

LEANOhio

Ohio Attorney General Information Technology Services Call Center Process

January 27 – 31, 2014

“RE FORMULATE IT”



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN **Ohio**

Team Members

- Laura Weatherspoon, OAG
- Aaron Shore, OAG
- Chad Ivery, OAG
- Glen Patterson, OAG
- Mark Edwards, OAG
- Angela Cherry, OAG
- Mark Smith, OAG
- Heather Stubbs, OAG
- Kim Vinova, OAG
- Joy Endrulas, OAG
- James Gregory, OAG
- Debra Hufstader, OAG
- Conchita Matson, OAG
- Amy Brown, OAG
- Delores Elliott, OAG
- Dustin Lazzarine, OAG
- Lakeima Roberts, OAG
- Lindsay Gladman, ODJFS
- Kris Hilty, Cleveland Federal Reserve

Key Stakeholders

- **Taxpayers** – (Constituents) Indirectly
- **Customers** – Attorney General (OAG) staff, contractors, and law enforcement agencies
- **Legislators**– Indirectly
- **Others** – State agencies, business partners, and others served by the OAG mission

Event Background

Identifying and building a workable plan to improve the satisfaction of Information Technology Services (ITS) customers with their experience once they have contacted the ITS Client Services Call Center.



Scope of the Event

- What is the **first** step in the process?
 - Phone call to the Tier 1 Client Services Call Center number or an e-mail sent to the Information Technology Services (ITS) Support email account.
- What is the **final** step in the process?
 - Closing of the associated work order in our Track-It system.

Out of Scope

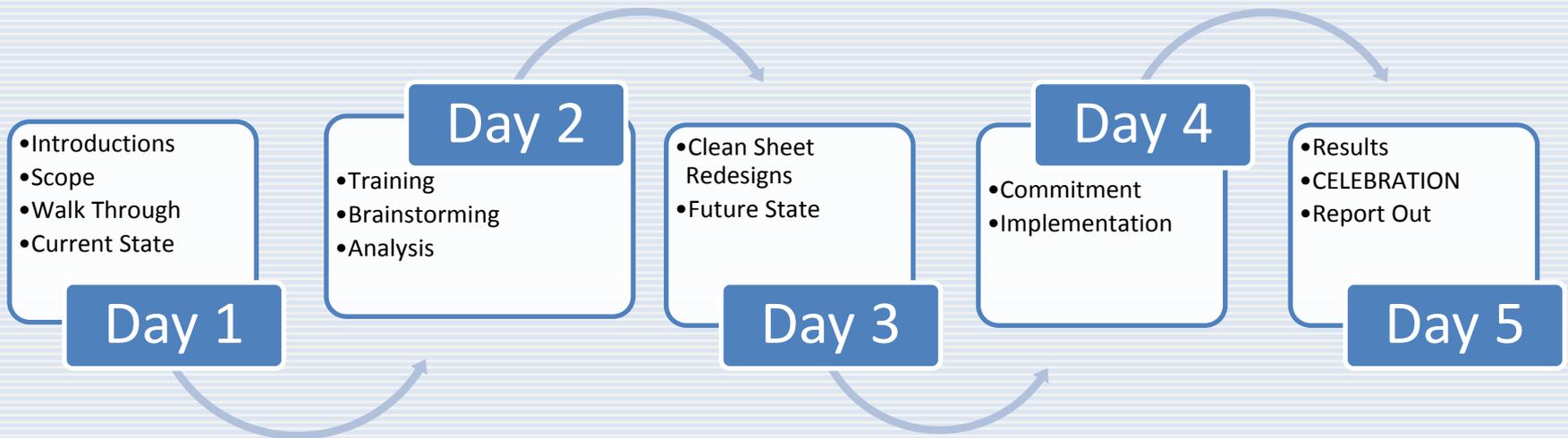
- No additional staff
- No additional money
- No IT solutions until the process is improved
- No changes to laws or labor contracts
- No one loses their job because of the Kaizen event, although duties may be modified

To Break for the Better

- Customer focused
- Right people changing the process
- One week-quick and action oriented
- Necessary resources available immediately
- New process implementation begins next Monday

