Defense Logistics Agency
MANUAL

DLAM 3000.05
Effective: December 23, 2024

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

SUBJECT: Customer Service Management (CSM) Case Management Procedures

REFERENCES: See Enclosure I.

1. PURPOSE: In accordance with Reference (b) this DLAM:

a. Outlines the business rules for managing all levels of customer CSM Case Management in CSM.

b. Supersedes DLAI 3000.07, Customer Interaction Center (CIC), providing detailed procedures for Level 1 CSM Case Management.

c. Outlines Business Process Identification (BPID) procedures.

d. Provides CSM Case Resolution Time (CRT) for CSM Case Management.

2. SUMMARY OF CHANGES: None. This is the initial DLA Manual on CSM Case Management. It must be reviewed in its entirety.

3. APPLICABILITY: The responsibilities and procedures documented in this manual apply to all functional users as defined in the glossary, supervisors and managers who manage CSM Cases.

4. DEFINITIONS: See Glossary.

5. RESPONSIBILITIES: See Enclosure 2.

6. <u>PROCEDURES</u>: See Enclosures 3,4,5 and 6.

7. <u>INFORMATION REQUIREMENTS</u>:

a. DLAI 3000.05 is the overall policy that requires applicable users to have access and use CSM in ServiceNow for CSM Case management. Local policy defines applicable CSM users.

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 Records and Information Management (RIM) policy and the DLA Records Retention Schedule.

8. <u>RELEASABILITY</u>: UNLIMITED. This Manual is approved for public release. It is available on the internal DLA Issuances Website.

9. <u>INTERNAL CONTROLS</u>:

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 https://dlamil.dps.mil/:f:/r/teams/CRMSITeam/Shared%20Documents/General/Monthly%20SI%20Slides?csf=1&web=1&e=a5K22R.

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 J62 Information Systems and J1 Training, will develop and provide CSM training for both sustainment and new capabilities.

10. <u>EXPIRATION DATE</u>: DLA will reissue or cancel this Manual by the fifth anniversary of its publication date. If not, it will automatically expire.

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Enclosure(s)
       Enclosure 1 – References
       Enclosure 2 – Responsibilities
       Enclosure 3 – Level 1 Procedures
       Enclosure 4 – Level 2 Procedures
       Enclosure 5 – Level 3 Procedures
       Enclosure 6 – BPID/Assignment Group Procedures
       Enclosure 7 – CSM Metrics
Glossary
       Part I.   Abbreviations and Acronyms
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ENCLOSURE 1: REFERENCES

(a) DLA General Order No: 11-22, November 2, 2022
(b) DLAI 3000.05, "Customer Relationship Management Execution Policy", August 2, 2024
(c) DLAI 5025.18, "Enterprise Post Award Request (PAR) Program", February 5, 2021
(d) DLAI 5025.18, "Enterprise Status Post Award Request (PAR) Instruction", March 26, 2021
(e) Memorandum of Agreement #LM-CSM-20230301, "Pre/Post-Award Communication & Support Via CSM ServiceNow", March 01, 2023
(f) DLA Records Retention Schedule, October 26, 2023
(g) DLAI 8200.01, "Agency Management Review (AMR) Program", July 22, 2019
(h) DLAI 4000.08, "Expediting a Sales Order", October 3, 2023

ENCLOSURE 2: RESPONSIBILITIES

1. DIRECTOR, LOGISTICS OPERATIONS (J3) will:

a. Have overall responsibility and oversight of the DLA CSM policy.

b. Ensure the proper execution and adherence to this policy.

2. COMMANDERS AND DIRECTORS OF MAJOR SUBORDINATE COMMANDS (MSCs), J-CODES, D-STAFFS, AND REGIONAL COMMANDS will:

a. Ensure all applicable CSM users adhere to the procedures outlined in this Manual.

b. Ensure both Customer Operations (Level 2) and those personnel in Supplier Operations (Level 3) designated by MSC leadership use CSM.

c. Monitor Level 2/3 metrics and develop action plans when not meeting goals.

3. DIVISION CHIEF, CUSTOMER SUPPORT DIVISION (J31C) will:

a. Ensure this policy is maintained and kept up to date.

b. Provide policy and process oversight for CSM Case management.

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

d. Ensure inter-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 Site Integrators and site assigned Business Process Analysts (BPAs).

