Stakeholder Interview Questions - Team 4

We are a team of consultants; our main goal is to understand the current process at **Splash** so as to enable us to carry out gap analysis of your process in terms of case management and to arrive at a future state that can deliver value to your customers and organization as a whole.

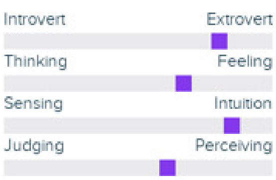
1) What is the vision, mission and strategy of your company?
2) What are your current issues, concerns, challenges and pain points you would like us to address?
3) What are your current business processes?
4) What is the business doing at present to alleviate or solve the issue?
5) How do you resolve customer cases at the moment?
6) How long does it take your support agents to complete cases ?.
7) What are the different channels you receive cases
8) How does your company distribute cases/tickets to your customer support?
9) What are the tools currently being used?
10) How do you prioritize your cases and what is the escalation process
11) How soon do you intend to implement the project
12) What is your end goal with this project?
13) What risks do you foresee and are you willing to take them?
14) Who is the end user? What support will they have?
15) Who are the stakeholders involved in your process

Lisa Cervantes

"Be positive, stay happy and don't let the negative of the world get you done. " - Germany Kent

Age: **42**
Work: **Customer Support Manager**
Family: **Married, kids, etc.**
Location: **New York**
Character: **Enthusiast**

Personality



Goals

- Implement better service management using Salesforce.
- Automate and streamline business processes in Salesforce
- Streamlining Reporting and Data Management in Salesforce
- Customer satisfaction

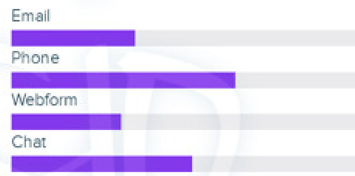
Frustrations

- Outdated system : Waste a lot of time on processes that could be automated.
- Lack of tools to improve the level of support to new and existing customers
- No standard way of reporting cases
- No uniform way of tracking data, in turn hampering future planning

Tools and Activities

- Centralized case management
- Checking the teams work load
- Daily report tracking tools
- Management reporting

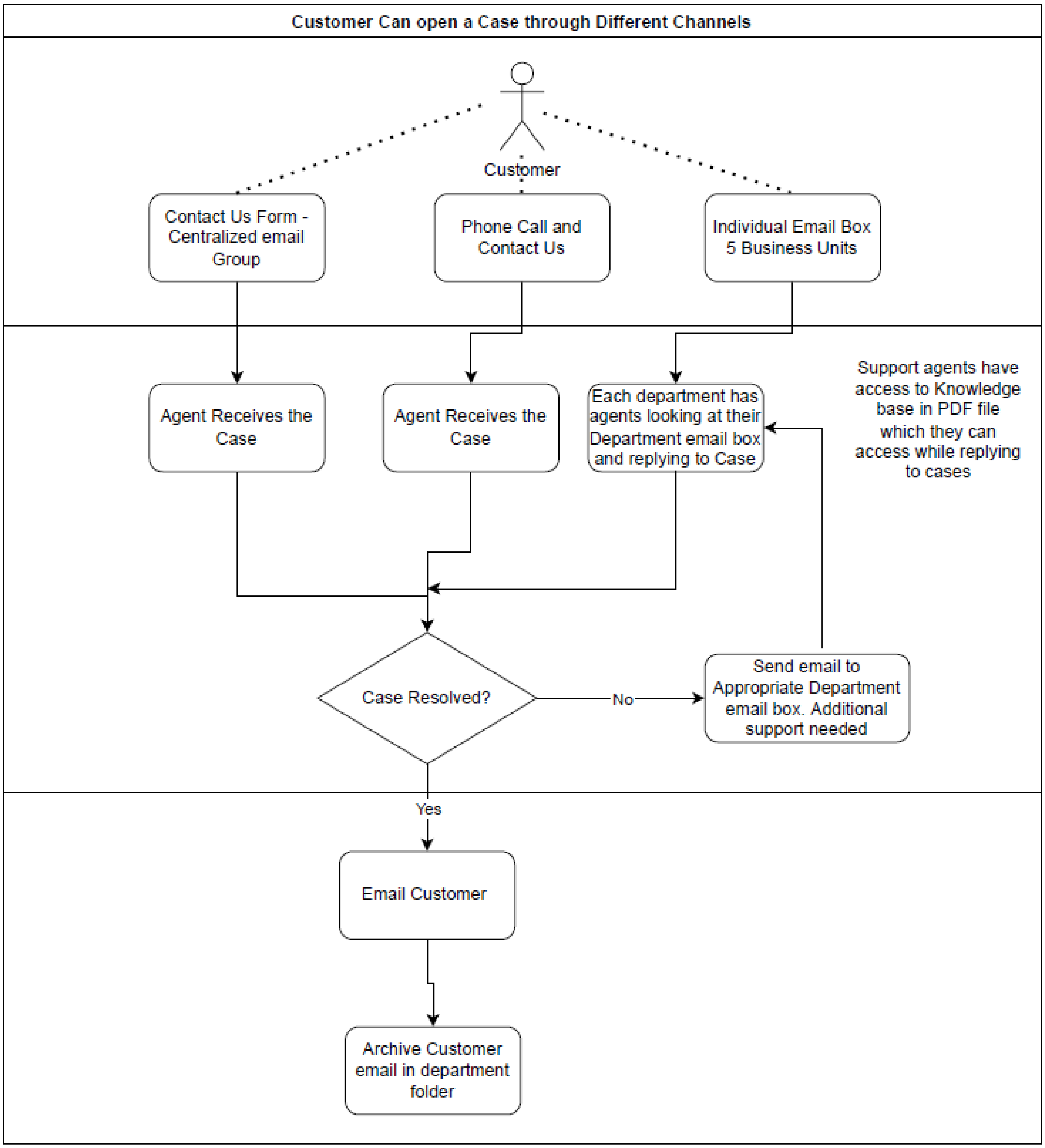
Preferred Service Channels



User Stories:

