

From Chaos to Cohesion

*Standardizing Disparate Workflows by Identifying
Common Elements*



Quick Level Set

Raise your (virtual or actual) hand if you ...

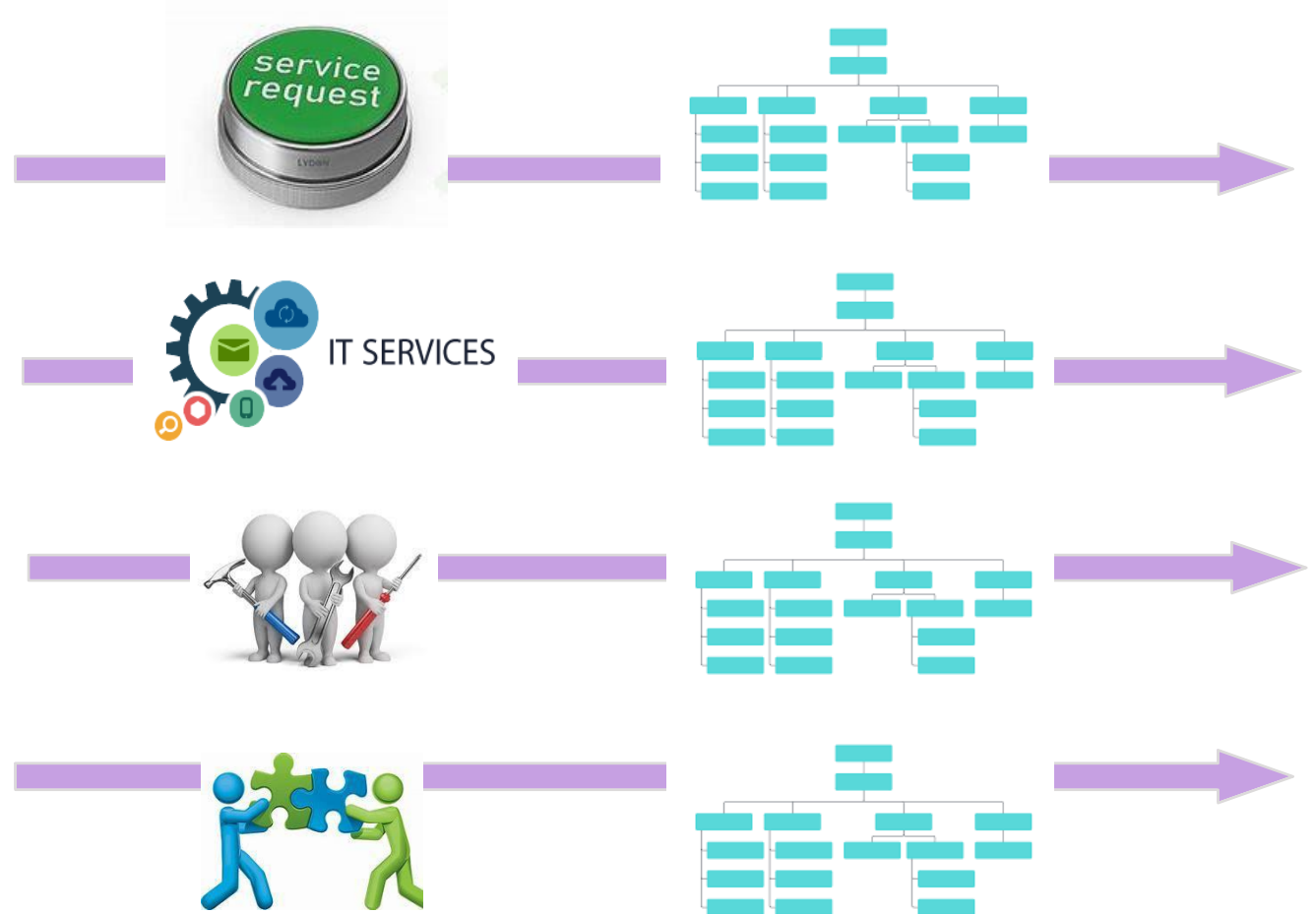
- Have ever submitted a request or ticket into a system
- Work in or with a ticketing system
- Have designed a Service Catalog

