AKA:
# "How can I get my agency some of that?"

- **Uniqueness** – Your roadmap may include both big projects as well as small improvements
- **Partners** – Choose knowledgeable partners that can collaborate with you and guide you
- **Tools** – Choose tools and solutions that can grow with you over time
- **Limits** – Understands available resources – Don't overcommit
- **Care** – It's ok to go slow – "Slow and steady wins the race!"
- **Time** – Modernization of a call center into a contact center can take multiple years and multiple phases

- **Learn** – What's new? What are the best practices? What have others done and learned?
- **Assess Strengths & Weaknesses** – Where do we need to improve?
- **Vision** – How do we want to operate? What channels will we support? What problems do we want to solve?
- **Strategy** – How will we accomplish the Vision? What changes do we need? What is our plan? What resources are available?
- **Implement** – Execute the Strategy.

Learn

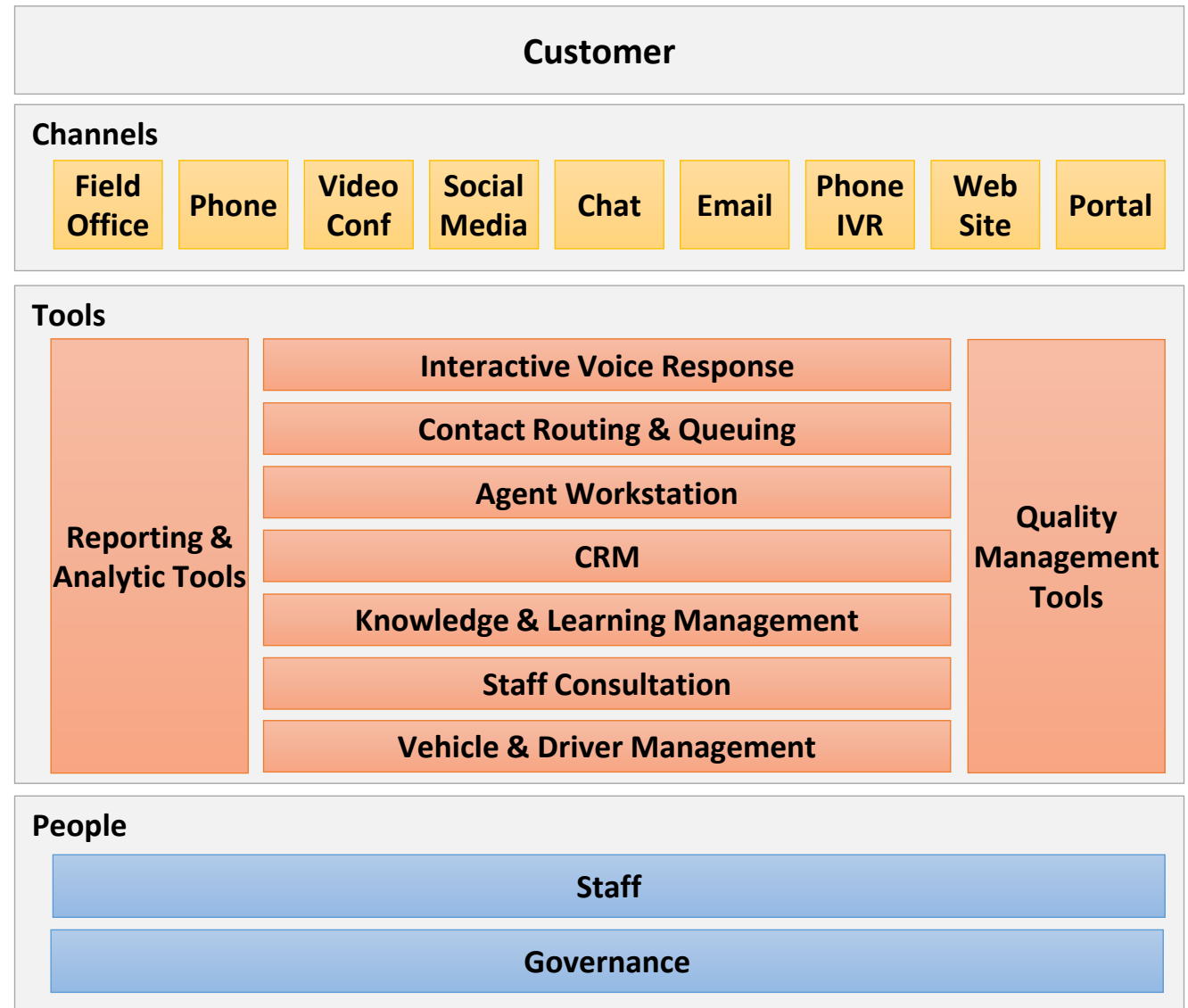Assess

Envision

Strategize

Implement
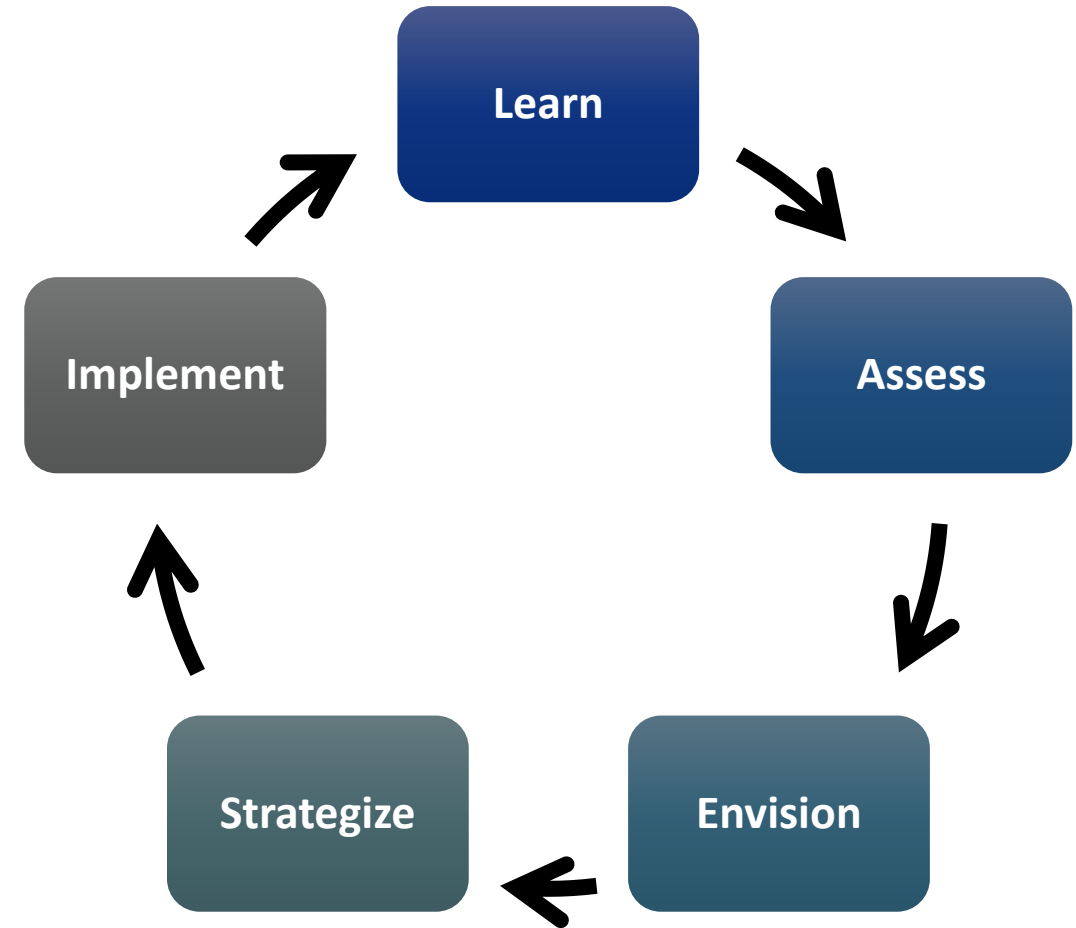
A model gives us a tool for

- Focusing our analysis
- Describing plans to others
