AGENDA FOR LAUNCH OF
CUSTOMER RELATIONSHIP MANAGEMENT - CALL CENTERS IPT
MAY 31, 2000

DESIRED OUTCOMES -

- Understanding of the context within which this IPT sits so that you can know the importance and relevance of the team's work in the broader context of the Department of Education
- Understanding of the concepts of chartering and process road mapping so that you can see how we are trying to set this IPT up for success
- Understanding of the charter and process road map for this IPT so that you can see how you might benefit from and contribute to its goals
- Understanding of your expectations and hopes for the work of this team so that the team can capitalize on your expertise
- Understanding of your issues and concerns so that we can try to avoid potential gaps or problems
- Understanding of advice and recommendations you would give the team so that we can build on your knowledge
- Understanding of roles, if any, that you might want to play in the process
- A list of next steps

WHAT	HOW	WHO	WHEN

START-UP -	• Big Picture Context–e.g.
	  • Customer Focus
	  • Alignment with PBO/Modernization
	  • What brought us to this point?
	  • Why are we doing this?
	  • How might it impact audience–contractors, students, employees…
	  • Part of culture shift–stakeholder inclusion, voice…
	• Introduction of Dena
	•
	• Introduction of Core Team and Team Leads
	•
	• Desired Outcomes
	• Agenda
	• Roles
	• Operating agreements
		JVV
		
		Dena
		
		IA
			2:00-2:20

OVERVIEW OF CONCEPTS OF CHARTERING AND PROCESS MAPPING	• Present concept of chartering • Present concept of process mapping	IA	2:20-2:30

OVERVIEW OF IPT CHARTER AND PROCESS MAP	• Overview of CRM–Call Center IPT charter • Overview of CRM–Call Center big picture process map	Dena	2:30-2:40
QUESTIONS AND ANSWERS	• Check for any questions from the audience	IA	2:40-2:55

BREAK-OUT GROUPS	• Break out participants into groups of about 5, and have them each go to a flip chart station to brainstorm their thoughts about 3 different questions listed below. (Each group should end up with 3 separate charts, one for each question)–
	• **Small groups**–given the already determined goals of this IPT (listed on a flip chart)–
	  • **Hopes/expectations** - What would be your hopes and expectations for the work of this team? If this team were successful, what would be happening?
	  • **Isssues/concerns** - What issues and concerns do you have?
	  • **Advice/recommendations** - What advice and recommendations would you give the team?
	• **Gallery Walk** - individuals walk around room to see results of other teams
	• **Large group debrief**
	• **JVV reactions**
		IA plus Core Team mem-bers with Break Out Groups
		
		IA
		JVV
			2:55-3:35
			
			3:35-3:50

CLOSE-	• Next Steps/Action Plan • +/Δ		3:50-4:00