

	Onboarding	Create Enquiry	Receive Enquiry	Process an Enquiry	Process an Enquiry (Partner)	Metrics / Analytics	Complaints	Knowledge base	
	<p>Create Service content page on SEP</p>	<p>Submit an Online Enquiry</p> <p>Submit Phone Enquiry</p> <p>Submit Email Enquiry</p>	<p>Record Enquiry</p> <p>Process Phone message</p>	<p>Triage an Enquiry</p> <p>Provide Partners with access to CRM to manage Enquiries</p> <p>Provide Partners with an API to manage Enquiries</p> <p>Provide Partners with a Portal to manage Enquiries</p> <p>Respond to Enquiry</p>	<p>Review Enquiry</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>	
1 Done									
2	<p>Automatically populate Partner field in CRM based on SEP Service Page</p>	<p>Send Email Acknowledgement of Enquiry Submitted on SEP website</p> <p>Assigned digital customers can make an enquiry</p>		<p>Produce Response</p>	<p>Review Enquiry</p>	<p>View All Outstanding Enquiries</p>			
3	<p>Automatically populate Partner field in CRM based on SEP Service Page</p> <p>Automatically populate when an Enquiry about lead in CRM based on Service</p>	<p>Submit an enquiry on multiple services/products</p> <p>Check data feedback added. Started the enquiry form for all partners?</p>	<p>Make automatic load of Enquiry into CRM faster</p> <p>Prepare a strong, clear and concise email, and the customer's response time</p>	<p>Notify Customer of enquiry response time for inquiry Responses</p> <p>Copy selected information from Knowledgebase when responding</p>	<p>Classify Enquiry</p> <p>Check Eligibility?</p>	<p>Identify Enquiries outstanding after SLA</p> <p>Report on Customer Feedback</p> <p>Identify Enquiry Referrals outstanding after SLA</p> <p>Report on speed and quality of Enquiry Responses</p>		<p>Partner need to see what we have on their service in the CRM</p> <p>Provide access to the customer Knowledgebase for all Partners</p>	
MVP: Beta									
7	<p>Manually populate Partner field in CRM</p> <p>Automatically populate Partner field in CRM based on SEP Service Page</p> <p>Automatically populate when an Enquiry about lead in CRM based on Service</p>	<p>Improve system support for EFRS logging new Enquiries</p> <p>Automatically populate partner field and when enquiry is about, based on service web form</p> <p>Manually populate partner field and when enquiry is for certain enquiry</p> <p>When logging Enquiry against multiple Contact or Accounts, Reallocate it</p>	<p>SLA set depending on partner / product</p> <p>Check Customer of enquiry response time for Partner (on live - having to call live - having to call live - having to call live)</p> <p>Check action immediately or next work shift/turnback?</p> <p>Split Enquiry if multiple topics / actions to cover</p> <p>Enquiries vs Enquiry Actions?</p> <p>Request further information</p> <p>Improve EFRS Enquiry Handling system</p> <p>Make enquiry system for partners to use</p> <p>Migrate user off-hand of having phone to other solutions</p> <p>Provide end-to-end tracking of Enquiries</p>	<p>Give ME access to LE CRM to support SEP Enquiry handling</p> <p>SLA to introduce more suitable solution for handling SEP enquiries</p> <p>SLA refuse internal progression on being Enquiries on Spurious, when possible</p> <p>Load Enquiry into CRM system</p> <p>Maintain Users</p> <p>View List of open Enquiries</p> <p>Close Enquiry</p> <p>Ability to see current status of an Enquiry</p> <p>Notify Partner of new Enquiry</p> <p>Manage how I receive Notifications</p> <p>Mark Enquiry as Closed</p>	<p>Customer to ask Customer for Feedback</p> <p>Mark Enquiry as closed</p> <p>Refer Enquiry to another Partner</p> <p>Refer Enquiry back to EFRS</p>	<p>Request further information</p> <p>Report on Enquiries that are routed back to CRM from Partner Enquiry Handling</p> <p>Report on end-to-end tracking of Enquiries</p> <p>Provide a status for Partner to track Enquiry (on live - having to call live - having to call live)</p> <p>Refer Enquiry to another Partner</p> <p>Refer Enquiry back to EFRS</p>	<p>Report on Enquiries that are routed back to CRM from Partner Enquiry Handling</p> <p>Maintain audit tracking for Enquiry Management</p> <p>Capture Customer Feedback some time after Response?</p> <p>Housekeeping</p> <p>Respond to FOL, SER and S&R requests</p> <p>minimal process needed?</p> <p>Report on Enquiries resolved by a Partner for other Partners</p> <p>Report Enquiries to Partners can run their own department?</p> <p>Report on Enquiries by volume, channel, Enquiry Type, SLA</p> <p>Report on Partners' SLAs</p> <p>Report on volume and Enquiry handling and timing</p>		

KEY

- Epics
- Features
- needs / stories
- to discuss
- to discuss if we have time lefts

WORK IN PROGRESS
Support for partners' meeting on
Wednesday 28/07/19.

Needs based on:
- initial workshop with partners on the 02/08/19
- interviews with partners by Craig
- sessions with Andy, Sheryl, and Craig and others.