- Ensuring completeness

## We can use this tool to

- Assess Strengths and Weaknesses
- Create A Vision
- Develop a Strategy & Roadmap

Customer

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

- Interactive Voice Response
- Contact Routing & Queuing
- Agent Workstation
- CRM
- Knowledge & Learning Management
- Staff Consultation
- Vehicle & Driver Management

Quality Management Tools

People

- Staff
- Governance

Assessment Tools are important to understand

- Current State
- Ability & Readiness to Change
- Barriers and Challenges
- Greatest Needs
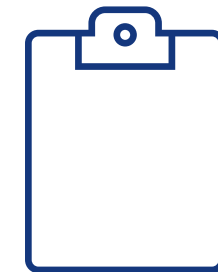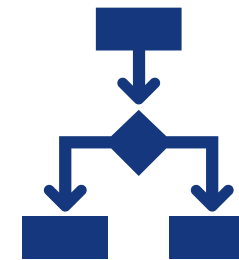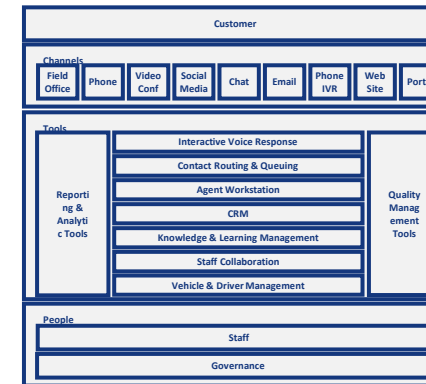
Assess Contact Center Components	How well is each component of your call center serving your mission?
Assess Functions	How successfully are you executing critical functions?
Customer Journey Maps	What is the customer experience and what improvements does it indicate?
Survey Staff	Anonymous surveys can collect concerns, beliefs, challenges, suggestions...
Survey Customers	Are they satisfied?
Team Discussions	What does your staff and other agency teams have to share or suggest?

