EAB

Reducing Cycle Time Between Need and Solution

Preempting Rogue Purchasing
By Matching IT Services to Users' Needs

▶ **Study in Brief**

This report profiles the strategies that progressive institutions are deploying to gain foresight into end users' technology needs and to rapidly connect end users with the services they need.

10 Ways to Use This Research

- Generating feedback on end user needs
- Improving IT customer satisfaction
- Rationalizing the IT service portfolio
- Communicating the IT value proposition
- Updating IT services for the cloud era
- Establishing IT communication teams
- Strengthening IT project prioritization processes
- Refining IT resource allocation processes
- Testing new service propositions
- Assessing the campus IT demand profile as a new-to-campus leader

Frustration on Both Sides

Perception that Desired Services Are Not Available Fuels Rogue Purchasing

There is widespread desire for an improved service delivery partnership between central IT and end users on campus. Front-line stakeholders feel like they don't have access to the latest technologies they need to be effective. Meanwhile, central IT worries that front-line users waste scarce resources when users buy duplicate services that are already available through central IT.

Sky-High Expectations Now the Norm

Today's technology users expect an "Amazon experience" whenever and wherever they use technology, whether that is at home or on campus. So when central IT can't help end users access a service or accomplish a task on the timeframe they expect, end users don't take no for an answer. Rather, they look for someone who will give them the answer they want—and very often, they find a willing accomplice in external vendors.

Meanwhile, from the CIO's vantage point, untold dollars are being wasted as users purchase solutions that are already available on campus, if only users took the time to look.

1. Duplicate Licenses
when multiple end users buy licenses for the same service.

2. Redundant Functionality
when multiple end users buy separate solutions to satisfy distinct needs, when a single (potentially already licensed) service could have met those needs more economically.

3. Unexpected Maintenance Costs
for central IT when the expectation that "the vendor will do it for me" is quickly dashed.

4. Integration Challenges
when new systems need data from the ERP and/or SIS in order to deliver their promised functionality and the vendor's promised API turns out not to be a panacea.

5. Non-Compliance with IT Standards
(e.g., security, enterprise architecture) when users purchase systems without doing the necessary due diligence.

When Users' IT Needs Aren't Met, the Rogue Purchasing Death Spiral Begins

When IT Doesn't Know What Campus Needs…

1. Duplicate Licenses

2. Redundant Functionality

3. Unexpected Maintenance Costs

4. Integration Challenges

5. Non-Compliance with IT Standards
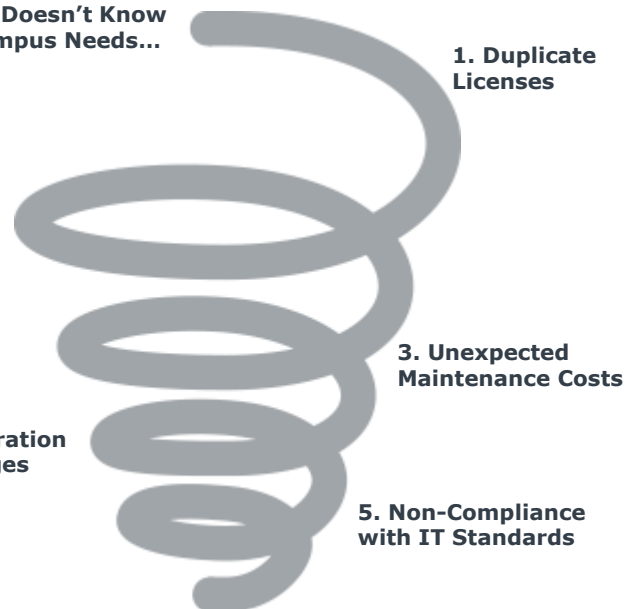
Lack of Two-Way Visibility Leads to Frustration, Waste

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Messages Not Getting Through

IT Slow to Identify and Satisfy Needs; Users Unaware of Service Offerings

Three Barriers to Meeting Users' Needs Quickly and Accurately

IT doesn't know what users need. As the acquisition and consumption of technology has spread into virtually every crevice across campus, monitoring and understanding the disparate technology needs of campus has become harder and harder. As a result, IT often wastes resources providing the wrong services and may not provide the services users actually want.