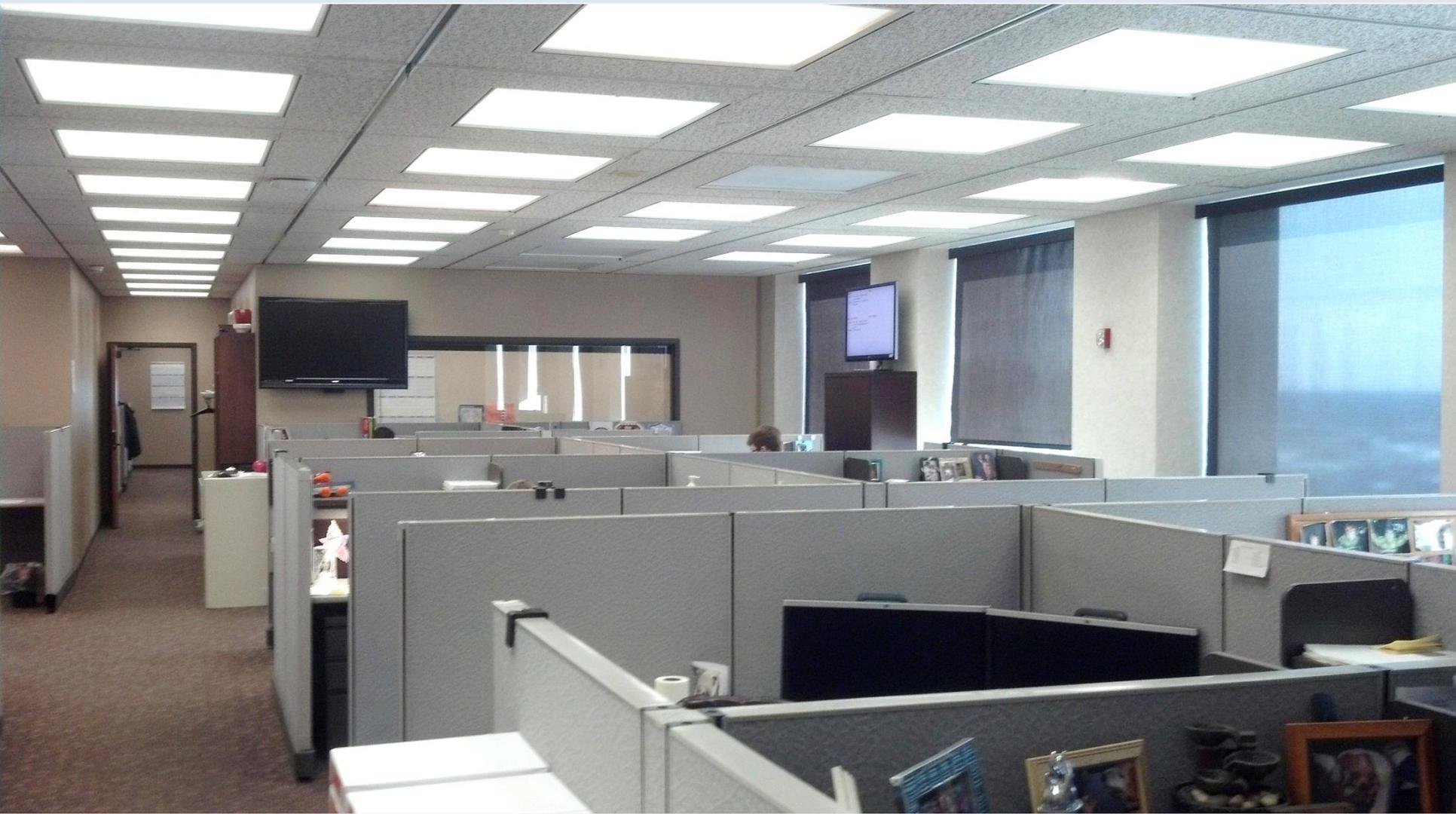


The Kaizen Approach



Walk-Through

The following pictures show where the work is accomplished and where the process lives.



