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Revised By:	Joshua Graves	Review Cycle/Date:	Annually
Reviewed By:	Amy Max	Reviewing Unit:	Service Desk
Title:	Technician Workload Management SOP		
Description:	This document is the operating standard for technicians to manage their workload.		

Technician Workload Management

Standard Operating Procedure

1. General Statement of Purpose
 - 1.1 This document contains the steps for checking cases, staying current on assignments, and updating cases. These steps enable a technician to more easily manage their workload.
2. Scope
 - 2.1 This standard pertains to all technicians within OMES/ISD.
3. Discipline
 - 3.1 Service Management Standards
4. Terms and Definitions
 - 4.1 Customer Relationship Management (CRM) – A customer service tool used to work, track, and update customer incidents.
 - 4.2 Technician – A role of anyone who gets CRM cases assigned to them.
5. Instructions
 - 5.1 Upon Arrival to work each day:
 - 5.1.1 Check Cases.
 - 5.1.2 Check Voice Mail for Callbacks.
 - 5.1.3 Check Email.
 - 5.1.4 Prioritize Cases.
 - 5.1.5 Login to IM.
 - 5.1.6 Check Hot Topics and White Board, if they exist for your Service Area.
 - 5.2 Staying current on assignments throughout the day:
 - 5.2.1 Email – Check email to follow up on any emails that need attention.
 - 5.2.2 Run Search in CRM to find any new assignments.
 - 5.2.3 Check Instant Messenger.
 - 5.2.4 Call Dispatcher when working away from the office. Other cases may have come in that can be worked before returning to the office.
 - 5.3 Case Updates - At least once a day or as a case's status changes.
 - 5.3.1 Waiting on Customer – If you are no longer able to work on a case, due to waiting for the customer to respond to either an email or phone call, change the status to Waiting on Customer and add a note to the case explaining why.

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- 5.3.2 Waiting for Vendor — If you are no longer able to work on a case because an outside vendor must attend to the issue, change the status to Waiting on Vendor and add a note to the case explaining why.
- 5.3.3 Waiting for Due Date – If you are not able to work on a case because it is something that needs to be done in the future, change the status to Waiting for Due Date and add a note to the case explaining why.
- 5.3.4 Working – Once you begin working on a case, change the case status to Working. Include a daily note to help identify progress, if needed.
- 5.3.5 Resolved – As soon as cases are resolved, update the solution, which will update the case to Resolved.
- 5.3.6 Out-of-Office Case Handling
 - 5.3.6.1 Expected Leave – When technicians are going on expected leave, they should notify their dispatcher of any unresolved cases that may need to be reassigned.
 - 5.3.6.2 Unexpected Leave – When technicians need to take unexpected time off, they should notify their supervisor using standard protocol as defined by your supervisor. The technician should also inform their supervisor of any pertinent appointment information and case updates.

6. Roles and Responsibilities

- 6.1 The technician is responsible for following the steps provided to manage their workload.

7. Limitation or Implementation Notes

- 7.1 In order to follow the steps in this operating standard and to successfully manage their workload, the technicians must have access to CRM, Outlook and IM.

8. References

- 8.1. Technician Workload Management Flow Chart
- 8.2. Technician Workload User Guide