Enhancing an Organization's Capabilities for Technical Assistance and Stakeholder Communication

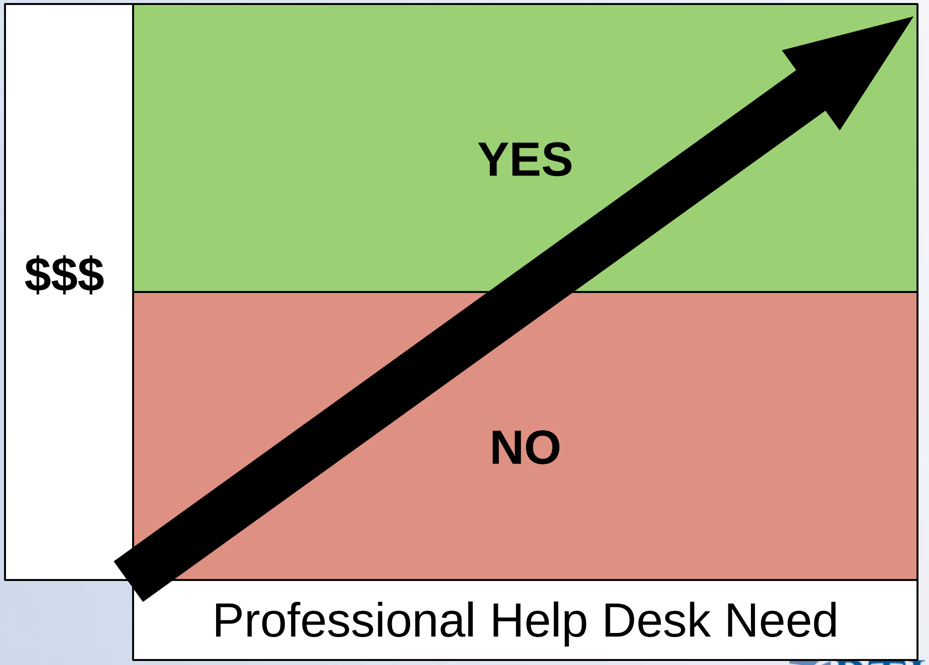
Presented by Nathan Sikes
FedCASIC 2014
March 19, 2014

RTI International is a trade name of Research Triangle Institute.

Background

- Projects often require Help Desk, technical assistance (TA) or work flow support for the general public, study participants, site coordinators, and other stakeholders.

- The size of and the funds available to a project likely dictates what level of support can be provided to the groups identified above.



Background

- Projects with funding or contractual restrictions may choose to use project staff to answer inquiries about the project’s interaction with the sample population.
  - Tracking Method → The Spreadsheet Solution
  - Staff Availability → Sharing Responsibility
  - Public Face

Telephone Operations Center

- Some projects required a full-time Help Desk function which project staff cannot provide.

- The RTI Telephone Operations Center successfully handles the projects needing larger support efforts:
  - People trained for Telephone Data Collection (CATI);
  - Supports in-bound inquiries with a robust telephony system;
  - 240-seat Research Operation Center open 18 hours a day, 7 days a week;
  - Not often thought of as a Help Desk solution provider although it has supported large projects in this manner for years.

Help Desk Operations – Software

- Entry of email had to be copied and pasted to tracking log
- Voicemail had to be transposed to tracking log
- Support of issues was not easily escalated to project staff
  - More copying and pasting to email
  - Telephone and voicemail
- Metrics Reports were not available

The Vision

- The facility could function as a solution provider for
  - Help Desk Services
  - Technical Assistance
  - Work Flow Support

- Implement a common, easy-to-use management system to assist in providing these services.

Requirements

- Requirements and Benchmark Comparisons
    - Knowledge Base Solution
    - Communication Tracking
    - Interoperability
    - Ease of Use and Administration
    - Custom Reporting and Analysis
    - Cost Effective

- Pros, cons, ratings were established for each solution

Comparing Systems

- A Leadership Team compared 4 Customer Relationship Management (CRM) solutions
    - Sales Force
    - Oracle/Siebel
    - Service Now
    - Current In-House System (If chosen, enhancement would be required.)

The Solution

- Choice

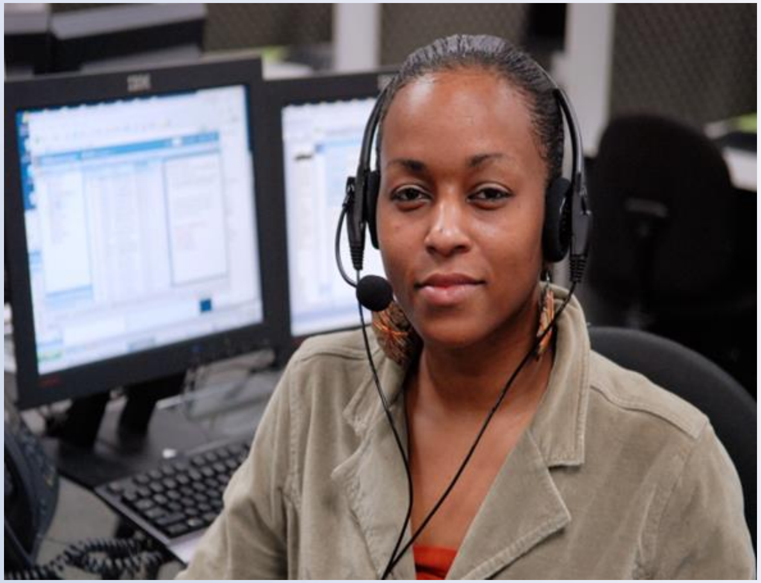
  The current in-house solution with enhancements, combining custom software with knowledgebase software using MadCap Flare.

- Why?
  - Achieve most of the functionality of high-end CRM systems
  - Highly Cost Effective compared to other solutions
  - Highly Tailored and Efficient
  - Setup costs within range of smaller projects

