

SDS Strategic Planning Update June 2007 Customer Service

ID Knowledge Sets/Baseline and Prioritize Training Needs

1. Survey to old SDS management developed and sent
 - To determine training priorities in the following categories
 - C&C Organizational Training
 - UW Orientation
 - UW Health & Safety
 - UW Computer Training
 - UW Catalyst
 - UW Administrative Applications
 - UW Professional & Organizational Development
 - Conferences
 - Team Specific Training
2. Same survey recently sent to new SDS management
3. Analysis of survey feedback (33 responses)
 - Top overall training needs identified:
 - Service Lines
 - Mission and Values
 - Culture of Service
 - Project Management
 - C&C Organizational Structure
 - Specific training identified under Voice & Data Networking:
 - Advanced Data Networking
 - Voice Networking Fundamentals
 - VoIP
 - ITIL
 - Unix Fundamentals
 - VPN Fundamentals
 - Firewalls
 - Specific training identified under Network Installation & Infrastructure:
 - Wireless security, analysis and troubleshooting
 - Specific training identified under Administration:
 - Disability etiquette
 - Records management
 - Variety of channels being used to provide staff training
 - Fairly high interest in professional and organizational development which demonstrates a strong customer emphasis. There was interest in:
 - Customer Service Excellence
 - Leadership
 - Building Team Relationships
 - Dealing with Difficult Customers
 - Overall, if training was required and of high priority, there was high correlation that the training was provided

4. Next steps:
 - Get agreement on priorities from SDS management
 - Create proposal for training
 - ID and implement communication methods
 - Communicate plan to staff

Define Customer service standards; ID, review and compare existing standards; ID operational differences

1. This effort is following in the footsteps of the larger C&C Customer Service Big Four effort to develop C&C Customer Service standards (now called guidelines) for all of C&C. What has been accomplished so far:
 - Existing standards have been reviewed and differences have been identified
 - Outside customer service entities were contacted for their customer service standards for a comparison
 - External and internal customers were asked to review and their input has been incorporated
 - A web page <http://www.washington.edu/cac/service/> has been developed with our draft customer service standards (guidelines) and the ability to hover over them and see tips from the Customer Service Workshop (hovering to be put in place 6/27 instead of current links)
2. Next steps:
 - Web page link to be sent to SDS directors and managers for feedback
 - Approval from EC (July)
 - Communicate to staff

SERVICE DELIVERY & SUPPORT GOALS

July 2006 – June 2007

Reliable & Responsive Systems

- Change Management
 - Defined and documented change management processes for critical network services
 - Identified Change Management Board team and began pilot in July
 - Moved from pilot to production on September 1st
 - Since the creation in July of the Request Tracker (RT) queue for tracking change requests, the Change Management Board has reviewed approximately 160 change requests
- Incident Response Procedures
 - Finished up incident response page for CacTools (including “red button”)
 - Developed new eOutage procedures, web page, and documentation
 - Expanded the duty manager concept to include systems as well as networks; updated duty manager procedures and on-call rotations
 - New eOutage and duty manager procedures were implemented January 30, 2007
 - Developed and published an After Action Review and Follow-up (AARF) web site with guidelines, templates, and best practices

Project Management

- Project Management Processes and Best Practices
 - Helped to organize the C&C Project Management Work group as part of our “Big 4” efforts
 - The Project Manager for this effort (Alisa) and a number of the team members (Thomas Nash, Bill Schaeffer, Peggy Ross, Janice Granberg) are from SDS
 - Key processes and templates for improving project coordination and communication with customers have been drafted; a first cut at a web site has been created
 - Recommendations will go to the Executive Council in July 2007
- Project Tracking and Communication
 - Developed a C&C Project Proposal Template (which included the “one-pager” elements required by the AVP and which has been approved by the SDT)
 - Improved project initiation processes and reporting for network and security infrastructure projects; prototyped the use of a Request Tracker queue for tracking these projects

June 2007 Progress Report: SDS Messages Subgroup

SDS Messages Subgroup Goal: All Service Delivery and Support (SDS) staff will understand and deliver Computing & Communications (C&C) common messages in support of service lines, culture of service, and vision/mission/values of C&C.

