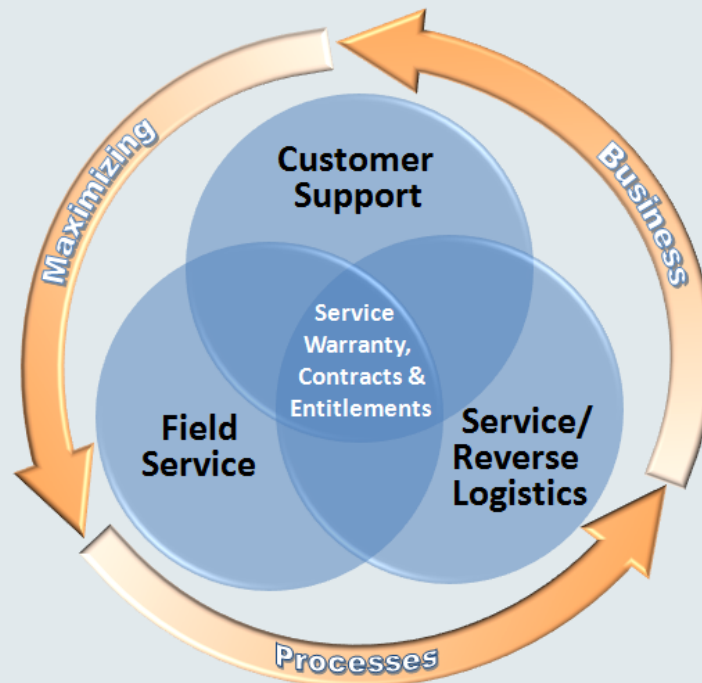# Service Delivery Optimization Gap Assessment

It's all about automating all of your service delivery functions by integrating your data, processes and technology

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The Assessment Identifies:

- Breakdowns in processes
- Duplicated efforts
- Gaps in performance
- Opportunities to reduce cycle times
- Suggested control points
- Areas to simplify and improve processes

Benefits

- Maximize customer interactions
- Identify departmental best practices that could be implemented elsewhere in the area of study
- Quantify ROI of systems and process changes
- Help align processes with your business objectives
- Provide the ability to respond more quickly to business and environmental changes when processes are fully documented

Assessment Overview

The objective of the Service Delivery Optimization Assessment and Discovery is to evaluate the current state of either your field service or customer support operations to identify gaps and areas of efficiency that can save your company significant time and money. Our methodology ensures that all organizational and functional processes and needs are thoroughly investigated, defined, and understood.

Our consultants use Business Process Mapping methodology to identify, document and analyze current processes. This gap analysis takes into account the strategy, direction and objectives of the company and service delivery operation, the actual work being completed and the impact the processes have on the end customer. Current processes will also be compared to industry benchmarks and best practices to align processes with industry standards.

One of the key end-result benefits of this optimization assessment is showing you where the gaps are in your field service or customer support operations and the impact and transformation that new processes and systems can have on your organization as redundancy in systems and personnel are minimized and customer interactions are maximized.

How it Works

Prior to any work being performed, we will provide you with a questionnaire, an overview of roles and responsibilities, what data and internal documents we require, etc. The answers to these questions, as well as the information provided, allow us to arrive at your location (as required) prepared and able to start immediately. This reduces time spent at your site(s) and the overall impact on your operation.

This engagement:

- Takes up to 4 weeks from the time we arrive on-site (or from kick-off meeting if there is no on-site time) to delivering the final documents (for either Field Service or Customer Support)
- Requires 2 service delivery subject matter expert personnel

Once our Gap Assessment is complete, we will meet with you to present our very detailed analysis and recommendations. This will include any proposed system additions as well as process change recommendations. This will include they will have on your organization's financial performance, operational efficiencies, and customer satisfaction.

Assessment and Discovery Process

A typical engagement consists of four phases, including:

| Project Organization | → | Project Definition | → | Process Definition | → | Analysis & Deliverables |

1. Project Organization

- Select project teams
- Define and assign project tasks to members
- Outline and flow chart the current/relevant organizational and business procedures and processes related to field service or customer support.
- Obtain sample copies of all appropriate client internal documents

2. Project Definition

- Conduct project survey
- Define required operating environment
- Identify any new interface requirements for all external systems and devices
- Review any identifiable future plans and growth potential that may impact processes, system operations and/or requirements

3. Process Definition

See chart on the next page

4. Deliverables

- Business Process Mapping for key field service or customer support workflows
- Gap analysis of the functional areas
- Key findings from interviews with stakeholders
- Recommendations including areas for efficiency improvements
- Functional requirements in descriptive flow charts
- Findings prioritized by level of impact on business objectives
- Assessment of customer feedback system
- Recommendations for each customer feedback system component
- Projected ROI of process improvements (or system changes if required)
- Descriptive flow charts of any new and existing interface requirements where appropriate
- Definition of any baseline application modifications required to achieve the ROI identified, and any new application additions required

Process Definition

Address the following	Customer Support	Field Service
Service Call Management and Escalation • Third-Party Call Management • Contract Terms & Conditions Management & Options • Reports and Measurements	✓	✓
Technical Assistance Help Desk • Problem Tracking and Management • Problem Resolution • Information Distribution • Productivity and Performance Tracking	✓	✓
Billing Requirements • T & M • Contract • Sales Order • Billing Review Process • Reports and Measurements	✓	✓
Enterprise Customer Intelligence • Executive Strategy • Customer Feedback Integration • Survey Design • Delivery and Data Capture • Reporting • Closing The Loop With Customers	✓	✓

Staff Training and Career Planning
• Train by Type
  o Employee Product
  o Required Certification
  o Customer Product
  o Customer Application
• Skill Level Tracking
• Class Management
• Reports and Measurements
	✓	

Scheduling Procedures
• Work Orders and Projects
  o Pre-Site
  o Development
  o Installations
  o De-Installations
  o Preventative Maintenance
• Reports and Measurements
		✓

Spare Parts Logistics & Management • Inventory Control Procedures • Orders, Returns (used, not used), DOA Process, Consumption • Purchase Orders • Reports and Measurements		✓