



DRAFT

**Minutes
Customer Service Committee**

**March 30, 2009
Commonwealth Enterprise Solutions Center (CESC)
11751 Meadowville Lane
Chester, Virginia 23836**

Attendance

Members present:

Dr. Mary Guy Miller, Chair
Aneesh P. Chopra

Kenneth S. Johnson
James F. McGuirk II

Others present:

Debbie Secor, VITA Director of Customer Account Management
Walter J. Kucharski, Auditor of Public Accounts
Fred Duball, VITA Director of Service Management Organization

Call to Order

Chairman Miller called the inaugural meeting of the Customer Service Committee to order at 1:32 p.m. At the request of the Chair, Ms. Secor called the roll and confirmed the presence of a quorum.

Committee Roles and Responsibilities

Dr. Miller welcomed the members and audience to the meeting. She described the importance of customer service, the work she and the ITIB have completed with VITA Director of Customer Account Management (CAM) Debbie Secor, and the importance of the committee going forward. She said VITA is a service organization that is judged by customer service. She said VITA does many things well and but it has room for improvement in the area of customer service. Many of VITA's customers are "captive," yet need to be treated as though they were earned every step of the way.

The role of the committee is to understand where VITA is with customer service, where it wants to go and what the gaps are in order to make the organization more effective. Dr. Miller asked Ms. Secor to provide an overview of customer service at VITA.

Customer Service Program Update

Ms. Secor introduced herself and described her customer service background with the Commonwealth. She delivered a presentation on the history and context of customer service at VITA, accomplishments and challenges, strategy and action plan, and potential ways for the committee to support customer service efforts.

History

Ms. Secor said VITA's customer relationship management (CRM) strategy has evolved since VITA was created in 2003 to support significant shifts in VITA's business model. There were four major phases, including the creation of VITA, integration of 90-plus agencies into VITA, formation of the IT Infrastructure Partnership and transformation, and transition to managed services. She said CRM is a new concept for government and VITA is the only internally-facing agency with a CRM strategy and organization.

VITA's CRM strategy is based on industry best practices. Ms. Secor said VITA worked with Gartner and other groups to tailor commercial strategies so they would work in state government.

Ms. Secor described the major changes that took place in each of the four phases of VITA, the impacts to customers and how the CRM strategy and organization evolved to provide support.

Mr. Jim McGuirk arrived.

In response to questions from Dr. Miller, Ms. Secor said during the transformation phase there were 11 customer-facing staff from VITA, including six CAMs and five Agency Performance Managers (APMs), organized by Secretariat. These roles were merged this quarter to address customer requests for a single point of contact. There are 10 CAMs from VITA, aligned by agency size.

In response to questions from Mr. McGuirk, Ms. Secor said many customers want VITA to understand what they do on a day-to-day basis to provide services without having to involve them as much. She noted the request for service (RFS) process is intended to gather agencies' business requirements, which can be challenging when agencies have long been accustomed to writing their own solutions. Instead of asking VITA to buy a server with a certain amount of memory, agencies are being asked about application support requirements, transaction speed, etc. so that VITA and Northrop Grumman can provide the best solution. She said the customers and CAMs are learning to work through the requirements phase and not the solutions phase.

Ms. Secor agreed with Dr. Miller's observation that some agencies are better at the RFS process than others. She noted that VITA has received positive comments from small agencies for helping them through the process because they don't have IT expertise on staff. She said that as VITA and Northrop Grumman complete more RFS projects, such projects will become more routine and won't require as much time in solution development.

In response to questions from Secretary Chopra, Ms. Secor said that VITA is planning to incorporate enterprise-wide and agency-specific service level agreements (SLAs) into a new memorandum of understanding (MOU) for distribution to agencies. She described the stakeholder-driven process to determine the order of SLA rollouts. The MOUs and SLA document will be rolled out in the coming quarter. Secretary Chopra commended the strategy and thanked Ms. Secor.