The most basic questions…

- What Works?
- What Doesn't Work?
- What Challenges Do We Have?
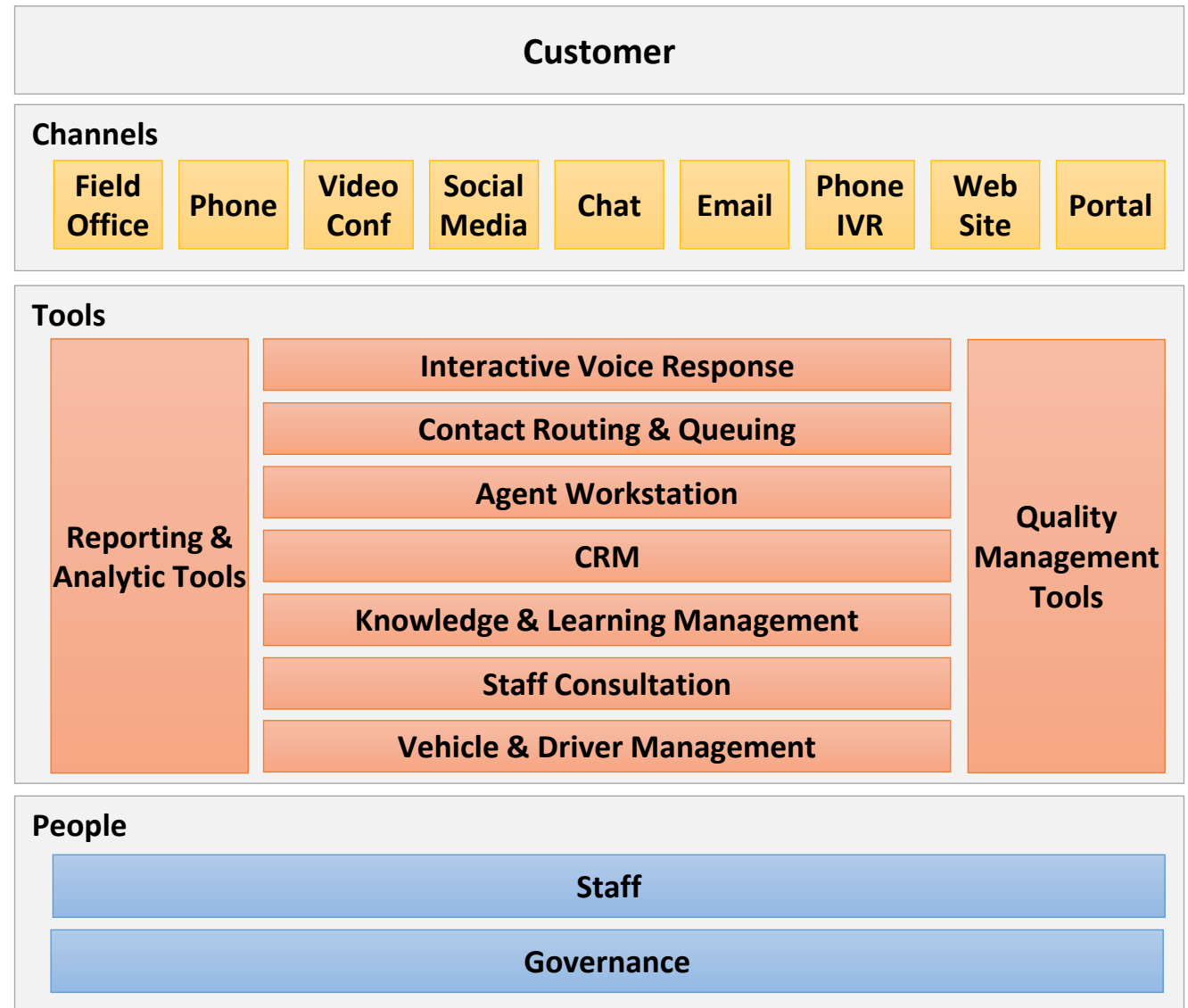- How Would We Like To Operate in the Future?
- What Do We Need?

