Virginia Information Technologies Agency

Customer satisfaction enhancement plan ~ overview

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VITA is Committed to Improving Customer Satisfaction

- VITA's customer relationship management (CRM) strategy has evolved since 2003
  - "Case management" is common; CRM is not
- At request of the ITIB, VITA partnered with the Harvard Kennedy School in 2008
- Today's discussion is about the customer satisfaction program we developed

Four Phases in Program

1. **Customer Insight Survey**
   To collect and understand customer views regarding VITA's services (April 2008)

2. **Customer Root Cause Sessions**
   To understand root causes of customer sentiment (August 2008)

3. **Customer Action Plan Workshop**
   To develop a portfolio of ideas that will enhance customer satisfaction (September 2008)

4. **Customer Satisfaction Enhancement Report**
   To deliver an actionable plan that will guide VITA's customer satisfaction efforts in the near, mid and long-term (October 2008)

Top Customer Insights

1. Ability to deliver current services during transformation

2. Speed and transparency of execution

3. Potential for service growth and extension

4. Customers are actively assessing gains relative to losses

Recommendations

1. Maintain and build
   - New services must be in line with customer needs
   - Improve core service delivery
2. Speed and transparency
   - Combine faster service delivery with clearer communication to customers
3. Growth
   - Emphasize greater customer service and delivery to actualize future growth
4. Assessing gains, losses
   - Accelerate and increase communication with customers to emphasize the long-term gains and public value

Customer Action Areas

1. Increase transparency and communication across VITA and the IT partnership

2. Enhance customer-facing support

3. Improve process-oriented service provision

4. Reform procurement and pricing

Additional information

Customer Action Area One
Increase Transparency and Communication across Partnership

Near Term	Mid-Term	Long Term
1. Provide Customer Account Team with priority decision rights within the partnership and access to all necessary information for customers 2. Develop and publish metrics on timelines for service provision 3. Provide documentation on how key customer-facing processes work and general timelines for customers 4. Bring all customer councils together for a meeting to share ideas and best practices	1. Develop and implement a communication program that outlines the value proposition of VITA post-transformation	1. Develop a customer relationship management (CRM) system that integrates help desk, request for service, procurement and project management into one interface 2. Via the CRM system, establish a unique ID that enables customers to access the status of services in real time

Customer Action Area Two
Enhance Customer-Facing Support

Near Term	Mid-Term	Long Term
1. Reorganize Customer Account Teams from Secretariat segmentation to agency size segmentation and realign support roles 2. Integrate information via manual processes between Northrop Grumman and Customer Account Team	1. Provide a deeper level of customer service training for customer support teams and within partnership 2. Map skill sets and recruit right staff for customer account assignments	1. Increase size and/or number of Customer Account Teams to meet a new ratio of support to agency 2. Integrate customer support processes with comprehensive CRM system 3. Develop CRM system and plan to link VITA and Northrop Grumman needs with longer-term Commonwealth needs

Customer Action Area Three
Improve Process-Oriented Service Performance

Near Term	Mid-Term	Long-Term
1. Develop and implement metrics and report on performance measures for process-intensive services 2. Identify easiest to improve problems/processes for earliest action (those generating most customer frustration) and develop plan to reform them 3. Publish/communicate help desk services, standards, timelines and escalation process and post to Web and elsewhere for customers	1. Publish process and performance via the Web and publications such as Leadership Communique and Network News	1. Offer streamlined project requirements, approval and oversight for projects that are smaller, less complex, and/or less innovative

Customer Action Area Four
Reform Procurement and Pricing

Near Term	Mid-Term	Long Term
1. Analyze and communicate process standards and expectations – especially time and cost for procurements 2. Allow individual customers to identify where their requests are in the process via manual or electronic methods 3. Clarify procurement rules and standards for in-scope and out-of-scope technologies 4. Pre-order standard products and have them in stock for quick delivery and implementation	1. Create ability for customers to order from online catalog of pre-approved products 2. Enable agency flexibility in procurement for low-cost and non-critical/non-enterprise technology products 3. Expand and document service catalog to include all items, time to installation and price 4. Provide customers direct access to status of request for services, procurement and project management	1. Tie procurement process into CRM system in order to track procurements, requests for service and major/non-major project approvals in real time (similar to FedEx online capabilities) 2. Seek general fund resources to cover major/non-major project approvals/oversight costs as “overhead” (as before) rather than as user fees

Next Steps	Delivery Date
Deliver Customer Satisfaction Enhancement Plan and action items to the Information Technology Investment Board	Oct. 16, 2008
Establish an oversight committee composed of a subset of executive staff who attended the Customer Action Plan workshop	October 2008
Task Oversight Committee with assigning owners accountable to each action item in the Customer Satisfaction Enhancement Plan	November 2008
Action item Owners create work plan, underlying deliverables and measures for each action item according to near-term, mid-term and long-term goals	November 2008
Deliver Customer Satisfaction Enhancement Plan and action items to Customer Councils	November 2008
Implement a dashboard to monitor activities and results of the action items	Dec. 1, 2008
Deliver Customer Satisfaction Enhancement Plan and action items to the Agency IT Resources (AITR) Communication meeting	Dec. 9, 2008
Report progress to the Executive Evaluation and Governance Committee	January 2009