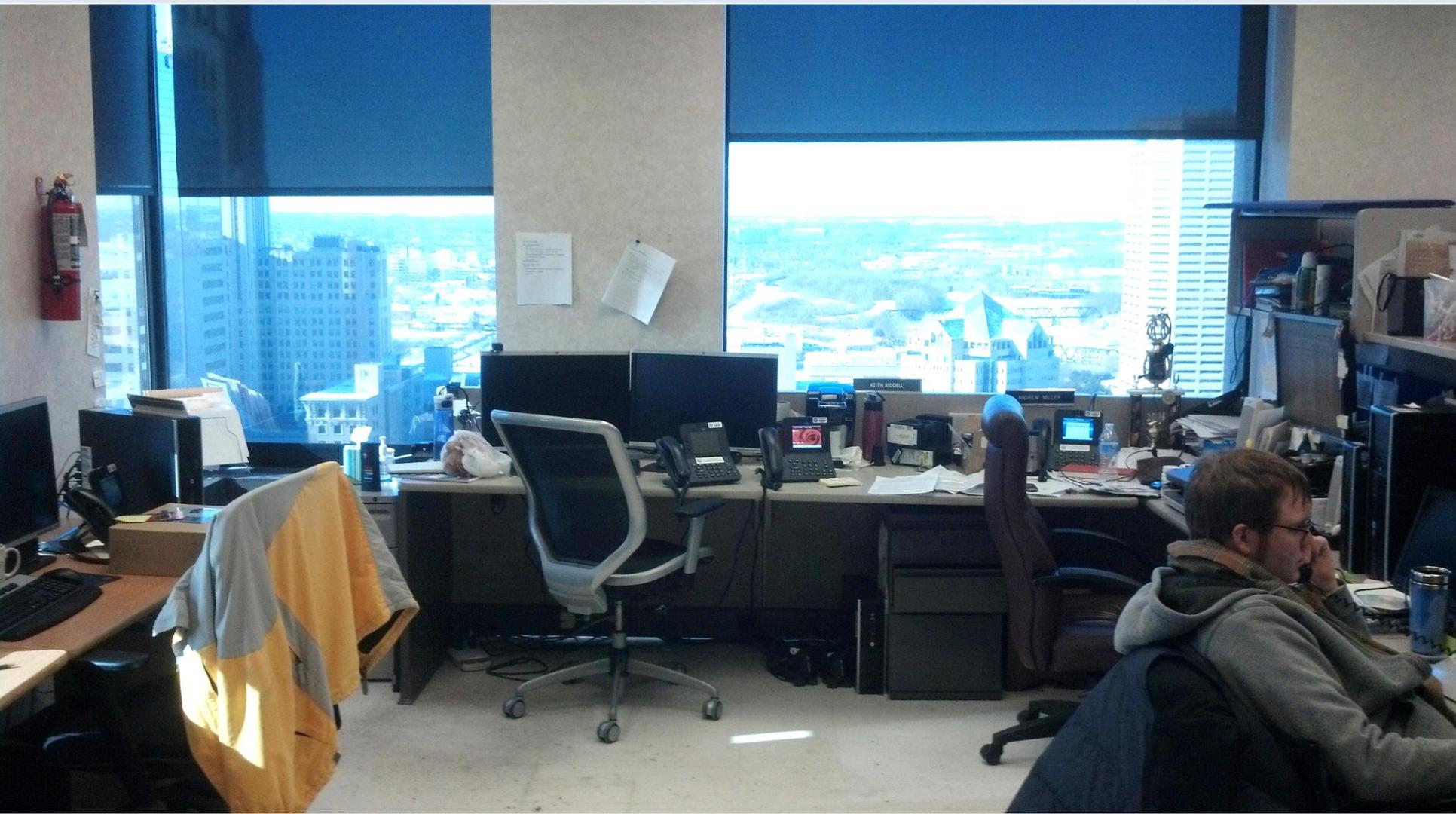


Calendar grid with dates and handwritten notes.



hp LASERJET 39A LASERJET hp LASERJET

State of Ohio Records Center
Date: _____
Order: _____
File Number: _____
Product Description: _____
From: _____
To: _____