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

g. Review and approve CSM training.

h. Approve position descriptions, performance plans and system access profiles for J31C.

i. Review/analyze CSM Key Performance Indicators (KPIs) and metrics.

j. Provide stewardship for CSM Process Area (participate/lead process improvement events).

k. Conduct regular review of metrics in support of the Agency Management Review (AMR) process to ensure customer engagements are accurately and timely entered (submitted) and worked in the CSM application.

l. Conduct regular review of CSM Service Management customer survey responses and ensure follow-up action is taken on customer requests and implements any training opportunity as applicable.

m. Conduct regular review of MSC/CIC metrics during monthly Site Integrator (SI) meetings to ensure timely response to customer inquiries. This includes, but is not limited to, open CSM Cases over an extended period, Service Level Agreements (SLAs) and top reasons for open CSM Cases. Metric review template is provided at Enclosure 7.

n. Collaborate with the MSCs on Agency Performance Review (APR) metrics at least ten business days prior to APR.

o. Manage Business Partner IDs (BPIDs) in Enterprise Business System (EBS) and Assignment Groups (AGs) in CSM.

p. Monitor Level 1 metrics and develop action plans when not meeting goals.

4. <u>BUSINESS PROCESS ANALYSTS</u> will:

a. Report CSM/SN issues to the CRM Program Office.

b. Manage CSM user assignments for their respective MSC.

c. Provide CSM Training to new users and additional training as needed.

d. Monitor metrics for their respective MSC.

5. <u>DLA CUSTOMER SERVICE AGENTS (CSAs)</u> will:

a. Ensure customer engagement activities are documented and tracked through ServiceNow, from initial CSM entry to final resolution utilizing the appropriate CSM application.

b. Adhere to the procedures outlined in this manual.

c. Report all issues and concerns regarding CSM to the CRM Program Office.

ENCLOSURE 3: LEVEL 1 PROCEDURES

1. The CIC agent captures/validates customer information in the CSM application Account and Contact Records.

2. Create a CSM Case utilizing the applicable account and contact information. Within the CSM Case, capture the customer's inquiry.

3. The CIC will utilize various systems to research the customer's inquiry and determine the required actions to resolve and close. If further assistance is required, escalate to the appropriate Level 2.

4. Advise customers that their first choice to seek resolution assistance should be their own service-related self-help tools and/or DLA's Self-Help Resources (e.g., Federal Government's e-Commerce online shopping system - FedMall).

5. For CIC metrics per the contractual agreement, see Enclosure 7.

ENCLOSURE 4: LEVEL 2 PROCEDURES

1. DEFINITION: A Level 2 CSM Case occurs when escalated from Level 1, created at Level 2, or systemically submitted by a customer. CSM will be the application used for CSM Case management.

2. GETTING ACCESS TO CSM:

    a. Apply for the appropriate AMPS role using one of the following:

        (1) Training QA – CSM-301 (ServiceNow Agent)

        (2) Training QA – CSM-302 (ServiceNow Agent Manager)

        (3) Training QA – CSM-303 (ServiceNow Supplier Ops)

        (4) Production – CSM-201 (ServiceNow Agent)

        (5) Production – CSM-202 (ServiceNow Agent Manager)

        (6) Production – CSM-203 (ServiceNow Supplier Ops)

    b. Each environment requires the Assignment Groups (AGs) be set up individually. They do not transfer between Training and Production Environment.

    c. Once approved, use https://dlatraining.servicenowservices.mil/ to access training and https://dla.servicenowservices.mil/ for production.

    d. Request CSM Assignment Group through Request Membership in CSM. Reference the job aid for further assistance.

    e. Complete profile in CSM by selecting Primary Group.

3. CREATING A CSM CASE:

    a. Level 2 agents can either create a CSM Case or submit a Supply Assistance Request (SAR) in FedMall on behalf of the customer.

    b. Level 2 agents will provide problem in the problem notes.

    c. Check for existing CSM Cases. Level 2 personnel will exhaust all avenues of causative research before creating a new CSM Case and advise customer of self-help tools.

1. WORKING AN ASSIGNED CSM CASE:

    a. CSM Cases are assigned to CSAs by an Assignment Group gatekeeper or equivalent.

    b. CSM functions will be used for all escalation, communication, and resolution, i.e. emails, notes, and attachments related to the CSM Case.

    c. Level 2 personnel will exhaust all avenues of research before contacting Level 3 for causative research actions as well as document all their activities in CSM. Below is the required information for CSAs to verify and document in Notes tab of the CSM Case prior to escalating the CSM Case to Level 3:

    (1) Applicable to Land & Maritime, Troop Support, and Aviation:

        (a) Check for Stock on Hand (SOH).

