

Case Study

Financial Management



Streamlining Helpdesk Processes

Challenge

The Bureau of the Comptroller and Global Financial Services (CGFS) team within the Department of State (DOS) oversees all financial systems, providing customer support with primary communication via email to a central helpdesk mailbox. The collective CGFS team, including 25 MIL analysts, rotated helpdesk shifts throughout the month to monitor email traffic and act as liaison between the customer and correct CGFS analyst or SME who would provide the helpdesk analyst with the resolution to then relay back to the customer. The indirect communication structure was very cumbersome, causing significant delays in response time and a disjointed approach to customer service. Additionally, as the CGFS helpdesk shifts were the analyst's ancillary roles, timely and effective follow through often lagged as primary duties remained their priority.

Solution

To streamline these processes, MIL team members proposed and implemented an improved business model based on dedicated Tier 1 analysts solely focused on the CGFS helpdesk. Tier 1 analysts triage all customer communication and when unable to resolve issues immediately, directly assign cases to specific SMEs based on areas of expertise.

Benefit

With a dedicated team structure, the group was able to ensure direct communication between customers and analysts resolving the issue, thereby minimizing unnecessary email traffic and delays, as well as improving response time and accuracy of information to the customer. Overall metrics stability and general customer satisfaction improvements will likely be reflected in the 2022 customer satisfaction survey initiated by DOS. Additionally, with the effectiveness of streamlining the helpdesk, the team was able to implement weekly training and overview sessions which are allowing the opportunity for Tier 1 and 2 analysts to expand knowledge of the Global Financial Management Systems as well as customer concerns.

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