START UNIVERSITY

Events Management

Start University (S-U)

Events Management

SU uses an Issue Tracking System (ITS) to maintain and manage every issue related to systems and assets. As the ITS is our single, issue repository, our event management process revolves around this system. In addition to issue tracking, the ITS helps us manage resource allocation, time accounting, priority management, and oversight workflow.

This system is available to our clients for both issue identification and entering as well as status tracking. Here's how it works:

Tracking Process:

- Repository – All issues are entered manually (by the Start University team or the client) via our e-mail Response Management Systems.
- Type – Ticket types are selected from a pull-down menu that includes all the ticket types defined during the onboarding process, for example:

  - CRM Change request
  - CRM Glitch
  - CRM Data Change
  - CRM New Functionality

  - Partner Site Urgent Correction
  - Partner Site Change
  - Partner Site typo detected
  - Partner Site New Section
  - Users related Issue

  - Communications platform
  - Integration
  - New Report
  - Report Correction

  - Application Urgent Correction
  - Application Site Change
  - Application Site typo detected
  - Application Site New Section

- Urgency / Priority – When entering a ticket type, the client identifies the priority level. SU management subsequently reviews each priority and, internally, or in consultation with the client, assigns a priority to each issue.

- Assignment – Once entered, the issue is reviewed by SU teams in order to assign the appropriate resource(s) required to resolve the issue.

- History – Throughout the workflow, detailed descriptions of the problem, attempted solutions or workarounds, and other relevant information is recorded.

- Status – Each issue is assigned a status based on the resolution process.

- Response time – SU management routinely tracks and analyzes resolution response time to ensure SLAs are being met and to continuously improve.

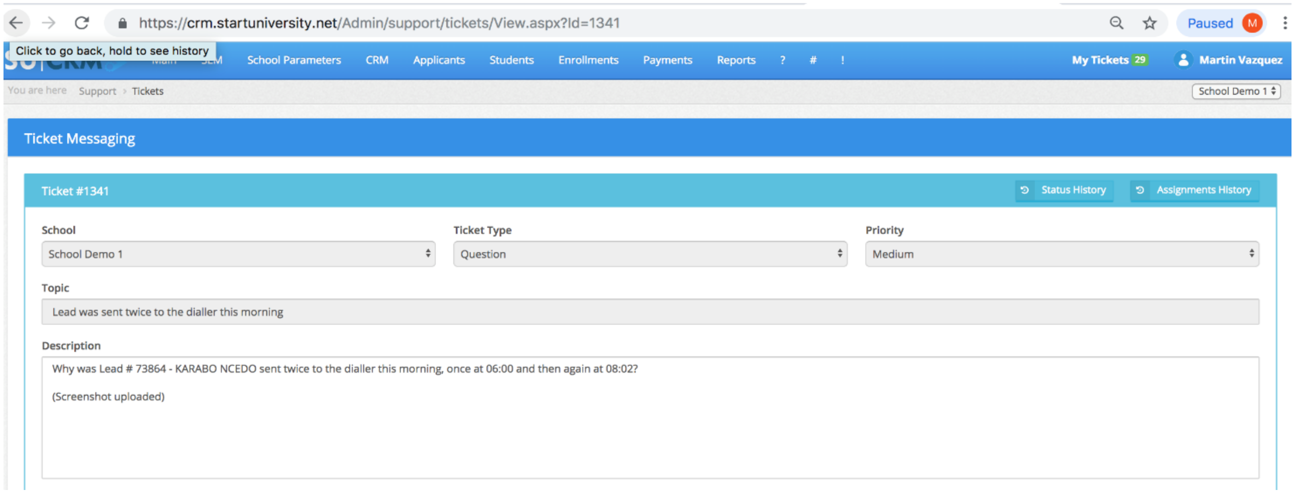
- Issue Disposition – SU management regularly tracks issue disposition for continuous improvement and to identify any potential trends.

- Knowledge bank addition – SU management reviews all issues to identify training issues and feature functionality for items that should be added to our knowledge bank.

- Change management – All changes are captured to maintain a comprehensive understanding of each change.

Example:

