
IM 1.4.01 Trailer Survey Process

Purpose:

The purpose of this document is to define the process and tasks associated with managing the Trailer Survey responses from clients.

Scope:

This process applies to all trailer survey responses provided by clients

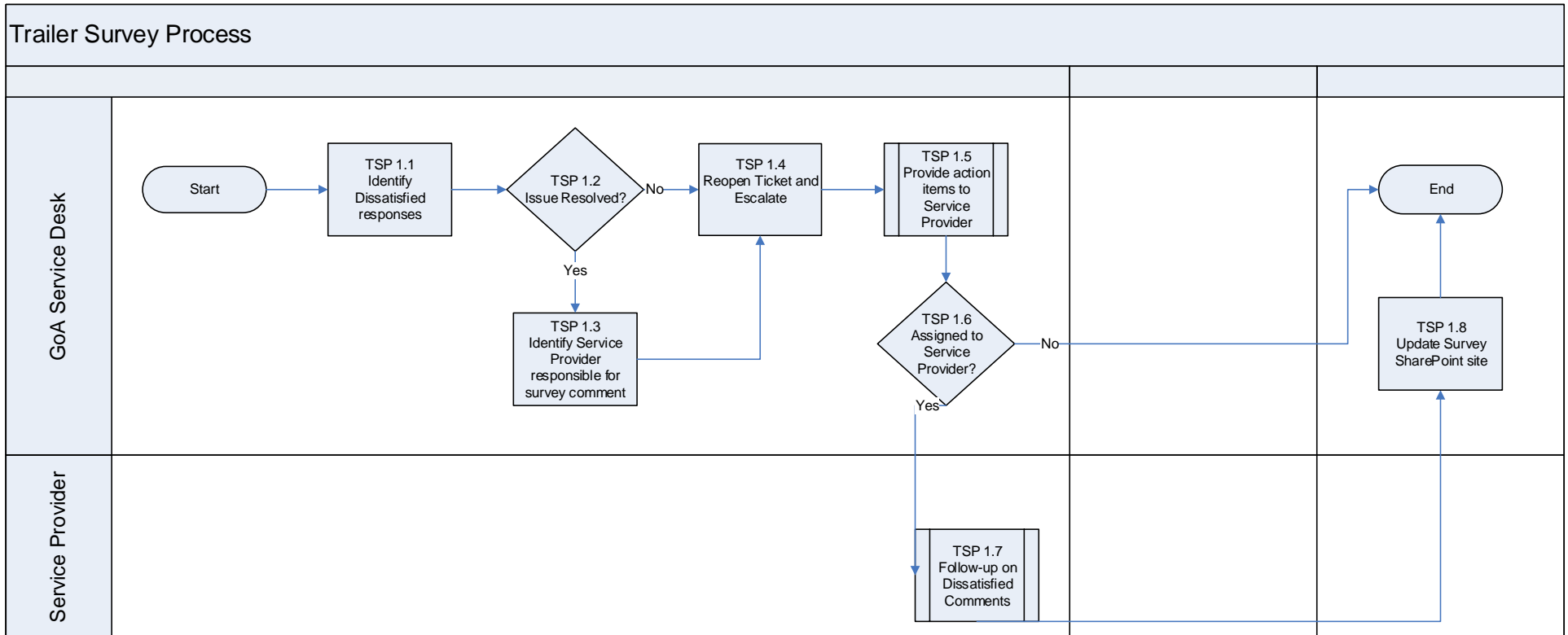
This process includes all steps up to, and including, identifying corrective actions required to prevent reoccurrence of a negative response.

Out-of-Scope:

Negative responses related to a Ministry internal service.

Exceptions:

Exceptions to this process must be approved by the Director of Client Relationship Management. Any process change will follow the formal Change Management Processes.



Business Rules:

- Trailer Survey is sent on every third Incident received.
- Follow up is required for every Survey with “Somewhat Disagree” or “Strongly Disagree for end to end service.
- The Service Desk is responsible for the review and initial assessment of all negative Surveys.
- The Service Desk is responsible for the initial contact with the client to help determine the reason for the negative survey and proper assignment of tickets if issue is not resolved.

Activities:

Table 1: Trailer Survey Process Activity Matrix

Activity	Inputs	Description	Outputs
TSP 1.1 Identify Dissatisfied responses	Trailer Survey Report	The Service Desk identifies dissatisfied comments and tickets that have not been resolved.	List of tickets requiring follow-up Resolution status of each ticket requiring follow-up
TSP 1.2 Issue Resolved?	Information from the client	Decision Point: Is client’s issue resolved? If YES: Move to TSP 1.3 If NO: Move to TSP 1.4	List of tickets to be to follow up on
TSP 1.3 Identify Service Provider responsible for survey comment	Set codes and add comments to the Survey site	The Service Desk will review comments to identify cause of dissatisfaction	Updated Trailer Survey site
TSP 1.4 Reopen Ticket and Escalate. Identify Service Provider responsible to follow up with client to resolve incident.	List of tickets requiring follow-up	The Service Desk will reopen ticket and notify Service Provider Incident Manager to have a tech assigned. Add work info entry to ticket indicating Trailer Survey identified ticket was not resolved. Review ticket “Work Info”	Notification to Service Provider Incident Manager Updated work log