No? Share your industry and role in the chat

The Situation



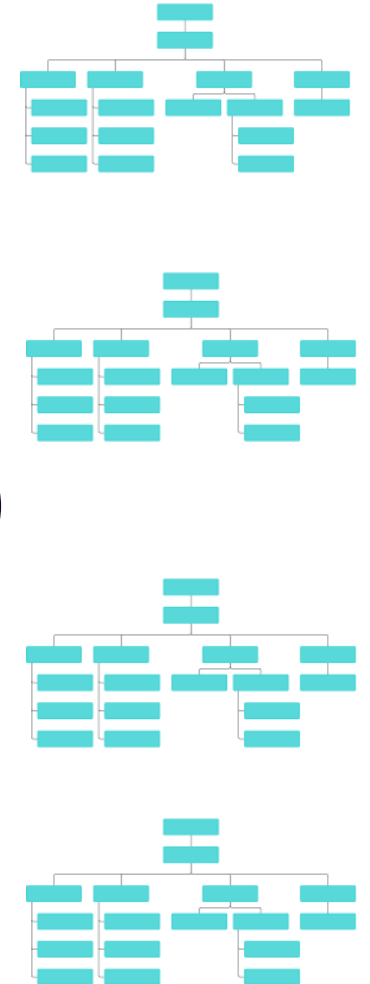
Customers



Enterprise Service Center



Customers



The Situation by the Numbers

CUSTOMERS

Approximately 20,000

TIMEFRAME

12-16 weeks

ITS ORGANIZATION

- 120 employees
- Over 150 Service Offerings
- 4 Teams
 - Support
 - Application Development
 - Project Management Office
 - Infrastructure & Operations (I&O)

BUSINESS PARTNERS

- 9, e.g. Finance/Accounting, Payroll, Travel, Facilities, Procurement...
- Offerings by partner, 5 – 25+



Where We Started

ITS Current State



Leads were deployed to an area of ITS

Focused on:

- Mapping the processes
- Finding the value streams
- Gaining insight into necessary metrics

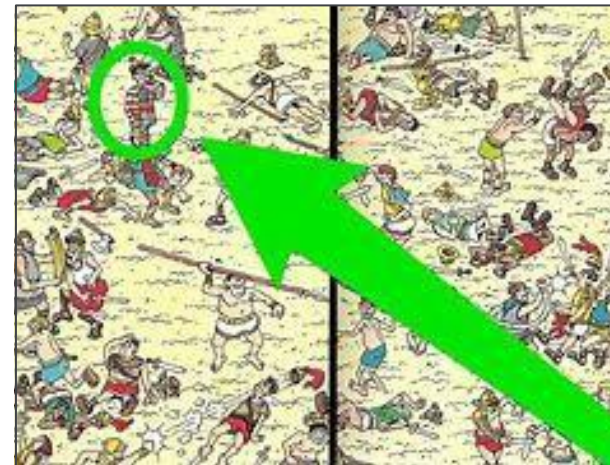
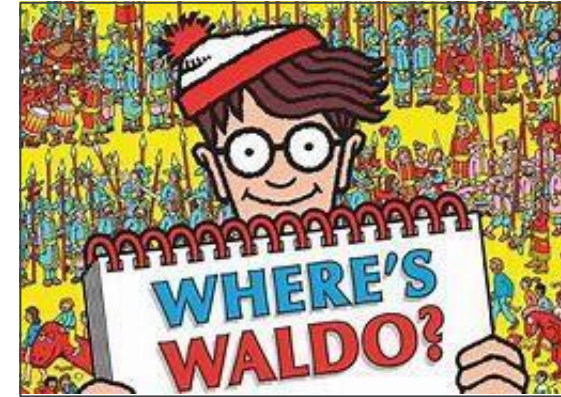
Results



