

New Organization

Customer Support & Training Department

Customer Support Dept

Quick Turn-Around Inquiries
Technical Resolution Inquiries
Product Support
Documents
DAC
Registrations
Miscellaneous Projects

Training Dept

Market Participant
Courses
Employee Development
Compliance Training
Employee Market &
Technical Training
On-Line Training

Customer Relations Function

Customer Relations

Departmental Objectives:

- **Accuracy**
- **Speed**
- **“Customer Service”**

Customer Relations Function

Re-Organization:

- Track all inquiries
- Triage all inquiries
- Process what we can immediately / “in-day”
- Specialty desks / Research Capabilities
- Customer Account capability--- but not for inquiries
- Product Support – New / existing areas
- Documentation – Manuals, Tech Bulletins,
Internal documents
- Ongoing Functions: DAC, Registrations, etc...

Re-Organized Function

Inquiry

Tier 1:

[Roger Kirkpatrick]

Receive calls
Create Tickets
Triage
Resolve Short-Term Inquiries

Documents

Administrative

If

Tier 2:

[Bob Friend]

Tech Reso
SME Reso
Product Support
Registrations

NYISO SMEs

Various Depts

Account Reps:

[Art Storey]

Customer
Advocacy &
Support
DAC

Training

[Paul Kiernan]

Re-Organization: Steps

- **Planning**
- **Defining positions**
- **Obtaining Supervisors**
- **Interviewing / Assigning staff / Internal Org**
- **Initial Customer Rep Training**
- **“Rolling out” Process**
- **Ongoing Maintenance:**
 - **Fine Tuning**
 - **Customer inputs**
 - **More Lean Six Sigma applications**
 - **More training**
 - **Measuring results & follow-up**