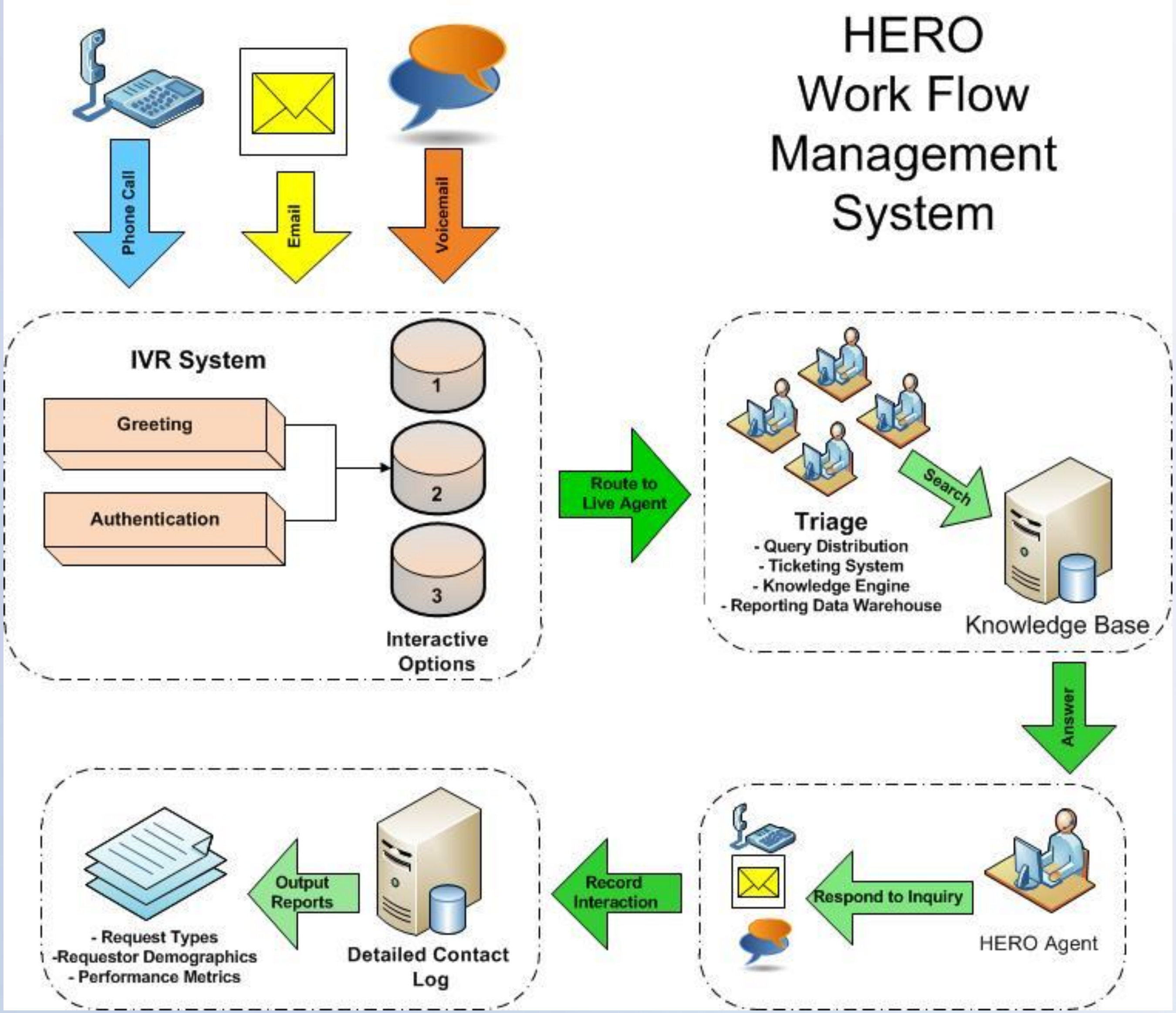
The Solution (Continued)

- Help Desk Resources Online (HERO)

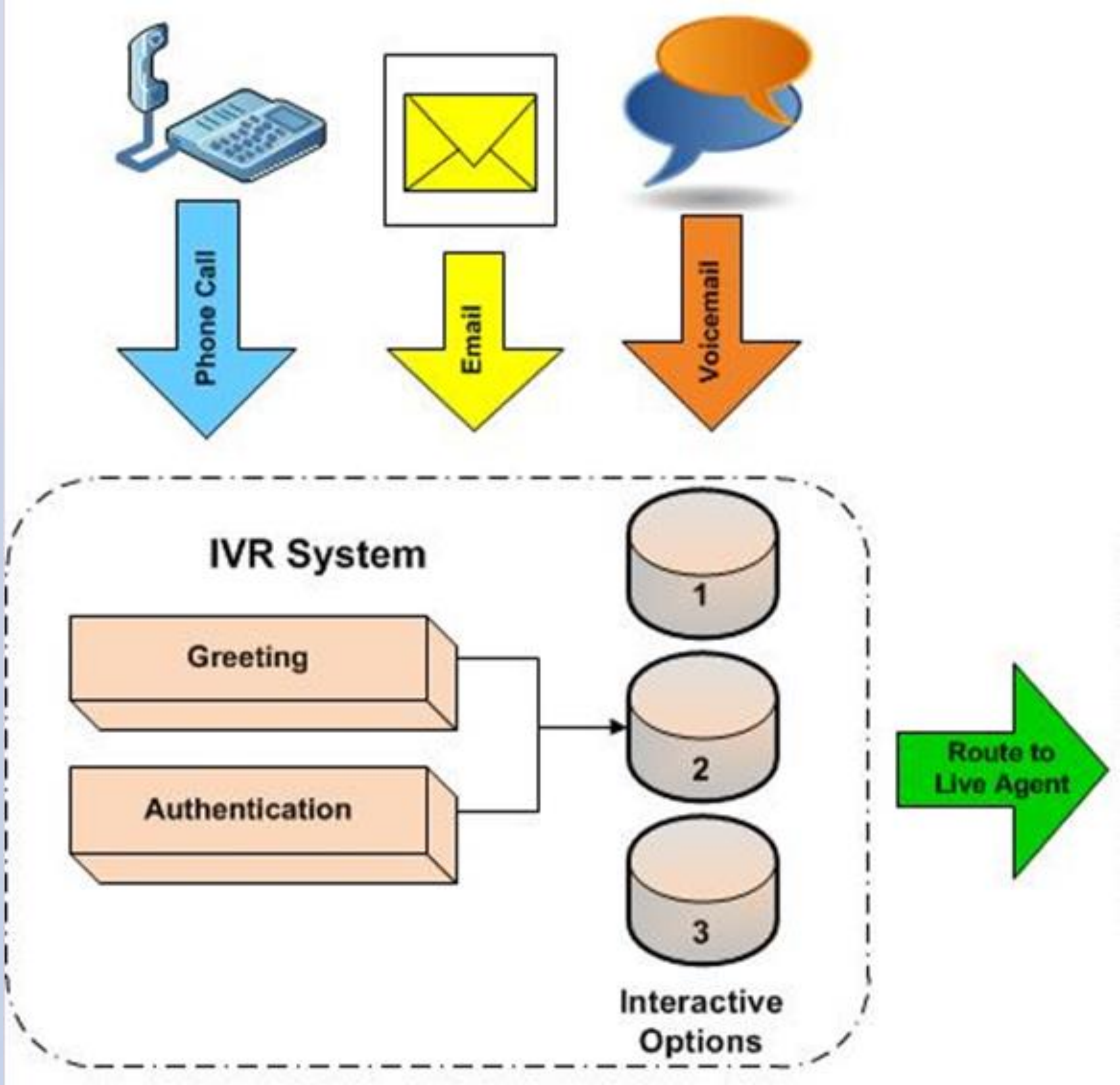
- HERO is now growing beyond a help desk solution
  - Work flow management
  - Issue tracking
  - Collaboration tool