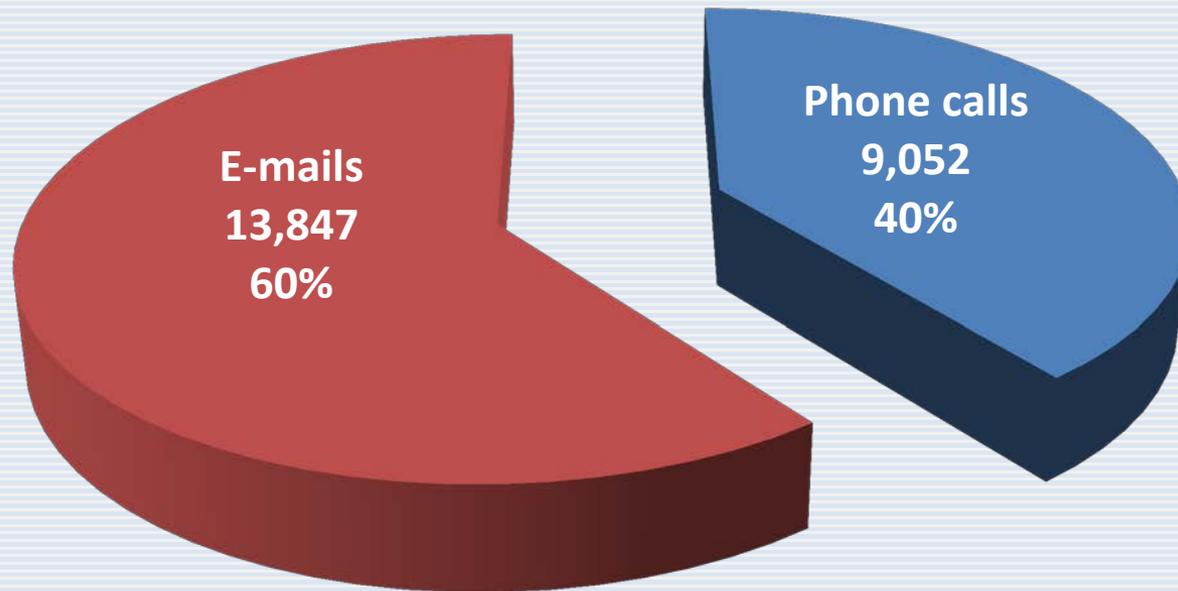


Baseline Data (May – Oct. 2013)

- **Number of customers:** 1,700+ OAG Staff and contractors
- **Number of completed work orders:** 20,031
- **Number in backlog items:** 1,802 (12/4/13)

Baseline Data (May – Oct. 2013)

