Defense Logistics Agency
INSTRUCTION

DLAI 3000.05
Effective: August 2, 2024

OPR: DLA Logistics Operations (J3), Customer Support (J31C)

SUBJECT: Customer Relationship Management (CRM) Execution Policy

REFERENCES:

(a) DLA General Order No: 11-22, November 2, 2022
(b) DLA Instruction (DLAI) 3000.05, "Customer Relationship Management Execution Policy", August 2, 2018 (hereby superseded)
(c) DLA Instruction 8180.01, "Records and Information Management", September 27, 2023
(d) DLA Records Retention Schedule (RRS), January 31, 2023

1. PURPOSE: In accordance with Reference (a) this DLAI:

   a. Establishes policy, assigns responsibility, and provides high-level procedures for the implementation and use of Customer Service Management (CSM), the application used to manage the approved CRM Strategy of providing next generation customer support.

   b. Supersedes and cancels Reference (b).

   c. Provides overarching policy for the use of CSM for all DLA customer engagements[1].

   d. Outlines the high-level process for the CSM Service Module resident on the ServiceNow (SNOW) platform.

   e. Defines the CRM Key Performance Indicators (KPIs), a DLA Customer Service Agent, and what is considered a business day in CSM.

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[1] A customer engagement is any interaction with a customer, whether one-way communication (self-help tools, customer feedback) or two-way (white glove service, engagement events, training).

f. Serves as the overall policy for the DLAM 3000.05 procedural manual on CSM Case Management.

g. Maintains Opportunity Management under the CRM program.

2.   SUMMARY OF CHANGES: This DLAI provides guidance on the CSM application residing on the SNOW platform. Account Management and Customer Outreach outlined in Reference (b), hereby superseded, have not transitioned to SNOW, and therefore are not covered in this Instruction.

3.   APPLICABILITY: This DLAI applies to all DLA activities who provide a customer service via a customer engagement or through Customer Service Agents[2] (CSAs) as defined in this document.

4.   POLICY: It is DLA policy that all DLA CSAs will use CSM to document their significant customer interactions as defined in this document. This includes interactions via email, phone, Customer Interaction Center (CIC), site visits, training, and strategic engagements.

5.   RESPONSIBILITIES: See Enclosure 1.

6.   PROCEDURES: See Enclosure 2.

7.   INFORMATION REQUIREMENTS:

a. CSM Business process information is readily available at Customer Service Management (dla.mil).

b. Preserve and maintain records, in any media – electronic or paper, to protect the business, legal and financial rights of the Government according to DLA RIM policy and the DLA Records Retention Schedule.

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[2] A DLA Customer Service Agent (CSA) is a DLA employee (as designated by their organization) who directly or indirectly provides customer service via one or more types of customer interaction. This includes but is not limited to the following divisions: Customer Support, Military Service Support, Whole of Government, Nuclear Enterprise & Space Support, regional commands, corporate events, Major Subordinate Command (MSC) Customer and Supplier Operations. An example of direct customer service is a Customer Support Representative (CSR) embedded with the DLA customer at their location; An example of indirect service is a Supplier Operations employee at an MSC HQs who provides information back to the Customer Account Specialist (CAS) to answer a customer question.

8. RELEASABILITY: UNLIMITED. This Instruction is for public release. It is available on the internal DLA Issuances Website.

9. INTERNAL CONTROLS:

   a. To monitor CSM goals, the J31C Customer Support Division will host monthly Site Integrator Meetings with all stakeholders to review and provide guidance on metrics, particularly Case Resolution Time (CRT), which will be reevaluated biannually. All briefing slides and minutes will be available at Customer Relationship Management (CRM) - CSM PMO Site Integrator Slide Deck - All Documents (dps.mil).

   b. To evaluate the CSM process and procedures, J31C will assess each Major Subordinate Command (MSC) and applicable J-code during periodic Agency Management Reviews (AMRs). All documents relating to AMR can be found at AMR (dps.mil).

   c. To ensure the CSM process is understood and followed, J31C, in coordination with Program Executive Office (PEO) Enterprise Applications, J62, will develop and provide CSM training for both sustainment (J31C) and new capabilities (J62).

10. EXPIRATION DATE: DLA will reissue or cancel this Instruction by the fifth anniversary of its effective publication date. If not, it will automatically expire.

ALEETA D. COLEMAN
Director
DLA Transformation

Enclosure(s)
        Enclosure 1 – Responsibilities
        Enclosure 2 – Procedures
        Enclosure 3 – Key Performance Indicators
Glossary

ENCLOSURE CONTENTS

ENCLOSURE 1: RESPONSIBILITIES

1. <u>DIRECTOR, LOGISTICS OPERATIONS (J3) under the authority, direction, and control of the DLA Director</u>, will have overall responsibility and oversight of the DLA CRM policy and execution thereof.