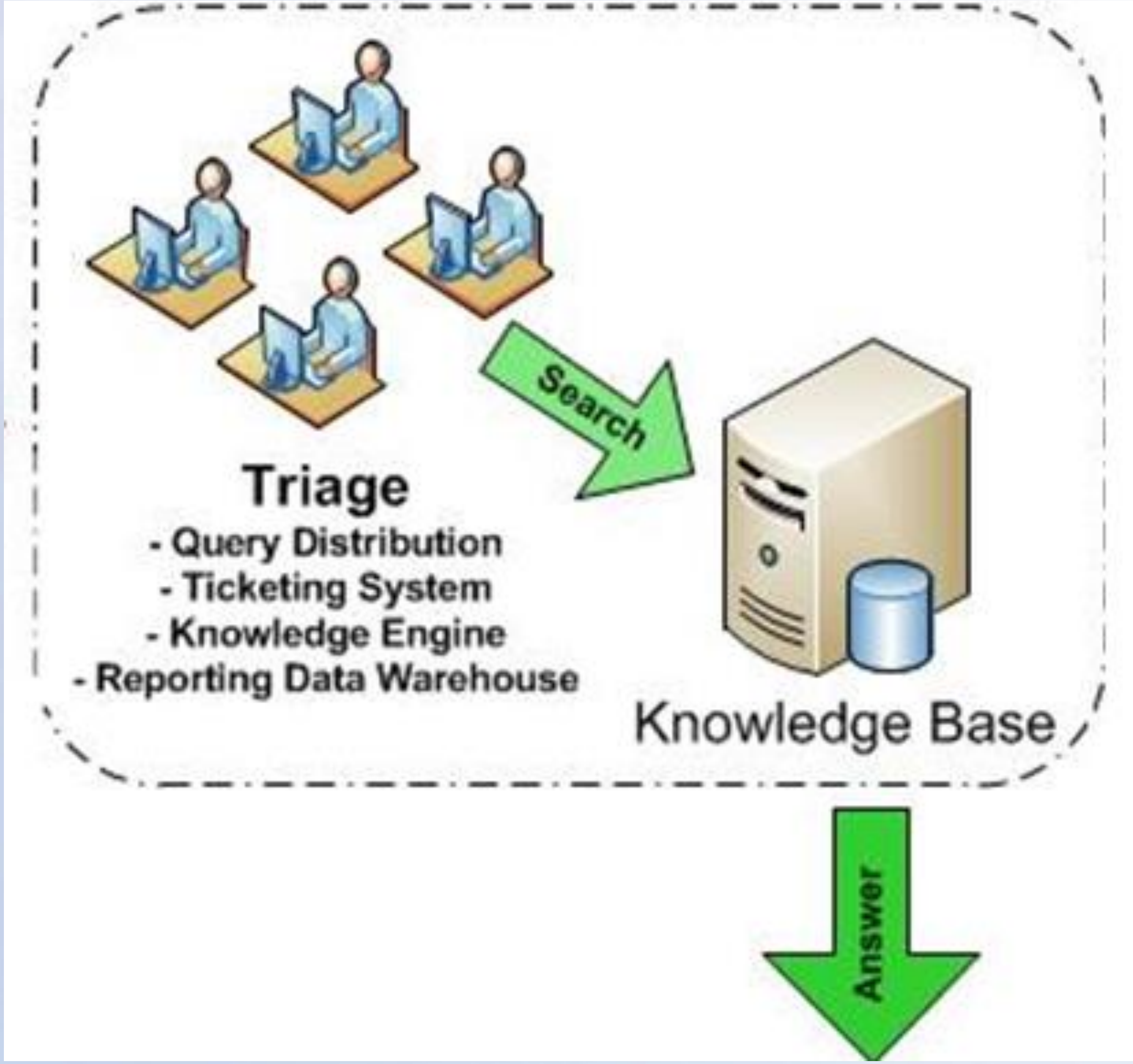
Processing an Inquiry


HERO
Work Flow
Management
System
Phone Call
Email
Voicemail
IVR System
Greeting
Authentication
1
2
3
Interactive Options
Route to Live Agent
Search
Triage
- Query Distribution
- Ticketing System
- Knowledge Engine
- Reporting Data Warehouse
Knowledge Base
Answer
Respond to Inquiry
HERO Agent
Record Interaction
Detailed Contact Log
Output Reports
- Request Types
-Requestor Demographics
- Performance Metrics

Processing an Inquiry


Phone Call
Email
Voicemail
IVR System
Greeting
Authentication
1
2
3
Interactive Options
Route to Live Agent

Processing an Inquiry

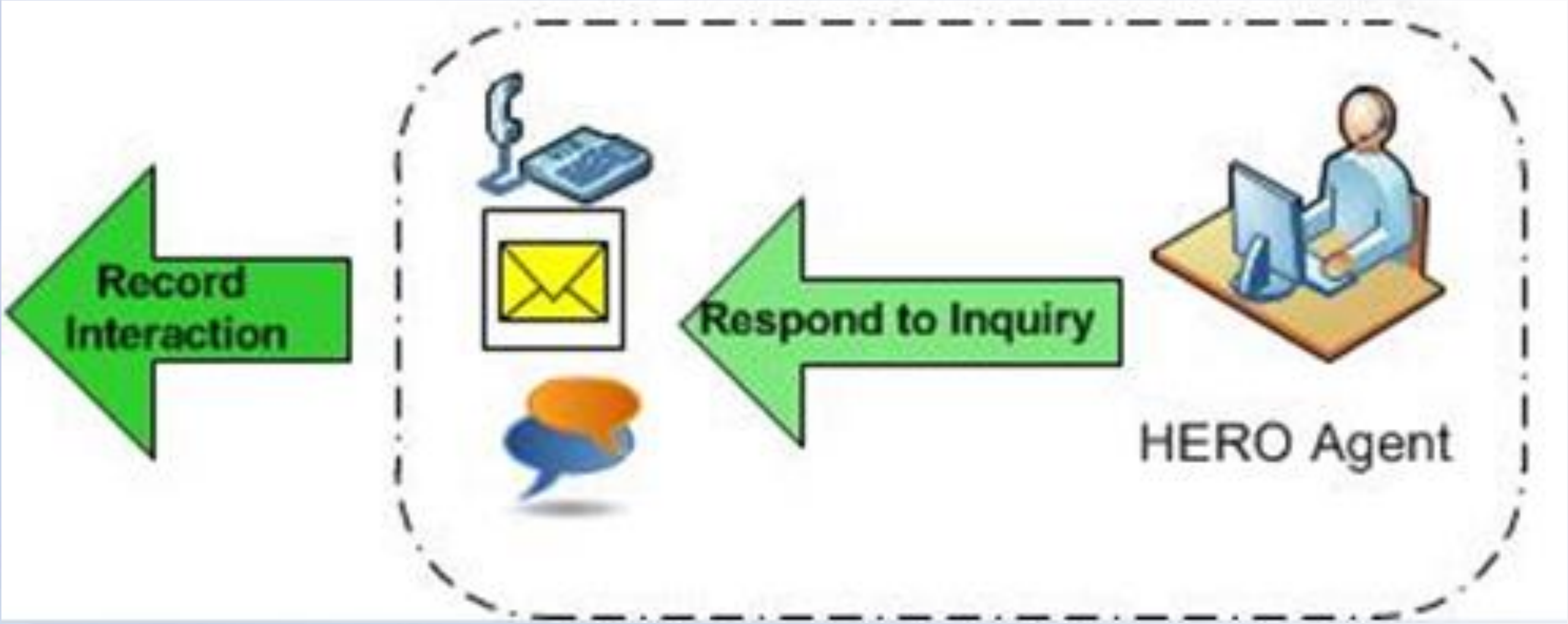


Triage

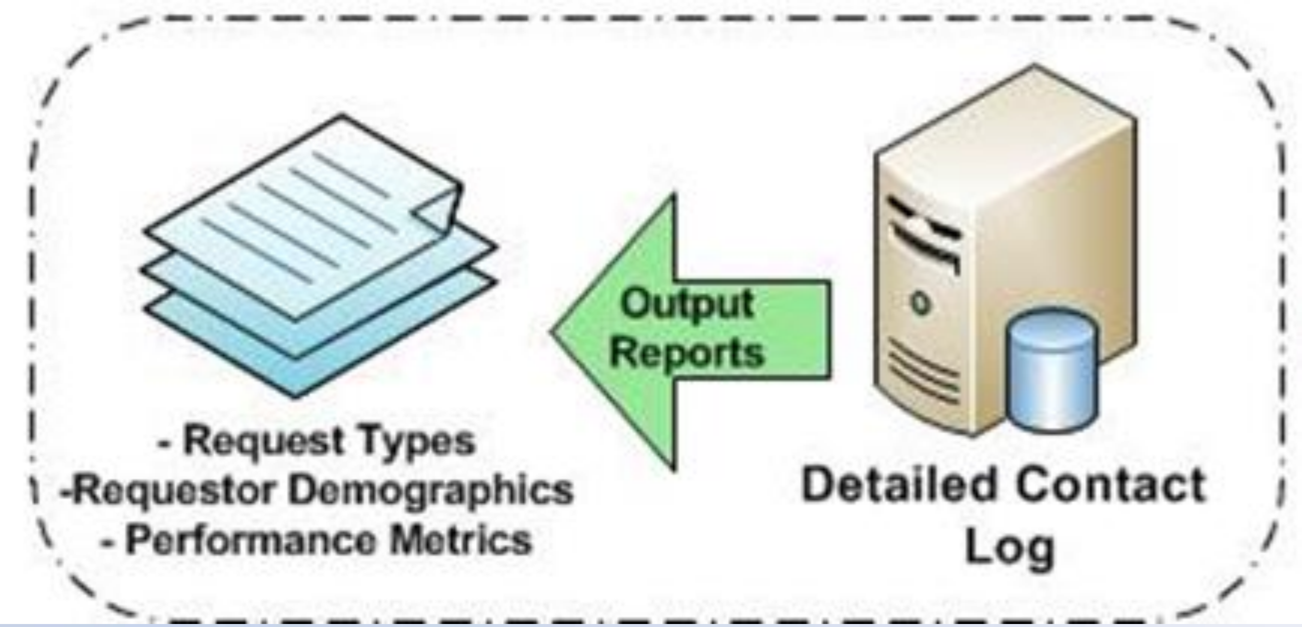
- Query Distribution
- Ticketing System
- Knowledge Engine
- Reporting Data Warehouse

