Self-assessment on request management

Self-assessment on request management

If you're using spreadsheets, email, folders or shared inboxes, task lists and the occasional sticky note to manage the flow of queries, you're not alone – these 'good enough' approaches are common throughout many organizations.

But it's easy to overlook the hidden costs of 'good enough':

- Urgent or critical requests that fall through the cracks
- Missed deadlines
- Valuable time spent on data administration and other low-visibility tasks
- Work in progress going 'invisible' when members of staff are out or unavailable.

Perhaps most fundamentally, the manual processes so many organizations rely on make it difficult if not impossible to determine the value and impact of request management services on the business. We know it's valuable, but how valuable? And how can we increase the value?

Enter workflow tools

Request management workflow tools launch your service from good enough to best practice. These platforms take over the heavy lifting of data management involved with a busy enquiry service. Instead of spending time managing the data associated with requests (from whom, by when, focused on what...?) your staff are freed up to do what they do best: creative problem solving, customer service and collaboration.

At the same time, request management workflow tools provide intuitive dashboards and centralized reporting, giving you instant visibility into the status of everything in the system. You can thus predict changes in capacity requirements, generate progress reports, and measure value.

Wondering if you can achieve these benefits? Use this simple self-assessment to identify the gaps between your current practice and best practice, and see how a request management workflow tool could move you from good to great.

TRG SCREEN

Self-assessment – From current practice to best practice

Fill out the form digitally and save your responses before returning, or print the document to fill out your responses.

For each statement regarding request management, select **Y** or **N**.

Intake of requests

	Y	N
We have a single funnel through which all requests are handled, regardless of source.		
Our guidelines for which types of requests we handle are clear.		
We have and adhere to internal rules for how requests are assigned to team members.		
We do not spend time manually entering information about incoming requests.		
Subtotal		

Response to requests

	Y	N
The processes by which requests are handled are documented and accurate.		
Documentation of request response (dates, times, what happened) are built into our management systems and processes.		
We do not spend time manually entering information about request response.		
Subtotal		

TRG SCREEN

Workflow management

	Y	N
It is easy to get an overview of volume and types of requests in the system at any time.		
Our visibility into overall workflow enables us to calculate the value of this service.		
Our visibility into overall workflow enables us to predict and manage capacity and timelines.		
We do not spend time manually generating reports about our request management process.		
Our support team, though spread across many locations, collaborates on the workflow seamlessly. (If you have a team of one or if everyone works in the same place, leave this one blank.)		
Subtotal		

Totals by category

Enter the total number of Y and N responses for each category:

	Y	N
Intake of requests		
Response to requests		
Workflow management		
Totals		

Interpreting your score

Count the number of '**Y**' responses you have, and compare your score:

9 or more: Your workflow for managing requests aligns with best practice.

6 to 8:   Many elements of your workflow are working well; if your Ns are clustered in a particular area, take a closer look at what it would take to improve that specific area of request management.

Fewer than 6:   Consider the benefits in time savings, reduced errors, improved reporting and overall management by strengthening your request management workflow and systems.

Validate the importance of best practice

It's one thing to spot the gaps between current practice and best practice; it's another to decide to invest in the work required to make improvements.

Use this section to articulate how your organization, internal customers and stakeholders can benefit from investing in improvements to the workflow of request management.

First, go back to your self-assessment and highlight those statements for which:

- You selected '**N**'
- Are of greatest importance to your stakeholders and organization.

TRG SCREEN

Next, list up to four improvements you would like to make to your request management workflow, based on this assessment.
For each improvement, add a few notes about what the specific benefits to your organization will be once these improvements are made.

	Desired improvement	Benefit to organization
1		
2		
3		
4		

Every improvement you make can lead to long-term benefits of efficiency, quality, reporting and value, as long as you work from a clear vision of what 'success' looks like. Discuss these results with your colleagues to gauge the balance of effort vs. impact and the ROI of investing in improvements.

TRG SCREEN

What next?

Wherever you have identified potential for improvement, Quest, from TRG Screen, can help.

Quest is a request management workflow tool which gives you full visibility into and control over:

- Handling and tracking of inbound requests, including prioritization of urgent requests
- Matching staff capacity and expertise to business needs
- Tracking progress, bottlenecks, and customer satisfaction
- Analysis of the service in terms of value, impact, quality and scope.

Quest can be implemented quickly, with minimal IT involvement.

Compare the results of your self-assessment to Quest's capabilities

Talk to us and request your demo at trgscreen.com/demo.