Users don't know what services are already available. As more and more services are provided at both the enterprise and local levels, keeping users apprised of the full suite of available solutions in a simple, centralized fashion becomes more and more challenging. This is especially the case when services are bought by distributed units without coordination with central IT or other distributed units. As a result, users don't access the services they need, even when they do exist.

Users give up when forced to wait for requests for new services to be approved and implemented. Many project review groups lack established, widely accepted criteria to assess new requests, so new criteria have to be determined for every new project, wasting time. The lack of clearly defined evaluation criteria means the approval of new projects often goes to the sponsors who shout the loudest, regardless of the value of their proposals. As a result, the services users actually need take so long to implement that users have often purchased their own solution by the time IT's offering comes online.

Closing the Communications Gap

Many CIOs who are acutely aware of the need to close the gap between user needs and their fulfillment have struggled to identify viable solutions. The standard response has been to do more of what CIOs have always done: if the strategy for understanding user needs has been to talk with governance committees, CIOs are now trying to broaden their sample by including more people on their committees or by adding in some face-to-face meetings with stakeholders. However rich these live conversations are, these strategies simply don't scale well enough to reduce the cycle time between campus IT needs and solutions.

Looking for Frontier Practice

> **"**
> — *How are IT teams ensuring users get what they want from IT?* —
>
> Members asked the Forum to find promising, replicable approaches to effectively identify user needs and rapidly address them. From more than 100 interviews with CIOs, three scalable strategies emerged.

This study is based on understanding gained from diverse higher education IT leaders. We are grateful to interviewees for sharing institutional insights and benchmarking practice. We have abstracted the institutional insights to make them more generalizable for colleges and universities with different missions and budgets, but the Forum's work is as ever grounded in the proven innovations of progressive practitioners.

Featured Institutions—With Sincere Appreciation

THE UNIVERSITY OF ALABAMA AT BIRMINGHAM

Curtis Carver
VP for IT and CIO

UNIVERSITY OF MONTANA

Matt Riley
CIO

WILLIAM & MARY

Courtney Carpenter
CIO

Selected Research Participants

Case Western Reserve
Sue Workman
CIO and Vice President for IT Services

University of Cincinnati
Nelson Vincent
Vice President for IT and CIO

California State University – Dominguez Hills
Chris Manriquez
Associate Vice President and CTO

Eastern Mennonite University
Ben Beachy
Director of Information Systems

University of Illinois-Urbana Champaign
Mark Henderson
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Indiana University
Bradley Wheeler
Vice President for IT and CIO

University of Montana
Matt Riley
CIO

Penn State University
John Harwood
Emeritus Associate Vice Provost for IT

Susquehanna University
Mark Huber
CIO

Thompson Rivers University
Brian MacKay
Associate Vice President and CIO

University of Wisconsin-Madison
Bruce Maas
CIO

University of Wisconsin-Oshkosh
Anne Milkovich
CIO

What the Best Are Doing

Ensuring congruence between IT services and user demand hinges on IT knowing what end users want and ensuring users can quickly and easily access it what they need.

Surfacing Users' Unarticulated IT Needs

Community Demand-Sensing Platform
Creating a Digital "Town Square" Where Users Nominate Service Ideas

By creating a gamified project nomination and discussion platform, schools are able to tap into the current of community demand. This virtual panel of engaged community members provides an up-to-date and complete understanding of the community's technology needs.

Accelerating the Fulfillment of Users' Current Needs

User-First Service Catalog
Empowering Users to Find Their Own Solutions via a One-Stop Shop

Some members are developing a solution-focused service catalog designed to seamlessly connect users with the service they require. Through the application of design principles from user experience research, the service catalog's structure rapidly guides users to answers to their questions without any active work on IT's part.

Pre-Approved Evaluation Criteria
Securing Community Consensus to Speed Evaluation of IT Project Proposals

Users need to understand whether and when their requests for new services will be implemented. By engaging stakeholders in the identification of broadly applicable, strategically aligned, and mutually agreeable criteria, some CIOs have standardized the metrics used to evaluate IT project proposals. Reviewing projects on an agreed-upon, like-for-like basis allows for quick prioritization decisions that reflect the institutional good.

