
Instructions for completing Service Request Evaluation form

1 Enter Service Request Number obtained from Remedy

2 **Has the customer been contacted within 24 hours?** This is defined as 24 hours after the Service Request has been opened. The time starts once the Service Request has been initiated regardless of when it appeared or was assigned to your workgroups queue.

Are diary entries user friendly?

- 3
- 1) If the customer were to read the diary entries would they understand what the status of their problem is?
 - 2) If the customer were to call the Support Center for a status of their service request, would the SC understand the status and be able to communicate this to the user?
 - 3) Is the action taken to resolve the problem clearly documented?

Kept Customer in loop? How is this determined?

Keep this in mind to determine if the customer is kept in the loop. If the customer needs to call the SC for the status of their SR, do they really know what the status is? Would that phone call be required?

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- 1) Are the diary entries updated to state when the next expected entry or work is to occur with the user?
 - 2) Is the customer informed when the next visit or work on their service request is to be performed?
 - 3) If you have set an appointment with the customer in advance has it been entered in the Service Request?
 - 4) If customer was not reachable when contacting them is there an entry stating the means of communication, for example, via email, voicemail or in person?
 - 5) Is there a statement stating the user was informed by leaving a service receipt form, email or voice mail?
 - 6) If you answered YES to all of the questions then it's a yes for keeping customer in the loop. If the answer is no to one of the questions then the Customer Service Objective has not been met.

Was customer sign-off obtained?

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- 1) When Service requests was placed in a resolved status was the customer contacted and is satisfied with the resolution? The only exception to this rule is if the customer is present upon resolution of the problem. If this is the case the SR can be placed in a resolved status and no call back is required. An example of an entry could be; "User was present when problem was resolved, the user signed off on the Service Request."
 - 2) When contact is made with the customer, was it noted in the Work Log of the service request?
 - 3) Were a minimum of three attempts over a two business week period done to contact a customer who has not approved a solution? The attempts may include phone calls, e-mails and site visits if appropriate
 - 4) If attempts to contact a customer three times over a two business week period prove to be futile, the information must be logged in the Work Log and the service request can be put in a Resolved state. The Work log must indicate the three separate attempts at contacting the user.