

Service Excellence Action Plan for Office of the Controller - Disbursements

Dimension	Action Step	Timeframe
Knowledge	<p>Develop internal procedural documents to standardize employee onboarding and ensure consistent invoice processing across all staff.</p> <p>Attend monthly Disbursements staff meetings to share knowledge and ideas and problem solve. Supervisors meet with smaller teams as needed.</p> <p>Attend OOTC retreat.</p> <p>Attend all A&amp;F town halls meetings to increase overall knowledge of other A&amp;F units.</p>	<p>Has begun and will be completed by Dec. 2024.</p> <p>Has begun and ongoing</p> <p>October 2024</p> <p>Has begun and ongoing</p>
Communication	<p>Respond to inquiries/questions, etc. within 48 hours, even if not yet resolved. Maintain this practice after the customer service tool is implemented.</p> <p>Each employee will have cameras on during virtual unit meetings.</p> <p>Work with CITS to add in Cisco Webex phone feature to all laptops for seamless phone responses.</p>	<p>Has already begun and ongoing</p> <p>Has already begun and ongoing</p> <p>Set up by end of August, 2024</p>
Process Improvement	<p>Using Adobe Pro, transition to completing state batches electronically to allow for more timely processing of invoices. Work with the state to send the reports electronically and work with CITS to create a place to receive the information.</p> <p>Revise website to make information easier to search for the user.</p> <p>Continue with bi-weekly Travel drop in sessions. Add sessions for Study Participant Payments (SPP). Resume Disbursements Workshops (upcoming for non-PO payments) as-needed. Send out announcement in Elm and Quantum Bits &amp; Bites and email to frequent users.</p>	<p>Begun in June, will be completed by the end of August, 2024</p> <p>Has already begun. Complete within 6 months</p> <p>Next workshop scheduled for fall 2024</p>

Attitude	<p>Create Customer Service Standards and scripts to help employees navigate customer interactions.</p> <p>Have a guest speaker at a staff meeting to train on navigating difficult conversations with customers. Supervisors to assign additional Percipio modules to staff as needed.</p>	<p>Scripts/scenarios created by end of 2024 by Disbursements team .</p> <p>Already begun and on-going</p>
Ownership & Accountability	<p>Develop internal procedural document to standardize follow-up processes</p> <p>Identify and create reports in Quantum and Image Now for various transactions to confirm that a transaction has been completed.</p>	<p>By Dec. 2024</p> <p>Has begun, will be complete by end of October.</p>