Community Demand-Sensing Platform

Creating a Digital "Town Square" Where Users Nominate Service Ideas

Practice in Brief

IT builds a digital platform for crowdsourcing ideas for IT projects. Any member of the campus community can submit ideas, vote ideas up or down, or leave comments. IT staff participate in the discussion. Every proposal receives a response from IT, regardless of feasibility or desirability, to encourage broad participation. As a result, IT understands the technology needs of campus and can proactively allocate resources. Users understand what steps are being taken to address their needs, and frequently discover an existing solution or a workaround through the discussion.

Implementation Steps

- IT ensures the platform is in place for the start of the academic year and prepopulates it with a handful of proposals submitted by IT staff. This ante helps establish a norm of participation once the platform opens to the broader community.

- IT leaders conduct a cross-campus, in-person "marketing campaign," soliciting feedback and ideas from across campus. IT leaders enter the project ideas into the platform in the moment, demonstrating their investment in the platform and encouraging future grass roots participation.

- Designated strike team of IT user support specialists has platform notifications pushed to email and phone, ensuring they are rapidly approving comments and providing feedback on proposals. Initial feedback includes general tips and reactions ("Try this in the meantime"). After a proposal has received a quorum of votes (both positive and negative), IT specialists circle back to commit to next steps and a concrete timeframe (no for now, but we'll revisit in future; quick fix we can implement immediately; long term project we'll submit to formal proposal review process).

Benefits to Institution

» Early detection of shifting IT needs

» Greater community engagement with and input into potential technology initiatives

> " Prior to implementing our crowdsourcing platform, we had to "guesstimate" what campus members wanted based on anecdotes and surmise. We inevitably missed the mark some of the time, and when we did, users found temporary fixes that ended up costing us in the long run. This initiative has meant that we can accurately allocate IT resources to the places where they do the most good while also providing users a window into the value the IT provides campus.

Curtis Carver, VP for IT and CIO
University of Alabama at Birmingham

Spotlight Practice

University of Alabama
at Birmingham

Anyone with a UAB ID and password can enter the site.

Real-time updates keep users informed whenever a new idea or comment is posted.

Users submit their own ideas and explore ideas already posted

The community votes up or down on idea submissions.

Comment threads provide a familiar way for IT staff (and community members) to share feedback and tips.

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ideascale   communities ▾

Curtis A Carver Jr ▾

SPARK
Share. Vote. Innovate.

UAB
INFORMATION TECHNOLOGY

UAB
Browse Popular Ideas

WELCOME   IDEAS   FAQ

Let's put our ideas to work.

Search Ideas

Submit New Idea

Usage statistics   [−]

140 Ideas Posted
934 Comments   7985 Votes
2469 Users

View the Leaderboard

COST SAVINGS & EFFICIENCY

Electronic Signature of Documents

There are lots of documents requiring approval and signature. Rather than print and circulate all of these documents on paper, let's move them to electronic form and take advantage of technology. There are systems by Blackboard, Adobe, and Docusign that provide this capability. The cost savings should more than pay for the system and the process more efficient and consistent. Having a search digital library, delivery ...**more** »

Submitted by **You** in Jun 2015 | **25 comments**

▲
248
votes
▼

+253   -5

POST AND VOTE

Move to a paperless purchase process- stop the faxing!

It's struck me as inefficient and outdated the way we go about making purchases on campus, through Oracle. If I have an electronic quote, I have to plug all the information in Oracle, print screenshots of the different Oracle screens, print a barcode page, print the quote, fax all of this paperwork to accounting, who then SCANS it back into an electronic format. This seems like a significant waste of paper, ink, and ...**more** »

Submitted by **Charles Prince** in Jun 2015 | **18 comments**

▲
188
votes
▼

+188   -0

POST AND VOTE

User-First Service Catalog

Empowering Users to Find Their Own Solutions via a One-Stop Shop

Practice in Brief

Some members are developing a solution-focused service catalog designed to seamlessly connect users with the service they require. Through the application of design principles from user experience research, the service catalog's structure guides users to solutions to their questions without any active work on IT's part. Success is measured in the decrease in low-complexity inquiries to the help desk and increase in the average time it takes to close tickets (as simple issues are resolved before being submitted as tickets).

Implementation Steps

- Conduct an audit of services available to users. Poll director-level central IT staff and distributed IT staff. Analyze help desk tickets for most common issues.

