Triage Redevelopment Project Plan

PROPOSAL: Review the current triage process, identifying areas for improvement or simplification. This new process should, at minimum, maintain both our current member satisfaction and On-The-Go rates. Redevelopment will take place with input from various stakeholders, including leadership and agents.

STAKEHOLDERS: Those from Member Services and Automotive who will be kept informed of the project status or will be involved with the triage redevelopment. *Names with an L after them are leadership for the department.*

- Automotive
  - DeptLeadership01 (L)
  - DeptLeadership02 (L)
  - DeptLeadership03 (L)
  - OtherDeptRep(s)01
  - OtherDeptRep(s)02
  - OtherDeptRep(s)03
- Member Services
  - DeptLeadership01 (L)
  - DeptLeadership02 (L)
  - DeptLeadership03 (L)
  - OtherDeptRep(s)01
  - OtherDeptRep(s)02
  - OtherDeptRep(s)03

Originally project plan listed the specific individuals from each department that were required for project

TRIAGE CATEGORIES: Ordered from what is expected to be the shortest to complete to the most involved

1. Category01 – description
2. Category02 – description
3. Category03 – description
4. Category04 – description

PROJECT PHASES:

1. Discovery
   a. To gain insight into triage from frontline agents, hold several small group Q&A sessions with select individuals from:
      i. Member Services: to gather opinions on current triage and suggestions on how to improve
         1. CSRs: two (2) sessions
         2. Dispatchers: one (1) session
         3. Resource Desk: one (1) session with Leads, CSR IIIs, and Supervisors who regularly work the resource desk
      ii. Automotive: to gather input from experienced automotive experts
         1. Fleet Technicians: one (1) session
         2. District Area Managers: one (1) session, for both their and their providers opinion
         3. Other Automotive Members: one (1) session
   b. Meet with Automotive and Member Services Leadership to discuss discovery results and align the internal feedback and provider input
   c. Document scripting for each triage category, clearly displaying all resolution paths
   d. Document the rules that affect, or are affected by, each triage category
2. Triage Review Process
   a. How to proceed once the triage category has been determined
   b. Review current triage and present initial rewrite to identified stakeholders
   c. Update new triage with recommendations and revisit with stakeholders
   d. Triage will be finalized when signed off by Leadership

3. Testing
    a. Develop test plan for each triage category
    b. Enter new triage into Test environment after sign-off
    c. Update corresponding triage rules
    d. Enter test calls, checking triage and rules are behaving as expected
    e. Select CSRs to enter test calls and provide feedback
    f. Rewrite triage based upon user input that would result in process improvements
4. Training
    a. Review new triage with Member Services Training team
    b. Provide resources required to develop appropriate training
    c. Align training completion and implementation timelines
    d. Agents who see a decrease in their OTG rate will require re-training
5. Implementation
    a. Input new triage into Production
    b. Update corresponding rules
    c. Work with Member Services Leadership to develop reporting plan to monitor OTG rates daily
6. Communication Plan
    a. Internal
        i. Initial project announcement to Automotive and Member Services
        ii. Weekly emails keeping Leadership apprised of project status
        iii. Focus group notifications and follow-up emails to selected agents
        iv. Testing group notifications and follow-up to selected agents
        v. Notification as each triage category is implemented in Production
        vi. Work with Member Services Leadership to provide Daily OTG reporting to Leadership
    b. External - - - *TBD – Need to discuss what this would look like*
        i. Create template DAMs can use to communicate with their service providers

Triage Redevelopment

Phase I: Discovery

Focus Group Questions: Call Center Customer Service Agents

- Triage
  - What areas of triage do you find most difficult?
    - *Ex. How questions are phrased; not knowing what triage to start with*
  - Are there any items you would like to see removed from triage?
  - What would you like to see added to triage?
    - *Remember, we're not fixing. We are gathering information so we can send a service provider to the member. The provider on scene makes the final determination. We only know what the member tells us.*
- Vehicle Issues
  - How do members describe their vehicle issues?
  - What are some common phrases that you hear?
  - Have you ever had a vehicle issue that stumped you? Is so, what was it and why?
- Triaging a Vehicle Issue
  - If you aren't sure what the vehicle is that the member is describing, what steps do you take to start triaging the issue
    - *Ex. Ask additional probing questions; make a guess and go*
- Triage Scenarios: For each scenario below, if you have a member who describes an issue using that phrase, or something similar, how do you triage the issue?
  - "My car won't start"
  - "My car died"
  - "I need a jumpstart"
  - "I KNOW it's the fuel pump"
  - "I KNOW it's the alternator"
  - "I KNOW it's the starter"