Incoming Items



Total work orders: 20,031

High Level Process Map

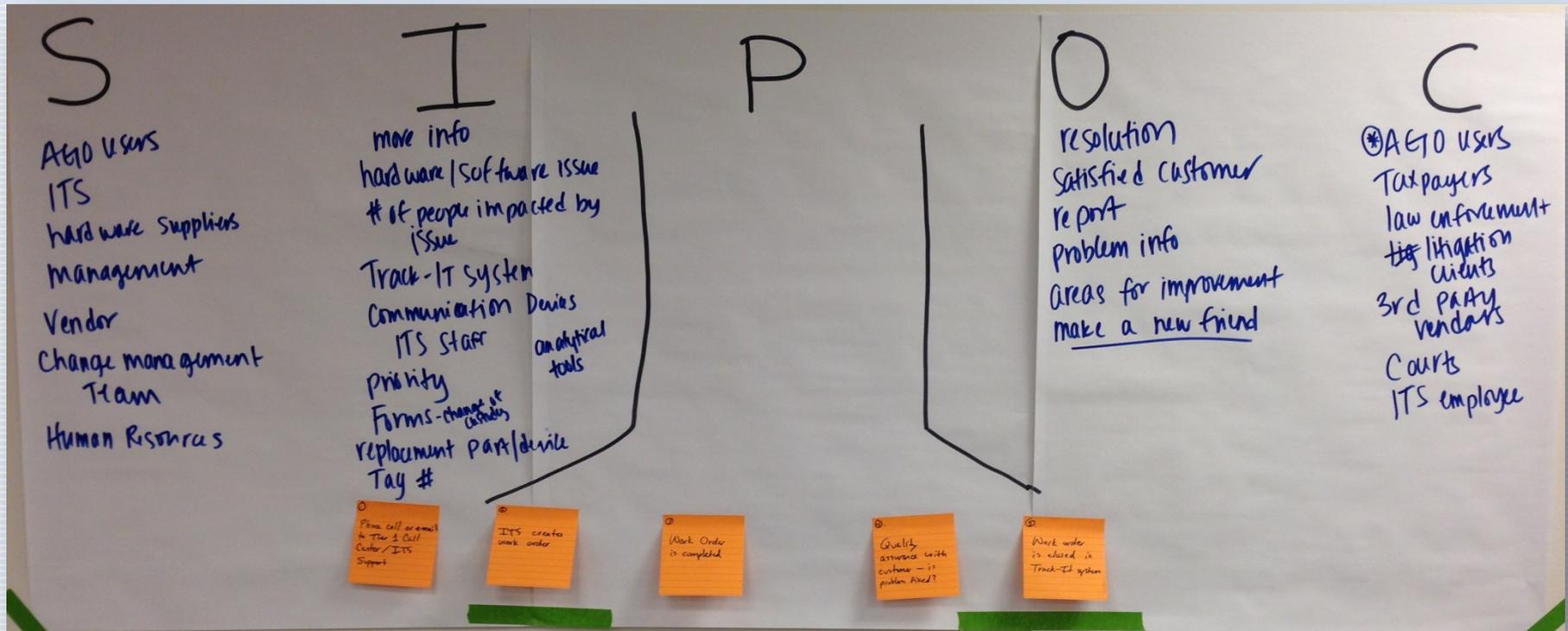
Suppliers

Inputs

Process

Outputs

Customers



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN **Ohio**

Project Goals

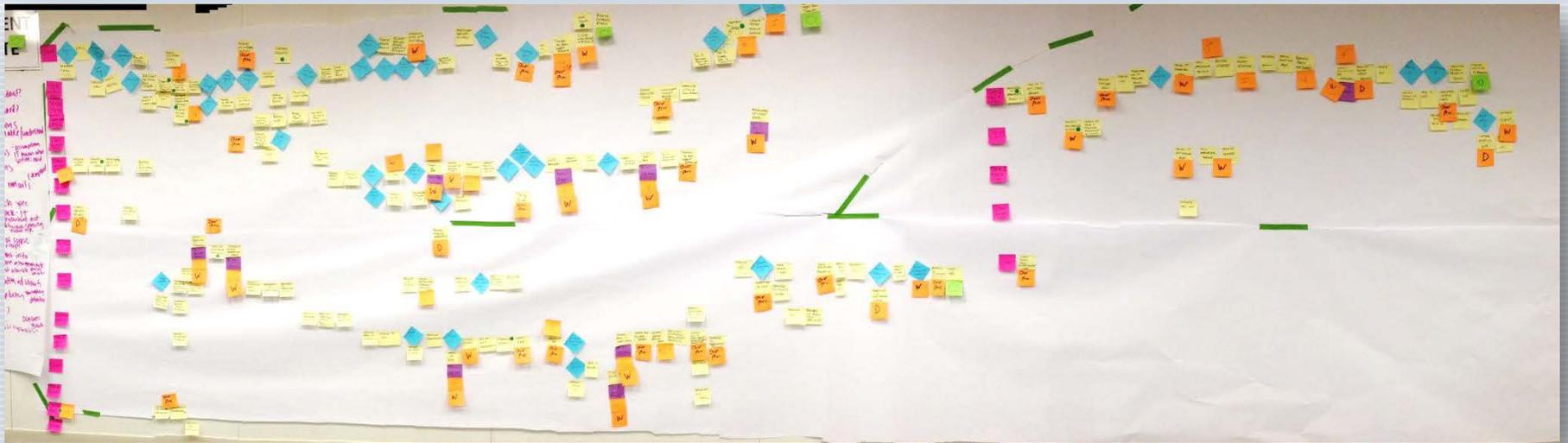
Improve
responsiveness
of Information
Technology
Services (ITS)
Client Services
to customers

Receive 85%
customer
satisfaction
score

Shorten avg.
work order
close time by
33%

Improve
internal
efficiency of ITS
Client Services
by streamlining
the process and
eliminating
duplication of
work

Current State



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN **Ohio**

Current State Had Too Many...

