Adapting Relationships in the Age of Customer Relationship Management

University of California San Diego
Kacy Marume, Client Experience
Irvin Palacios, Analytics

Yesterday (2012)
The times they are a changin'

Today

Wait Until Tomorrow
Business and Financial Services

11 operational units
Disbursements
Mail Services
Material Support Services
Procurement and Contracts
Travel
Disparate experiences
Footprints vs. Email

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Custom</td>
</tr>
<tr>
<td>Message Body</td>
<td>Hi,</td>
</tr>
<tr>
<td>Message Body</td>
<td>Can you please provide payment status on invoice #58135874952?</td>
</tr>
<tr>
<td>Message Body</td>
<td>Thanks,</td>
</tr>
<tr>
<td>Message Body</td>
<td>Dennis</td>
</tr>
</tbody>
</table>
No tracking
Ping-Pong
My "GO-TO"
Campus intranet, is it helpful?
In one ear, out the other
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Wait Until Tomorrow
What, Why, How?

- What are we trying to achieve?
- Why should we pursue this?
- How are we going to do it?
- Introducing BFSupport
Consensus Building and Decision-Making What's going to work for the campus?

- Met with Business and Financial Services Leadership
- Met with Information Technology Services
- SalesForce selected
- Rollout plan
Consensus Building and Decision-Making

What's going to work for the campus?

- Met with Business and Financial Services Leadership
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Wait, why is procurement leading the charge?
It's the real deal

- Partnered with IT who had worked with other CRM applications
- Brand development
- Divisional project leads identified
- Rolled onto the platform in three waves
- Knowledge base creation
What's BFSupport?

- One, easy-to-use place
- Easy transferring of cases
- Real-time self-help that is dynamic
- Data! Performance data and data to build long-term strategies

- Where's my go-to person?!
- Outsourced support?
- Answer the phone!
- How do I get my question to you
What's BFSupport?

- One, easy-to-use place
- Easy transferring of cases
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- Where's my go-to person?!
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IPPS Use of BFSupport