- Organize services using groups and labels that end users understand. Eliminate language end users don't use. Request feedback from individual end users around the accessibility of the language.

- Create ubiquitous exposure to the service catalog. Situate the service catalog prominently on the IT website and/or university intranet. Ensure that the most common places users expect to find information about IT link to the service catalog.

- Schedule regular maintenance for the service catalog, making sure the list of services remains current and incorporating feedback from end users. Monitor service desk cases for new topics that come up frequently and update catalog accordingly.

Benefits to Institution

» Faster time-to-resolution for end users; increased productivity

» IT resources redirected away from one-off problems to strategic initiatives

» Greater utilization of existing IT investments

> ""
>
> The services catalogue helped define how we communicate with end users. We start with how the campus thinks and speaks IT– and we work back from that. Campus members' ability to find the services they need has improved dramatically as a result.

Matt Riley, CIO
University of Montana

Spotlight Practice

University of Montana

Common Catalog Problems

IT-Centric Information Layout
- Organized by IT unit
- Mismatch of request support and overview of IT's services

Critical Information Hard to Find
- Information not featured on home page
- Multiple clicks to find an answer

Not Written in Plain English
- "I just want to access Wi-Fi… Is that what this 'WPA2' link means?"
- "Is a 'software environment' the same thing as an operating system? I'm confused…."

…Create Common IT Problems

1 Helpdesk Taking the Wrong Calls

IT staff spend too much time answering questions (e.g., "How do I access the VPN?") that could be routed to self-service channels

2 End Users Going Rogue

When the directory fails to deliver an answer, end users find their own solutions—often leading to duplicated purchasing and wasted resources
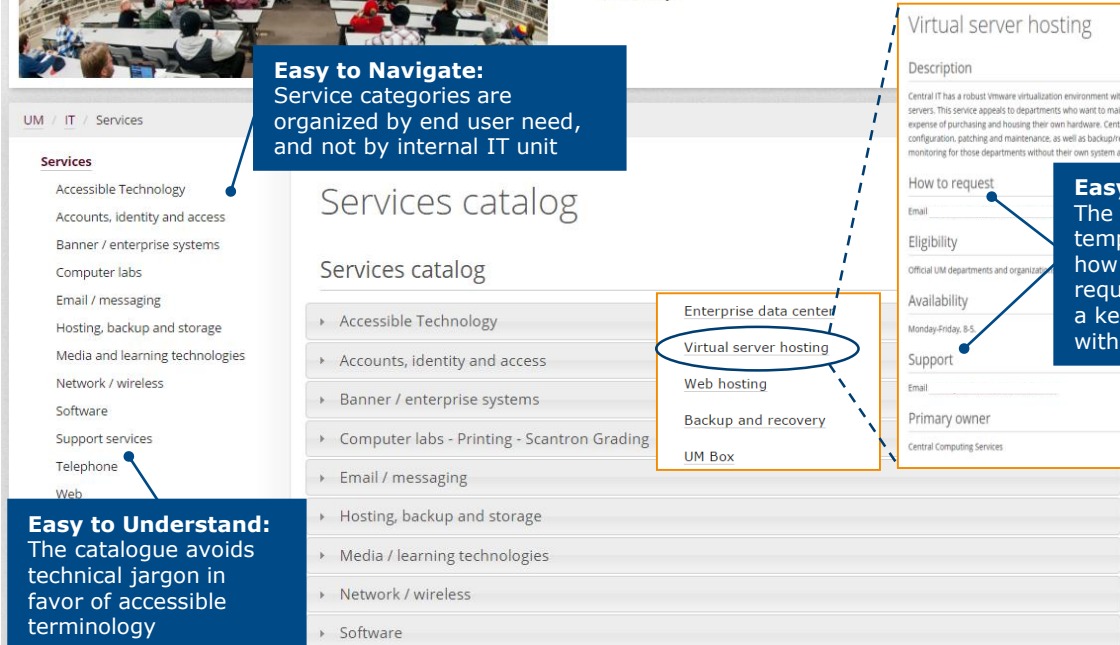
3 IT More Disconnected

- Campus has poor visibility into the services that IT offers
- Directory gives the impression that IT is difficult to work with
- Low utilization and engagement put IT further out of step with campus