Accomplishments and Challenges

Ms. Secor described customer service accomplishments over the last six years and current challenges. She described the focus on raising awareness among all VITA and Northrop Grumman staff, emphasizing that customer service is everyone's responsibility, not just the responsibility of customer-facing staff. With transformation, she noted, VITA and Northrop Grumman are asking customers to help move transformation forward. It's a difficult culture to seek high customer satisfaction ratings. She described the "fire and rescue" approach to responding to some service and support issues when notification and escalation processes are not followed.

In response to questions from Mr. Johnson, Ms. Secor said she would provide a copy of the CAM mission statement. She said VITA works every day to manage expectations, which can be difficult with the changes under way.

In response to a question from Secretary Chopra, Ms. Secor said VITA has discussed with a representative group of customers what the repercussions of not meeting an SLA. The bottom line is that everyone wants to meet each SLA. The contract establishes a system of financial penalties and credits between VITA and Northrop Grumman for meeting or missing certain SLAs.

In response to questions from Mr. McGuirk, Ms. Secor said that Northrop Grumman also does not have a CRM software tool. The help desk uses Peregrine for incident management. Secretary Chopra commented that CRM is one of the enterprise solutions.

Strategy and Action Plan

Ms. Secor outlined the customer service strategies and surveys that have taken place and shared the overarching CRM roadmap. She discussed the establishment of customer councils where subject matter experts provide advice and assistance to each VITA directorate. Ms. Secor described plans for periodic "pulse" surveys to measure satisfaction in a particular area. The next pulse survey will measure the success of the CAM-APM merger. She said VITA plans to repeat the customer insight survey in the future.

While customers remain the top priority, Ms. Secor said VITA does not expect to achieve strong satisfaction improvements until transformation is complete and agencies are fully experiencing the benefits of the new environment.

Committee Involvement

Ms. Secor outlined three areas of potential committee involvement, including addressing culture and building trust, enhancing customer outreach and input, and promoting support for using established escalation processes.

Secretary Chopra said his office gets many calls and that the escalation process has major gaps and problems. He said agencies are not looking to leapfrog the process, but that the

processes are flawed. He asked how VITA is looking at the processes and who owns the issue. Ms. Secor responded that she and Mr. Fred Duball own the issue. She said the processes do work if they are used correctly and everyone follows them. She said VITA plans to clarify communications around the process and manage expectations around timeframes to resolve issues. All service requests must start at the VITA help desk. She noted it can be difficult to get customers to start by opening a ticket.

Ms. Secor said VITA recently instituted a process for resolving billing disputes, resulting in positive feedback from some agencies.

In response to questions from Mr. Johnson, Ms. Secor said VITA meets with agencies regularly on their transformation plans and to establish transformation priorities. She said there is a certain structure and process that must be followed – network must come before messaging, for example. Mr. Duball confirmed Ms. Secor's statement about technical prerequisites and flexibility for the areas that are not dependent.

Dr. Miller said the issues around culture, outreach and process are interrelated and the committee needs to come up with agreement on how to approach them. She said it is important for the committee to support the escalation process and promote it from top to bottom in state government.

In response to questions from Dr. Miller, Secretary Chopra said the Chief of Staff have hosted two town hall meetings with the largest 20 agencies to work on reaching the transformation finish line. The meetings are promoting good dialogue and identifying issues.

In response to a question from Mr. Johnson, Secretary Chopra said agencies are highly decentralized and probably would never have a standard operating procedure. He noted that VITA will be "living with marble cake" for the foreseeable future.

Dr. Miller commended Ms. Secor for her diligence, dedication and focus, and for the helpful briefing to the committee. She urged the committee to pay attention to Ms. Secor's call for support, to speak and act as one, and to help agencies understand what is in place.

Other Business

Dr. Miller asked if there was new business for discussion. There was none.

Public Comment

Dr. Miller asked if there was any public comment.

Linda Belflower, Agency Information Technology Resource (AITR) for the Virginia Employment Commission, offered her perspective as a customer. She described customer service improvements made by VITA, the challenges of transformation at her agency, and the need for improved service quality and responsiveness.

Adjourn

Mr. Johnson commended Dr. Miller for her leadership and contributions to the ITIB and to her advocacy for improved customer service. Dr. Miller thanked him and adjourned the meeting at 2:39 p.m.