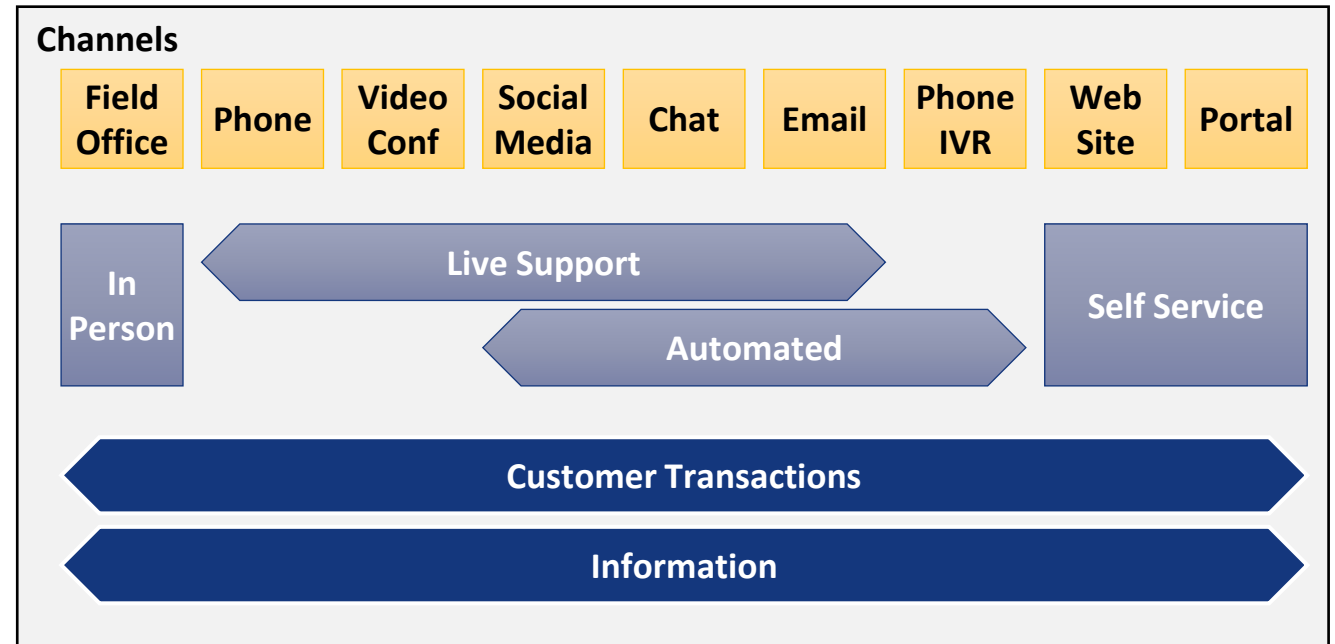## Always consider this question: Why?

For Each Tool

- Do we have one?
- What about it works?
- What doesn't work?
- Is training sufficient?
- Is it integrated with other systems?
- It is properly configured?
- Can we support it?
- Is it meeting our current needs?
- Can it meet our future needs?
- What improvements do we need?

Customer

Channels

| Field Office | Phone | Video Conf | Social Media | Chat | Email | Phone IVR | Web Site | Portal |

Tools

Reporting & Analytic Tools

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Quality Management Tools

People

Staff

Governance

For Each Channel

- Do we have one?
- What about it works?
- What doesn't work?
- Is it being used?
- Is it easily accessible and usable for customers?
- How accurate is the information being provided?
- Is it integrated with other systems?
- Can we support it?
- Is it meeting our current needs?
- Can it meet our future needs?
- What improvements do we need?

Channels

Field Office	Phone	Video Conf	Social Media	Chat	Email	Phone IVR	Web Site	Portal

In Person — Live Support — Automated — Self Service

Customer Transactions

Information

American Association of
Motor Vehicle Administrators

For Each Function

- Do we do it?
- What works?
- What doesn't work?
- What challenges do we have?
- Are there defined processes that everyone follows?
- Is staff training sufficient?
- Do we have the tools to perform the function?
- Do we have the data to perform the function?
- Do we have any metrics to manage this function?
- What do we need to do it better in the future?

Functions

Service Delivery

| Contact Mgmt. |
| Customer Comm. Mgmt. |
| Case Management |
| Agency Ops Coordination |
| Knowledge & Process Mgmt. |

Operational Support

| Technology Support |
| Quality Management |
| Forecasting |
| Process Improvement |
| Reporting & Analytics |

Staff Support and Governance

| Training | Staff Comm. Mgmt. |
| Project & Portfolio Management | Workforce Mgmt. |

Service Delivery

- **Contact Mgmt.** – The process of initiating, assessing, escalating, resolving, documenting, and following-up on a customer request.

- **Customer Comm. Mgmt.** – The process of structuring, creating, organizing, updating, and distributing information, instructions, and communication to customers.

- **Case Management** – The processes for identifying, assessing, documenting, collaborating, and resolving a complex customer issue.

- **Agency Ops Coordination** – The process of communicating and collaborating with other agency business units and subject matter experts to address a customer's needs.

- **Knowledge & Process Mgmt.** – The process of collecting and organizing process and product knowledge so that it remains accurate and accessible to users and customers.

Operation Support

- **Technology Support** – The process of having technical experts assess, install, configure, maintain, and enhance Contact Center tools.

- **Quality Management** – The process of using tools to collect operational data from staff, customers, interactions, and transactions to determine the quality of customer services, service delivery challenges, and the results of operational improvements.

- **Forecasting** – The process of estimating upcoming operational needs and staffing levels based on historical data and evolving trends.

- **Process Improvement** – The process of identifying challenges and changing processes, technology, and training to improve efficiency, accuracy, timeliness, and customer satisfaction.

- **Reporting & Analytics** – The process of collecting data and creating management reports to guide operations as well as analyzing data to solve operational problems.

Staff Support & Governance

- **Training** – The process of creating training materials for all processes and products, delivering initial and ongoing training to staff, and assessing the effectiveness of training.

- **Staff Communication Mgmt.** – The process of developing information, regularly communicating it to staff, and assessing the effectiveness of the communications so that all staff stay current on evolving operations.

