

Summary for Deliverable 5.3.1 Draft Charter August 31,2000

Deliverable 5.3.1	Summary	Results
<ul style="list-style-type: none"> □ The objective of this deliverable is for the Customer Relationship Management Team – Best in Business to have a completed charter so that the team can be clear about purpose, desired outcomes, deliverables, boundary conditions, etc. 	<ul style="list-style-type: none"> □ The agreed-upon charter ensures that the team is set-up for success, people understand their roles and are effectively implementing the process road maps. 	<ul style="list-style-type: none"> □ The charter was completed by August 31, 2000. □ A copy of the charter is attached below.

Charter (Draft)

SUB-TEAM NAME

***CUSTOMER RELATIONSHIP MANAGEMENT
BEST IN BUSINESS***

SHARED AND MEANINGFUL PURPOSE-

PURPOSE-

- Identify Best Practices for:
 - Improving customer satisfaction
 - Reducing unit costs
 - Improve customer relationship management in a timely manner 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 benefit

SPECIFIC AND CHALLENGING GOALS-

TOPIC	PERFORMANCE INDICATOR	GOALS	FUTURE PURPOSE
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Team Assembly	Commitment of sub-team members to the task and responsibilities	<ul style="list-style-type: none"> Gather the team members Review roles and responsibilities Obtain commitments Establish regular meetings Completion by 6/30 	•
Expert Identification and Enrollment	<ul style="list-style-type: none"> Agreement on and enrollment of Best Practice experts Agreement on Best Practices data gathering plan 	<ul style="list-style-type: none"> Research and enrollment of Best Practices experts Develop a data gathering plan Obtain core team consensus Completion by 6/30 	•
Best Practices Development	<ul style="list-style-type: none"> Complete Data gathering Complete summary document 	<ul style="list-style-type: none"> Survey of Best in business & Data Gathering Compilation of results (include feasibility analysis) Completion by 8/11 	
Gap Analysis (Participate with Current State)	<ul style="list-style-type: none"> Completed Gap Analysis 	<ul style="list-style-type: none"> GAP analysis between Best in Business and Current State Completion by 9/01 	
Solution for the future	<ul style="list-style-type: none"> Recommended solutions 	<ul style="list-style-type: none"> A list of recommended solutions and a business case for each Management Council agreement on solutions that will be implemented 	❖ Completion by 9/09

SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS-

Note: To be determined during discovery process

CLEAR ROLES-

Sponsor	Jeanne VanVlandren
Core Team Leader	Dena Bates
Sub Team Leader	Denise Hill
Recorder/Documenter	
Facilitator	
Sub Team Members	
Vincent Ferrer (P/T – Schools)	Vincent-Ferrer@ed.gov
Richard Windham (F/T – AC)	Richard.Windham@ac.com
Chris Hill (P/T – CIO)	Chris_Hill@ed.gov
Diane Clark (Provide Input)	Diane Clark
Scott Reynolds (Provide Input)	
Varlerie Sherrer (P/T)	
Dan Opperman (P/T – SF Region)	Dan_Opperman@ed.gov

Paul Steinhauer (P/T – NCS (CPS/FAFSA))	Steipa@ncs.com
Marilyn LeBlanc (Provide Input)	Marylyn_LeBlanc@ed.gov
Sandy England (ECAD)	Sandy_England@ed.gov
Dee Carter (Customer Support Branch)	Dee_Carter@ed.gov
Barbara Anderson (EDS)	Barbara.anderson@eds.gov
Jason Sellers (Ombudsman)	Jason_Sellers@ed.gov
Chuck Priddy (EDS)	Chuck.Pridy@eds.gov
Barbara Bolden	Barbara_Bolden@ed.gov

DECISION-MAKING-

- Preferred approach – team consensus on recommendations
- Fall-back approach – team leader and/or business owner where consensus cannot be achieved
- Recommendations from the Core Team to the sponsor as the final decision maker

A COMMON AND COLLABORATIVE APPROACH-

AN AGREED UPON PROCESS MAP AND WORK PLAN-

Refer to the process map

OPERATING AGREEMENTS AND PRINCIPLES - how we want to work together-

- Communicate information to each other
- Establish and maintain timelines
- Consistent meeting time
- Complete assignments by the due date
- Show up on time
- Start and end on time
- Distribute documents timely
- Read read-ahead materials
- Resolve to deal with Core Team issues – resolve them, do not let them fester
- Respect all options
- Notify the Team Leader when unable to attend meetings

Sub team may add items

HOW OFTEN THE TEAM WILL THE SUB-TEAM MEET AND OTHER KEY AGREEMENTS-

Tuesdays 2-4 pm

COMPLEMENTARY SKILLS AND RESOURCES-

KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS-

TEAM TO DEVELOP OR KICK - OFF

COMPETENCY REQUIREMENTS FOR THE TEAM-

tbd

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

OTHER