CAMP TECHNOLOGY: CONNECTING PROCESSES

Kayaking through BFSupport

Presented by Mike Morganson

PC West: Red Shoe Room | 12:30 – 1:15
AGENDA

Part 1
Introduction to BFSupport
What, When, Why?

Part 2
Demonstration Using the Customer Portal

Part 3
Data Helping Us Help You

Part 4
Group Discussion Ideas for Improvements
A centralized web portal for campus to ask questions, report issues, and request services.
CAMPUS EXPERIENCE BEFORE BFSUPPORT

- BFS handled customer service in divisional silos
- No tracking of issues (all through email/phone)
- We ping-ponged campus from division to division
- Campus called "their guy/girl" to get help
- Not clear if Blink content was helpful
IMPLEMENTATION TIMELINE

Wave 1: Went live June 19, 2013
- Disbursements
- General Accounting
- Procurement & Contracts
- Travel

Wave 2: Went live March 11, 2014
- Cashier’s
- Mail Services
- Material Support Services
- OPAFS

eRAP: Went live May 21, 2014

Coming in Summer 2016: Payroll (?)
CAMPUS EXPERIENCE

• Single, easy to use place for campus
• Automatic issue routing
• Real-time self help
• No more ping-ponging customers
• Performance Data
DIVISIONS AND TEAMS

- Integrated Procure-to-Pay Solutions
  - Accounts Payable
  - Payment Request
  - Payment Services
  - Mail Services
  - Moving Services
  - Material Support Services
  - Strategic Procurement (Marketplace Help Desk)
  - Travel and Entertainment

- Central Cashier’s Office
- General Accounting
- Office of Post Award Financial Services

Other groups on campus:
- eProposal Development (ePD)
DEMO
WHAT HAPPENS AFTER A CASE IS SUBMITTED?

- Case Number is assigned to your inquiry
- Routes automatically to the BFS team responsible for the category/sub-category
- BFS team is notified that they have a new case to review and respond to
- Communication from BFS team member to you
- Eventually, the case is “closed” and includes a 1-question survey

- If campus has a follow-up question and replies to email, case is re-opened and assigned back to the same BFS individual you were working with last
EMAIL NOTIFICATIONS

• Case Submitted
  • When you initially submit your inquiry

• Case Cancelled
  • If you cancel your case

• Case Update
  • From BFS agent you are working with

• Case Closed
  • When agent “closes” the case

• Case Re-Opened
  • When you reply to any email with a case number which has been closed
Available to Campus:
- Buscon@ucsd.edu
- Camshelp@ucsd.edu
- DirectDP@ucsd.edu
- Messenger@ucsd.edu
- Passports@ucsd.edu
- MailDeskShip@ucsd.edu
- FedEx-Bills@ucsd.edu
- MSS-Receiveing@ucsd.edu
- Surplus@ucsd.edu
- MSS-Moving@ucsd.edu
- StorehouseOrders@ucsd.edu

Available to Non-Campus Customers:
- CreditCards@ucsd.edu
- DirectDP@ucsd.edu
- Disbursements@ucsd.edu
- MPHelp@ucsd.edu
- STIP@ucsd.edu
- Travel@ucsd.edu
- Undiscas@ucsd.edu
MONTHLY CASE VOLUMES FOR IPPS UNITS

Case Record Type

Case Vol

May 2013

0500 1000 1500 2000 2500

562

1,955

668

490

417

490

2,547
MONTHLY AVERAGE FOR AGENTS’ 1ST REPLY

[Graph showing monthly averages with a peak at 62.67 and a low of 9.56]
MONTHLY AVERAGE SUPPORT RATING

![Graph showing monthly average support rating with a peak of 4.6 and a dip to 3.9.](image)

- **May 2013:**
  - Avg. Support Rating: 3.9 to 4.6
## Data and Trends

### Sample Department

#### Data for: Current Calendar Year

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Top Questions</th>
<th>Record Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding/Updating Traveler/Vendor Accounts</td>
<td>24</td>
<td></td>
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<tr>
<td>Suggestions</td>
<td>14</td>
<td></td>
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<tr>
<td>STORE</td>
<td>10</td>
<td></td>
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<tr>
<td>SHIPS or Desktop Shipping Support</td>
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<td></td>
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<tr>
<td>Travel Reimbursement</td>
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<tr>
<td>General Questions</td>
<td>7</td>
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<tr>
<td>Express Card</td>
<td>6</td>
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<tr>
<td>General Travel</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>New Feature Requests</td>
<td>8</td>
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</tr>
<tr>
<td>PO Related Payments (Invoices)</td>
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</table>

#### Data for: Current Calendar Year

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Top Customers</th>
<th>Record Count</th>
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<tbody>
<tr>
<td>Karen Andrews</td>
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<tr>
<td>Erin Gerlach</td>
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<tr>
<td>Antonino Ascutto</td>
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<tr>
<td>Tristan Merica-Jones</td>
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<td>Bernie Camberos</td>
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<tr>
<td>Judy Winstead</td>
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<tr>
<td>Robin Knox</td>
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<tr>
<td>Tristan Merica-Jones</td>
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<tr>
<td>Lee Banda</td>
<td>4</td>
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</tr>
<tr>
<td>Todd Hifka</td>
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</tr>
</tbody>
</table>
FUTURE PLANS FOR BFSUPPORT

- Live Chat
- Knowledge Base-Blink content connection
- Metrics-based projects that improve processes
- Evaluating shared resources to support BFSupport
Questions?
BFSUPPORT TEAM

Jenn Glassman
Program Manager

Mike Morganson
CRM Analyst

Sara Velarde
CRM Analyst

Martin Krolik
ITS Developer

Rob Klima
ITS Site Administrator
Don’t forget to stop by and visit us in the Price Center East Ballroom