        (b) Check Item/SIMI/Internal Notes (Current note within 30 calendar days).

        (c) Check Purchase Request (PR) Status.

        (d) Check Records Management using appropriate PR, Purchase Order (PO), or Smart Number (validate no open or recently closed PARs if Post-Award).

        (e) Check for existing CSM Cases.

        (f) Research and if applicable apply necessary PR Wedge options (if Pre-Award).

        (g) Check Internal Comment if PR is Tech-Blocked (MM03 > Basic Data 1 > Additional Data > Internal Comment).

        (h) If, by using the available resources, Level 2 cannot obtain the necessary information to answer the customer's query, Level 2 will escalate the CSM Case to the appropriate Level 3.

    (2) Applicable to Distribution and Disposition:

        (a) Assign CSM Case to yourself in CSM.

        (b) Read and identify problem.

        (c) Initiate interim response to customer.

        (d) Conduct preliminary research in Material Tracker and Web Visual Logistics Information Processing System (WEBVLIPs) / Logistics Data Gateway (LDG) to identify status and site associated with the requisition.

        (e) Conduct additional research in site specific Distribution Standard System (DSS) and /or Warehouse Management System (WMS).

(f) Assign the applicable Distribution Center (DC) to the CSM Case if a site issue.

(g) After initiating email to the DC, place the CSM Case in Pending DLA Response.

(3) Other MSCs follow local policy.

2. ESCALATING A CSM CASE TO LEVEL 3 (PRE-AWARD): The following criteria will be met or provided within the referred CSM Case, otherwise Level 3 may refer the CSM Case back to the CSM cell and include the Level 2 and Level 3 supervisors for visibility and training purposes:

a. National Stock Number (NSN) and PR Number fields are filled prior to CSM Case escalation.

b. There is a one-to-one ratio with a CSM Case and PR number.

c. Notes tab will contain required information to indicate the type of action request (PR Expedite, Emergency Request, PR Other, Partial Request, Product Specialist (PS) Referral, etc. or as applicable) as it will ensure efficiency of reviewing/tracking CSM Cases in CSM. These categories are not limited to the types listed, but the type provided must remain clear and concise.

d. Description Field is not to be used internally.

e. If Item/SIMI/Internal/PR Status Notes are current (i.e., within 30 calendar days), but the Estimated Award Date (EAD) is not sufficient to support the customer's requirements, then justification must be provided in the Work Notes. Justification should include, as applicable:

(1) Total quantity needed to support item. (if more than specific requisition quantity)

(2) Breach of stock or ZT block was requested and denied. (if applicable)

(3) Notes are current but not sufficient to support. (if applicable)

(4) EAD is not sufficient. (if applicable)

(5) Reason, Critical Mission Support Information, and/or Date of Need (include briefing requirements/timeline/if the item is part of a larger project or list). If applicable, include Aircraft on Ground (AOG) and Tail Number, Mission Impaired Capability (MICAP), Underway Limiting and Hull Number, Deployment, Downed Equipment and Serial Number, etc.

f. Level 2 agents will communicate with the customer adhering to the timeframes in the Interim Response Table below throughout the life of the case.

Level 2 Interim Response Table		
CSM Case Priority	Interim Response (business days – not to exceed)	Recurring Quality Status (until resolution) (business days - not to exceed)
IPD 01/IPG I/Emergency	1	3
IPD 02-03/IPG I/High	2	10
IPD 04-07/IPG II/Medium	2	15
IPD 08-15/IPG III/Low	2	25

g. An Interim Response informs the customer that their case is being worked and that a resolution or status update will be provided within the timeframe outlined in table.

h. Customer Operations will communicate the final resolution of Pre-Award and/or Post Award actions to the customer via email utilizing the functionalities available in CSM. The table above does not apply to CSM Cases created by CSA without external contact or to CSM Cases closed within these timeframes.

6. ESCALATING A CSM CASE TO LEVEL 3 (POST-AWARD): See DLAI 5025.18

7. CLOSING A CSM CASE:

a. Ensure Level 3 provides resolution systemically or manually in the Notes tab.

b. Ensure resolution information is documented in the resolution notes section.

c. PAR completed CSM Cases with quality resolution need to be closed within 5 business days.

d. For PAR CSM Cases with an inadequate response from Level 3, the Level 2 CSA will keep the CSM Case open, submit a new PAR referencing the original PAR and notify CSA's supervisor on the request via CSM email functionality.

e. Level 2 supervisors have the discretion to approve closure of a CSM Case involving long lead times (45 days) but must provide the customer a quality reason for closing and if possible, an alternate solution, i.e., the item(s) have an EDD greater than 45 days, no further action can be taken at this time. Recommend other actions, i.e., local purchase, lateral support, or additive manufacturing.