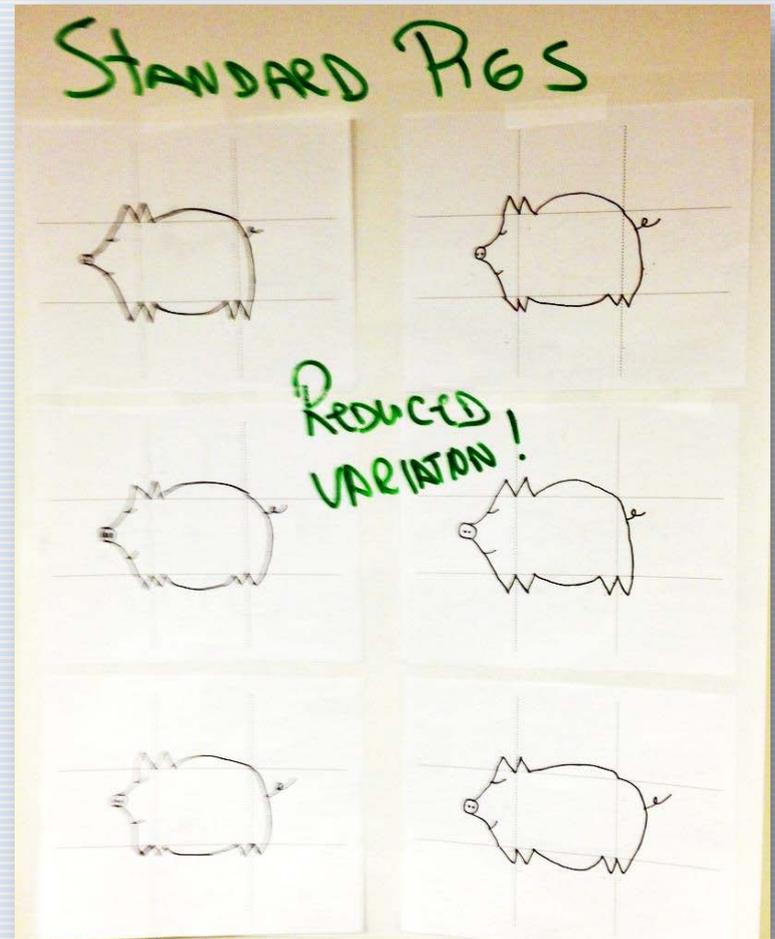
- Decisions
- Handoffs
- Loop Backs
- TIM U WOOD



TIM U WOOD



Standardization



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN Ohio

Brainstorm- 114 Ideas!



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEANOhio

Team Analyzed and Evaluated All Ideas



- Automate Equipment User Agreement (EUA) form
- Re-evaluate / follow-up tech support
- Customer communication
- Forms used to gather info
- Assign by section

Clean Sheet Redesigns



SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN Ohio

Common & Unique

COMMON

- Web Form
- Dashboard
- Auto-Assign
- Remove generic request
 - Std. Entry Point
- Communication w/ Client
through process
- Same Tech
- Training

UNIQUE

- Closure (Client)
- Common Queue (T₁+2)
- Chat
- One business Day Auto-close
- Customer "Nevermind" button
- "Pending" closure
- Customer Satisfaction!