Knowledge Base

Processing an Inquiry


Record Interaction
Respond to Inquiry
HERO Agent

Processing an Inquiry


Output
Reports
- Request Types
-Requestor Demographics
- Performance Metrics
Detailed Contact
Log

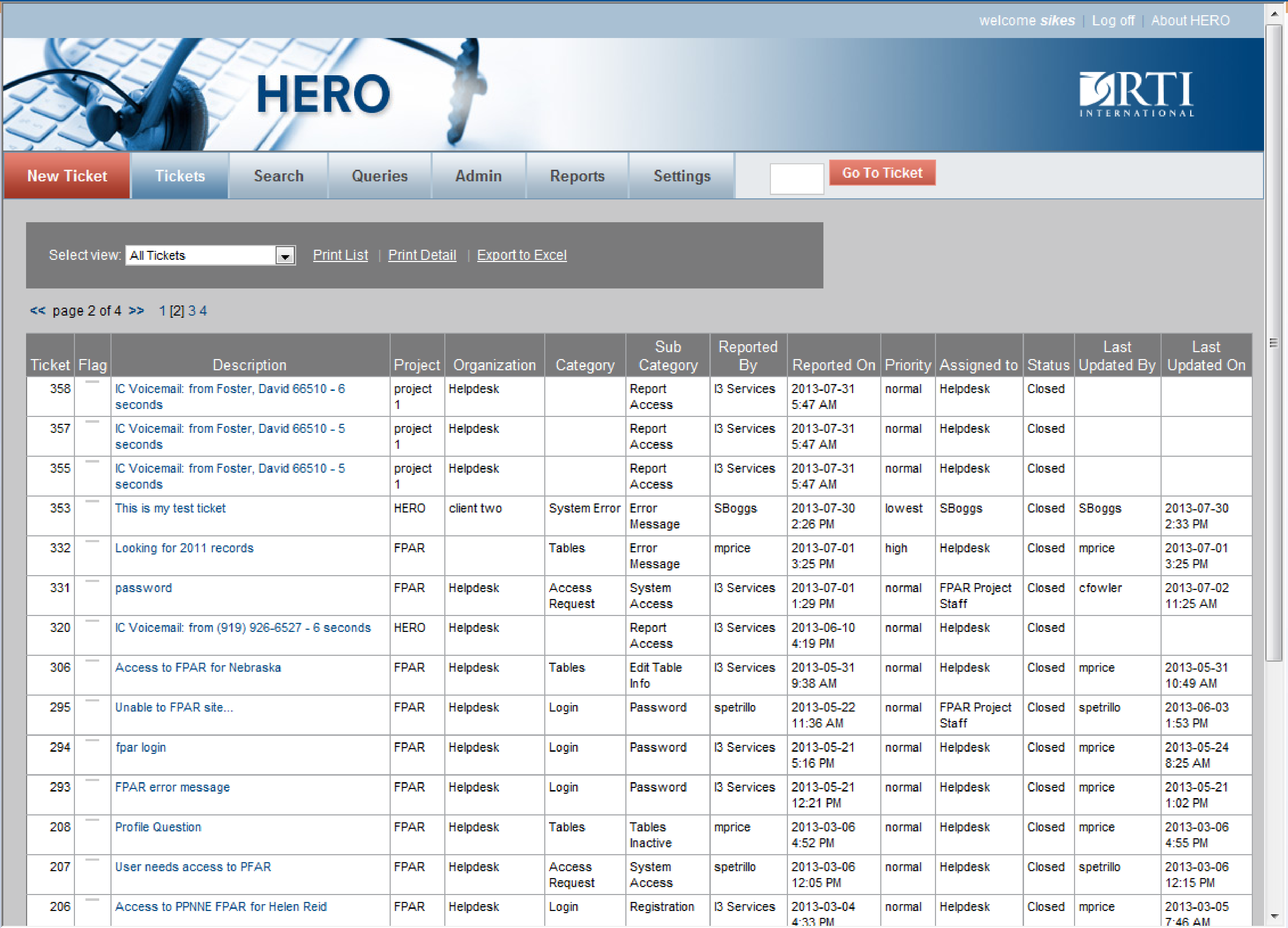
Lessons Learned

- An Existing In-House Solution may:
    - Meet 90%+ of your requirements needs
    - Be a Cost Effective Solution
    - Be a Highly Comprehensive Solution
    - Reduced Help Desk Costs Results in Buy-in from Smaller Projects

- Costs Include:
    - Setup Costs in HERO
    - Training for Telephone Staff
    - Knowledge Base Development

Example Project

- Family Planning Annual Report (FPAR) operated Help Desk for grantees needing to help users of a Web-based reporting system