1. Entering a ticket (see illustration1) - Upon issue identification, the client initiates a ticket.

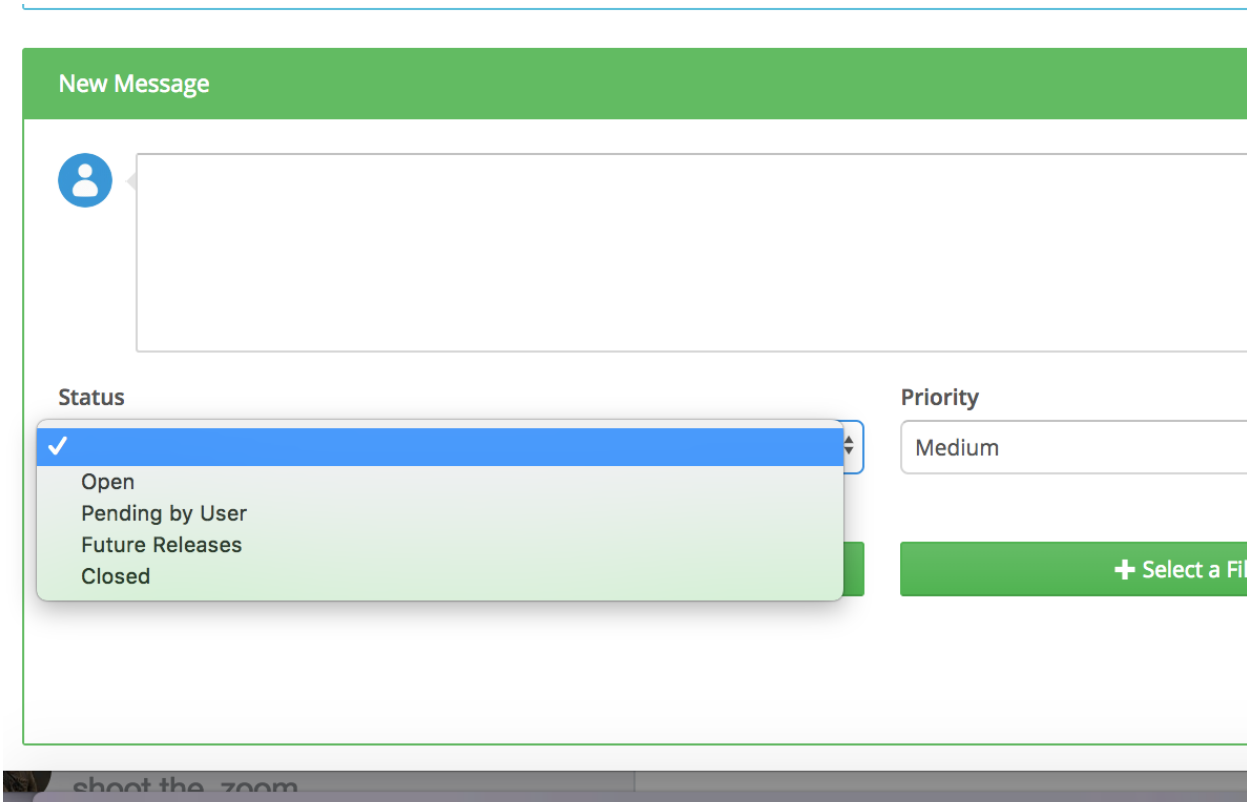


2. SU verifies the issue and attempts recreation as necessary. SU also works with the client to ensure information is complete (e.g. environment, when and how the issue occurs, etc.)

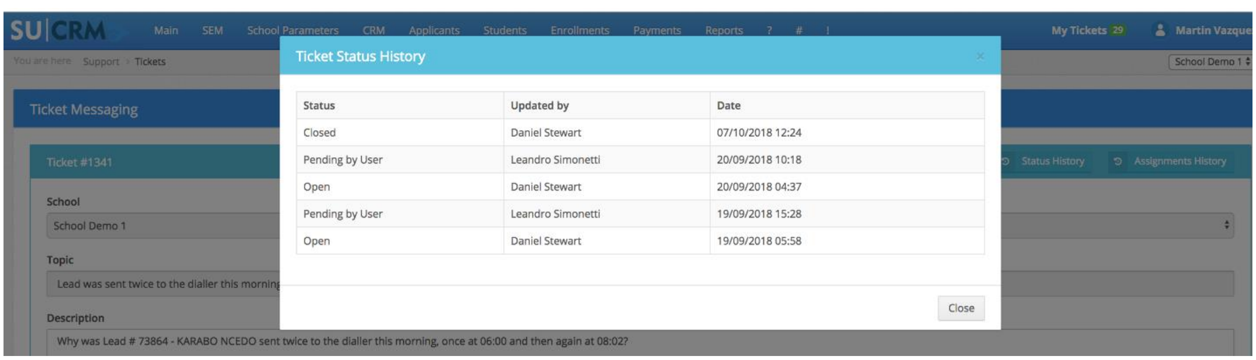
3. After verification, SU enters an estimated time for resolution.

4. Priority and urgency - Low priority issues are minor and resolved as time permits, urgent issues are investigated immediately (priorities and response times are outlined in each client's SLA.)

5. Status (see illustration 2)
   a. If the issue is training related, SU will assign a status of: Pending by User (indicating to the client that this is an issue to be addressed locally) – These issues are reviewed in the weekly client calls, if not sooner.
   b. As an issue is resolved by SU, the status is updated within the system (open to pending to future releases to closed)
   c. The status change is trackable.



6. Status History (see illustration 3) – Once an issue is resolved, it is marked as Closed in the issue tracking system. Only clients can mark tickets **Closed.** SU will mark the tickets as “pending by user” for the client to close.



7. Communication History (illustration 4) – All communication history, for each issue, is retained in the ITS.

Message History

Daniel Stewart 07/10/2018 17:24

Understood, thank you.

Leandro Simonetti 20/09/2018 15:18

Yes. When a lead is reassigned, it is sent to the dialer with the new operator assigned.

Daniel Stewart 20/09/2018 09:37

So just to clarify, it was as a result of this action under Assignments History?
19/09/2018 08:29 Lebogang Kutu Lebogang Kutu

Leandro Simonetti 19/09/2018 20:28

Same case as reported before. This is caused because the lead was reassigned after it was sent to the Dialer. Not sure why the call center guys are reassigning these leads. We don't have the chance to kill the previous request. We would need to analyze the options we have to apply in these cases.

Daniel Stewart 19/09/2018 11:40

Another example uploaded.

Daniel Stewart 19/09/2018 10:58

Why was Lead # 73864 - KARABO NCEDO sent twice to the dialler this morning, once at 06:00 and then again at 08:02?

(Screenshot uploaded)