ENCLOSURE 5: LEVEL 3 PROCEDURES

1. DEFINITION: A Level 3 Case occurs when escalated from Level 2. CSM will be the application used for CSM Case management.

2. LEVEL 3 RESPONSIBILITIES:

a. Level 3 will adhere to all agreed upon terms of this policy.

b. The use of CSM email and notes must be adhered to for evidentiary matter so audits and history can be tracked for customer resolution.

c. Once Level 3 has resolved the issue, they will respond back to the last CRM Cell Individual with the information in the Notes tab of the CSM Case.

d. For CSM Cases Escalated to Level 3, communication documentation between Level 3 and Level 2 will be conducted using the CSM Case Notes tab and through CSM email (if needed).

e. Note: If Level 3 does not receive the required information from Level 2 notify them utilizing the CSM email functionality and include Level 2 and Level 3 supervisors for visibility and training purposes. Level 3 CSA's will then return the CSM Case back to Level 2.

2. PRE-AWARD:

a. Level 3 agents will adhere to the timeframes (measured in business days) below for Pre-Award CSM Cases. The time is not to exceed these business days. See the glossary for definitions of Quality Update and Recurring Status Update.

Pre-Award Timeframes			
CSM Case Priority	CSM Case Assignment	Initial Quality Status Update	Recurring Status Update
IPD 01 / IPG / Emergency	1	5	10
IPD 02-03 / IPG 1/ High	1	8	15
IPD 04-08 / IPG 2 / Medium	2	10	20
IPD 09-15 / IPG 3 / Low	3	15	30

b. If the Level 3 Assignment Group is non-responsive or did not adhere to the maximum response timelines in the above table, the Level 2 CSA may escalate through the internal CSM email function and include the Level 2 and Level 3 supervisors for expedited assistance.

c. Quality Status Update: A quality status update provides status updates and substantiative information that Level 2 can provide to the originating customer. A quality status update will include, but is not restricted to:

(1) Bottom Line Up Front (BLUF).

(2) Quotes (if any received, extensions, re-solicitations, award strategy). Note: Some information may not be releasable.

(3) Estimated Shipping Date (ESD) or Estimated Award Date (EAD).

d. Resolution/Respond to CRM Cell: Level 3 will provide final response back to Level 2 based on the following logics.

(1) If the PR is with the Engineering Support Activity (ESA), Level 3 will provide timeline with Estimated Completion Date (ECD) and return CSM Case back to Level 2.

(2) Level 3 resolution is the award with the Contract Delivery Date (CDD), determination of non-procurable, or cancellation of PR.

(3) If the PR is cancelled, Level 3 will inform Level 2 with explanation as to why.

(4) If delay is anticipated (issues with quote, tech data, etc.) Level 3 will return CSM Case to Level 2 if delay is greater than 45 days while providing quality information in the response; if delay is less than 45 days then Level 3 resolution is the award.

(5) All communication from Level 3 to Level 2 will be internal through the CSM functionality. However, for all correspondence regarding quality status updates, recurring status updates, and resolution, the notes tab will be utilized.

3. POST-AWARD: Follow procedures in DLAI 5025.18. The Post-Award Timeframes below are extracted from DLAI 5025.18.

Post-Award Timeframes for Status PARs	
CSM Case Priority	Follow-up after (business days)
IPG I	5
IPG II	10
IPG III	15
All others	30

ENCLOSURE 6: BPID / ASSIGNMENT GROUP PROCEDURES

1. As DLA's business processes change, we need to align CRM's Business Partner organization structure to support workflow assignment and documentation. (Refer to flowchart on next page which outlines new change and/or update submission process)

2. As MSCs identify new business changes and/or updates within existing organizational structure, their CRM Site Integrator and/or CRM BPAs will validate the new structure with the existing CRM Master Business Partner Organization List.

3. Once validated, the MSCs will provide the J3l CRM Program Team with their proposed changes and/or updates via email.

4. J3l CRM Program Team will review all proposed new changes and/or updates. If additional clarification is required, they will reach back to the applicable MSC.

5. Once confirmed, the J31 CRM Program Team will submit a DLA IT Ticket and assign CRM related issues to the CRM APPLE2CRM queue.

