

Needs based on  
 all call activity with partners on the  
 04/09/19  
 Reviewed with partner by Craig  
 sessions with Andy, Shergil and Craig and  
 others  
 Further workshops and calls with partners

Reviewed on the  
 26/09/19 with Tracy,  
 Steven and Stéphanie

# Enquiry handling - view of the work left to deliver

	Onboarding	Create Enquiry	Receive Enquiry	Process an Enquiry	Process an Enquiry (Partner)	Metrics / Analytics	Complaints	Knowledge base	
Done	<p>Create Service contact page on SGP</p> <p>Submit an Enquiry on BIP Website</p> <p>Submit Phone Enquiry</p> <p>Submit Email Enquiry</p>	<p>Submit an Enquiry on BIP Website</p> <p>Submit Phone Enquiry</p> <p>Submit Email Enquiry</p>	<p>Record Enquiry</p> <p>Process Phone message</p>	<p>Process an Enquiry</p> <p>Provide Partners with an API to Manage Enquiries</p> <p>Respond to Enquiry</p>	<p>Review Enquiry</p> <p>Classify Enquiry</p> <p>Request further information</p>	<p>Manage Enquiries</p> <p>Management Information</p> <p>Audit</p> <p>Continuous Improvement</p> <p>Administration</p>	<p>Complaints</p>	<p>Maintain Knowledge base</p> <p>Access Knowledge base</p>	Done
engaging	<p>Send Email Acknowledgement of Enquiries Submitted</p> <p>Submit an enquiry on multiple services/products</p>	<p>Send Email Acknowledgement of Enquiries Submitted</p> <p>Submit an enquiry on multiple services/products</p>	<p>add partner field to CRM screen enquiry</p> <p>Integrate manually produce partner field and add enquiry to the enquiry</p> <p>Automatically produce partner field and add enquiry to the enquiry</p>	<p>Valid SLA is the same for all products and partners</p> <p>Mark Enquiry as Closed</p>	<p>Partner requests to customer with valid 3 working day SLA</p> <p>Mark Enquiry as Closed</p>	<p>Review Enquiry</p> <p>Classify Enquiry</p> <p>Request further information</p>	<p>View All Outstanding Enquiries for partners on CRM</p> <p>Report on Customer Feedback ?</p> <p>Identify Enquiries outstanding after SLA</p> <p>Identify Enquiry Referrals outstanding after SLA</p>	<p>Maintain Knowledge base</p> <p>Access Knowledge base</p>	engaging
to do	<p>Standardize enquiry form for all partners with leading front leading phone</p>	<p>Standardize enquiry form for all partners with leading front leading phone</p>	<p>Automatically create SLA for all enquiries based on product/industry</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on speed and quality of Enquiry Responses</p> <p>Report on Enquiries by volume, channel, Enquiry Type, SLA</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	<p>Maintain assets tracking for Enquiry Management</p> <p>Capture Customer Feedback some time after Response?</p> <p>Respond to FOL, SLA and rights of Enquiry requests</p> <p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	to do
WIP: Data									WIP: Data
Backlog	<p>Core data needed to fulfill the enquiry is provided</p> <p>Standardize enquiry form for all partners with use of business data as single</p>	<p>Core data needed to fulfill the enquiry is provided</p> <p>Standardize enquiry form for all partners with use of business data as single</p>	<p>Integrate system support for SLA Logging new Enquiries</p> <p>Make automatic link of Enquiry into CRM faster</p>	<p>Improve EFRS Enquiry Handling system</p> <p>Load Enquiry into CRM system</p> <p>Close Enquiry</p> <p>Ability to see current status of an Enquiry</p> <p>Split Enquiry if multiple topics / actions to cover</p>	<p>Provide a reason for Partner to receive Enquiry if they aren't able to do so</p> <p>Respond to ask Customer for Feedback</p> <p>Improve EFRS Enquiry Response UI</p> <p>Refer Enquiry to another Partner</p>	<p>Report on Enquiries that are routed back to CRF from Partner</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	<p>Report on Enquiries resolved by CRF for Partners</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report on enquiries to Partner via other channels</p> <p>Report on Partner's SLAs</p>	Backlog

**KEY**

- Epics
- Features
- Steps in the process
- to check
- locked in Leads - slow work needed
- urgent work to go - might need to start after