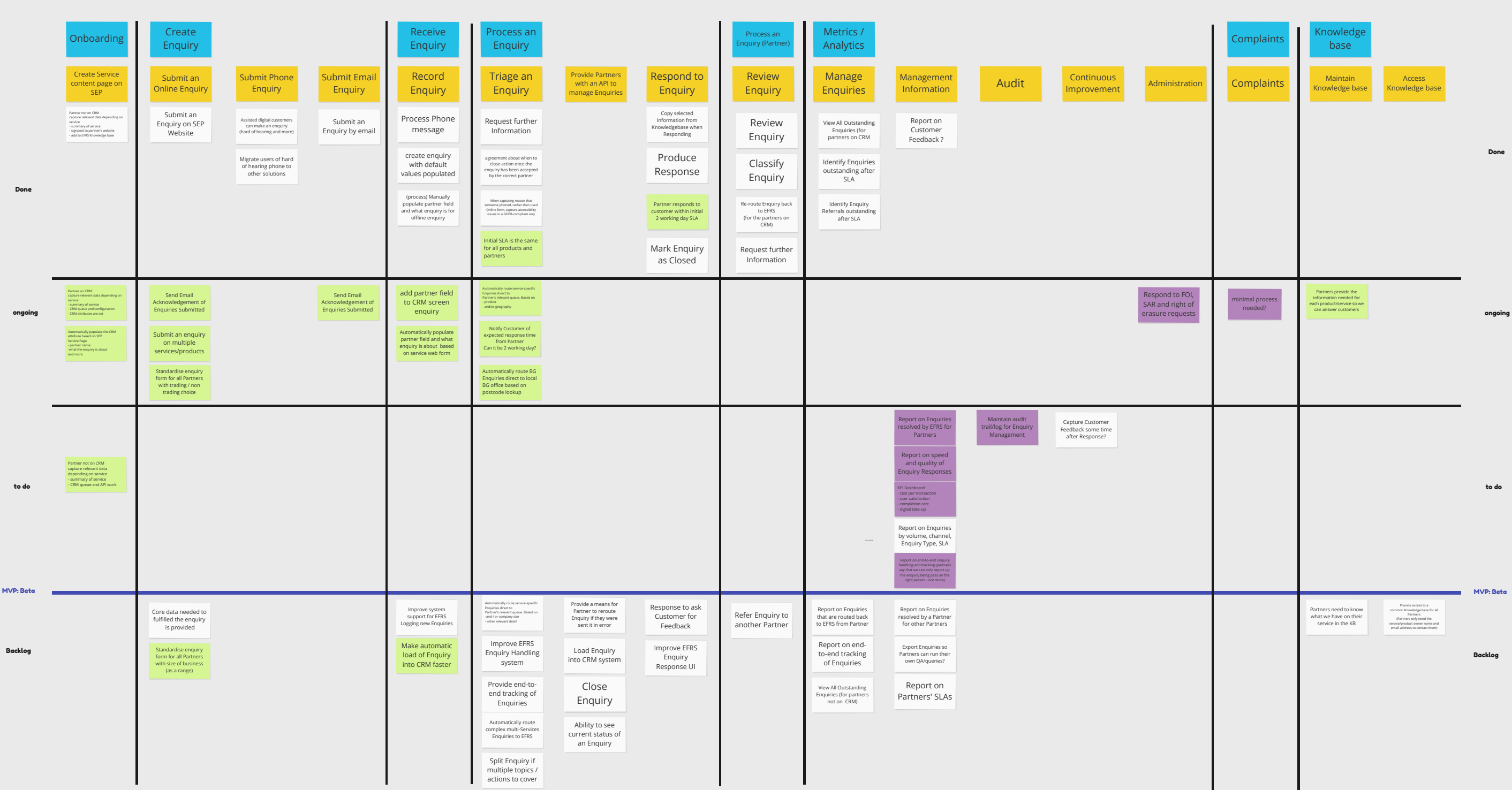# Enquiry handling - view of the work left to deliver

Needs based on:
- initial workshop with partners on the 02/08/19
- interviews with partners by Craig
- sessions with Andy, Sheryl, and Craig and others.
- further workshop and calls with partners

Reviewed on the 26/09/19 with Tracy, Steven and Stéphanie

KEY

Epics	(blue)
Features	(yellow)
steps in the process	(white)
to check	(red/pink)
ticket in Leankit - dev work needed	(green)
analysis work on going - might need dev work after	(purple)

Epics (row)

Onboarding | Create Enquiry | Receive Enquiry | Process an Enquiry | Process an Enquiry (Partner) | Metrics / Analytics | Complaints | Knowledge base

Features (row)

Create Service content page on SEP | Submit an Online Enquiry | Submit Phone Enquiry | Submit Email Enquiry | Record Enquiry | Triage an Enquiry | Provide Partners with an API to manage Enquiries | Respond to Enquiry | Review Enquiry | Manage Enquiries | Management Information | Audit | Continuous Improvement | Administration | Complaints | Maintain Knowledge base | Access Knowledge base