iHelp Desk

Client Engagement
iHelp Desk

- Shared help desk structure currently being built for the procure-to-pay team
  - Managing Procurement and Accounts Payable questions
    - procurement policy questions
    - eProcurement/Jaggaer how-to questions
    - invoice payment status
<table>
<thead>
<tr>
<th>Week 1-2</th>
<th>Procurement</th>
<th>Activity</th>
<th>Themes and Learning Goal</th>
<th>Things to know</th>
</tr>
</thead>
</table>
| **Introductions** | *If familiarity with each of the following and the concepts they provide:* - Business and Financial Services - Integrated Procure-to-Pay Solutions (at all sites) - UC system and structure | *Flavours new employees handbook: become familiar with mission, cultural statements, unit structure*  
*Schedule 30 min meeting on the following topics:* - UC System/audit level FPS structure (org chart) - Gele Ta - FPS Compression - TPC  
*Make a note on 'What is FPS?' - Identify goals for Integrated Procure-to-Pay Solutions (PPS) in Bikis and read the associated pages*  
*Visit our online e-resource site*  
*Create a list of all FPS applications, what they generally do, and what teams manage them (will be an evolving list that you can add to/kick off as you go through the ramp-up)*  
*Create a list of all the accolades北斗 (B) and SBP Support, what inquiries are supposed to be directed there and what teams manage them (will be an evolving list that you can add to/kick off as you go through the ramp-up)* | Provide a definition with UC San Diego-specific context for each of the following terms: to create your own - helpdesk - B2B - location of terms (come from these terms are internal, no information might not be readily available on Bikis):  
*Procure-to-Pay Supply Chain, Procurement, Reimbursement, Accounts Payable Business and Analytics, Campus and Student Mail, Message, Moving Services, Passport, Payment Request, Payment Services, Posta Center, Reimbursement and Distribution, Self-Store, Shopping, 3100U Strategic Procurement, Budget, Sales, Tax Advisory Services, Technology and Project Management, Travel and Entertainment, UC Travel Street, TeleConnect, Office of the Controller General Accounting, Office of Post Award, Financial Services, Payroll, Program Management, and Business Integration, Student Business Services, SBP Support (Save Green) |
| **Procurement** | *Know how to shop for goods and services in Marketplace*  
*Understand requisition workflow and approval process to the business unit*  
*Identify the different roles (shopper and approver)*  
*Basic understanding of OPAL and the Fund Manager role in Marketplace* | *Register and attend next Day (5-7) Service and Training (and SBP)  
Register and attend SBP*  
*Familiarize with the UC Learning*  
*Complete Marketplace training*  
*Schedule meetings on the following topics:*  
*Remote helpdesk (take 1-hour)*  
*Marketplace navigation - Ban, Ashby and Nabi (1-hour each)*  
*Mobile B2B (30-min)*  
*Shapiro/B2B (for 2-3 hours)*  
*Learn more about IOV, consulting, Independent Contractors, quick payments, and how to use the various tools and resources* | Provide a definition with UC San Diego-specific context for each of the following terms:  
*Marketplace terms: Marketplace (BillLine/LineItem), Windows Shopper, Item, Item Price, Price List, Requisition, Approval, Reimbursement, Invoice, Payment, Approval, Reimbursement, Purchase Order, Checkout/Invoicing, Item, PID, ETP, EIR, Financials, Slip-To-Codex, Order Quantity, Reimbursement, Goods & Services, Invoices, and what you can do for each service considered “excluded”*  
*UCM, EDL, Invoicing, B2B, EIR, ETP, Administration, Reimbursement Workflow, Procurement Workflow*  
*Procurement terms: Professional Buyer, Business Manager, Account Manager, Reimbursement, Price Proposal, Terms and Conditions, Agreement, purchase orders, invoices, and what you can do for each service considered “excluded”*  
*Define our key customer as: who are they, what do they care about?*  
*Understand the different roles they play and how they interact with each other* |
| **Week 3-4** | **Suppliers and Supplier Management** | *Supplier Setup Process*  
*Schedule 30 min meeting on the following topics:*  
*Invoice processing with Supplier Request process*  
*Supplier Search - UC*  
*Supplier setup process: Invoicing Setup, blanket agreement, Payables, and Purchasing** | Provide a definition with UC San Diego-specific context for each of the following terms:  
*VMM, Supplier Search, Invoicing Setup, Blanket Agreement, Payables, Purchasing, Supplier Setup Process* |
| **PIT and IT** | *Invoice PA process: including Invoicing Equipment*  
*Understand the workflow of PAO/P DAO process*  
*Understand the breakdown of PAO/P DAO process* | *Schedule 30 min meeting on the following topics:*  
*Invoice PA process: including Invoicing Equipment*  
*Understand the breakdown of PAO/P DAO process*  
*Understand the breakdown of PAO/P DAO process* | Provide a definition with UC San Diego-specific context for each of the following terms:  
*PIT, PAO/P DAO, Invoice PA, Equipment PA, PAO/P DAO, Billing, PAO/P DAO, PAO/P DAO, PAO/P DAO, PAO/P DAO, PAO/P DAO* |
| **Inbound and Outbound Delivery** | *Understand Receiving/Distribution process*  
*Understand and Outbound Shipping process*  
*Understand Campus Mail process*  
*Understand how Maple and Paragon work*  
*Understand how the Workflow works*  
*Understand the breakdown of PAO/P DAO process* | *Schedule 30 min meeting on the following topics:*  
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*PIT, PAO/P DAO, Invoice PA, Equipment PA, PAO/P DAO, Billing, PAO/P DAO, PAO/P DAO, PAO/P DAO, PAO/P DAO, PAO/P DAO* |
| **Week 5-7** | **Payment** | *Schedule 30 min meeting on the following topics:*  
*Schedule 30 min meeting on the following topics:*  
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*Schedule 30 min meeting on the following topics:*  
*Schedule 30 min meeting on the following topics:*  
| *Overview of Accounts Payable, Payment Services*  
*Overview of Accounts Payable, Payment Services*  
*Overview of Accounts Payable, Payment Services*  
*Overview of Accounts Payable, Payment Services*  
*Overview of Accounts Payable, Payment Services*  
| *What are all of the different ways transactions are accepted?*  
*How are they routed through Accounts Payable for processing?* |
Bye-bye Customer
Hello Client
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Exciting!

ASK

Expanded iHelp

Data!
Why rebrand?

- More areas outside of BFS are onboarding
- "BFSupport" vs "BFS Support" vs "BS Support"
More and new!

- Onboarding reimbursement-related questions
- New apps mean new questions
Data, Big Data, Bigger Data

- CRM Dashboards
- Machine Learning
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