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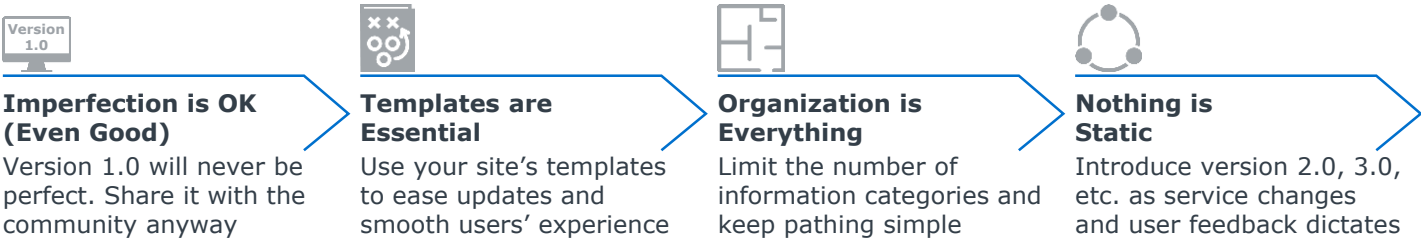
Information Technology Services

Search IT

| IT Home | About IT | Services | Support | Security | Training | Policies | IT A to Z Index |

IT Services

IT provides enterprise computing, software, network and telephone services as well as support services for web, email, learning technologies and IT accessibility.

Easy to Find:
The catalogue is prominently displayed on IT's main page

UM / IT / Services

Services

- Accessible Technology
- Accounts, identity and access
- Banner / enterprise systems
- Computer labs
- Email / messaging
- Hosting, backup and storage
- Media and learning technologies
- Network / wireless
- Software
- Support services
- Telephone
- Web

Easy to Navigate:
Service categories are organized by end user need, and not by internal IT unit

Services catalog

Services catalog

- ▸ Accessible Technology
- ▸ Accounts, identity and access
- ▸ Banner / enterprise systems
- ▸ Computer labs - Printing - Scantron Grading
- ▸ Email / messaging
- ▸ Hosting, backup and storage
- ▸ Media / learning technologies
- ▸ Network / wireless
- ▸ Software

Enterprise data center
Virtual server hosting
Web hosting
Backup and recovery
UM Box

Virtual server hosting

Description

Central IT has a robust Vmware virtualization environment with the capacity to host hundreds of Windows or Linux virtual servers. This service appeals to departments who want to maintain autonomy over their server management without the expense of purchasing and housing their own hardware. Central IT can also manage the server OS installation, configuration, patching and maintenance, as well as backup/recovery, security, networking, hardware, storage and monitoring for those departments with their own system administrator.

How to request
Email

Eligibility
Official UM departments and organizations

Availability
Monday-Friday, 8-5

Support
Email

Primary owner
Central Computing Services

Easy to Ask for Help:
The service overview template tells users how to submit a request and designates a key point of contact within IT

Easy to Understand:
The catalogue avoids technical jargon in favor of accessible terminology

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Version 1.0

Imperfection is OK (Even Good)
Version 1.0 will never be perfect. Share it with the community anyway

Templates are Essential
Use your site's templates to ease updates and smooth users' experience

Organization is Everything
Limit the number of information categories and keep pathing simple

Nothing is Static
Introduce version 2.0, 3.0, etc. as service changes and user feedback dictates

Pre-Approved Evaluation Criteria

Securing Community Consensus to Speed Evaluation of IT Project Proposals

Practice in Brief

Working with any existing project prioritization bodies, IT develops a comprehensive set of evaluation criteria that can be applied across the range of proposals IT receives. Having widely-agreed-upon, quantitative metrics makes it possible to rapidly and transparently triage proposals while still ensuring alignment with institutional priorities.

Implementation Steps

- Solicit input from stakeholders into the criteria that should be used to evaluate project proposals. Aim for comprehensiveness at this stage. Ensure that individuals who currently have a role in evaluating proposals are consulted.

- Working with IT leadership and key institution executives, distill nominations into criteria that are measurable, broadly applicable across different kinds of projects, and comprehensible to end users. Recirculate revised criteria to stakeholders for input and approval.

- Work with executive leadership to introduce criteria to campus, emphasizing the role campus leaders played in approving criteria. Position the criteria as a way to promote transparency and alignment between IT projects and institutional priorities.