---

Done

Onboarding
- Create Service content page on SEP
- Partner not on CRM capture relevant data depending on service
  - summary of service
  - signpost to partner's website
  - add to EFRS Knowledge base

Create Enquiry
- Submit an Online Enquiry
- Submit an Enquiry on SEP Website

Submit Phone Enquiry
- Assisted digital customers can make an enquiry (hard of hearing and more)
- Migrate users of hard of hearing phone to other solutions

Submit Email Enquiry
- Submit an Enquiry by email

Record Enquiry
- Process Phone message
- create enquiry with default values populated
- (process) Manually populate partner field and what enquiry is for offline enquiry

Triage an Enquiry
- Request further Information
- agreement about when to close action once the enquiry has been accepted by the correct partner
- When capturing reason that someone phoned, rather than used Online form, capture accessibility issues in a GDPR-compliant way
- Initial SLA is the same for all products and partners

Respond to Enquiry
- Copy selected Information from Knowledgebase when Responding
- Produce Response
- Partner responds to customer within initial 2 working day SLA
- Mark Enquiry as Closed

Review Enquiry
- Review Enquiry
- Classify Enquiry
- Re-route Enquiry back to EFRS (for the partners on CRM)
- Request further Information

Manage Enquiries
- View All Outstanding Enquiries (for partners on CRM)
- Identify Enquiries outstanding after SLA
- Identify Enquiry Referrals outstanding after SLA

Management Information
- Report on Customer Feedback ?

---

ongoing

Onboarding
- Partner on CRM: capture relevant data depending on service
  - summary of service
  - CRM queue and configuration
  - CRM attributes are set
- Automatically populate the CRM attribute based on SEP Service Page
  - partner name
  - what the enquiry is about and more

Create Enquiry
- Send Email Acknowledgement of Enquiries Submitted
- Submit an enquiry on multiple services/products
- Standardise enquiry form for all Partners with trading / non trading choice

Submit Email Enquiry
- Send Email Acknowledgement of Enquiries Submitted

Record Enquiry
- add partner field to CRM screen enquiry
- Automatically populate partner field and what enquiry is about based on service web form

Triage an Enquiry
- Automatically route service-specific Enquiries direct to Partner's relevant queue. Based on - product - and/or geography
- Notify Customer of expected response time from Partner. Can it be 2 working day?
- Automatically route BG Enquiries direct to local BG office based on postcode lookup

Administration
- Respond to FOI, SAR and right of erasure requests

Complaints
- minimal process needed?

Maintain Knowledge base
- Partners provide the information needed for each product/service so we can answer customers

---

to do

Onboarding
- Partner not on CRM capture relevant data depending on service
  - summary of service
  - CRM queue and API work

Management Information
- Report on Enquiries resolved by EFRS for Partners
- Report on speed and quality of Enquiry Responses
- KPI Dashboard
  - cost per transaction
  - user satisfaction
  - completion rate
  - digital take-up
- Report on Enquiries by volume, channel, Enquiry Type, SLA
- Report on end-to-end Enquiry handling and tracking (partners say that we can only report up the enquiry being pass on the right person - not more)

Audit
- Maintain audit trail/log for Enquiry Management

Continuous Improvement
- Capture Customer Feedback some time after Response?

MVP: Beta

Backlog

Create Enquiry
- Core data needed to fulfilled the enquiry is provided
- Standardise enquiry form for all Partners with size of business (as a range)

Record Enquiry
- Improve system support for EFRS Logging new Enquiries
- Make automatic load of Enquiry into CRM faster

Triage an Enquiry
- Automatically route service-specific Enquiries direct to Partner's relevant queue. Based on - and / or company size - other relevant data?
- Improve EFRS Enquiry Handling system
- Provide end-to-end tracking of Enquiries
- Automatically route complex multi-Services Enquiries to EFRS
- Split Enquiry if multiple topics / actions to cover

Provide Partners with an API
- Provide a means for Partner to reroute Enquiry if they were sent it in error
- Load Enquiry into CRM system
- Close Enquiry
- Ability to see current status of an Enquiry

Respond to Enquiry
- Response to ask Customer for Feedback
- Improve EFRS Enquiry Response UI

Review Enquiry
- Refer Enquiry to another Partner

Manage Enquiries
- Report on Enquiries that are routed back to EFRS from Partner
- Report on end-to-end tracking of Enquiries
- View All Outstanding Enquiries (for partners not on CRM)

Management Information
- Report on Enquiries resolved by a Partner for other Partners
- Export Enquiries so Partners can run their own QA/queries?
- Report on Partners' SLAs

Knowledge base
- Partners need to know what we have on their service in the KB
- Provide access to a common knowledge base for all Partners (Partners only need the service/product owner name and email address to contact them)