

U.S. Department of Treasury

CRM Case Study

OHRES

The Department of Treasury, best known for its many bureaus, was created by a law enacted by the U.S. Congress September 2, 1789 and is the second oldest department in the Federal Government. The Treasury department consists of the following bureaus: *ATF, USCS, DO, USSS, TIGTA, BEP, IRS, FMS, BPD, OCC USCS, MINT, FLETC, OTS, OIG*

U.S. Department of Treasury - Office of Human Resources Enterprise Solutions (OHRES) has partnered with Northrop Grumman Information Technology (IT) to modernize operations of Treasury human resources systems. OHRES management states that, "through OHRES new enterprise-wide human resources system, utilizing PeopleSoft HR, and a legacy NFC-based technology we are committed to improving customer service, product quality and expanding the number of functional capabilities in production."

The main program of OHRES is the large HR implementation, dubbed HR Connect, which will initially rollout to all bureau level HR personnel with the "End-State Model" reaching to all 150,000+ Treasury personnel. To support this large program, OHRES needed a system to track all technical support, development, testing and infrastructure workflow between OHRES and the bureaus as well as internal workflow within OHRES. To facilitate this, program management selected the CRM tool Clarify to fill their requirements.

Addressing the Treasury's Needs with CRM
The OHRES organization within Treasury consists of four groups with more than 170 individ-

uals supporting the extensive program. The following groups exist in the OHRES organization: Finance and Administration; Customer Support; Research and Development; Technical Architecture

A multi-tier 3-level technical support operates with tier 1 held by each bureau and tier's 2 and 3 held by Customer Support at OHRES. Finance/Admin and Customer Support (tier 2 support) are the main groups to have constant contact with bureau level personnel. To do their jobs effectively, the technical support analysts must interact and share information with all bureaus, including the other groups within OHRES and the legacy HR system, NFC.

Previously, communication consisted of conference calls, telephone calls, and email and manual reports. In addition, the current internal paper work order process was laden with mis-cues and missing work orders, which frustrated internal staff. The OHRES program had now grown to the point where management realized that, in addition to being time consuming and inefficient, this method of communication did not provide a means of measuring internal productivity and service levels required by the bureaus -a progressively more important objective. In its quest to create a more effective and efficient organization, OHRES selected Clarify for its CRM application, and turned to program contractor Northrop Grumman IT to tailor the CRM solution to meet their needs.

IT

Multi-phase implementation

Northrop Grumman IT created a multi-phased solution that allowed OHRES to quickly increase service levels to the bureaus and continue to expand and add functionality as needed.

Phase 1 Goals

1. Rollout Clarify to 112-seat user base, inside 90 days
2. Restructure support processes
3. Customization to Clarify in support of processes
4. Develop a basic reporting tool to be used on the OHRES intranet by bureau-level personnel, accessing Clarify data.

Phase 1a Goals

1. Completion of training
2. Rollout new paperless work order process
3. Additional customizations to Clarify application
4. Maintenance and support of Clarify

Above and Beyond Goals

1. Clarify implemented on all 170+ OHRES personnel
2. Implemented Clarify on the Finance and Administration group
3. Installation /implementation of third party reporting tool, Actuate eReports

All above goals were achieved within the project timeline. A project that normally takes 6-9 months utilized Rapid Deployment (RAD) and completed Phase 1 with 90 days.

In Phase 1a, a new paperless work order process was developed. After initial requirement, gathering for the new process it became obvious that ALL OHRES personnel would need access to the Clarify tool, since all personnel can submit work orders. This opened up an additional challenge of increasing the user base beyond its original intention of 112 users. Additional training was conducted. The rollout of the paperless work order process was a success. Clarify now tracks all Work Order requests and eliminated the missing Work Orders and miscues, providing for an efficient process, which added hours of productivity per week.

Meeting numerous milestones and successes gave Northrop Grumman IT the momentum to push the CRM project further. Training was increased to accommodate all 170+ OHRES personnel and implement Clarify into the previously Finance and Administration group. At this point in Phase 1a, we are in a maintenance mode. Additional customizations and configurations have been made to the application to facilitate the various processes in the OHRES office.



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