Benefits to Institution

» Decreased delay from project proposal to implementation

» Greater strategic alignment between IT projects and institutional needs

» Increased understanding and trust of the project evaluation process

> "
>
> Before we instituted our prioritization rubric, the prioritization committee had grown into this big, bloated thing with every VP and dean having their say. It was too big to make decisions. Now, we evaluate proposals far more rapidly, and we know we're providing the right answer for the institution as a whole.

Courtney Carpenter, CIO
College of William and Mary

Model Process for Identifying, Refining, and Sharing Criteria

Brainstorm Broad Categories of Criteria	Develop Specific Criteria	Prune and Refine Criteria	Circulate Criteria for Community Approval
IT facilitates discussions with members of existing project evaluation groups, campus leaders to define high-level categories	IT leadership team develops concrete metrics for categories	IT leadership team prunes metrics to approximately XX in each of YY categories	IT solicits feedback on draft criteria from existing project evaluation groups, President's Cabinet

Iterate on criteria to incorporate key feedback

Considerations to Ensure Are Reflected in Your Criteria

What's the putative value of this project to the institution?

- Advances institutional priorities (e.g., enrollment, student success, research)
- Addresses regulatory mandate
- Remedies urgent business need
- Mitigates upcoming technology obsolescence

Are the required resources available (now or in future)?

- Funding needs are well documented and accounted for
- Person-hours of labor have been projected and accounted for
- Expertise to implement and support this technology exists at the institution and can be allocated to this project

What are the financial ramifications of this project? How long will it take to recoup the investment?

- Creates a new revenue stream or strengthens an existing one
- Saves money through cost avoidance or increased efficiency

How will this project impact existing business processes?

- Improves an existing process
- Makes possible new, better processes

How complex is this project?

- Impacts [only one/a few/many] systems/business units/colleges
- Can be completed on a flexible timeline
- Does not depend on other in-process projects

How bleeding edge is this project?

- Vendor is known and experienced in this area
- Underlying technology is mature and has been used at institution before

How will this project complement our existing technology systems?

- Provides functionality not currently available
- Is compatible with existing enterprise architecture
- Is likely to be reusable to address future needs

How ready is the requesting unit to leverage this project?

- Project champion has capacity and standing to advocate for project
- Requesting unit understands TCO and maintenance requirements
- Unit is open to changing business processes as needed

Reducing Cycle Time Between Need and Solution

Using this Report to Speed Consensus for Change

Many Forum members use our research as an occasion to convene IT and campus leaders. Together, they review best-practice lessons from innovative higher education institutions and deliberate about the need to revisit policies, implement new processes, or reallocate staff and budget dollars.

Forum reports now feature self-evaluation diagnostics and discussion guides that IT leaders can use as a backbone for focused working sessions. We recommend that members distribute this report to the relevant stakeholders as pre-reading to establish a common vocabulary and fact base. Then, spend 60-90 minutes going through the diagnostics and discussion questions to decide whether policy course-corrections or resource re-allocations make sense. Forum staff would be delighted to facilitate such discussions live on your campus or on a private webconference as helpful.

Creating a One-Hour IT Team Working Session

- Send report to IT leadership or procurement task force and committees for pre-reading

- Convene group to discuss diagnostic questions and assess need for adopting profiled practices

- Contact IT Forum for implementation support:

  – Unmetered consultation with Forum researchers

  – Networking contact with profiled institutions

  – Model policy and process templates

Surfacing Users' Unarticulated IT Needs

Community Demand-Sensing Platform

By creating a gamified project nomination and discussion platform, schools are able to tap into the current of community demand. This virtual panel of engaged community members provides an up-to-date and complete understanding of the community's technology needs.

Found in Forum Research

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Typical Practice   **Frontier Practice**
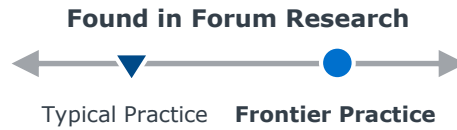
1. Who participates in identifying campus technology needs?

