Query Management Process – SOP

Resources required:

- Query Management Data Input Spreadsheet
- NGG C&S Query Management KPI
- Access to CRM
 - o <u>New Report for Updating Query (all gas)</u>

Process:

- 1. Open the NGG C&S Query Management KPI document
- 2. For key performance indicator that you are looking to update, right click and select:
 - Edit Data > Edit Data in Excel

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This will open the *Query Management Data Input Spreadsheet* document.

3. Using the CRM *New Report for Updating Query* filter the data to show only the latest reporting weeks' data, then click *Apply*.

The reporting week runs from a Monday to a Sunday and is always taken a working week prior to the current day. E.g. If running the report on Monday 23rd September, the reporting week would be:

Monday 9th – Sunday 15th September.

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(59) 00001436 (1)	Colin Williams Future Markets 26/01/2018 14:28		Range		Case Received All Time		
				Custom Stort P	End Dat	Case Record Type not equal to Complaint, Survey Action	×
				02/09/2019	Cancel Apply	Case Owner Value Stream equals Gas Operations, Future Markets, GTO, Future Energy Scenarios	×
00009764 (2)	John Cummins	Gas Operations	06/12/2018 15:30	10/12/2018 18:00	- Interconnecto	Task Subtype equals Task, Email, List Email, Call	×

4. In order to obtain the number of queries that have been raised for that reporting week, add together the number of Case Numbers that appear in the far-left hand column under Case Number.

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	SO CRM Home	Accounts 🗸 Contacts	✓ Cases ✓ Working C	Groups 🗸 🛛 Key Eve	ents 🗸 Reports 🗸	Dashboards 🗸	Gas Contra	cts ∨ Sites ∨ * More ▼	
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<	00011660 (1)	Martin Cahill	Gas Operations	11/09/2019 12:00	11/09/2019 12:00	12/09/2019 09:20	National Gr	Show Me All cases	
								Case Received 09-Sep-2019 - 15-Sep-2019	
								Case Record Type not equal to Complaint, Survey Action	×
								Case Owner Value Stream equals Gas Operations, Future Markets, GTO, Future Energy Scenarios	×
	00011669 (1)	Joanne Clamp	Gas Operations	12/09/2019 12:00	12/09/2019 12:00	12/09/2019 14:36	General Pul	Task Subtype equals Task, Email, List Email,	×
	00011675 (3)	Hayley Johnson	Gas Operations	13/09/2019 10:00	13/09/2019 10:30	16/09/2019 11:06	ICIS	Call	
4							• • •		

Closed 🕇 💌 Case Number 🕇 💌 0001163 (2) (3)

Each case number represents an individual query entered in CRM. Please Note: Do not be fooled by the numbers in the brackets. These are not always representative of the numbers of queries, but the numbers of activities logged against those queries.

Once the number of queries has been established, this can then be entered into the Query Management Data Input Spreadsheet. The total number of queries should be added to the No. Queries *Raised* column, against the appropriate reporting week.

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16		15-21 Jul			9	9	30									
17		22-28 Jul			6	6	30									
18		29-4 Jul/Aug			14	14	30	30	-						-	
19		5-11 Aug			13	13	30	25	· ·							
20		12-18 Aug			10	10	30								_	
21		19-25 Aug			11	11	30								_	
22		26-1 Aug/Sep	3		8	11	30	15			1.1	1.1		-		
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- 28	Þ	No. Queries Recie	wed % Closed in	5 Day SLA %	Acknowlegded within	24 Hours	+		- * A ^{3/*}			7	- 1 ⁹ 4'	4		×

As part of this step, we must also enter the number of queries raised by each of the three business units (Future Markets, GT & Gas Operations). This information can be obtained by using the same CRM report and extracting the information from the *Case Owner – Value Stream* column.

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Closed ↑ ▼	Case Number ↑ 💌 00011638 (2)	Case Owner: Full Name 💌 Martin Cahill	Case Owner Value Stream 💌 Gas Operations	Case Received ↓ ▼ 09/09/2019 12:00	Case Acknowledged O9/09/2019 12:00	Case Closed	Account N ^t Teeside CA	Filters	\rightarrow
								Show Me All cases	
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								Case Record Type not equal to Complaint, Survey Action	×
								Case Owner Value Stream equals Gas Operations, Future Markets, GTO, Future Energy	×
		Martin Cahill	Gas Operations	09/09/2019 12:00	09/09/2019 12:00		Teeside CA	Scenarios	
								Task Subtype equals Task, Email, List Email, Call	×
4									_
Row Counts	Detail Rows	Subtotals	Grand Total 🔽						

Once this information has been obtained, it can also be used to populate the **Query Management Data Input Spreadsheet** and specifically, the value stream columns for No. Queries Raised. <u>Please Note:</u> It is worth at this point sense checking the data. If you have established that 10 queries have been raised during the reporting period and the number of queries across each of the 3 value streams equates to 9, there revisit the information. The sum of this number should match the total number of queries raised during that reporting week.

