

Lean Project Summary



Streamlining Approvals and Billing for Operational Service Requests

Problem Statement and Project Importance:

The current service request (SR) process often requires DET employees to contact customers multiple times to obtain the necessary agency approvals and billing information. When Enterprise Service Desk (ESD) employees need to contact customers for agency approvals, it delays completion of the SR and interrupts customers. If all the required information is instead provided when the SR is submitted, the time needed to complete the SR would be reduced, and it's less likely that customers would be interrupted by additional requests for information. In addition, incomplete information about billing often delays closing of the SR, even though the technical work for the customer has been completed. These delays skew DET metrics regarding how quickly the SRs are being resolved.

Project Outcomes:

The Lean project team included customer representatives from DOC and DOT. The interagency team reported its recommendations to the State CIO's Office in early January 2016. The recommendations include:

- Agencies will maintain a list of approvers and provide the distribution list(s) to DET.
- Agency approver lists will be maintained in Cherwell (the software DET uses for tracking and processing SRs).
- Specific forms will be incorporated into Cherwell that provide the approval and billing fields required before further routing of the SR from the ESD.
- Functionality will be utilized in Cherwell that auto-generates emails requesting any needed approvals and billing information.
- The clock on the SR doesn't start until the necessary information is received.
- Specific form will be incorporated into Cherwell that requests billing start date.
- Functionality will be utilized in Cherwell that auto-generates reports to agencies showing pending tickets waiting for approvals.

Status:

The Lean project team is guiding implementation of recommendations with the appropriate DET and agency staff, particularly with Cherwell developers. The team is also designing a communication plan for the streamlined processes that includes information posted on the new DET portal, as well as regular updates provided to agency technical groups.

Contact BillyJo Peterson at BillyJoM.Peterson@Wisconsin.gov if you have any questions on this lean project.

