOR
  - Dennis Harrell, DCJS
  - Maurion Edwards, DGS
  - Cameron Caffee, OSIG
  - Cathy Nott, VDACS
  - Mark Gribbin, JLARC
- **Planning interactions with the IT infrastructure program**
  - Doug Chandler, DFS
  - Bill Reed, VSP
  - Mike Harrell, DCR
  - Kimberly Carter, VRC
  - Lee Tinsley, DVS
  - Charity Hooper, UMW
  - Steve Fox, ABC
- **Process used for defining new services**
  - Christopher Brown, DMAS
  - Preetha Agrawal, CSA
  - Kevin Cronin, TAX
  - Dave Burhop, DMV
  - Patrick Cornish, TRS

VITA requests interested AITRs to continue participation

Expectations are to participate in requirements gathering and testing



# Top 5 AITR Interaction Projects

Interaction projects leads

Project	VITA Lead	AITR Lead	AITR Back-up
<b>Operational</b>			
Service delivery involving multiple towers	Chad Wirz	TBD	
Work requests	Perry Pascual	TBD	
Expectations of what is a partnership	Judy Marchand Hampton	TBD	
<b>Governance</b>			
Planning interactions with the partnership	Zeta Wade	TBD	
Process used for defining new services	Paul Dodson	TBD	

VITA requests an AITR to serve as the primary point of contact for each of the projects

Expectations

- Determine how/when additional AITRs participate
- Represent the voice of the customer
- Participate in requirements gathering, definition of desired outcomes, testing



## Timeframe

- Phase 1
  - Creating and presenting recommendations to address the interaction challenges
    - Recommendations should be presented no later than two (2) months from project kick-off meeting
- Phase 2
  - Implementing recommendations
    - Timing will vary based on individual recommendation timelines
    - Valued customer experience improvement plan milestone list should be updated to include the key milestones for each recommendation



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Questions?



## Appendix

- AITR interaction touch points
- Improvement plan template



## Service Delivery (Multiple Towers) Process

- Interaction touch points
  - Open VCCC ticket – neutral
  - Ticket assigned – positive
  - Agency escalation – positive
  - Agency locates resource – needs attention
  - Agency engages VITA – neutral
  - Ticket resolution – positive
  - RCA delivery – needs attention



## Work Request Process

- Interaction touch points
  - Discuss with CAM/AOM – neutral
  - Reply from CAM/AOM – positive
  - Complete paperwork – needs attention
  - Submit paperwork – neutral
  - Feedback from CAM – needs attention
  - Complete revised paperwork – needs attention
  - Receive work request number – positive
  - Status from CAM/AOM – needs attention
  - Receive proposal – positive
  - Submit changes – needs attention
  - Acceptance - neutral



## Partnership Expectation Process

- Interaction touch points
  - CAM/AOM – neutral
  - Clear roles and responsibilities – needs attention
  - Comprehensive Infrastructure Agreement (CIA) orientation/training – needs attention
  - Contract not partnership – needs attention
  - Mutual empowerment – needs attention
  - Clear definition of partnership – neutral
  - Partnership dictating to agency – needs attention
  - CAM/AOM advocacy – neutral
  - Communication of standards – needs attention
  - ITP changes and impact – needs attention
  - Simple policies and procedures – needs attention
  - Quick determination of service request or work request – needs attention
  - Ability to negotiate – needs attention



## Planning Interaction Process

- Interaction touch points
  - Edict from VITA – needs attention
  - AITR meeting presentation – needs attention
  - Contact CAM/AOM and weekly meeting with AOM – positive
  - Follow up on meeting – needs attention
  - CAM/AOM feedback – needs attention



## Defining New Services Process

- Interaction touch points
  - Request service (work request) – neutral
  - Request sent to CAM – positive
  - Rework work request – needs attention
  - Check status – needs attention



# Improvement Plan

## Project Overview

Project Name	
Focus Area	<i>Define the focus of this particular project (there may be more than one project tied to your area); what issue areas will you address?</i>
Success Criteria	<i>To be defined by the project team; given the topic of your project, what will success look like when you are finished</i>
Key Project Deliverables	<i>What are the new or modified processes, tools, etc., that this project will produce? Initially, this should contain the recommendation for improvements. Once the recommendation is approved, this will be updated with the approved improvements.</i>
Target Completion Date	<i>What is the final date by when the work will be complete?</i>



# Improvement Plan

## Milestones – Last Updated MM/DD/YYYY

Milestone	Lead	Status	Risks	Issues	Due Date
<i>What is the major activity that you will complete? Kick-off the project, complete the recommendation, approval of the recommendation, implementation of the individual recommendations</i>		<i>Not Started Active Complete</i>	<i>Are there any risks (may happen) that may affect the ability to complete this milestone?</i>	<i>Are there any issues that are affecting the ability to complete this milestone?</i>	<i>When will this milestone be complete?</i>



# Improvement Plan

## Suggested Milestones – Phase 1

Milestone	Lead	Status	Risks	Issues	Due Date
Formally kick-off project <ul style="list-style-type: none"> <li>Hold meeting with project team to review materials, set expectations and begin to draft timeline, approach</li> </ul>		Active	Ability to schedule – availability of project team members	N/A	TBD
Conduct brainstorming session <ul style="list-style-type: none"> <li>Conduct root cause analysis exercises</li> <li>Brainstorm solutions to root causes</li> <li>Prioritize solutions</li> </ul>					
Compile root causes and proposed solutions into recommendation presentation					
Present recommendation to steering committee					