- **Workforce Mgmt. –** The process of managing Contact Center staff including scheduling, managing staffing levels, and optimizing resources to ensure that service levels are met.

- **Project & Portfolio Management –** The process of identifying potential projects to improve Contact Center operations, assessing available resources, prioritizing projects, and executing projects.

Channel	Transaction Information Both	Meeting Needs (1-5)	Approach	Challenges	Needed Improvements & Why
Phone	B		Live		
Video Conf	N		Live		
Live Email			Live		
Live Chat			Live		
Live Social Media			Live		
IVR			Automated		
Email Bot			Automated		
Chat Bot			Automated		
Web Site			Self-Service		
Portal			Self Service		
Field Office			In-Person		

	Meeting Needs? (1-5)	Integrated (1-5)	Challenges	Needed Improvements & Why
Interactive Voice Response				
Contact Routing & Queuing				
Agent Workstation				
CRM				
Knowledge & Learning Mgmt.				
Staff Collaboration				
Vehicle & Driver Management				
Quality Management				
Reporting & Analytic				

	Meeting Needs? (1-5)	Proper Training? (1-5)	Challenges	Needed Improvements & Why
Call Mgmt.				
Customer Comm Mgmt.				
Case Mgmt.				
Agency Ops Coordination				
Knowledge Management				
Process Management				

What is a Journey Map?

A customer journey map is a visualization of the process that a customer experiences in order to accomplish a goal or satisfy a need.

- **Overall Journey** – Describes the customer's broader experience – not just the agency's 'process steps'

- **Typical Persona** – Represents the typical experience for a category of customer – a 'persona'

- **Emotions & Challenges** – Designed to provide insight into the customer's challenges, emotions, and motivations

Why a Journey Map? Customer Experience!

A journey map focuses the agency's thinking on the customer's overall experience…

- **Motivation** – Where are they "coming from"?
- **Challenges** – What questions, confusion, or misconceptions do they have?
- **Gaps** – Are there gaps in the "journey" that are disjointed or painful?
- **Innovation** – Is the current experience outdated compared to 'digital life' expectations in our modern world?
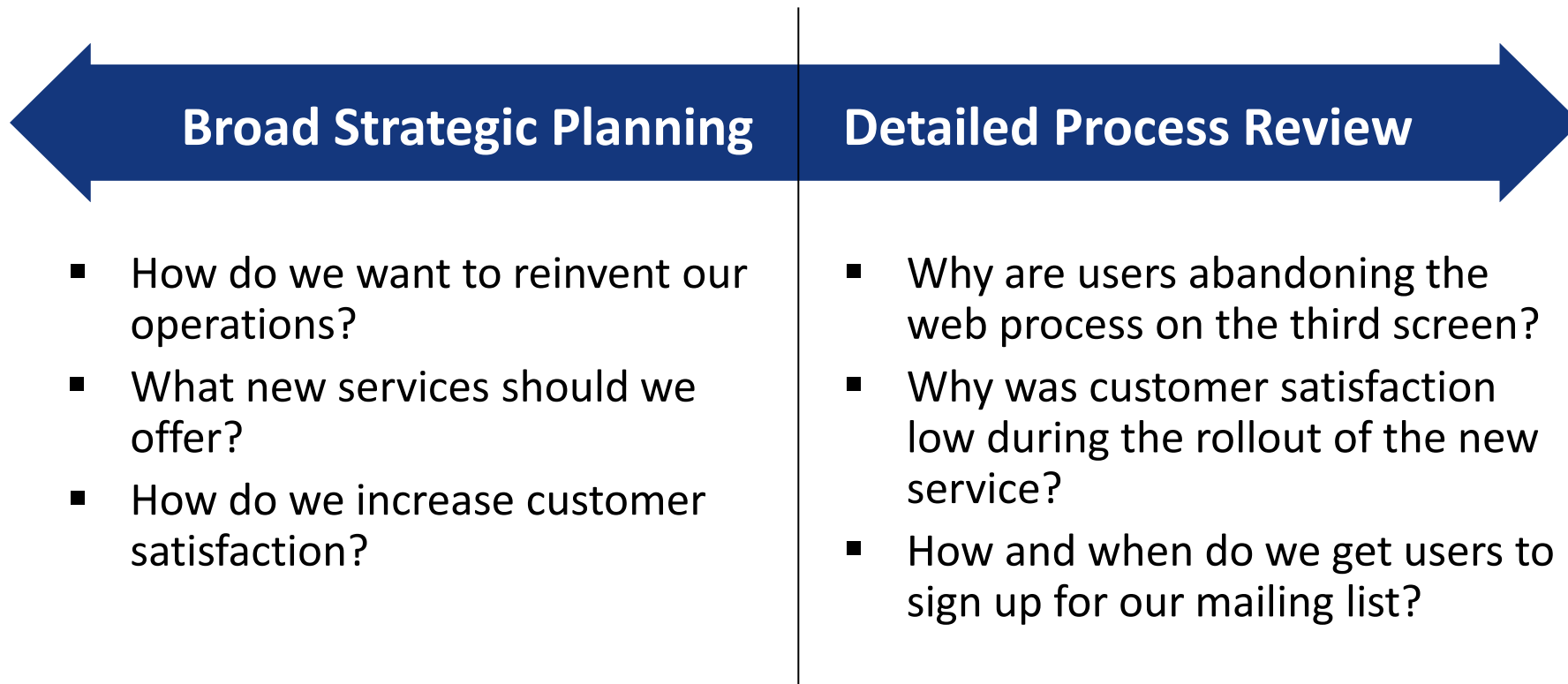
What a Journey Map is Not

It's more "artist's rendition" than "detailed blueprint."

