



## **Student Financial Assistance**

### **Deliverable 77.5.2**

### **Enterprise Customer Service Delivery Model (CSDM) – Current State Analysis:**

#### **Task Order Summary:**

The Consistent Answers Definition and Preliminary Design initiative was approved by Investment Review Board on April 5, 2001. During this initiative, the Consistent Answers team conducted extensive discovery and evaluation of the current environment, created a target state customer service environment, and developed a business case and sequencing plan to transform SFA customer service. The Enterprise Customer Service Delivery Model – Current State Analysis deliverable presents the current SFA customer service environment through contact center and SFA operating models, contact center scorecards, an integration/interface inventory, and a systems/telephony architecture.

SFA's customers and delivery partners are serviced by DC, regional offices, and eleven major contact centers. Each customer service area has unique phone numbers, email addresses, contact history databases, and contract parameters for cost and performance metrics. Most of the customer service areas operate largely independently of one another and employ individual strategies, processes, and technologies to deliver customer service.

The current customer service environment makes it difficult for customers and delivery partners to interact with SFA. The segmented information makes it time consuming for customer service representatives and SFA employees to access and understand a customer and/or delivery partner's complete experience with SFA. The current customer service environment does not optimize SFA's ability to serve customers and delivery partners and the silos of information contribute to excess costs through duplicated work and misdirected inquiries.

The Consistent Answers team leveraged the work and findings from completed and current projects including the Call Center IPT, the implementation of the new Ombudsman Case Tracking System, the Schools CRM Storyboard project, the School's Institutional Data View project, eServicing, and the Financial Partners Square One initiative.

The information for this deliverable was compiled from existing documentation, contact center and SFA surveys and reports, contact center and SFA regional office site visits, and SFA interviews. Operating Partners involved include ACS/AFSA, EDS, NCS, and Raytheon. Discovery sessions were held for students, schools, and financial partner groups in Chicago and San Francisco and schools in New York. Multiple other SFA groups were involved in the current environment discovery and review. Please reference the operating models for more information.

#### **Deliverable Summary:**

The information for deliverable 77.5.2 was collected between June – September 2001.

#### **The objective of the Confirm Approach to Front Load Savings Deliverable:**

- Define the current state CSDM
- Define the technology and telephony architecture as SFA's Customer Interaction Centers (CIC)
- Simulate the current state CSDM

#### **Milestones completed during June – September**

- CIC Survey
- CIC Site Visits
- SFA and Regional Office Site Visits
- Deliverable Documentation



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### Enterprise Customer Service Delivery Model – Current State Analysis:

#### Table of Contents

Section Title	CA Team	Summary
CSDM	All	Overall “As Is” model of the current systems, processes, and customer service interaction points for SFA.
CIC Master Survey	Process Design / Central IVR / Tech Arch / Simulation	Compilation of the information requested from the Operating Partners in order to create the detailed Current State Analysis for SFA.
SFA Master Survey	Customer View	Compilation of the information requested from SFA/Regional Offices in order to create the detailed Current State Analysis for SFA.
CIC Operating Models	Process Design / Central IVR / Tech Arch / Simulation	An overview of current and planned customer service capabilities in existing CICs including interactions, service channel utilization, process flows, and systems enablement.
CIC Scorecard	Process Design	Assessment and improvement opportunities for each CIC in relation to the key areas described in the Operating Model.
Contracts Scorecard	Process Design	Assessment of current contract components compared to best practice or reasonable target metrics.
SFA Operating Models	Customer View	An overview of current and currently planned customer service capabilities in existing SFA and Regional Offices including operations, interactions, service channel utilization, process flows, and systems enablement.
Systems / Technology Inventory	Tech Arch	An overview of existing technology infrastructure at all of the location sites for the existing call centers in the current environment.
Integration / Interface Inventory	Tech Arch	An overview of existing integration points and interfaces at and between the existing call centers in the current environment.
Telephony Architecture and Operating Models	Central IVR	An overview of the current IVR processes and flows in place at all call centers utilizing IVR technology detailing scripts, automated processes, and utilization percentages.
Simulation Results	Simulation	A simulation of baseline customer service processing in three call centers (FSAIC, DLSC, DLCC) and associated costs to serve as the baseline for the financial model, to support the development of the To-Be model, and to identify near term improvement opportunities.