

SUB-TEAM CHARTER

SUB-TEAM NAME-

CUSTOMER RELATIONSHIP MANAGEMENT/ CALL CENTER IPT – CURRENT STATE

SHARED AND MEANINGFUL PURPOSE-

PURPOSE-

- Improve customer satisfaction
- Reduce unit costs
- Better customer relationship management in a timely way through the medium that best meets their needs, i.e. phone, web, paper
- Promoting electronic business while maintaining easy access to paper

WHY NOW?-

The PBO Performance Objectives and the Customer Service Task Force Report both make a strong request for a single number for all student calls by September 2000.

This initiative has the greatest potential to affect the PBO goals, enterprise-wide.

VISION OF SUCCESS-

?

GUIDING PRINCIPLES -

- Remain customer focused, not process focused
- Best in business
- Reliable and consistent
- Worthy of trust
- Implement Quick Hits
- Provide immediate customer beneficial impact

SPECIFIC AND CHALLENGING GOALS-			
TOPIC	PERFORMANCE INDICATOR	GOALS	FUTURE PURPOSE
<p>Agreement on SFA Sites To Inventory + Contact person at each site</p>	<ul style="list-style-type: none"> • Select, agree upon, and prepare list of SFA Sites to be inventoried <i>(Elicit help from key Channel representatives to identify Customer Relationships in their Channels supported by Call Center operations or services.)</i> • Provide inventory list to Core Team for comment. 	<ul style="list-style-type: none"> • Inventory sites selected by Tuesday, June 13, 2000 • Inventory list to Core Team Tuesday, June 20, 2000 	<ul style="list-style-type: none"> • Provides information on current practices which could be absorbed or continued in future iterations of products, services or Call Center practices for our customers • Presents “reality” of current practices that we may <i>NOT</i> want continued in future Customer Relationship Management solutions • Details current systems solutions to support Call Center Operations, and their weaknesses, which serves as a “start point” for future enhancements

<p>Select components to be Inventoried by Site</p>	<ul style="list-style-type: none"> • Inventory all SFA sites, focusing on Call Center activities and other related processes (such as web services and manual processing), as appropriate, including: <ul style="list-style-type: none"> ▪ Location ▪ Services provided ▪ Volumes ▪ Staffing level ▪ Top 20 questions ▪ Information Technology ▪ Who is the Customer ▪ Reporting—kinds of reports they provide ▪ Availability of quality measures, standards, and procedures • Elicit prior inventories of sites from affected Channels 	<ul style="list-style-type: none"> • Select components to be Inventoried, Tuesday, June 6, 2000 	<ul style="list-style-type: none"> • NA
<p>Complete Inventory</p>	<ul style="list-style-type: none"> • Initiate start of inventories • Complete all inventories 	<ul style="list-style-type: none"> • Inventories begin Thursday, June 22, 2000 • Inventories completed Tuesday, July 18, 2000 	<ul style="list-style-type: none"> • NA

<p>Prepare Final Report and Brief Summary Report to Core Team</p>	<ul style="list-style-type: none"> • Prepare written report (and all supporting documentation as attachment(s)) • Brief summarized version of report to Core Team on Wednesday, July 28, 2000 	<ul style="list-style-type: none"> • Complete report by Friday, July 21, 2000 • Brief Core Team, and provide final written report by Tuesday, July 25, 2000 	<ul style="list-style-type: none"> • NA
<p>SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS-</p> <p>Update as required from information provided by Core Team to sub-teams.</p>			
<p><u>CLEAR ROLES-</u></p>			
<p>Sponsor</p>	<ul style="list-style-type: none"> • Jeanne Van Vlandren 		
<p>Team Leader</p>	<ul style="list-style-type: none"> • Dena Bates 		
<p>Sub-Team Leader (Current State)</p>	<ul style="list-style-type: none"> • Corwin Jennings 		
<p>Sub-Team Members</p>	<ul style="list-style-type: none"> • 		
<p>Recorder/Documenter</p>	<ul style="list-style-type: none"> • TBD 		
<p>Facilitator</p>	<ul style="list-style-type: none"> • Nancy Brodsky • Julia Santiago 		

DECISION-MAKING-	
	<ul style="list-style-type: none">• Preferred approach – sub-team consensus on recommendations• Fall-back approach – sub-team leader and/or Core Team leader and/or business owner where consensus cannot be achieved• Recommendations to the Core Team to the sponsor as the final decisionmaker
<u>A COMMON AND COLLABORATIVE APPROACH-</u>	
AN AGREED UPON PROCESS MAP AND WORK PLAN-	
MASTER PROCES MAP (TO BE INCLUDED AS AN ATTACHMENT)	
OPERATING AGREEMENTS AND PRINCIPLES - how we want to work together-	
<ul style="list-style-type: none">▪ Communicate - info. to each other▪ Stick to timelines▪ Consistent meeting time▪ When given assignments - complete by due date▪ Showing up on time▪ Ending and starting on time▪ Getting documents in advance▪ Read documents in advance▪ Resolve to deal with core team issues - resolve them, don't let them fester▪ Mindful that all opinions desired, respected and considered▪ If can't attend meeting, let Corwin know▪ If material is passed out in the meeting, make sure non-attendees get it	
HOW OFTEN THE SUB -TEAM WILL MEET AND OTHER KEY AGREEMENTS-	
<ul style="list-style-type: none">▪ Team should meet weekly, on Tuesday of each week, from 2 – 4 p.m.▪ Each member should be prepared to brief the collective sub-team on tasks presented To them for resolution or information gathering at the previous meeting	
<u>COMPLEMENTARY SKILLS AND RESOURCES-</u>	
KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS-	
COMPETENCY REQUIREMENTS FOR THE TEAM-	
<ul style="list-style-type: none">▪ Considered expert in core functional area (Call Center operations or similar function)▪ Technical orientation (program and/or system)	

- Flexible/adaptable to changing dynamics in IPT

RESOURCE REQUIREMENTS- –(time, people, money, materials)

To be identified...travel, fees, etc...

OTHER