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Campus leadership in executive meetings

Select faculty and student committees

All campus constituents
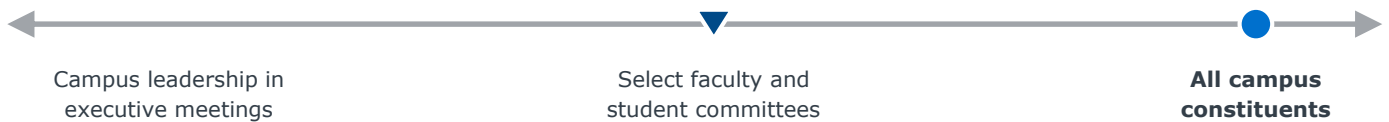
2. How concrete are the metrics we use to assess campus's technology needs?

◀——▼————————————●——▶

Metrics are impressionistic (e.g., conversations, industry trends)

Metrics are indirect (e.g., help desk tickets, download frequencies)

Metrics are direct (e.g., up-and-down votes on proposals)
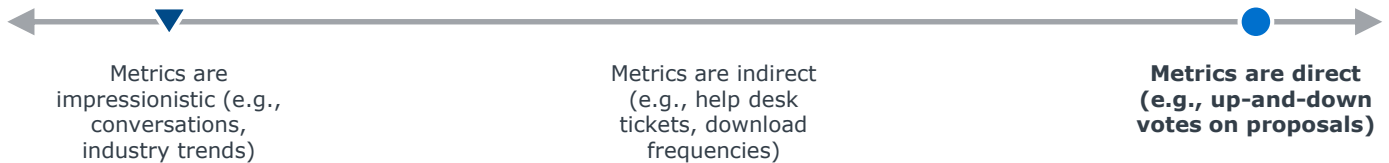
3. How frequently do we formally assess campus technology needs?

◀————▼————————●——▶

No set schedule

Every few years, e.g., for strategic plans

Annually, e.g., through surveys

Continuously, as users articulate needs
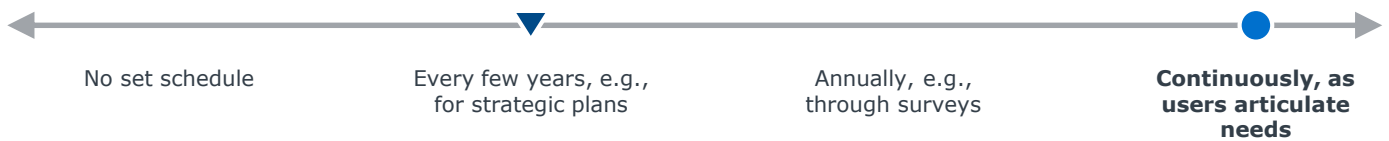
4. How explicitly do we acknowledge users' feedback?

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IT's response is only indirectly seen in new service offerings

IT's response is explicitly shared with campus leaders

IT's response is explicitly shared with all constituents
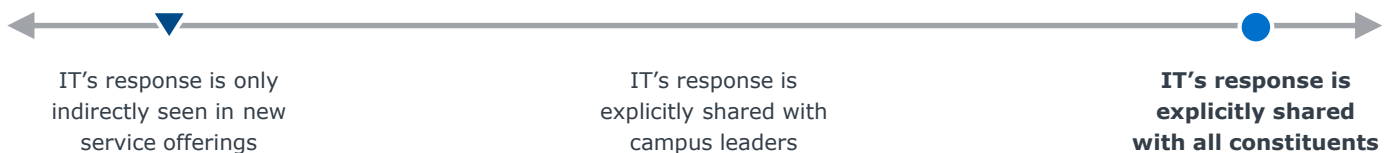
5. How quickly do we acknowledge users' feedback?

◀————————▼————————●——▶

IT responds after all feedback has been gathered and analyzed

IT responds intermittently, e.g., via monthly updates

IT responds in near real time, as each idea is submitted

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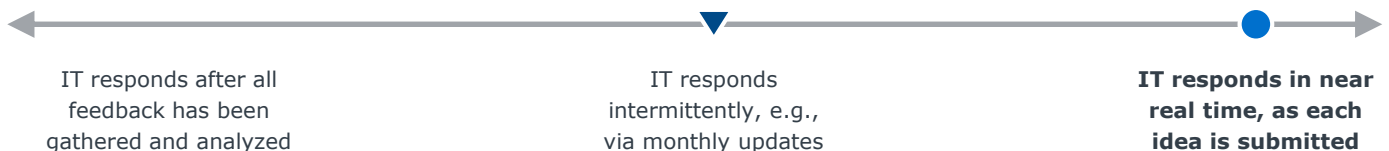
User-First Service Catalog

Some members are developing a solution-focused service catalog designed to seamlessly connect users with the service they require. Through the application of design principles from user experience research, the service catalog's structure rapidly guides users to answers to their questions without any active work on IT's part.