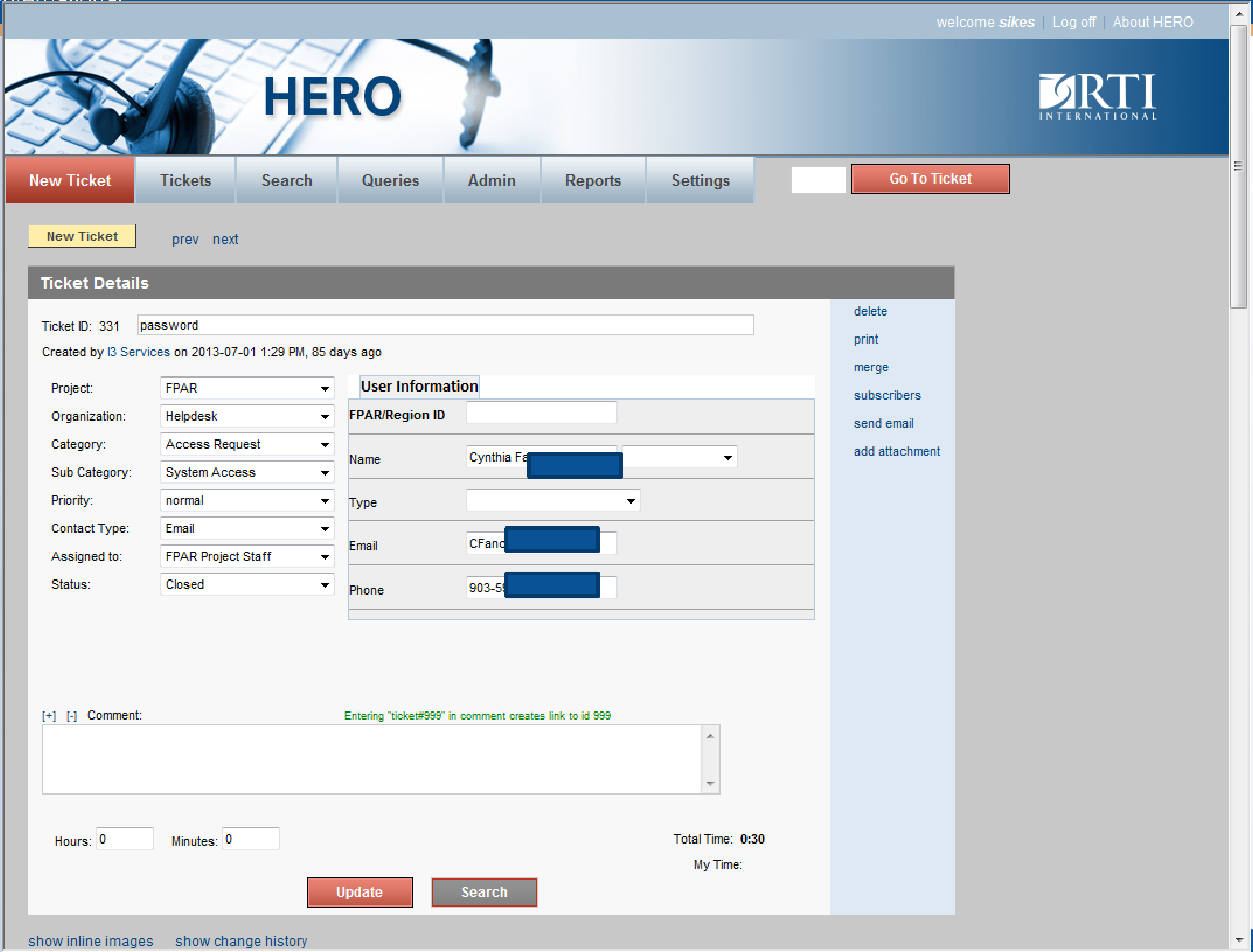


Select view: All Tickets

Print List | Print Detail | Export to Excel

<< page 2 of 4 >> 1 [2] 3 4

Ticket	Flag	Description	Project	Organization	Category	Sub Category	Reported By	Reported On	Priority	Assigned to	Status	Last Updated By	Last Updated On
358		IC Voicemail: from Foster, David 66510 - 6 seconds	project 1	Helpdesk		Report Access	I3 Services	2013-07-31 5:47 AM	normal	Helpdesk	Closed		
357		IC Voicemail: from Foster, David 66510 - 5 seconds	project 1	Helpdesk		Report Access	I3 Services	2013-07-31 5:47 AM	normal	Helpdesk	Closed		
355		IC Voicemail: from Foster, David 66510 - 5 seconds	project 1	Helpdesk		Report Access	I3 Services	2013-07-31 5:47 AM	normal	Helpdesk	Closed		
353		This is my test ticket	HERO	client two	System Error	Error Message	SBoggs	2013-07-30 2:26 PM	lowest	SBoggs	Closed	SBoggs	2013-07-30 2:33 PM
332		Looking for 2011 records	FPAR		Tables	Error Message	mprice	2013-07-01 3:25 PM	high	Helpdesk	Closed	mprice	2013-07-01 3:25 PM
331		password	FPAR	Helpdesk	Access Request	System Access	I3 Services	2013-07-01 1:29 PM	normal	FPAR Project Staff	Closed	cfowler	2013-07-02 11:25 AM
320		IC Voicemail: from (919) 926-6527 - 6 seconds	HERO	Helpdesk		Report Access	I3 Services	2013-06-10 4:19 PM	normal	Helpdesk	Closed		
306		Access to FPAR for Nebraska	FPAR	Helpdesk	Tables	Edit Table Info	I3 Services	2013-05-31 9:38 AM	normal	Helpdesk	Closed	mprice	2013-05-31 10:49 AM
295		Unable to FPAR site...	FPAR	Helpdesk	Login	Password	spetrillo	2013-05-22 11:36 AM	normal	FPAR Project Staff	Closed	spetrillo	2013-06-03 1:53 PM
294		fpar login	FPAR	Helpdesk	Login	Password	I3 Services	2013-05-21 5:16 PM	normal	Helpdesk	Closed	mprice	2013-05-24 8:25 AM
293		FPAR error message	FPAR	Helpdesk	Login	Password	I3 Services	2013-05-21 12:21 PM	normal	Helpdesk	Closed	mprice	2013-05-21 1:02 PM
208		Profile Question	FPAR	Helpdesk	Tables	Tables Inactive	mprice	2013-03-06 4:52 PM	normal	Helpdesk	Closed	mprice	2013-03-06 4:55 PM
207		User needs access to PFAR	FPAR	Helpdesk	Access Request	System Access	spetrillo	2013-03-06 12:05 PM	normal	Helpdesk	Closed	spetrillo	2013-03-06 12:15 PM
206		Access to PPNNE FPAR for Helen Reid	FPAR	Helpdesk	Login	Registration	I3 Services	2013-03-04 4:33 PM	normal	Helpdesk	Closed	mprice	2013-03-05 7:46 AM


welcome sikes | Log off | About HERO
HERO
RTI INTERNATIONAL
New Ticket
Tickets
Search
Queries
Admin
Reports
Settings
Go To Ticket
New Ticket
prev
next
delete
print
merge
subscribers
send email
add attachment
[+]
[-]
Update
Search
show inline images
show change history

Ticket Details

Ticket ID: 331 password

Created by I3 Services on 2013-07-01 1:29 PM, 85 days ago

Project:	FPAR
Organization:	Helpdesk
Category:	Access Request
Sub Category:	System Access
Priority:	normal
Contact Type:	Email
Assigned to:	FPAR Project Staff
Status:	Closed

User Information

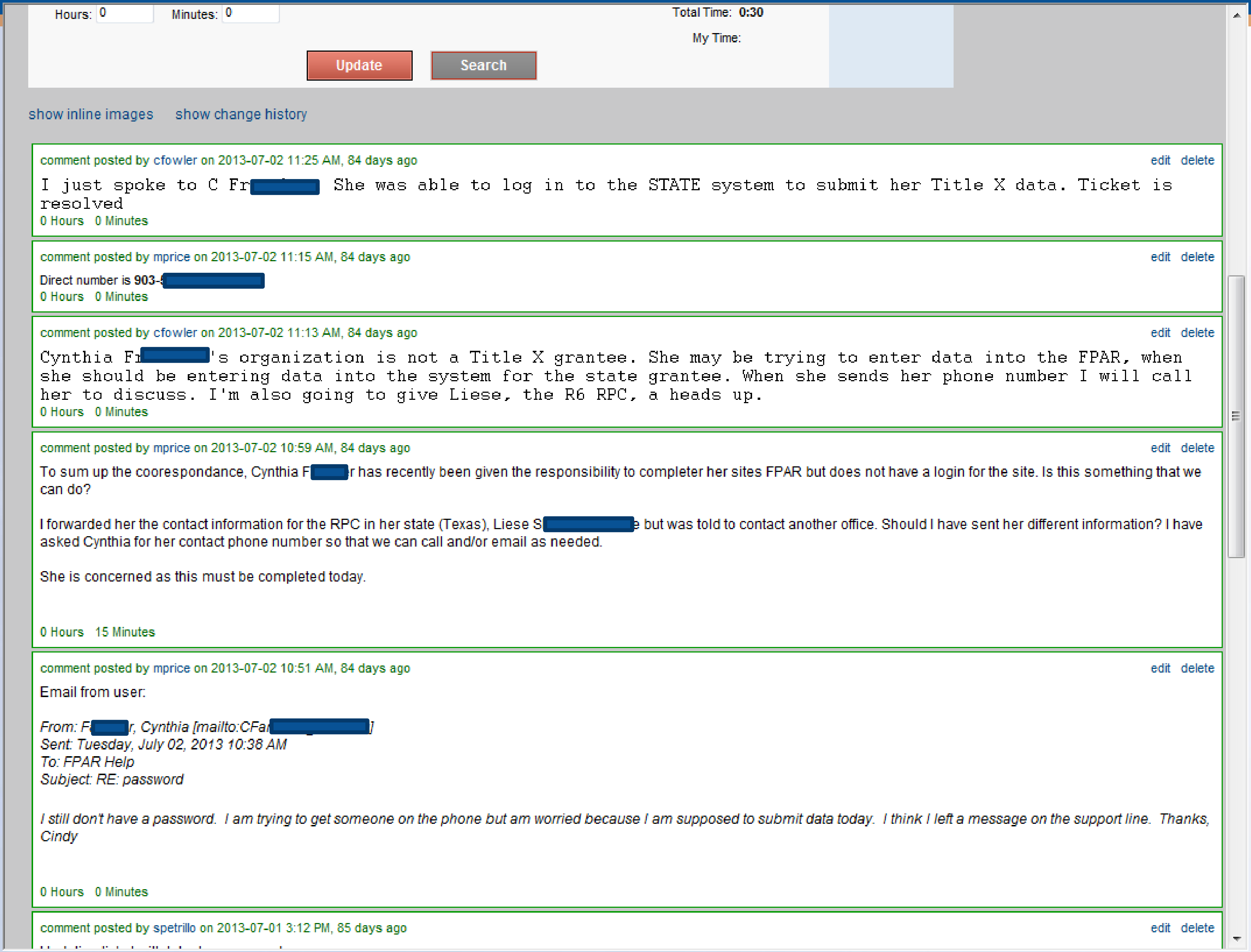
FPAR/Region ID	
Name	Cynthia Fa [redacted]
Type	
Email	CFanc [redacted]
Phone	903-5 [redacted]