- Tremendous variation
- Choices/Branching/Decisions
- Level of detail was proving to be difficult
- Starts and ends were hard to define
- Each current state conversation had taken anywhere from one to two hours

Took a Step Back

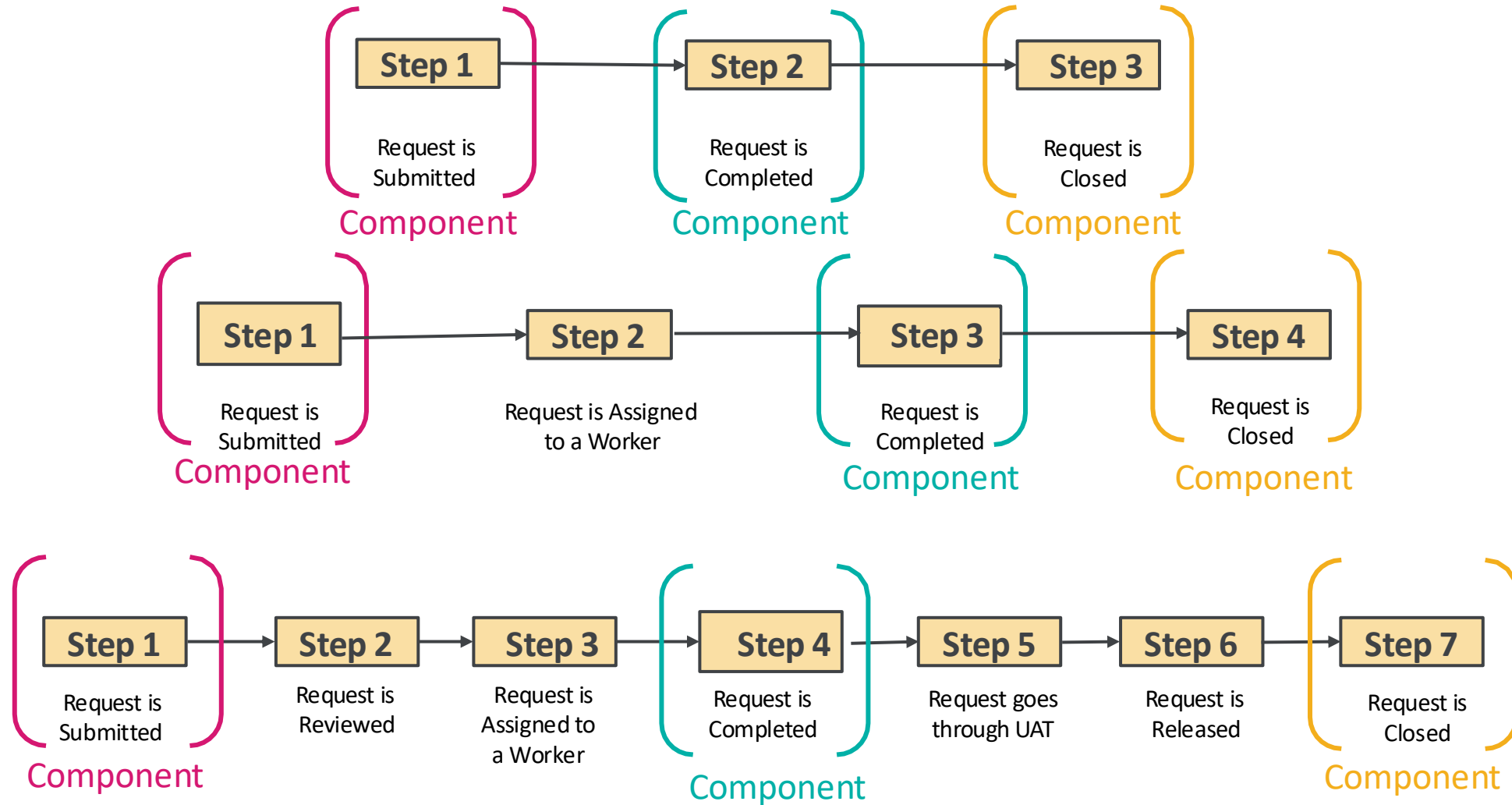
- Lots of content from the SMEs
- Some commonalities
- Were there standards in there?