Found in Forum Research

Typical Practice   **Frontier Practice**

1. How frequently do we update the service catalog?

Intermittently/ unpredictably	Annually	**Every time a service is added or retired**

2. How accessible is the service catalog?

Users must click through multiple pages to access	Users can access with a single click from IT home page or drop down menu	**Users can access top-level categories directly on IT's homepage**

3. How user-friendly is the service catalog's language?

Reads as if written by an IT professional, with technical jargon	Reads as if written for a generic university, lacking local terms or names	**Reads as if written by a local (articulate) student or staff member**

4. How user-friendly is the service catalog's structure?

Structure is inconsistent or lacks sufficient high-level organization	Structure is consistent but uses internal IT groupings unfamiliar to users	**Structure uses groupings that reflect users' experiences**
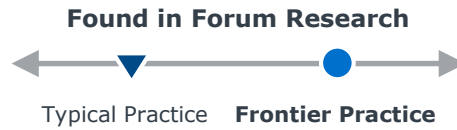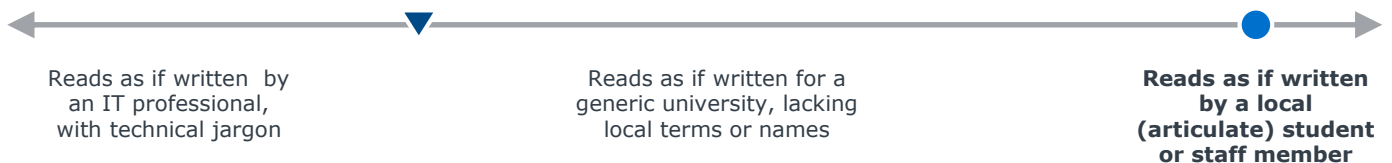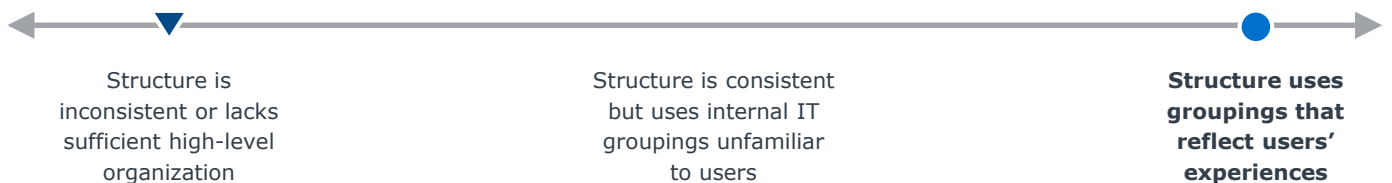
5. How easy is it to find additional support via the catalog?

Does not reliably include contact details for service owners	Directs users to a general IT help desk	**Connects users to the specific service owner**

Pre-Approved Evaluation Criteria

Users need to understand whether and when their requests for new services will be implemented. By engaging stakeholders in the identification of broadly applicable, strategically aligned, and mutually agreeable criteria, some CIOs have standardized the metrics used to evaluate IT project proposals. Reviewing projects on an agreed-upon, like-for-like basis allows for quick prioritization decisions that reflect the institutional good.

Found in Forum Research

Typical Practice   **Frontier Practice**

1. How long does it take for an IT project proposal to be approved?

Semesters   Months   **Weeks**

2. How is the final decision on an IT request communicated to users?

Reasons are not communicated   Users must request an explanation   **Users receive a copy of the completed scoring rubric**

3. What percentage of approved projects are aligned to institutional goals, as opposed to purely local or individual goals?

50% or less   51-75%   76-99%   **100%**

4. How clear and consistent are the criteria used to evaluate proposals?

No explicit, agreed-upon criteria exist   Criteria are too vague or broad to be used consistently   **Criteria are clearly articulated and applicable across projects**

IT Forum

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The best
practices are
the ones that
work for you.ᔢᴹ