2. <u>COMMANDERS AND DIRECTORS OF MAJOR SUBORDINATE COMMANDS, J-CODES, D-STAFFS, AND REGIONAL COMMANDS</u>, will:

    a. Ensure all significant customer interactions are documented in CSM.

    b. Ensure both Customer Operations and Supplier Operations interactions are captured in CSM.

    c. Coordinate CSM process execution as well as program support with all MSC CRM Site Integrators (SIs) and Business Process Analysts (BPAs) (site assigned) to ensure execution and accountability.

3. <u>DIRECTOR, DLA PORTFOLIO MANAGER ENTERPRISE CAPABILITIES (J62B)</u>, will:

    a. Develop and deliver training for all new CSM capabilities prior to fielding.

    b. Assist J31C and potentially J1 with development of sustainment training.

    c. Provide CSM Program updates at monthly Site Integrator Meetings.

4. <u>DIVISION CHIEF, CUSTOMER SUPPORT DIVISION (J31C)</u>, will:

    a. Ensure this policy is maintained and current.

    b. Provide policy and process oversight.

    c. Direct/guide/approve all matters related to the CSM process including MSC and end-user support.

    d. Ensure intra-process integration (includes coordination across sites on processes, policies, procedures, and business rules).

    e. Coordinate CSM process execution as well as program support with MSC CRM SIs and BPAs (site assigned).

    f. Coordinate system requirements with our CRM Sustainment Teams (both functional and business intelligence).

g. Approve position descriptions, performance plans, and system access profiles.

h. Add/approve CSM KPIs and metrics.

i. Provide stewardship for CRM Process Area (participate / lead process improvement events).

j. Conduct regular reviews of metrics in support of the AMR process to ensure significant customer interactions are accurately and timely entered and worked in the CSM application.

k. Conduct regular reviews of CSM customer survey responses. Follow-up action will be taken on customer concerns and training opportunities will be implemented as applicable.

l. Conduct regular review of MSC/CIC metrics during monthly Site Integrator meetings to ensure timely response to customer inquiries. This includes, but is not limited to aged open cases, Service Level Agreements (SLAs), and top reasons for open cases.

m. Manage Business Partner Identification (BPIDs) in Enterprise Business Systems (EBS) and Assignment Groups in CSM. BPIDs will be reviewed / updated quarterly.

n. Coordinate and provide CSM sustainment training to new and existing users.

ENCLOSURE 2: PROCEDURES (High-Level)

1. <u>CSM CASE MANAGEMENT</u>:

   a. The DLA CSM Case Management process involves lifecycle documentation of customer interactions from initial contact through case resolution[3]. This process provides an approach in addressing customer requirements which drives efficiencies and quality control in customer service. The three levels of Case Management are Level 1[4], Level 2[5], and Level 3[6].

   b. Level 1 is the entry point for customer interactions via phone or email. Interactions are documented by creating a case in CSM. Level 1 will provide a timely and accurate response to customers inquiries and issues. Cases that need additional research/action are escalated to the appropriate Level 2 for resolution.

   c. Level 2 will research the customer issue. If unable to resolve, the case will be escalated to the appropriate Level 3.

   d. Level 3 additional research of customer issue. Once Level 3 has resolved the issue, a response will be provided to the Level 2 of record.

   e. Level 2 will provide resolution upon case closure.

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[3] A case is considered resolved when actionable information is provided back to the customer. i.e. an estimated award date, contract delivery date, an estimated ship date or an answer to an expedite request.
[4] Level 1 is defined as the Customer Interaction Center.
[5] Level 2 is defined as any CSM Cell/Assignment Group that receives an escalated case, i.e. Customer Operations and equivalent.
[6] Level 3 is defined as any CSM Cell/Assignment Group that receives an escalated case that needs additional research, i.e. Supplier Operations and equivalent.

ENCLOSURE 3: KEY PERFORMANCE INDICATORS

1. Customer Satisfaction (CSAT):

    a. Indicates the degree of how well DLA is meeting the customer's needs and expectations.

    b. Measured in the standard format of customer surveys following customer engagements.

    c. The CSAT metric will be briefed at senior leader forums, i.e., Executive Board/Alignment Group, and reviewed at CRM SI Meetings periodically.

    d. CSAT can be found on the Customer Service Manager Dashboard.
Customer Service Manager | Prod (servicenowservices.mil)

    e. The baseline CSAT goal is 85% (either satisfied or extremely satisfied).