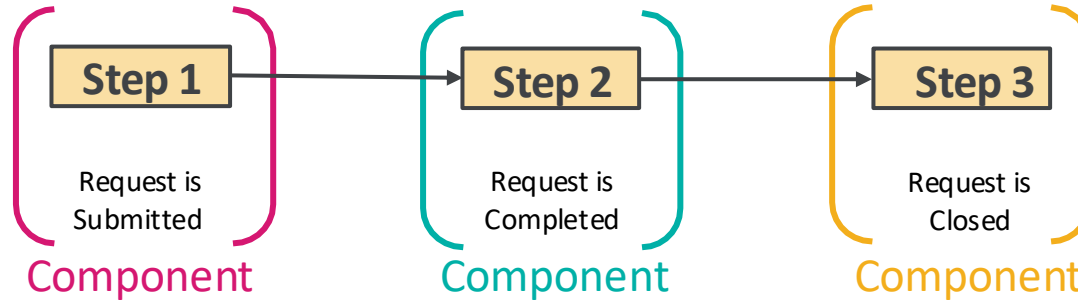
Components were the Key



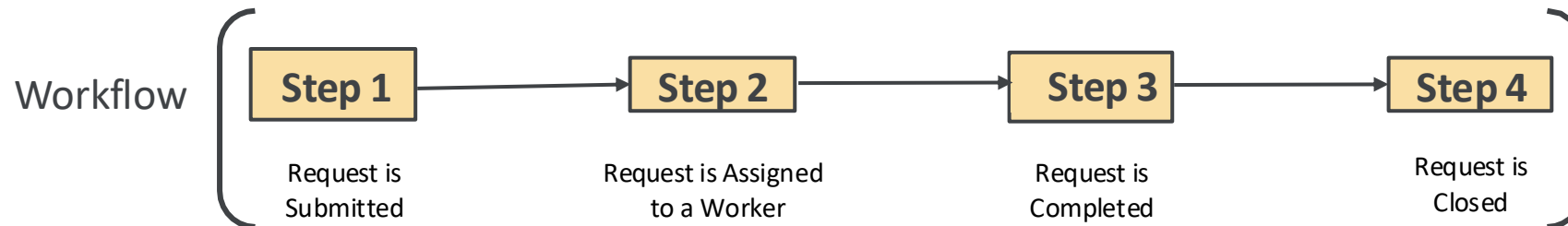
Example Request Processes



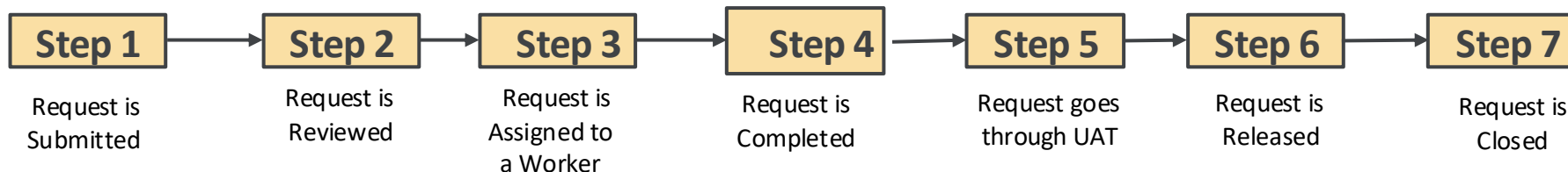
Example Request Processes



1) Standardize the Components...



