Computer Frameworks Look-in to Outlook

Team Task Management-July 2009

Computer Frameworks have utilized the features of Microsoft Outlook to improve the efficiency of team task management in the work place.

Team tasking situations are common in many organizations. Where the requirement is to reliably record incoming work requests, allocate those amongst team members and track them through to completion, an automated task management system can be very helpful. And if the organization's chosen email and collaboration system has an inbuilt task management capability then using the same familiar system for emailing, calendaring and task management can be convenient, efficient and cost effective, especially where tasks are usually generated in response to incoming emails, faxes or phone enquiries. Organisations that have adopted Microsoft Outlook as their standard email client and are seeking a new or improved team task management capability can benefit from Computer Framework's experience delivering such solutions to other clients ranging from large enterprises to small businesses. Read on for more information.

Organisations that have adopted Microsoft Outlook as their standard email client and are seeking a new or improved team task management capability can readily benefit from Outlook's inherent task management features, which become truly enterprise grade when Microsoft's Exchange Server is employed at the back end.

In many cases it may just be a matter of analyzing the customers tasking requirement and advising or assisting the client to configure their Outlook / Exchange service to provide the desired tasking functionality.
We have found there to be no substitute for actual hands on experience in a variety of environments when setting up team tasking systems of this type.

More complex cases may involve

- ✓ teams that process multiple service request mailboxes
- ✓ large teams with dedicated work allocators
- ✓ intensive environments with hundreds of workers processing thousands of service requests daily
- ✓ long duration workflow style processing
- ✓ rule-based task allocation
- ✓ custom designed forms for recording tasks
- ✓ centralization of customer correspondence
- ✓ preserving data privacy in the team environment
- ✓ correspondence retention and archiving policies

Some examples of Outlook/Exchange-based team tasking solutions that Computer Frameworks staff have successfully designed and implemented are as follows-

Customer Service Centre - a service request management solution shared by three customer service centres at an insurance industry major in Melbourne, Australia. The service centres employed over 120 consultants and work allocators and processed upwards of 500 service requests per day.

Insurance Claims Handling - a claims diary management solution for a small dispersed team of senior claims handlers. The system allowed the team to demonstrate compliance with the strict regulatory requirements for client contact and follow up as a claim was processed. By intelligently integrating claims diary tasks with the user's ordinary Outlook Calendar and Reminders functions, the solution functioned effectively as a workflow process manager, guiding users through their daily scheduled tasks.

Computer Frameworks has observed from experience that the comprehensive team tasking functions available with Outlook/Exchange are often never exploited - even when a strong requirement for that capability does exist - simply because those functions are not understood and appreciated by the owners or they simply require a small degree of customization to make for an ideal solution. Computer Frameworks is able to assist organizations understand and unlock these functions and enjoy a simple, elegant and inexpensive solution to their team tasking requirements.

In summary, the consulting and solution delivery services Computer Frameworks offers in the domain of team tasking are

- ✓ design and creation of shared access team mailboxes
- ✓ routing of incoming service requests in the form of emails and faxes
- ✓ provision of service routines to automatically convert incoming service requests to outlook tasks
- ✓ design and development of custom outlook forms
- ✓ manual or automatic allocation and re-allocation of tasks to consultants / team workers
- ✓ team leader oversight of processing activity
- ✓ application tools for reporting processing performance against SLAs
- ✓ permission settings to control data access
- ✓ configuring for high performance and high service availability
- ✓ data retention strategy for compliance purposes
- ✓ conversion from lotus notes-based workflow and tasking solutions
- ✓ tailoring the outlook interface to maximize ease of use and worker productivity
- ✓ Microsoft outlook and office object model programming
- ✓ documentation and end user training

For further information or to discuss your specific requirements please contact Computer Frameworks.

computerframeworks

level 2 362 kent street sydney nsw 2000
enquiries@computerframeworks.com.au
www.computerframeworks.com.au
p 9299 1212 **f** 9299 9844