User Story Number	User Story	Acceptance Criteria
1	As a Customer Support Manager I want the ability to segregate Cases by department, so I can understand the department workload	Given that I am able to run reports, when I segregate cases by departments, then I should be able to reassign cases based on workload.
2	As a CSM, I want to be able to see what type of cases are taking longer for my agents so that I can have a better idea of how to resolve the issues.	Given that I am able to track type of cases, when I log into case management, then I should be able to provide prompt resolution
3	As a CSM, I want to keep track of the number of cases my agents work on by daily/weekly/monthly so that I can know where support is needed to share with my supervisor	Given that I have log into the system, When I checked the case management platform, then the overall number of cases processed should display
4	As a Customer Support Manager, I want to be able to view escalated issues so that I can monitor if issues are resolved	Given that I checked case management platform, when I view the page, then I should be able to see escalation tickets or report
5	As a Customer Support Manager, I want to know how long it takes my agents to resolve cases, so that I can measure performance.	Given that I am able to see the number of cases closed, when I look at the report then I should be able to measure the performance of my agents.

Splash Current Process



Here are the Questions for Part 2 :

Where are the paint points in the process?

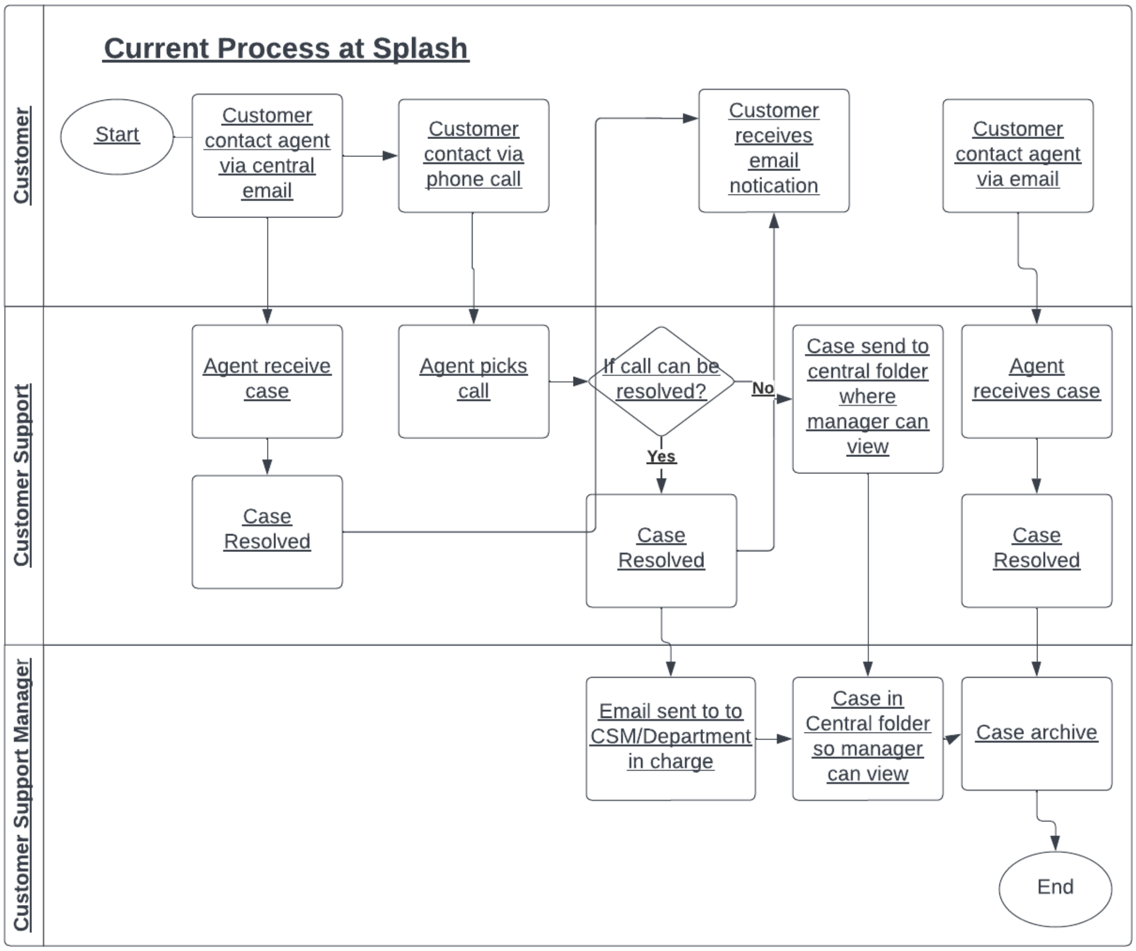
* There is no centralized tracking of Cases. Each case takes its own individual flow
* No way to know which agent is working on which case
* No way to Categorize the case based on priority
* No mechanism to escalate a case
* Knowledge base is available but not real time. Agents have to search through knowledge base

What steps are easiest and what steps need to be simplified?

* Need to simplify the process of cross team collaboration
* Need to simplify the knowledge base for easy search

What additional questions would you ask the client about the process?

* When should a case be escalated?
* How should inter-department collaboration happen if we use an application?



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No. Of case by Priority
No. Of cases by Product Line
No. Of cases by

Escalation Count By Agent

Escalation by product line

Escalation Count by product line

Mean time to Resolve and Mean time to respond