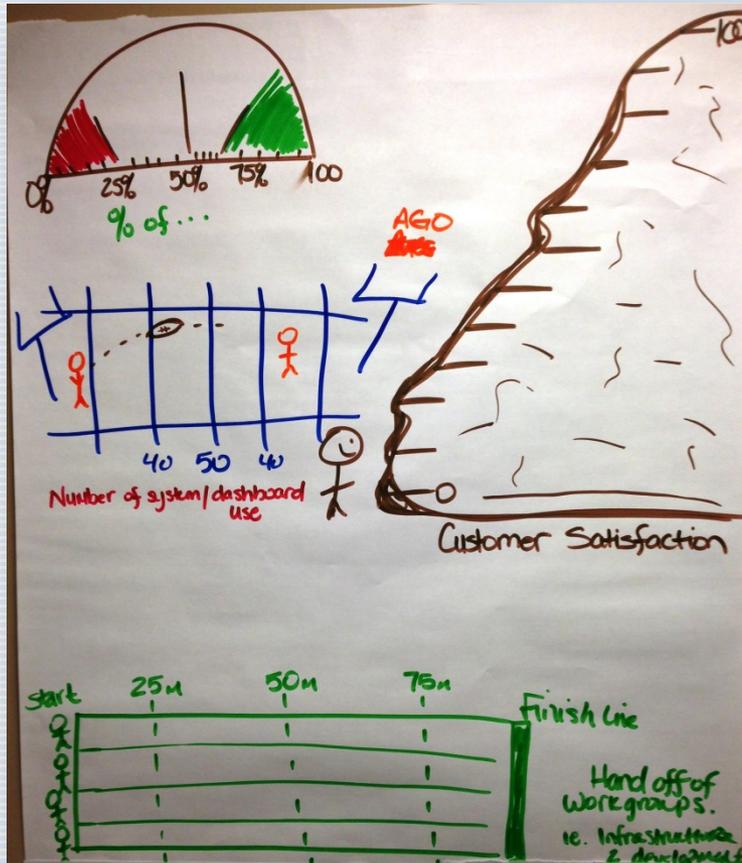
Future State Improvements

- Collecting all necessary information at the start of the process
- Electronic forms
- Customers able to pull information
- Better use of technology
- System will auto assign work orders
- Customers can select follow up preferences
- Standard entry/exit point

Scorecard

Measure	Current Level	NEW	Change
Process Steps	84	39	54%
Decision Points	12	8	33%
Handoffs	10	5	50%
Loopbacks	7	1	86%
Delays	6	0	100%
Known Waste Points	32	0	100%
Process Lead Time (Sample: On-Boarding Sep-Dec 2013)	14 days	5 days	64%

Metrics & Event Savings



SAVINGS

<u>Area</u>	<u>Pre.State</u>	<u>Future State</u>
loopback/Infogather	20 hours	1 hour
Escalation Process	30 mins	1 min
Asset Tracking	10 hours	1 hour
Followup	60 hours	1 hour

Total Time Saved: 87 hrs, 29 min

Key
1 day = 10 work hours

SIMPLER. FASTER. BETTER. LESS COSTLY.

LEAN **Ohio**

Improvement Summary

Major Improvement

Customer Friendly Form

Personalized Follow Ups

Customers able to Pull Work Order Information

How We Improved

Customers will now be able to access and fill out a form for their ITS work orders. The form was designed with customer input.

Customers can select if they would prefer to be contacted and can fill out a follow up survey if they choose.

Dashboard will allow customers to track, modify, and close ITS work orders.

Implementation Plans

- Communication
- Training
- Forms
- IT Changes
- Customer Experience



Communication Plan



Communication

- Faster better notifications for Outages
 - internal/external
 - Outages
 - text/email/AG net
- Survey
- Dashboard
- ITS Brown Bag
- Involve Client Services Manager with VIP/Section Head communication

what	Who	when
Notifications - Outages - INTERNAL/external - TEXT/Email/AGNET - Banner/Ticker	James Gregory MARK Smith ANGELO Scott Blake	June 30, 2014
y Creation	MARK Smith Joy GLEN Amy	MARCH 3, 20
BOARD	Angela Angelo	June 30, 2014
Brown Bag	MARK Smith Laura	MARCH 5, 2014
Client es mgr. of munication	AARON	Feb 3, 2014

Training Plan

CURRENT TRAINING

New Users:

- 30 min - New Hire - overview of IT: ↓
 - What ITS Provides
 - Password change
 - How to Contact - Phone OR Email
- 2 HRS - iManage
 - AGNet
 - OAKS
 - EXCEL Timesheet
 - Network Security
 - AG Portal

• Securing the Human web Based TRAINING

CURRENT USERS:

- AGO University
- ONE ON ONE TRAINING
- Videos
- Pamphlets
- Distant Learning
 - Go To MEETING
 - Lync
- WEB Based Training
 - E LEARNING
- MANUALS

TIER 1 + TIER 2

- ONE ON ONE TRAINING
- Electronic Docs
- Shadowing
- Jump in
- JOB Aids
- DAILY MEETING

FUTURE STATE

NEW USERS:

- CURRENT TRAINING PLUS:
 - Training on Intelligent FORM
 - Lync chat TRAINING
 - DASH BOARD TRAINING
 - SURVEY TRAINING

CURRENT USERS:

- CURRENT TRAINING PLUS:
 - WEB BASED TRAINING on INTELLIGENT FORM - INTERACTIVE w/Quiz
 - Lync chat TRAINING
 - DASH BOARD TRAINING - WEB BASED
 - SURVEY TRAINING

TIER 1 + TIER 2

CURRENT TRAINING PLUS

- STANDARD KNOWLEDGE BASE
 - Electronic
 - constantly updated
- ~~NEW FLOW PROCESS~~
- NEW FLOW PROCESS

IN-HOUSE APPLICATIONS

- INTELLIGENT FORM
- DASHBOARD
- Lync chat
- SURVEY
- TRACKIT Training
 - changes

SIMPLER. FASTER. BETTER. LESS COSTLY.