SDS Messages Subgroup Lead: Sheryl Burgstahler

SDS Messages Subgroup Tasks and Status:

1. Monitor the development of C&C common messages. (done, ongoing)
2. Draft examples of SDS messages that build on C&C and UW visions and messages.
3. Share drafts with SDS managers and discuss further development, use, and distribution of the messages.
4. Share draft messages across SDS groups and incorporate unit feedback into new drafts of C&C common messages.
5. Disseminate common messages throughout SDS.
6. Work with SDS managers to incorporate messages within work products and activities.

SDS Messages Subgroup Progress:

In January of 2007, Sheryl shared with Cindy Brown, project manager of the C&C Communications work group the January 2007 report from the SDS Messages Subgroup, which included most of the content that is in the remaining paragraphs of this document, The goal of the C&C Communications work group (<https://www.washington.edu/cactools/planning/strategic/cmux/index.html>) is to develop and implement a comprehensive communications and brand identity plan to enable effective two-way communication within C&C and with the UW community. Cindy Brown, Sandy Moy, Amy Philipson, April Ryan, Oren Sreebny, and Pam Stewart are committee members. The C&C Communications group shared draft messages with upper management in June, 2007. Once the draft is reviewed by upper management and others within C&C a final document will be shared by the Communications work group. The SDS Communications group will then create a document that provides examples of messages and/or of implementation ideas for SDS units in the context of, and support of, the UW vision.

As an exercise to begin exploring how SDS messages might look, C&C strategic planning reports, UW documents, and comments from Scott Mah's blog were reviewed to select from what is currently available content that should be considered in developing SDS messages. From these documents, draft SDS messages were created.

From Strategic Planning Report:

- C&C's goals for strategic planning are to position C&C to respond strategically to technology challenges over the next three-to-five years and to ensure that it does so in support of the overall vision and mission of the University of Washington.
- C&C's vision should be in the context of, and support, UW's vision.
- C&C has both internal UW roles as well as regional and national roles.

Draft SDS Messages:

- SDS is positioned to respond strategically to technology challenges over the next three-to-five years and to ensure that it does so in support of the overall vision and mission of the University of Washington.
- SDS's vision is in the context of, and supports, the UW vision.
- SDS has internal C&C roles, internal UW roles, as well as regional and national roles.

From C&C's Big 4 Goals/Actions:

- Customer service
- Communications
- Project and financial management
- Reliable & responsive systems

Draft SDS Message: SDS maintains high quality:

- Customer service
- Communications
- Project and financial management
- Reliable and responsive systems

From C&C's Vision Poster:

To partner with the UW community in creating technology solutions that enable the University of Washington to enrich lives through teaching, research, and public service.

Draft SDS Message: SDS partners with the UW community in create and support technology solutions that enable the University of Washington to enrich lives through teaching, research, and public service.

From Scott Mah's BLOG:

- **Question 2. From your own perspective and in the fewest words possible, what is Computing & Communications?** An organization comprised of exceptional people, many recognized internationally for their technology excellence, responsible for delivery of core computing and communications infrastructure for the UW, leadership for ensuring we are moving in the right technological directions, and innovating to ensure UW is successful in fulfilling its research, teaching, and public service mission.
- **Question 3. What is Computing & Communications' biggest passion as an organization, why does that passion matter to you, and why would it matter to those outside the organization with which it hopes**

to communicate? To become an organization that embraces a service culture so that all interactions exceed customer expectations, and that the broader community considers C&C a trusted partner in achieving whatever makes the most sense for UW and its people to be as successful as possible in their endeavors.

- **Question 6. If someone reading the story of Computing & Communications could remember just one thing, what would you want it to be?** That C&C is committed to its customers, and we strive for service excellence, and are successful in our relationships with people.
- **Question 8. From your point-of-view, what are the 1-3 greatest strengths that Computing & Communications has to offer its customers and stakeholders?** The collective world-class knowledge in our people, knowing how to deliver reliable and scalable services, and willingness to adapt and change to be responsive to environment and challenges.

Draft SDS Messages:

- SDS is comprised of exceptional people, many recognized internationally for their technology excellence, responsible for delivery of core computing and communications infrastructure for the UW, leadership for ensuring we are moving in the right technological directions, and innovating to ensure UW is successful in fulfilling its research, teaching, and public service mission.
- SDS is an organization that embraces a service culture so that all interactions exceed customer expectations, and that the broader community considers C&C a trusted partner in achieving whatever makes the most sense for UW and its people to be as successful as possible in their endeavors.
- SDS is committed to its customers, and we strive for service excellence, and are successful in our relationships with people.
- The three greatest strengths of SDS are the collective world-class knowledge in our people, knowing how to deliver reliable and scalable services, and willingness to adapt and change to be responsive to environment and challenges.