6. The CRM Program Team will also forward the DLA IT Ticket number to the J62 CRM Sustainment Team via email.

7. The J6 CRM Sustainment Team will assign the ITSM Ticket, review, and reach back to J31 CRM Program team if additional validation is required.

8. If requested, J3l CRM Program Team will provide further coordination to validate the new change and/or update request.

9. If no further validation is required, the J6 CRM Sustainment Team will implement the new changes and/or updates via EBS and then forward the data to J31 CRM Program Team.

10. J31 CRM Program Team will forward the data for input into ServiceNow within two business days.

11. The J31 CRM Program Team will update the CRM Master Business Partner List, publish it at Customer Relationship Management (CRM) - Reference Material CRM - All Documents (dps.mil) and send notification to the MSCs.

12. BPID Process Flow:
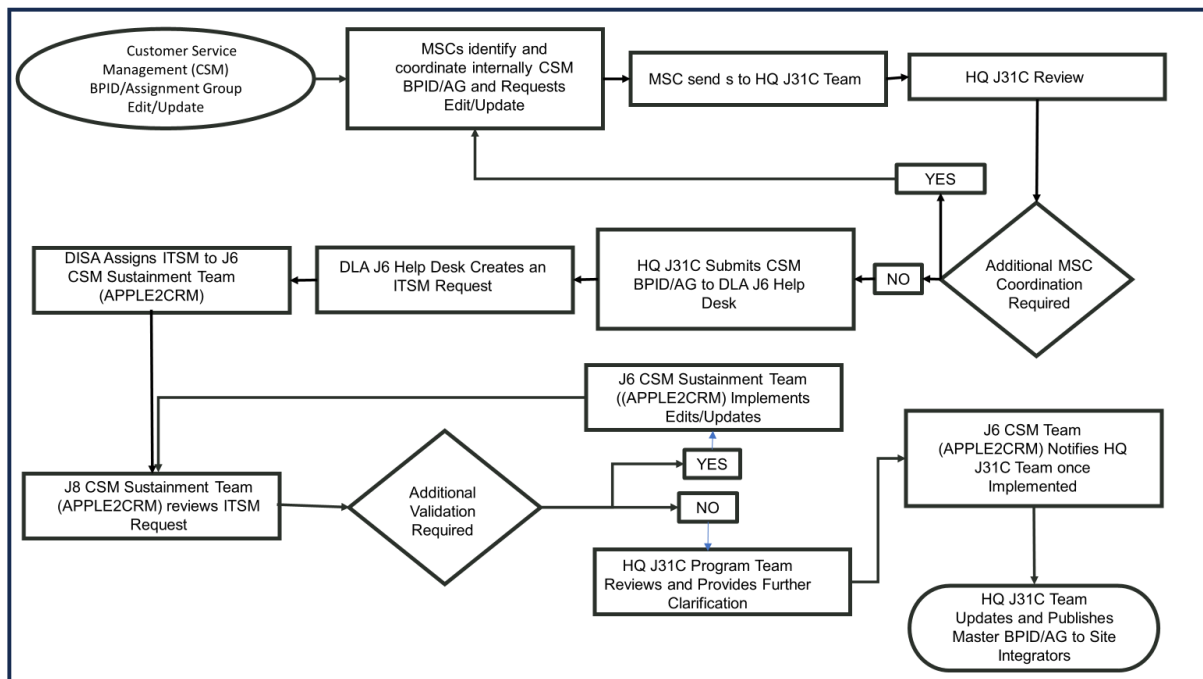
ENCLOSURE 7: CSM METRICS

1. CRT is the overarching agency metric for CSM, measured in business days from CSM Case creation to CSM Case closure. The baseline CRT metrics, assignment time and IRT are included in table below.

CSM Metrics	
Enterprise CRT-Levels 1,2, and 3 combined	85% in 8 business days or less
Level 2 and Level 3 combined	85% in 16 business days or less
Enterprise CSAT	85% (either satisfied or extremely satisfied)
Level 2 CSA assignment	2 business days or less
Level 2 Interim Response Time (IRT)	See table on page 12

