

Enhancing On-Campus Customer Service by Providing One-Stop Shopping for Administrative Processes

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Abstract

It is hard for administrative processing units to complete the tasks associated with their job and provide exceptional customer service to the business units who are initiating the transactions, especially when several of the processing units – Finance and Payroll are located off campus. Administrative processing units in higher education and state agencies are also notorious for bureaucratic paperwork. The following proposal outlines the operational efficiencies the University of Houston experienced when the organization dedicated an entire department to providing customer service to the community, and most specifically to the departments initiating business transactions.

This new Administration and Finance Customer Service Center represents the blending of key staff from administrative units across campus. The staff includes three new Human Resource customer service specialists, one Payroll customer service specialist, two dedicated Finance customer service specialists, and one Manager. This department is located near the Human Resources Department – making it easier to provide complete full service to the customers. Implemented in February 2004, final build out of the center was completed in June 2004. The new space exhibits the look and feel of an open bank lobby, providing work stations for representatives and waiting area seating for customers. An executive office was transformed into a small training area for new employees.

The goals of the center were as follows:

- *Link all of the administrative units to provide one-stop shopping for Payroll, Human Resources and Finance questions to provide relief for the operational units who are processing transactions.*
- *Eliminate the potential for lost documents by providing the Payroll-Human Resources link so that forms used by both departments are entered into the HR/Payroll system in a timely manner.*
- *Assist Human Resources by establishing and utilizing a tracking database to track requested personnel actions for Human Resources and departments.*
- *Maintain a call database to report various statistics, including types of calls and solutions to operating units.*
- *Provide a listening ear to business and operational departments so that potential business efficiencies are researched and implemented.*

The Manager of the Center was recognized by the President of the University of Houston with the President's Award in September 2004 for her contributions to streamline processes and obtain efficiencies with the creation of the Administration and Finance Customer Service Center.

Introduction of the Organization

The University of Houston is a large, urban research institution located in the

nation's fourth largest metropolitan area. The university employs over 5,000 faculty and staff in 200 departments and 18 colleges and divisions to serve approximately 35,000 students. The administrative operating units serving faculty, staff and student employees are the Human Resources, Payroll and Finance offices.

A new President was appointed and took office in September 2003. During his first month in office, the President issued a challenge to the Division of Administration and Finance, asking them to focus on obtaining operational efficiencies by eliminating forms, signatures and complex processes. He believed that streamlining processes provide enhanced customer service as they eliminate customer frustrations. The Vice President for the Division embraced the opportunity and announced the creation of the Customer Service Center in December 2003, with an opening date of February 1, 2004.

Statement of the Initiative

Previously, campus business staff would call a variety of individuals within the operating units to ask questions, get passed from person to person, until they were connected with someone who could assist them in solving their problem. This process was not very efficient for either side, as processors could get involved in researching a problem that would stop them from processing documents and business staff would spend too much time on the phone trying to track down answers to questions. The other problem faced by the operational units was that they were so busy processing documents that they had no time available to research innovative ways to streamline departmental processes.

Design

The Customer Service Center's direction was established by and for the college and division business units with input from the administrative operational units. The Center is accountable to the administrative operating units as well as the colleges and divisions that it serves. An advisory group of business personnel from the colleges and divisions provides direct feedback to the Manager of the Center. Approximately four weeks were devoted to developing the concept of the Center, including designing the space. The Center purchased seven full licenses for the Remedy Action Request System call tracking system. Remedy is the call tracking system recommended and used by our Information Technology Division, which creates reports in an Excel format. The other costs associated with the creation of the center included one-time build-out costs and new, recurring salary costs for three new Human Resources Customer Service Representatives.

The Center was able to go live very quickly and spent the first four weeks working with the departments within the Division of Administration and Finance to develop an electronic customer service survey to determine the business needs of the university. Center staff distributed the survey and analyzed the results to formulate an action plan of processes that could be streamlined. The following provides a listing of accomplishments by the Center during its first six months of operation:

- Provide a front-line support system for callers so that they only have to remember one phone number, which is answered by a live person during the workweek. Customer Service representatives are aware of common problems and questions so they are able to respond quickly. For more complex questions, the representatives are able to contact the appropriate personnel in the operating units and

then respond back to the customer, eliminating the need for the customer to make many phone calls. An electronic call report is submitted each month to the operating units so that they are aware of the types of problems business units are experiencing as well as the answers being provided by the representatives.

- Assisted Finance operational staff by providing college/division training for the upgrade to PeopleSoft Financials 8.4. Customer Service staff conducted road shows of the upgrade software to each college and division. These college and division sessions provided opportunities to address department specific questions. This outreach opportunity also was a great public relations tool and provided the setting to describe the Customer Service Center and develop a customer base.
- Modified training on Finance and Payroll/HR systems to include a process for training new employees during their first week of employment. Previously, staff sometimes went untrained and without access to the financial system for months. With the new training program, staff receive their training on basic financial and human resources/payroll transactions within the first week they are hired.
- Worked with Information Technology to eliminate the forms required by employees to obtain computer and e-mail accounts. The Customer Service Center works with the Human Resources Department to obtain a listing of the new hires for a particular period and uses an electronic process in the Remedy Action Request System to feed this information back to Information Technology. The process for creating the accounts takes approximately one week. Department business contacts are notified each week that their employees have been given their accounts and are provided set-up instructions to activate the accounts.

- Using the Remedy Action Request System to track calls and solutions.

Previously, there was no record of the number and type of calls being received by the administrative operating departments. By tracking the calls in the Remedy System, we are able to keep track of the calls we receive, the number of calls received by each representative, review the timeframe needed to and also maintain a solutions management database so that common and consistent solutions are applied to problems.

- Developed *The Business Manager's Survival Guide*, an on-line departmental desk manual. Previously, departments were responsible for creating their own desk manuals. Since many of our business practices are defined by university policy and procedure, we combined all of the procedures into a comprehensive desk manual so that all departments will be utilizing the same document. This manual is updated as policies and procedures change so departments will all be accessing current information. Department business staff estimated that providing this service to them has saved them at least one full week per year.

- Worked with Human Resources to develop the Personnel Action Request (PAR) tracking database, which allows the Customer Service representatives to assist Human Resources with tracking personnel actions prior to being entered into PeopleSoft.

- Devote a full-time staff member to pursue operational efficiencies. The role of the Manager is devoted to relationship-building within the universities. Meeting and working with the colleges and divisions to develop opportunities for efficiencies. These concerns are communicated back to the administrative operational units who work with the Manager directly to identify solutions. These solutions are routed back to the campus and are evaluated and then implemented.

Benefits

The benefits of the implementation of the Customer Service Center are numerous. The most immediate benefit has been a more efficient workforce. Because the Customer Service representatives are on the front lines addressing questions, comments, and researching solutions, both the administrative operating units and the business staff can be more productive. With the development of the call tracking system and a solutions management system, departments receive consistent responses to similar questions. The Customer Service Center encourages open communication between the business staff and the administrative operating units. Departments are able to make recommendations for process efficiencies at any time and know that their requests will be researched to see if they should be implemented. The customer-centered approach of the center has successfully bridged the gap between the administrative operating units and the department business staff which they serve. We have pledged to evolve with the changing needs of our university and will continue to be shaped by the direction in which they lead us.