From University of Washington Values Statement:

Integrity, diversity, excellence, collaboration, innovation, respect.

(<http://www.washington.edu/discovery/>)

Draft SDS Message: SDS values include integrity, diversity, excellence, collaboration, innovation, respect.

From University of Washington Vision/Priorities: The University of Washington's vision and strategic priorities reflect the core values and culture that make us great and unique.

- **UW Standard of Excellence**. We recruit the best, most diverse, and innovative faculty and staff from around the world, encouraging a vibrant intellectual community for our students. We link academic excellence to cutting edge research through scholarly exploration and intellectual rigor. We hold ourselves to the highest standards of ethics, as a beacon for our community and the world.
- **Academic Community**. We are educators and learners. We promote access to excellence and strive to inspire through education that emphasizes the power of discovery and the foundation of critical and analytic thinking. We foster creativity, challenge the boundaries of knowledge, and cultivate independence of mind through unique interdisciplinary partnerships.
- **World Leaders in Research**. We have grown into the most successful public research university in the nation in attracting support for our research. Ours is a proud culture of innovation, collaboration, and discovery that has transformational impact.
- **Celebrating Place**. The natural beauty of the Pacific Northwest envelops us. This is an important element of who we are, for this awe-inspiring place not only anchors us, it reaffirms our desire to effect positive change in the world around us. We accept gratefully our role in preserving and enhancing Washington: the place, the people, our home.
- **Spirit of Innovation**. As Washingtonians, we are profoundly optimistic about our future. Based on our past and present, we find inspiration for the future. Ours is a culture with a determined persistence that engenders innovation and a belief that our goals can be realized.
- **World Citizens**. We are compassionate and committed to the active pursuit of global engagement and connectedness. We assume leadership roles to make the world a better place through education and research. We embrace our role to foster engaged and responsible citizenship as part of the learning experience of our students, faculty, and staff.
- **Being Public**. As a public university we are deeply committed to serving all our citizens. We collaborate with partners from around the world to bring knowledge and discovery home to elevate the quality of lives of Washingtonians. This measure of public trust and shared responsibility guides our decision-making as well as our aspirations and vision for the future. (<http://www.washington.edu/discovery/>)

DRAFT SDS Messages: The SDS vision and strategic priorities reflect the core values and culture that make us great and unique.

- **UW Standard of Excellence**. SDS recruits the best, most diverse, and innovative staff from around the world, encouraging a vibrant intellectual community. Through effective technology services, SDS supports academic excellence to cutting edge research through scholarly exploration and intellectual rigor. We hold ourselves to the highest standards of ethics, as a beacon for our community and the world.

- **Academic Community.** SDS staff are educators and learners, providing customer-first technology services while continually listening to and responding to our customers. We provide access to excellent technology tools and strive to inspire through education that emphasizes the power of discovery and the foundation of critical and analytic thinking. We foster creativity, challenge the boundaries of knowledge, and cultivate independence of mind through our support of interdisciplinary partnerships.
- **World Leaders in Research.** SDS provides technology and services that support to help maintain the UW position as the most successful research university in the nation in attracting support for research. Thus, SDS contributes to our proud culture of innovation, collaboration, and discovery that has transformational impact.
- **Celebrating Place.** We acknowledge our role in preserving and enhancing Washington: the place, the people, our home.
- **Spirit of Innovation.** SDS efforts support a UW culture with a determined persistence that engenders innovation and a belief that our goals can be realized.
- **World Citizens.** SDS staff are compassionate and committed to the active pursuit of global engagement and connectedness. We assume leadership roles to make the world a better place through technology and the support of education and research. We embrace our role to foster engaged and responsible citizenship as part of the learning experience of our students, faculty, and staff.
- **Being Public.** SDS, as part of a public university, is committed to serving all our citizens. We collaborate with partners from around the world to bring knowledge and discovery home to elevate the quality of lives of Washingtonians. This measure of public trust and shared responsibility guides our decision-making as well as our aspirations and vision for the future.