GLOSSARY

PART I. ABREVIATIONS AND ACRONYMS

Acronym	Definition
AG	Assignment Group
AMR	Agency Management Review
AOG	Aircraft on Ground
APR	Agency Performance Review
BLUF	Bottom Line Up Front
BPA	Business Process Analyst
BPID	Business Partner Identification
CAGE	Commercial and Government Entity
CAS	Customer Account Specialist
CDD	Contract Delivery Date
CIC	Customer Interaction Center
CRM	Customer Relationship Management
CRT	CSM Case Resolution Time
CSA	Customer Service Agent
CSAT	Customer Satisfaction
CSM	Customer Service Management
DC	Distribution Center
DoDAAC	Department of Defense Activity Address Code
DSS	Distribution Standard System
EAD	Estimated Award Date
EBS	Enterprise Business System
ECD	Estimated Completion Date
EDD	Estimated Delivery Date
ESA	Engineering Support Activity
ESD	Estimated Shipping Date
FAD	Force Activity Designator
GSD	Global Service Desk

HQ	Headquarters
ICC	Initial Customer Contact
IST	Integrated Supplier Team
KPI	Key Performance Indicators
LDG	Logistics Data Gateway
LESO	Law Enforcement Support Office
MICAP	Mission Impaired Capability
MILSTRIP	Military Standard Requisitioning and Issue Procedures
MSC	Major Subordinate Commands
NMCS	Non-Mission Capable Supply
NSN	National Stock Number
PAR	Post Award Request
PO	Purchase Order
POD	Proof of Delivery
PR	Purchase Request
PS	Product Specialist
RIM	Records and Information Management
RDD	Required Delivery Date
SAR	Supply Assistance Request
SI	Site Integrator
SLA	Service Level Agreements
SOH	Stock on Hand
UEI	Unique Entity ID
UMMIPS	Uniform Material Movement and Issue Priority System
WebVLIPS	Web Visual Logistics Information Processing System
WFPP	Wildland Fire Protection Program
WMS	Warehouse Management System
ZT	Technical Defect – Managerial Review

PART II. DEFINITIONS

Business Day:	A 24-hour period, excluding weekends and holidays, i.e. a CSM Case created at 7:00 pm on Friday would be one business day until 7:00 pm on Monday.
CSM Case Assignment	The number of business days a gatekeeper has to assign a CSM Case to an agent.
CSM Case Escalation	Refers to the process of forwarding or elevating a customer's issue to a next level of support.

CSM Case Resolution:

A CSM Case is considered resolved when actionable information is provided back to the customer.

Examples of **resolved** CSM Cases include (not all encompassing):
a) Providing Estimated Delivery Date or Contract Delivery Date for Backorders.
b) Providing yes/no response to expedite request with new CDD or improved EAD for pre-award- both impacting ESD.
c) Providing a PoD
d) Catalog inquiries

Examples of **unresolved** CSM Cases include (not all encompassing):
a) Items not on contract
b) Delinquent contracts
c) Payment disputes
d) PoD disputes

Customer Operations	Anyone involved with Level 2 CSM Cases, this includes customer facing personnel, CAS, TVLS, etc.
Customer Service Agent:	A DLA employee who directly or indirectly provides customer service via one or more types of customer interaction. This includes but is not limited to the following: J31C, MSS, WOG, NESO, regional commands, corporate events, MSC Customer and Supplier Operations, Materiel Planners, Pre-Award Contract Specialists, Quality Assurance Specialists/Tech Quality, IST Chiefs, Supply Chain Point of Contacts, respective Directorate Leadership, and J1 DTC. An example of direct customer service is a CSR/CLSS embedded with the DLA customer at their location; an example of indirect service is a Supplier Ops employee at an MSC HQs who provides information back to the CAS to answer a customer question.

FAD	Force Activity Designators are used in conjunction with urgency of need designators that determines priority.
Functional User	Any CSA who manages CSM Cases in ServiceNow.
Level 1	Defined as the Customer Interaction Center, the entry point for customer interactions.
Level 2	Defined as any CSM Cell/Assignment Group that receives an escalated CSM Case, i.e. Customer Operations and equivalent.
Level 3	Defined as any CSM Cell/Assignment Group that receives an escalated CSM Case that needs additional research, i.e. Supplier Operations and equivalent.
PS Referral	Product Specialist Referral.
Quality Status Update	A response that provides status updates and substantiative information, especially for long lead time items, on status (received, expedited, extensions), actions to follow, or any current hurdles that the Customer Operations can provide to the originating customer.
Reassignment	Refers to the process of transferring a CSM Case from one support agent or team to another.
Reoccurring Status	A response that acknowledges status changes and updates to the initial quality response, in accordance with Pre-award Timeframe Table under Level 3 procedures, via CSM email functionality to Level 2.
Supplier Operations	Organizations that conduct acquisition operations.