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1		Week	Future Markets	GT	Gas Operations	No. Queries Raised	Target									
14		1-7 Jul	2		12	14	30									
15		8-14 Jul	1		12	13	30				No. Queri	ies Receiv	ed			
16		15-21 Jul			9	9	30	,	5							
17		22-28 Jul			6	6	30									
18		29-4 Jul/Aug			14	14	30	3	0						_	
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20		12-18 Aug			10	10	30									
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20	()-	No. Queries Recie	eved % Closed in	5 Day SLA %	Acknowlegded within	a 24 Hours	+					- ¥	- 1 ⁹	39	<u> </u>	

In turn, this information will automatically populate the stacked bar diagram on the right-hand side.

5. The automatically populated diagram can then be copied and pasted into the *NGG C&S Query Management KPI*.

Now that you have updated the **No. Queries Received** diagram, you are now required to update the other parts of the NGG C&S Query Management KPI, including: **% Queries Acknowledged within 24 Hours**.

- 1. As before in step 2, right click the diagram and select *Edit Data > Edit in Excel*.
- 2. Before entering any data into the spreadsheet, we must first establish the number of queries that were acknowledged within 24 hours.

To do this, use the *Case Received* and *Case Acknowledged* columns.

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Closed 🕇 💌	Case Number 🕇 💌	Case Owner: Full Name 💌	Case Owner Value Stream 💌	Case Received 🦊 💌	Case Acknowledged 💌	Case Closed 🔍	Account N	Filters	→			
	00011659 (1)	Karen Thompson	Gas Operations	09/09/2019 12:00	09/09/2019 12:00		Interconne	Show Me				
23)	00011637 (3)	Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pro	All cases				
								Case Received 09-Sep-2019 - 15-Sep-2019				
							Case Record Type not equal to Complaint, Survey Action	×				
								Case Owner Value Stream equals Gas Operations, Future	×			
		Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pro	Markets, GTO, Future Energy Scenarios				
								Task Subtype equals Task, Email, List Email, Call	×			
1												
Row Counts	Detail Rows	Subtotals O	Grand Total 🗸									

Compare the figures. If the query was received over the weekend, the clock should start at the same time of the first working day. For example, if received on Saturday @ 2.30pm, the clock will start at 2.30pm on Monday.

Total the number of queries that met the 24 hour acknowledgment SLA. The information can then be entered into the **Query Management Data Input Spreadsheet.**

3. Take the information from the latest reporting week and enter the following formula (shown as an example):



(Number of queries that met 24 Acknowledgement SLA / Total number of queries raised x 100)



This will calculate the % queries that met the 24hour acknowledgment SLA and populate the diagram in accordance.

4. Copy and paste the repopulated line chart, as shown above, onto the **NGG C&S Query Management KPI**.

To update the **%** *Queries Closed in 5 Days SLA*, follow steps 1-4 (as above) but using the following information to establish how many queries met the 5 day SLA.

			All 🔻 🔍 new query	r				★• 🖬 ? 🌲	١
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Closed 🕇 💌	Case Number 🕇 💌	Case Owner: Full Name 💌	Case Owner Value Stream 💌	Case Received ↓ ▼	Case Acknowledged 💌	Case Closed 💌	Account N 🔺	Filters	\rightarrow
	00011659 (1)	Karen Thompson	Gas Operations	09/09/2019 12:00	09/09/2019 12:00		Interconne	Show Me	
23)	00011637 (3)	Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pro	All cases	
				09/09/2019 09:30	09/09/2019 12:30			Case Received 09-Sep-2019 - 15-Sep-2019	
						09/09/2019 13:02		Case Record Type not equal to Complaint, Survey Action	×
								Case Owner Value Stream equals Gas Operations, Future	
		Hayley Johnson	Gas Operations				Macwell Pre	Markets, GTO, Future Energy Scenarios	×
								Task Subtype equals Task, Email, List Email, Call	×
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Row Counts	Detail Rows	Subtotals (Grand Total						
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If a case number does not have a date entered in the Case Closed column, then this means that the case/query has yet to be closed.

For the 5-day closure SLA, working days should only be counted. For example, if a query was received on a Saturday at 2:30pm, the 5 day SLA would run from the time it was received to 2:30pm on the following Friday.