A journey map is not representative of every detail of the customer's experience or the business process.

- Not detailed process steps as compared to process flows or swim lane diagrams
  - Focuses on tasks and questions
- Not Everyone or All Challenges
  - Can't consolidate all personas,
                    all paths and
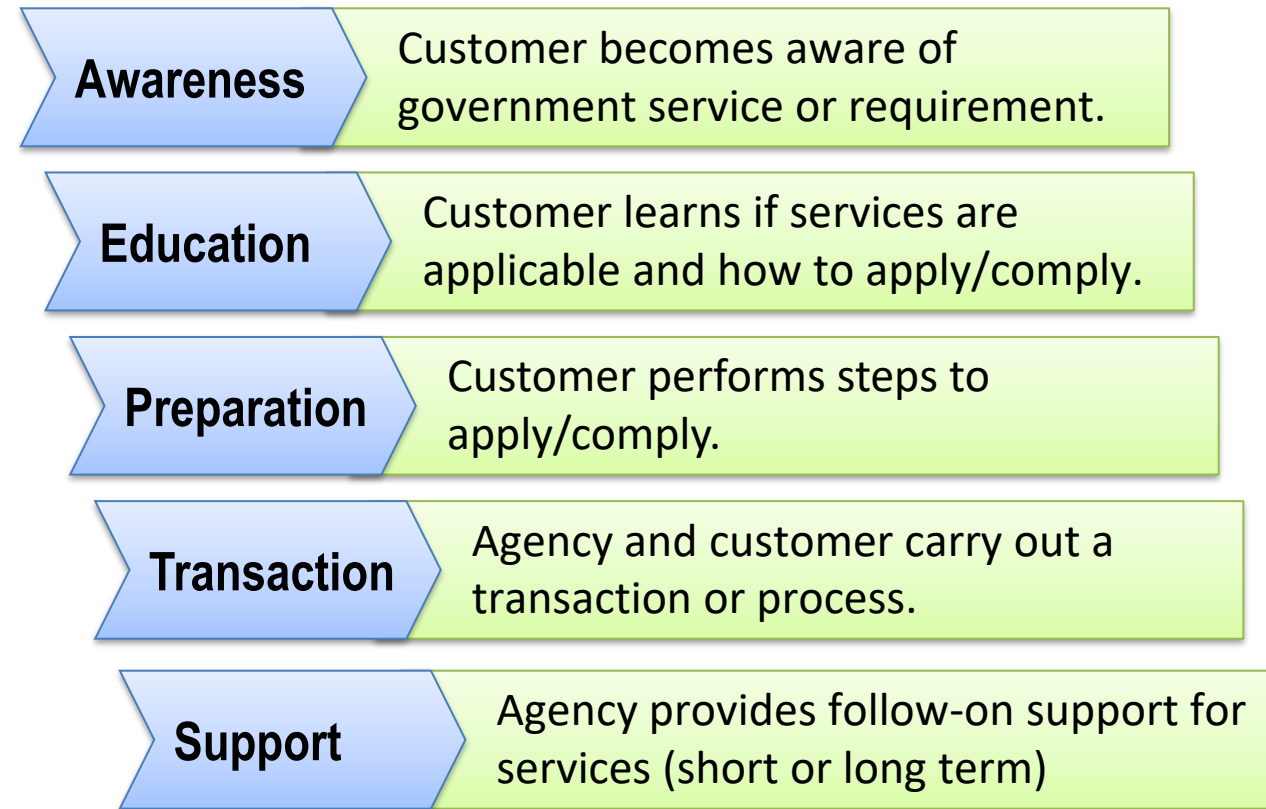   all challenges into a single journey map.

Journey Maps – Range of Usage

Journey maps are a tool that can be applied in many planning activities.

Broad Strategic Planning	Detailed Process Review
▪ How do we want to reinvent our operations? ▪ What new services should we offer? ▪ How do we increase customer satisfaction?	▪ Why are users abandoning the web process on the third screen? ▪ Why was customer satisfaction low during the rollout of the new service? ▪ How and when do we get users to sign up for our mailing list?

Typical Phases of a Public Sector Customer's Journey

This Journey Map framework can be used as a tool to assess the customer's journey and develop a better experience.

Awareness — Customer becomes aware of government service or requirement.

Education — Customer learns if services are applicable and how to apply/comply.

Preparation — Customer performs steps to apply/comply.

Transaction — Agency and customer carry out a transaction or process.