Forms Plan

Forms

★ Based of response from first two pages

Choose an application you're having the issue with

- ID+
- EAGO
- OPA
- CUBS
- lmanage

Can find a claim

Need expense line unlock

Need claim invoiced

None of these apply

provide info

Preferred method of contact from ITS Support

- Email
- Phone
- Text : mobile# _____
- Lync

014

Forms

- Electronic EUA
- Magic Form
- Electronic OnBoarding Form
- TrackIt Autoreponse e-mail
- Close Work Order

Autopopulate Data

- Name
- Section
- Location (building, City, floor)
- Tag # , Phone#

★ Data fields can be edited which will repopulate the data

How May We Help You?

- Having a problem with
 - application
 - printer
 - PC Equipment
 - phone
 - internet access

I Need To Borrow A...

- Projector
- Laptop
- Blackberry
- Air Card
- Projector Screen
- Elmo

New Hire Setup

I need to update/change web/AGNET

I need to schedule a

- Video Conferencing
- Audio/Visual Setup
- Clicker

IT Changes

- IT Changes
- 1) Formulate Tier 1 script (2/18/2014)^{1st cut}
 - 2) Change system client notification templates (2/14/14) (work order email verbiage)
 - 3) Create electronic forms
 - a) On-boarding ~~Form~~ and transfer form (3/31/14)
 - b) EUA form /or WORK with Fixed assets
 - c) Ad-hoc report form (2/7/2014) (6/30/2014)
 - d) Software change form (3/14/14)
 - e) MAGIC form (Phase 1-2/22/2014) (Phase 2-4/30/14)
INTELLIGENT
 - 4) Work Order Status DASHBOARD (DDMINOS)
(Phase 1-2/22/2014) (Phase 2-4/30/2014)
 - 5) Complete Track-It upgrade (2/19/2014)
 - a) Skills-based routing (Pilot 2/28/2014)
 - 6) Evaluate chat tool (3/31/2014 - Evaluate & implement)
 - 7) Enable Follow-up method (Flagging the work order)
 - 8) Automate Hot Items process (or stop) (2/7/2014) (3/15/14)
 - 9) Finalize triage script (3/30/2014)
 - 10) Enable rework (2/7/2014)



Customer Experience

SURVEY

Rating Scale 1-5
Bullet

1. Please Rate your overall Satisfaction. comment on low score
How effectively
2. Was the status of your work order communicated to you? comment on low score
3. Do you have any specific issues w/ this work order?
wo Number
~~Text Box~~ Please Explain your issue.
~~Text Box~~
4. Any other comments you would like to share w/ ITS?

CLONE
GLEN 😊

Foreword:
option to provide wo Number?
Anonymous Survey?
Optional Survey
Explain Rating Scale

GREETINGS:

ACD- Thank you for calling Ohio Atty Gen. ^{MIKE DEWINE'S}
Information Technology Support.
Please Press 1 for Litigation Support
~~OR~~ Press 2 for all other support
OR stay on ~~the~~ The Line.

LIVE PERSON:

This is "NAME" (of ITS). USER
Can I please have your name, ^{USER}
~~IF NO- conversation~~

Thank you, am I talking w/ Beth Smith of Finance
(NAME) (Section)

IF NO- could I have the correct spelling of
your last name.

IF YES - How can I help you?

What Begins Monday?



- Introduce concept to ITS staff
- Standardize ITS greetings
- Formulate Tier 1 script

Special *thanks* to...

Senior Leadership:

- Kim Murnieks, Chief Operating Officer
- Mary Mertz, First Assistant Attorney General

Sponsor:

- Michelle Burk, Chief Information Officer

Team Leader:

- Mark Smith

Subject Matter Experts:

- James Gemperline

Connect with LeanOhio

lean.ohio.gov