Comment: Entering "ticket#999" in comment creates link to id 999

Hours: 0 Minutes: 0

Total Time: **0:30**

My Time:



Hours: 0 Minutes: 0

Total Time: 0:30

My Time:

comment posted by cfowler on 2013-07-02 11:25 AM, 84 days ago

I just spoke to C Fr[redacted] She was able to log in to the STATE system to submit her Title X data. Ticket is resolved

0 Hours 0 Minutes

comment posted by mprice on 2013-07-02 11:15 AM, 84 days ago

Direct number is **903-**[redacted]

0 Hours 0 Minutes

comment posted by cfowler on 2013-07-02 11:13 AM, 84 days ago

Cynthia F[redacted]'s organization is not a Title X grantee. She may be trying to enter data into the FPAR, when she should be entering data into the system for the state grantee. When she sends her phone number I will call her to discuss. I'm also going to give Liese, the R6 RPC, a heads up.

0 Hours 0 Minutes

comment posted by mprice on 2013-07-02 10:59 AM, 84 days ago

To sum up the coorespondance, Cynthia F[redacted]r has recently been given the responsibility to completer her sites FPAR but does not have a login for the site. Is this something that we can do?

I forwarded her the contact information for the RPC in her state (Texas), Liese S[redacted]e but was told to contact another office. Should I have sent her different information? I have asked Cynthia for her contact phone number so that we can call and/or email as needed.

She is concerned as this must be completed today.

0 Hours 15 Minutes

comment posted by mprice on 2013-07-02 10:51 AM, 84 days ago

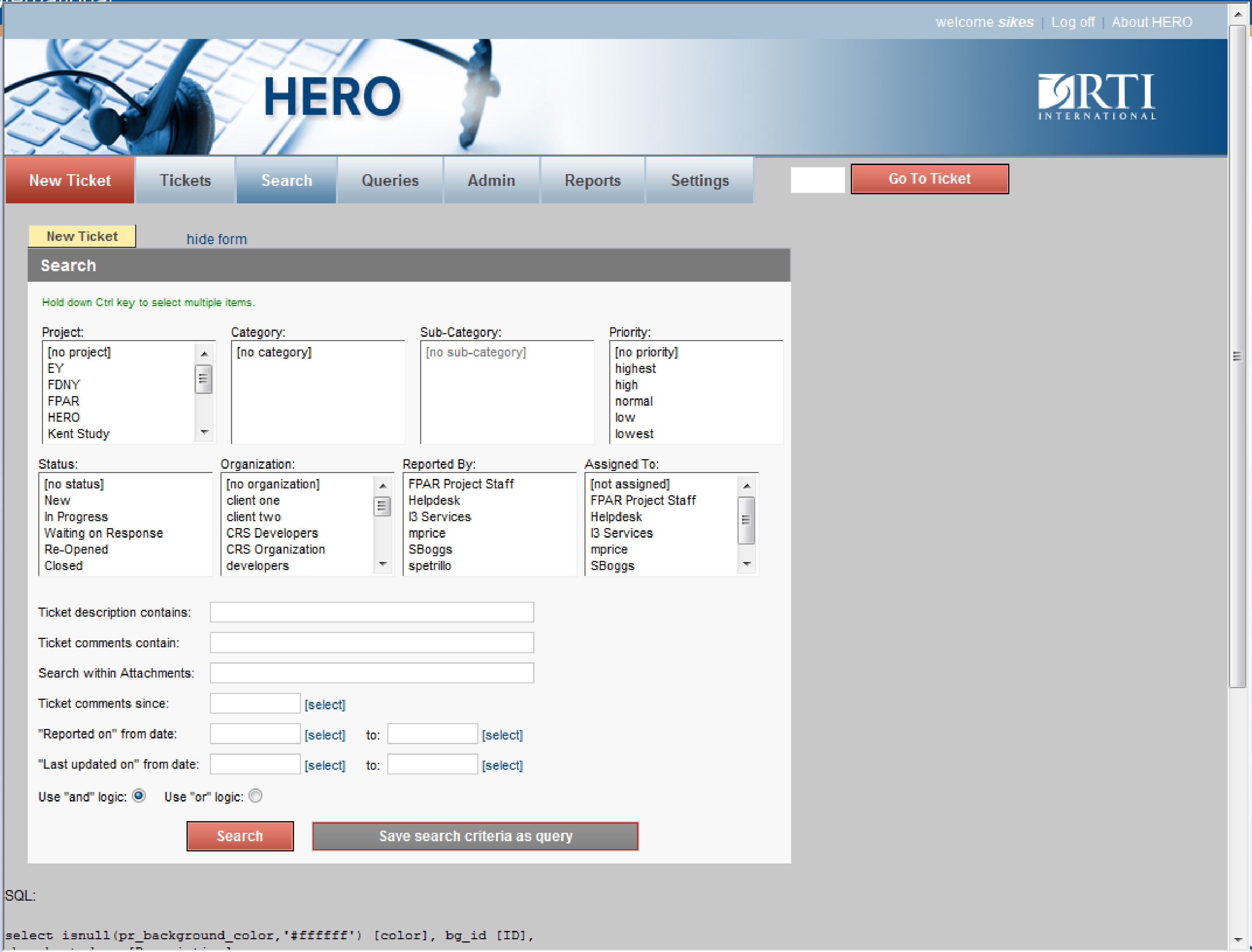
Email from user:

From: F[redacted]r, Cynthia [mailto:CFa[redacted]]
Sent: Tuesday, July 02, 2013 10:38 AM
To: FPAR Help
Subject: RE: password

I still don't have a password. I am trying to get someone on the phone but am worried because I am supposed to submit data today. I think I left a message on the support line. Thanks, Cindy

0 Hours 0 Minutes

comment posted by spetrillo on 2013-07-01 3:12 PM, 85 days ago


welcome sikes | Log off | About HERO
HERO
RTI INTERNATIONAL
New Ticket
Tickets
Search
Queries
Admin
Reports
Settings
Go To Ticket
New Ticket
hide form
Search
Save search criteria as query

Search

Hold down Ctrl key to select multiple items.