Support — Agency provides follow-on support for services (short or long term)

AAMVA — American Association of Motor Vehicle Administrators

Persona	Situation				
	Awareness	Education	Preparation	Transaction	Support
Customer Activity	**What steps is the customer taking?**				
Mindset	**What are their concerns? What questions are they asking?**				
Touchpoints	**How are we interacting with them?**				
Emotions	**Very Happy to Very Sad**				
Opportunities	**What can we do better?**				

American Association of Motor Vehicle Administrators (AAMVA)

Tom, 28, Best Buy Salesman, Getting married

Tom is a driver who was told he may need a Real ID Driver's License for plane travel. He needs to find out if he needs it and get one if necessary.

	Awareness	Education	Preparation	Transaction	Support
Customer Activity	Tom is told he may need a Real ID for air travel.	Tom researches Real ID on web and DMV website.	Tom obtains SS Card as part of supporting docs.	Visits field office. 15min wait + 15 min transaction.	Calls to see when ID will arrive.
Mindset	Confused, Annoyed, Who has the answer?	Many options for documentation? Are they secure?	Feels like spent all day getting documents.	Line not too long. Facility easy to find.	Annoyed it is late, Happy call center could track status.
Touchpoints	Flyer in renewal notice.	Website, Call Center	Website, Call Center	Field Office	Call Center, Field Office
Emotions	(neutral)	(sad)	(sad)	(happy)	(neutral)
Opportunities	Better customer awareness – more channels	Simpler info on website. More training call staff	Better support for obtaining documentation	Reduce time in the field office	Provide proactive notifications and on-line lookup

Journey Map Planning Steps

- What transactions do you want to target?

- How do you hope to use the results?

- What staff handle these transactions?

- When do these transactions occur – how will you find examples?

- What individuals or team can lead the analysis?

Two Approaches to Journey Mapping

Call Monitoring & Interviews

- **Identify Calls to Review** – Recordings are easier than live listening

- **Listen and Look For Patterns** – You will see when calls are unusual or part of a pattern

Staff Discussions & Interviews

- **Identify Staff and Manager** – This can include call centers and field offices

- **Discuss and Look For Patterns** – Walk the staff through the journey and collect observations

- **Start Mapping** – Select examples or create an average composite

- **Document Learnings –** There is no one right approach or format

Journey Mapping – Some Considerations

- **Live Monitoring**
  - Hard to sit on live calls and catch target issues
  - Use data to find the right times to look for calls – look to improve categorization
  - Listened to 50 calls – See what you learn about everything – customer service and review process
  - Try to match IVR/Routing wait times to calls
  - Look for transfers and varying level of agent quality
  - Check for process consistency and the quality of support and advice being given
  - Reflect on the training being given to staff and the level of empowerment
  - How close are you to one-stop shopping?
- **Agent Discussions**
  - Much quicker process
  - More likely to hear "What's wrong with the customer"
  - Still effective

A Vision Document is a check point.

- Where are we now?
- Where do we want to be?

Consider documenting…

- **Scope Current Operations** – Customers, transactions, channels
- **Current Strengths** – Staff knowledge and commitment is always important
- **Current Challenges** – This list can be long
- **Areas To Improve –** Linked to patterns in current challenges & metrics
- **Approaches to Improvement –** Improvements come from creativity
  - What we see others doing
  - What we hear from customers in customer requests
  - What we hear from staff and management

A vision document is an important communication and planning tool...

- **Road Map** – It's contents would be the first part of a plan or road map
- **Communication Tool** – It is a communication tool to explain the current and future state
- **OCM** – It is an Organizational Change Management tool that can help "rally the troop"
- **Funding** – You may need to "sell" your improvement effort against competing projects

Road Mapping! What to Accomplish and How…

Based on our Assessment and Vision…
What improvements or projects might we consider and why?

- New/Upgraded CRM
- New Chat Feature
- Improved Knowledge Repository (and approach to using it)
- New Training Program
- Better Scheduling
- New Staffing Strategy
- Assessment of Phone System
- New Approach to Coordinating with Other Agency Business Units

Road Mapping! What to Accomplish and How

Potential Steps in Your Roadmap

- **Research** – RFIs, Vendor Demos, Agency Visits, Online Research
- **Requirements** – Defining processes, technical needs, system support needs
- **Procurements** – Developing RFPs and procuring services and products
- **Process Improvements** – Creating new manuals, instructions, workflows, responsibilities
- **Training** – Creating and delivering training materials
- **New Tool** – Implementing a new tool or feature
- **Assessment** – Evaluating the effectiveness of the changes

A Road Map is a Sequence of Projects

Your agency probably has a form for defining new projects.

Goals	**Increase Service Quality with CRM system that is available to all channels and field office.**
Scope	Drivers & Vehicles, Contact Center, Field Office, Back Office – Notes, Correspondence, Emails
Schedule	1 year
Budget	$XXM
Resources	Project Manager, 2 Part Time SME, 2 Testers
Approach	New System? Improve Existing System? Research Project? Hosted? On Premise?

How About an Assessment Project?