Activity	Inputs	Description	Outputs
		and “Audit Log” to determine which team is most appropriate for following up on the comments	
TSP 1.5 Provide action items to Service Provider	Updated list of tickets requiring follow-up	Service Desk will provide client and CIM comments to Service Provider	Update Trailer Survey SharePoint site Notification to Service Provider team
TSP 1.6 Assigned to Service Provider?	Updated list of tickets requiring follow-up	Decision Point: Assigned Service Provider will determine if ticket is for them. If YES: Move to TSP 1.7 If NO: Process complete	Service Provider follow-up
TSP 1.7 Follow-up on Dissatisfied Comments	Service Provider follow-up	Each service provider follows up on the comments provided by CIM or the Service Desk	Communication with Service Provider
TSP 1.8 Update Trailer Survey site	SharePoint site update	Service Desk will update the Trailer Survey site with survey response	Update Trailer Survey site updated

Terms of Reference:

Assignee Service Provider: Service Provider listed as assigned in ITSM.

Responsible Service Provider: Service Provider responsible for following up on the trailer survey comments.

Sub-Process Activities:

Table 2: TSP 1.5 Sub-Process Activity Matrix

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TSP 1.7.10 Complete and Send Trailer Survey Response	Updated Trailer Survey Response Form with possible actions to prevent reoccurrence	Complete Trailer Survey Response form attached to follow up request Send response to sa.dutycim@gov.ab.ca with subject line of Trailer Survey Response	Updated Trailer Survey Response Form

Roles and Responsibilities:

Table 2: Trailer Survey Process RACI Matrix

Trailer Survey Process RACI Matrix								
R = Responsible, A = Accountable, C = Consulted, I = Informed								
Activity	Client	Service Desk	Assigned Service Provider Support Team	Service Provider Support Team Incident Manager	Corporate Incident Management	Service Delivery Manager	Affected Service Provider Manager	GOA Functional Director
TSP 1.1 Identify Dissatisfied Rating Tickets				C	R,A			
TSP 1.2 Ticket Resolved?	C		C	I	R,A			
TSP 1.3 Reopen Ticket and Escalate			I	I	R,A			
TSP 1.4 Identify Service Provider responsible for survey comment				C	R,A			
TSP 1.5 Provide Comments to Service Providers				I	R,A			
TSP 1.5.1 Select Tickets for each Service Provider					R,A			
TSP 1.5.2 Add Special Instructions as needed					R,A			
TSP 1.5.3 Send Follow-up Request to Service Providers			I		R,A			
TSP 1.5.4 Update Tracking Log					R,A			
TSP 1.6 Assigned to ES Service Provider?					R,A			
TSP 1.7 Follow-up Dissatisfied Comments	C			R	A			
TSP 1.7.1 Review Client and CIM Comments			R,A					
TSP 1.7.2 Review Incident Ticket			R,A					
TSP 1.7.3 Correctly Assigned?			R,A		I			

TSP 1.7.4 Contact CIM for Reassignment			R,A		I			
TSP 1.7.5 Reassign Follow-up			I		R,A			
TSP 1.7.6 Contact Client	C		R,A					
TSP 1.7.7 Identify Reason for Dissatisfaction	C		R,A					
TSP 1.7.8 Take Action to Correct Dissatisfaction			R	A				
TSP 1.7.9 Take Action to Prevent Reoccurrence			R	A				
TSP 1.7.10 Complete and Send Trailer Survey Response			R,A					
TSP 1.8 Perform Quality Check					R,A	I		
TSP 1.9 Update Weekly Report to Enterprise Services Executive					R,A			

Measurements:

Every Process will have a balanced set of measurements (Key Performance Indicators) against which its performance can be tracked, communicated and improved. As the process matures, the KPI's and review cycle may be modified based on the Process Owner's discretion. The tables below identify the KPI/report and the measurement criteria.

Table 3: Trailer Survey Process Measurements

Trailer Survey Process	Report and Review Cycle					
	Daily	Weekly	Monthly	Every 3 Months	Every 6 Months	Yearly
KPI/Report						
Number or % of Trailer Survey Response Forms completed within one week of receipt of comment from Trailer Survey Report		X	X			

Document Review:

The document will follow the Review schedule below:

Annual Review: The document shall be reviewed for completeness and accuracy every October 14th. The Document Owner is accountable for performing an annual Document Review.

Ad-hoc Review: Ad-Hoc requests for document revision should be directed to the Document Owner and submitted using the Change Management Process and supporting systems. The Document Owner is accountable for managing the ad-hoc document revisions.

Associated Documents:

- Trailer Survey Weekly Report to Enterprise Services Executive
- Trailer Survey Daily Tracking Log
- Trailer Survey Response Form

Document Review Schedule:

The *Document Owner* is accountable for managing revisions of this document.

Annual:

The document shall be reviewed for completeness and accuracy annually. Each review should be completed on or before the last day of the month shown in the document properties below.

Ad-hoc:

Ad-Hoc requests sent to SA Duty CIM <sa.dutycim@gov.ab.ca> shall be reviewed.

Document Properties			
Version	3.0	Effective Date	04/01/2013
Annual Review	October	Last Reviewed / Revised	07/09/2018 (MDY)
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Document Owner	Lisa Fleming		
Role	Mgr. Incident & Problem Mgmt.		
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