Project: [no project], EY, FDNY, FPAR, HERO, Kent Study

Category: [no category]

Sub-Category: [no sub-category]

Priority: [no priority], highest, high, normal, low, lowest

Status: [no status], New, In Progress, Waiting on Response, Re-Opened, Closed

Organization: [no organization], client one, client two, CRS Developers, CRS Organization, developers

Reported By: FPAR Project Staff, Helpdesk, I3 Services, mprice, SBoggs, spetrillo

Assigned To: [not assigned], FPAR Project Staff, Helpdesk, I3 Services, mprice, SBoggs

Ticket description contains:

Ticket comments contain:

Search within Attachments:

Ticket comments since: [select]

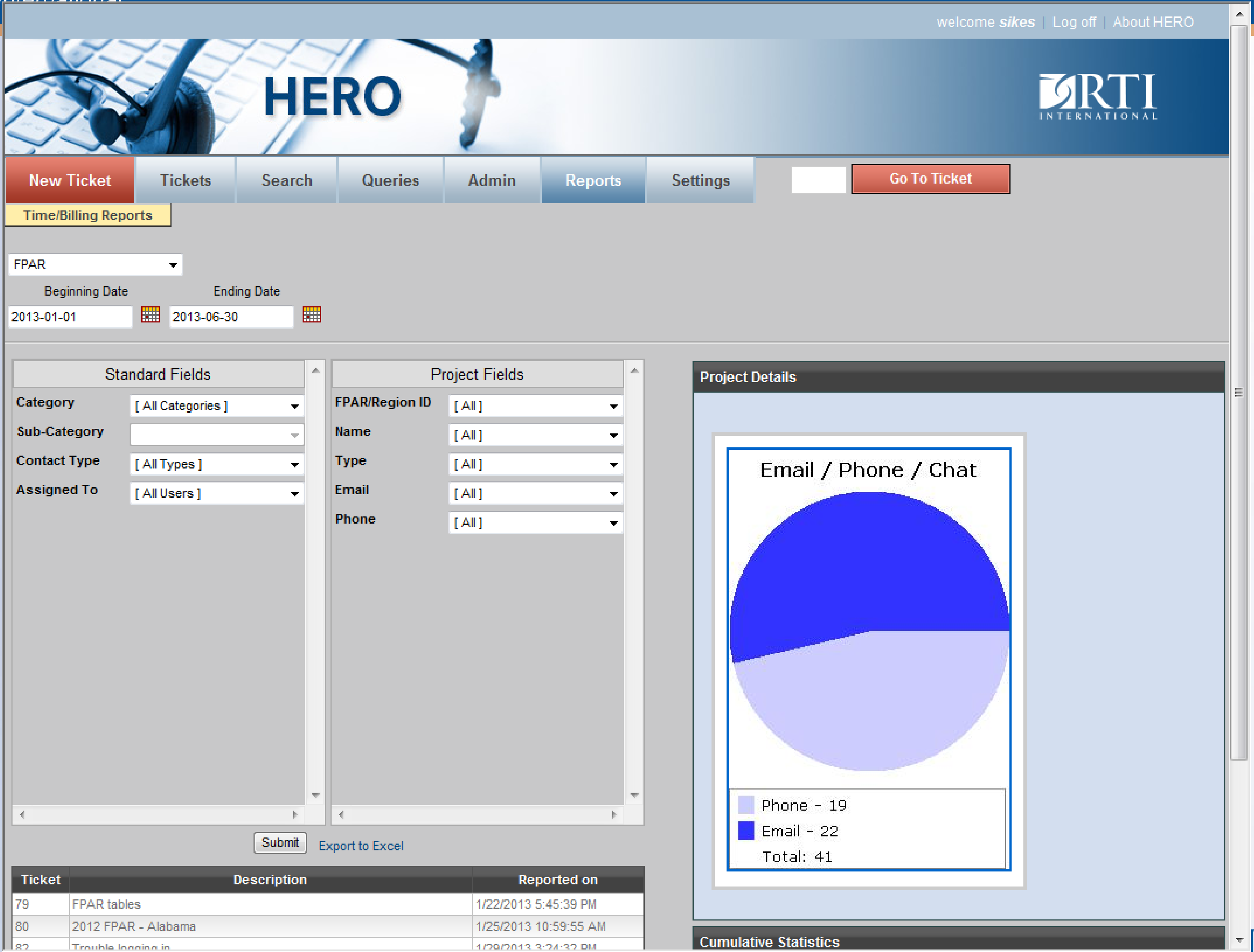
"Reported on" from date: [select] to: [select]

"Last updated on" from date: [select] to: [select]

Use "and" logic: ● Use "or" logic: ○

SQL:

```
select isnull(pr_background_color,'#ffffff') [color], bg_id [ID],
```


welcome **sikes** | Log off | About HERO
HERO
New Ticket
Tickets
Search
Queries
Admin
Reports
Settings
Go To Ticket
Time/Billing Reports

FPAR

Beginning Date	Ending Date
2013-01-01	2013-06-30

Standard Fields

Category	[All Categories]
Sub-Category	
Contact Type	[All Types]
Assigned To	[All Users]

Project Fields

FPAR/Region ID	[All]
Name	[All]
Type	[All]
Email	[All]
Phone	[All]

Submit
Export to Excel

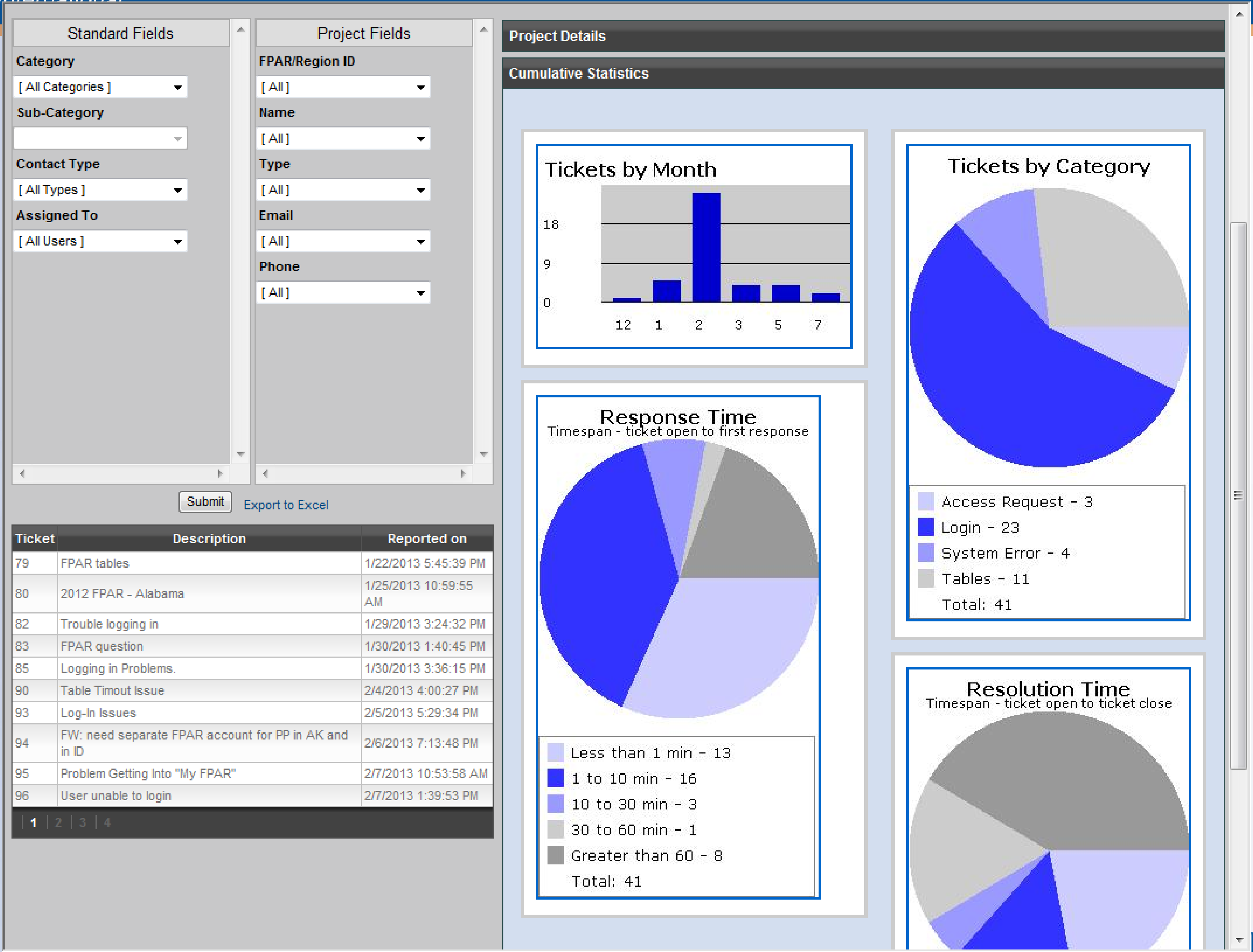
Ticket	Description	Reported on
79	FPAR tables	1/22/2013 5:45:39 PM
80	2012 FPAR - Alabama	1/25/2013 10:59:55 AM
82	Trouble logging in	1/29/2013 3:24:32 PM

