

SFA Modernization Partner
United States Department of Education
Student Financial Assistance



Customer Relationship Management
CRM Implementation Plan

Task Order #11
Deliverable #11.1.3

March 31, 2000

Table of Contents

1	Introduction	1
1.1	Purpose	1
1.2	Scope	1
2	CRM Functions Included in Release 1 - June 30,2000	2
3	CRM Implementation Team Organization	3
4	CRM Implementation Plan	4

1 Introduction

1.1 Purpose

This deliverable is part of Task Order 11, and is documentation of the implementation plan for conversion from the current Ombudsman Case Tracking System (OCTS) to Siebel's CRM system.

1.2 Scope

This document covers the following areas:

- CRM Functions Included in Release 1 – June 30, 2000
- CRM Implementation Team Organization
- CRM Implementation Plan

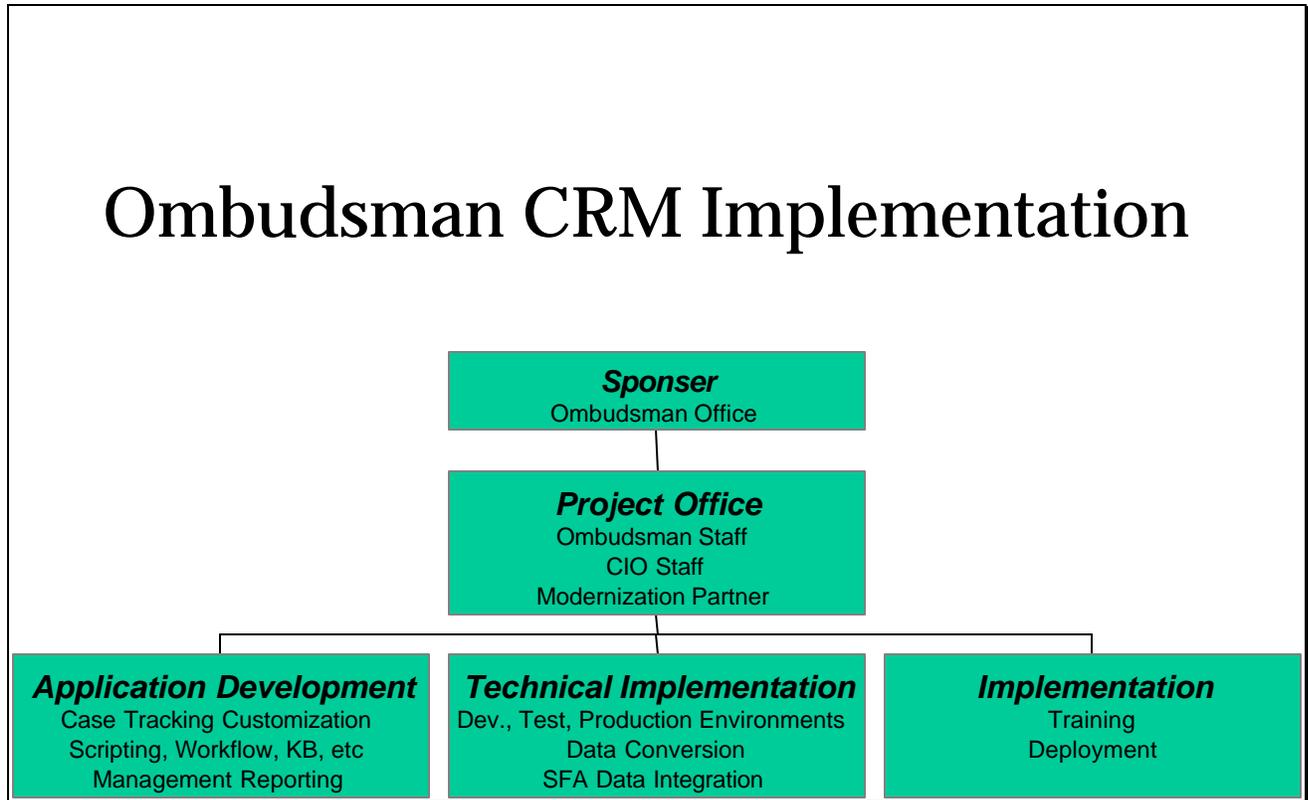
2 CRM Functions Included in Release 1 – June 30, 2000

At the time of presentation of the Implementation plan, it was decided that the target date for Implementation of the first release would be June 30, 2000. The following functionality would be available at that time.

- The Current OCTS data would be converted and migrated to the Siebel system.
- Ombudsman and Call Center Specialists would be able to process cases using Siebel rather than OCTS.
- Tracking of specialist activity would be done using the automatic functions provided by Siebel.
- Management Reporting would be enabled for both standard reports and ad hoc capability.
- The system will enable Internet users to enter cases and retrieve case status.
- The following functions will be enabled and tested. Implementation of the functions will be the responsibility of the Ombudsman staff.
 - Scripting and workflow automation
 - Automatic creation of work items such as E-mail and Fax.
 - Knowledge Base capability
 - Customer Satisfaction Survey
 - Automatic integration of data from SFA data bases such as NSLDS

3 CRM Implementation Team Organization

The following chart represents the team organization for CRM Implementation



Andersen Consulting plans to staff the project with a project manager, 5 consultants and 2 analysts. Three of the consultants will work with the Ombudsman Staff to develop the new application for the Specialists. One consultant will work with the CIO staff to develop the development, test and production environments and one consultant will work with the Ombudsman staff to develop training materials and assist in the training of the Specialists.

4 CRM Implementation Plan

The attached Microsoft project plan has been developed for implementation of the first release of the project which completes on June 30, 2000.