Road maps and improvement strategies are not just implementation projects.

| Goals	**Assess Operations, Identify Opportunities to Improve, Develop Recommendations**
Scope	Phone, Email, Chat, Website
Schedule	3 Months
Budget	$XXM
Resources	Project Manager, 3 Part Time SME
Approach	Create working groups, Perform assessments, Identify top priorities

How About Improving Knowledge Management?

How About a Pilot Project?

Great way to test a new approach or solution.

|	
Goals	Improve Knowledge Capture, Management, Training
Scope	All Vehicle Processes – Implement new tools and related processes for knowledge management
Schedule	10 Months
Budget	$XXM
Resources	Project Manager, 3 Part Time SME
Approach	Create working groups, Perform assessments, Identify top priorities

First Roadmap – Organize the Projects
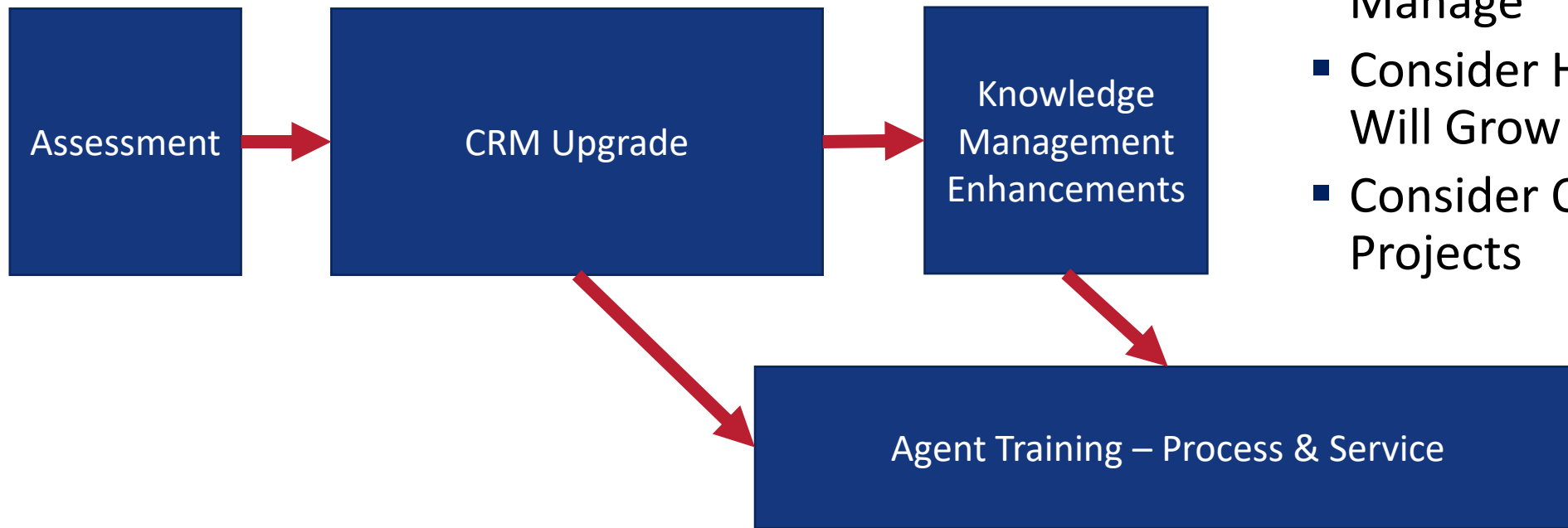
- Consider Dependencies
- Consider How Much Change the Agency can Manage
- Consider How The Staff Will Grow & Mature
- Consider Other Agency Projects

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Assessment → CRM Upgrade → Knowledge Management Enhancements
                    ↓                        ↓
              Agent Training – Process & Service
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Create a Vision & Tell Your Story

The process is intended to help you develop a clearer understanding of…

- What's working
- What's not work
- Where should we improve
- How should we improve
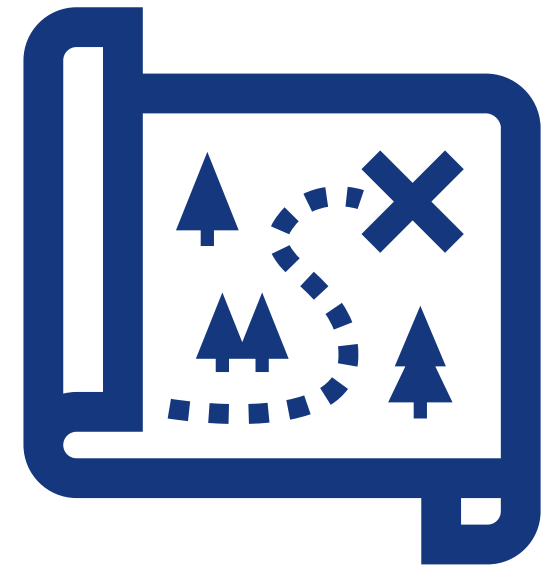
Some Mathtech Wisdom…

Agencies are experts in the "As-Is"

**To be successful, they need to become experts
in the "To-Be"**

Plus, they need to be prepared for the journey.

THANK YOU

Questions?

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