Shared Service Request Intake

A fictional five-week plan for bringing scattered service requests into one shared route.

Independent portfolio demonstration using fictional data. This is not a Vizient or client deliverable.

GOAL	Make it easier to send a request to the right team and see what happens next.	**IN SCOPE**	Agree request categories, set ownership, test a small pilot, prepare users, then launch.
SCENARIO	A team is replacing scattered service requests with one shared intake route.	**OUT OF SCOPE**	No new software purchase or redesign of the teams' underlying services.

19	4	7	1
Work items	Complete	In progress	Blocked / waiting

Sample update at the end of Week 3

The pilot checked 12 fictional requests. Ten reached the intended team; two were misrouted because the category descriptions were unclear. The team is revising those descriptions and will retest them before launch. One decision is still needed on how to schedule two short training sessions around team coverage.

The plan keeps ownership, dependencies, decisions, and the meaning of 'ready' visible so status updates can lead to action.

Workplan

Weeks 1-3 | Align the team, prepare the route, and learn from a small pilot.

ID	Phase	Week	Task / deliverable	Owner role	Status	Ready when / next step
01	Align	W1	Kickoff: agree the problem, goal, scope, and working rhythm	Project manager + sponsor	Complete	Goal and boundaries written down; weekly 20-minute check-in agreed.
02	Align	W1	Map how a request moves today, from arrival to response	Operations lead	Complete	Common handoffs and places where requests get lost are captured.
03	Align	W1-W2	Agree three plain-language request categories and priority rules	Operations lead + team leads	In Progress	Categories are distinct enough for a new user to choose without help.
04	Align	W1-W2	Choose simple pilot measures and a baseline method	Project manager + sponsor	In Progress	Track correct routing, time to first response, and requests needing clarification.
05	Prepare	W2	Set up the shared intake route and required request fields	System administrator	In Progress	Test entry captures category, summary, contact, and needed-by date.
06	Prepare	W2	Assign a primary owner and backup for each request category	Team leads	Not Started	Every category has a first-review role and an escalation route.
07	Prepare	W2-W3	Write a short triage guide and status definitions	Operations lead	In Progress	Guide explains where work goes and what each status means.
08	Prepare	W2-W3	Create 12 fictional pilot requests across the agreed categories	Project manager	Complete	Sample set includes straightforward cases and a few unclear requests.
09	Pilot	W3	Walk pilot users through submitting and checking a request	Operations lead + team leads	In Progress	Users can submit a sample and find its next-step status.
10	Pilot	W3	Run the pilot and record routing, questions, and handoffs	Pilot users + project manager	In Progress	All 12 samples have an observed destination and outcome.

Workplan

Weeks 3-5 | Fix what the pilot found, confirm readiness, launch, and hand over.

ID	Phase	Week	Task / deliverable	Owner role	Status	Ready when / next step
11	Pilot	W3	Review results: 10 routed correctly; 2 need category fixes	Project manager + team leads	Complete	Two confusing category descriptions are assigned for revision.
12	Pilot	W3-W4	Revise the two unclear category descriptions	Operations lead	In Progress	Updated wording makes the distinction clear without adding categories.
13	Pilot	W3-W4	Confirm daily triage owner and backup coverage	Team leads	Not Started	Primary and backup roles are available during the review window.
14	Ready	W4	Retest the two revised descriptions with sample requests	Pilot users + project manager	Not Started	Both previously misrouted requests now reach the intended team.
15	Ready	W4	Choose two short training slots that fit team coverage	Sponsor	Blocked	Sponsor selects two session times by Tuesday of Week 4.
16	Ready	W4	Confirm support path for a request that lands in the wrong place	Operations lead + team leads	Not Started	Teams know how to reassign a request and tell the requester.
17	Ready	W4	Hold a go / no-go check against launch-readiness criteria	Sponsor + project manager	Not Started	Proceed only when routing, ownership, support, and training are ready.
18	Launch	W5	Open the shared route to the first user group and monitor daily	Operations lead + system administrator	Not Started	Review new requests daily during launch week; raise issues promptly.
19	Launch	W5	Review first-week measures and hand over ongoing ownership	Project manager + team leads	Not Started	Share results, open actions, and ongoing owner with the sponsor.

Risks, dependencies, and decisions

A short working list to keep open questions tied to an owner and next step.

Type	Item	Owner role	Needed by	Next step
Decision	Two short training sessions need to fit around team coverage.	Sponsor	Tuesday, W4	Choose two time slots before launch invitations go out.
Dependency	The shared route must send each category to its agreed owner.	System administrator	End of W2	Confirm routing with one sample request per category.
Risk	Unclear category wording may send requests to the wrong team.	Operations lead	Before launch	Revise two descriptions and retest both misrouted samples.
Risk	Unclear backup coverage may leave new requests waiting.	Team leads	End of W4	Name primary and backup roles for each category and review window.

Launch check

Routing works; category wording is clear; primary and backup owners are set; training is scheduled; support and reassignment path is known.