2. Case Resolution Time (CRT):

    a. The elapsed time from case creation to case closure.

    b. Measured in business days as defined in Glossary, Part II.

    c. There is an inverse relationship between CRT and CSAT- a lower CRT will likely result in a higher CSAT.

    d. The CRT metric will be briefed at senior leader forums, i.e., Executive Board/Alignment Group, and reviewed at CRM SI Meetings biannually.

    e. CRT can be found on the Customer Service Manager Dashboard.

    f. The baseline Enterprise CRT is 85% in 8 business days or less for Levels 1, 2, and 3 combined.

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

AMR	Agency Management Review
BPA	Business Process Analyst
BPID	Business Partner Identification
CAS	Customer Account Specialist
CIC	Customer Interaction Center
CRM	Customer Relationship Management
CSM	Customer Service Management
CSR	Customer Support Representative
CSA	Customer Service Agent
CSAT	Customer Satisfaction
CLSS	Customer Logistics Site Specialist
DTC	DLA Training Center
EBS	Enterprise Business System
HQ	Headquarters
KPI	Key Performance Indicator
MSC	Major Subordinate Command
MSS	Military Service Support
NESO	Nuclear Enterprise Support Office
OPS	Operations
PMO	Program Management Office
SI	Site Integrator
SLA	Service Level Agreement
SNOW	ServiceNow
WOG	Whole of Government

PART II. <u>DEFINITIONS</u>

Actionable Information	The point where a CSA has provided all available information and taken (or is taking) all available steps to meet the customer's need.

- It is not limited to a specific requirement: i.e. Award of contract.
- Puts the customer at a decision point: i.e. to wait for the item to arrive, to obtain the item from another source (cannibalize off similar equipment, COTS…), cancel the order, etc.

Business Day	A 24-hour period, excluding weekends and holidays, i.e. a case created at 7:00 pm on Friday would be one business day until 7:00 pm on Monday.
Business Process Analyst	An analyst for a Business Process (i.e. Planning, Order Fulfillment, Finance, Procurement), analyzing policy, procedure, and recommending system enhancements. The BPA is responsible for understanding system functionality and business capabilities. Recommends changes in how the process is executed, including system changes or other process improvements. Based on analysis of performance results and/or trends, generates written reports with process improvement recommendations for top-level management briefings and for submittal to the Process Owner.
DLA Customer Service Agent (CSA)	A DLA Customer Service Agent (CSA) is a DLA employee (as designated by their organization) who directly or indirectly provides customer service via one or more types of customer interaction. This includes but is not limited to the following divisions: Customer Support, Military Service Support, Whole of Government, Nuclear Enterprise & Space Support, regional commands, corporate events, Major Subordinate Command (MSC) Customer and Supplier Operations. An example of direct customer service is a Customer Support Representative (CSR) embedded with the DLA customer at their location; An example of indirect service is a Supplier Operations employee at an MSC HQs who provides information back to the Customer Account Specialist (CAS) to answer a customer question.

Customer Engagement

Any interaction with a customer, whether one-way communication (self-help tools, customer feedback) or two-way (white glove service, engagement events, training).

Customer Relationship Management

The name of the program managed by the DLA J31C CRM Program Office. Established within DLA in 2006, the program is intended to improve customer support.

Customer Service Management

A case management application provided by ServiceNow. Case Management was the only module that transitioned from the legacy CRM application in EBS.

Level 1 Agent

Defined as the Customer Interaction Center, the entry point for customer interactions.

Level 2 Agent

Defined as any CSM Cell/Assignment Group that receives an escalated case, i.e. Customer Operations and equivalent.

Level 3 Agent

Defined as any CSM Cell/Assignment Group that receives an escalated case that needs additional research, i.e. Supplier Operations and equivalent.

Opportunity Management (OM)

Opportunity Management is the CRM framework for gathering information and tracking/managing activities requiring DLA resources to work with/convince a specific customer to procure products/services from or do business with DLA.

Significant Customer Interaction

Any assistance provided to a customer that results in transactional, and/or information that allows a customer to come to a decision point.

Site Integrator

Represents each organization regarding customer support activities and participates on Enterprise teams/forums as they relate to Customer Support. Continually assesses new customer initiatives, systems capabilities/functionality, processes to enhance customer support. Champions organizational changes or work processes to improve customer support.

White Glove Service

Face-to-face interaction between a CSA and a customer, usually involving a CSA embedded with a specific group of

customers, who uses all available resources to manage life-cycle logistics in hopes of a positive customer experience.