Project Details

Email / Phone / Chat

▢	Phone - 19
■	Email - 22
	Total: 41

Cumulative Statistics


Standard Fields
Project Fields
Submit
Export to Excel
Project Details
Cumulative Statistics
Tickets by Month
18
9
0
12
1
2
3
5
7
Tickets by Category
Access Request - 3
Login - 23
System Error - 4
Tables - 11
Total: 41
Response Time
Timespan - ticket open to first response
Less than 1 min - 13
1 to 10 min - 16
10 to 30 min - 3
30 to 60 min - 1
Greater than 60 - 8
Total: 41
Resolution Time
Timespan - ticket open to ticket close

Category
[All Categories]

Sub-Category

Contact Type
[All Types]

Assigned To
[All Users]

FPAR/Region ID
[All]

Name
[All]

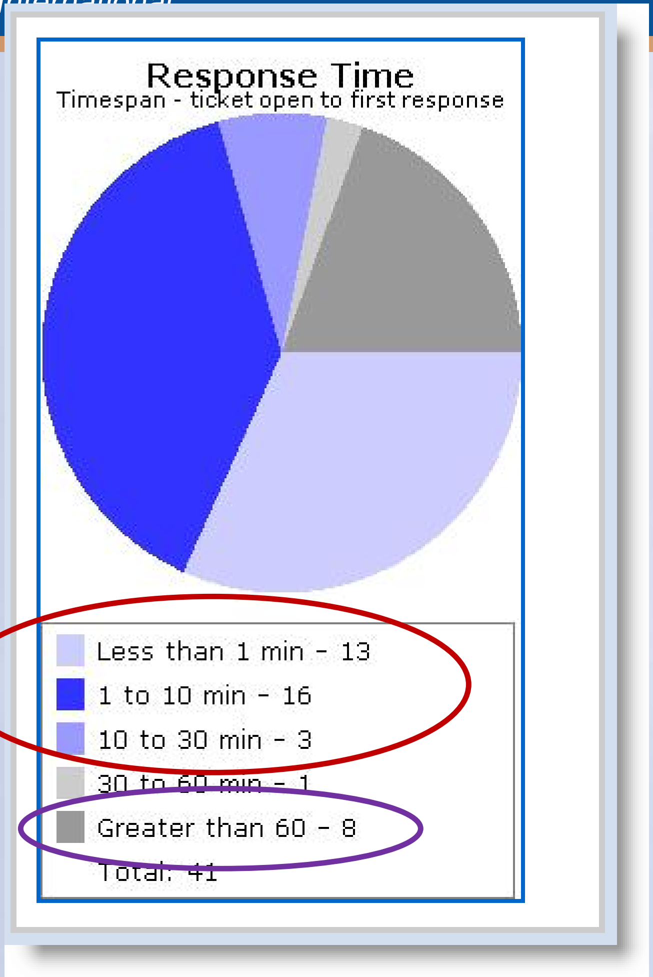
Type
[All]

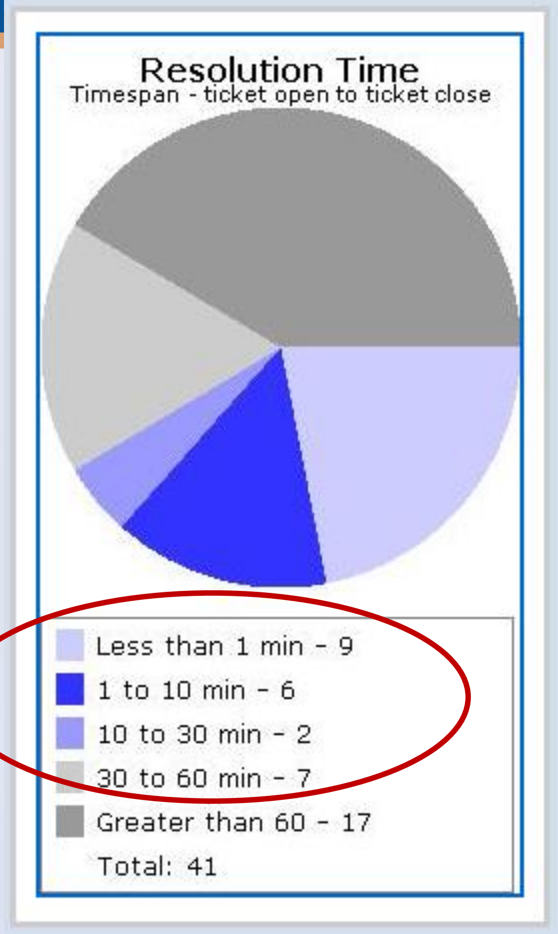
Email
[All]

Phone
[All]

Ticket	Description	Reported on
79	FPAR tables	1/22/2013 5:45:39 PM
80	2012 FPAR - Alabama	1/25/2013 10:59:55 AM
82	Trouble logging in	1/29/2013 3:24:32 PM
83	FPAR question	1/30/2013 1:40:45 PM
85	Logging in Problems.	1/30/2013 3:36:15 PM
90	Table Timout Issue	2/4/2013 4:00:27 PM
93	Log-In Issues	2/5/2013 5:29:34 PM
94	FW: need separate FPAR account for PP in AK and in ID	2/6/2013 7:13:48 PM
95	Problem Getting Into "My FPAR"	2/7/2013 10:53:58 AM
96	User unable to login	2/7/2013 1:39:53 PM

1 | 2 | 3 | 4





- 78% of all responses by the Help Desk to the user were within 30 minutes of opening the ticket.
- Greater than 60 - Typically received after the Help Desk was closed for the day

- 57% of all tickets were resolved and closed within 60 minutes.
- 9 tickets required intervention by FPAR Project Staff (21% of all tickets)

Questions?

HERO Development Team / Contributors

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919-316-3320

- Barri Braddy Burrus
- Susanna Cantor
- Charles Ebel
- David Foster
- Michael Price
- Nathan Sikes
- Howard Speizer