2) Optimize and Standardize the Workflows

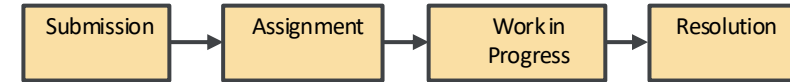


Experiment #1

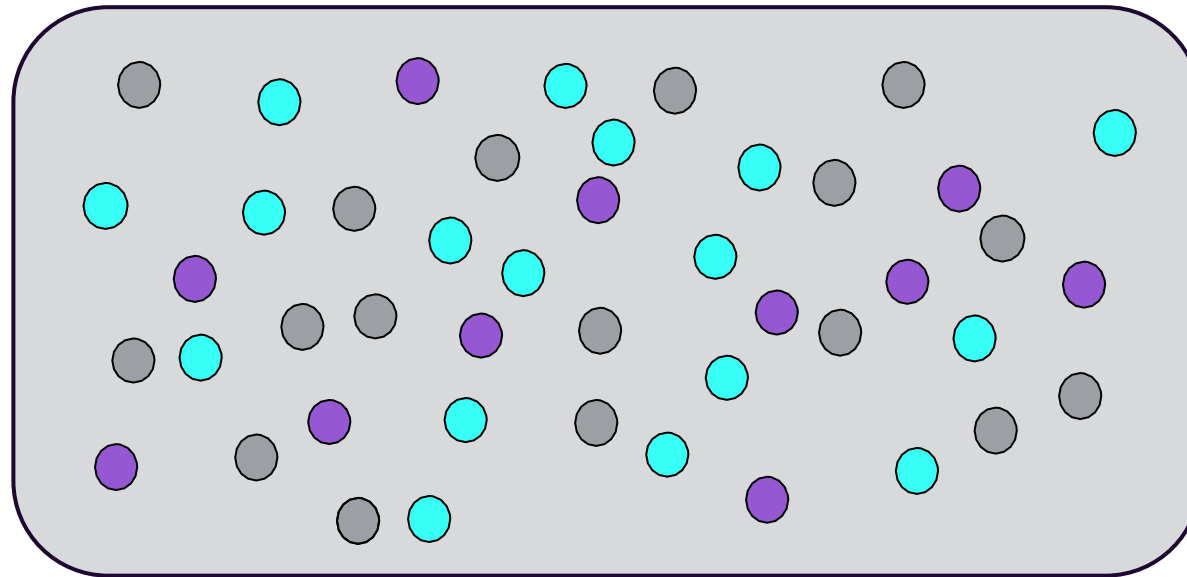
Workflow 1



Workflow 2

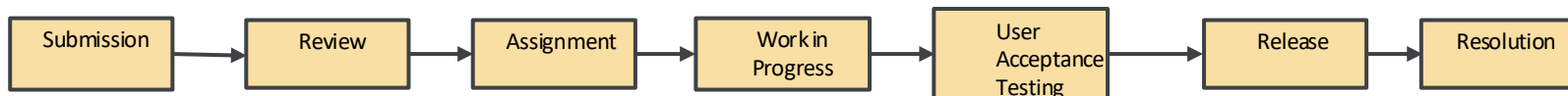


Service Offerings (44)



-  Apps Dev Offering
-  I&O Offering
-  Support Offering

Workflow 3



Components & Definitions Examples

ID	Component	Description
A	Submission	Customer initiation of a request
B	Work In Progress	Resources are taking action(s) to fulfill the request
C	Resolution	The request requires no further action and will be closed or cancelled
E	Scheduling	The request can't or won't be completed immediately but must be assigned a specific date and/or time to continue and/or be finished
F	Worker Assignment	Associating human resource(s) who will complete the work with the request
G	Verification	A check with the Requestor to be sure the completed work meets the request requirements
L	Purchase	Spending money to acquire an additional service or product in order to complete the request
M	Disposition	Provides the mechanism to cancel or reschedule a request at any time
P	Pre-Close Review	Part of the Resolution component; used to complete an internal review of the completed work and any related tasks
Q	Change Control	An external process to support the request moving through the ITS Change Control process
S	Release	Making new and changed services and features available for use
T	Prioritizing	Evaluating if and/or when the request will be completed relative to other related requests

Method

Session Activities Part I

Each fulfillment process was defined using a Process Toolkit

- Business area selected components that they used
- Talked through each Offering sequencing the cards to define the workflow
- Eliminated waste where saw it
- Defined the necessary processes

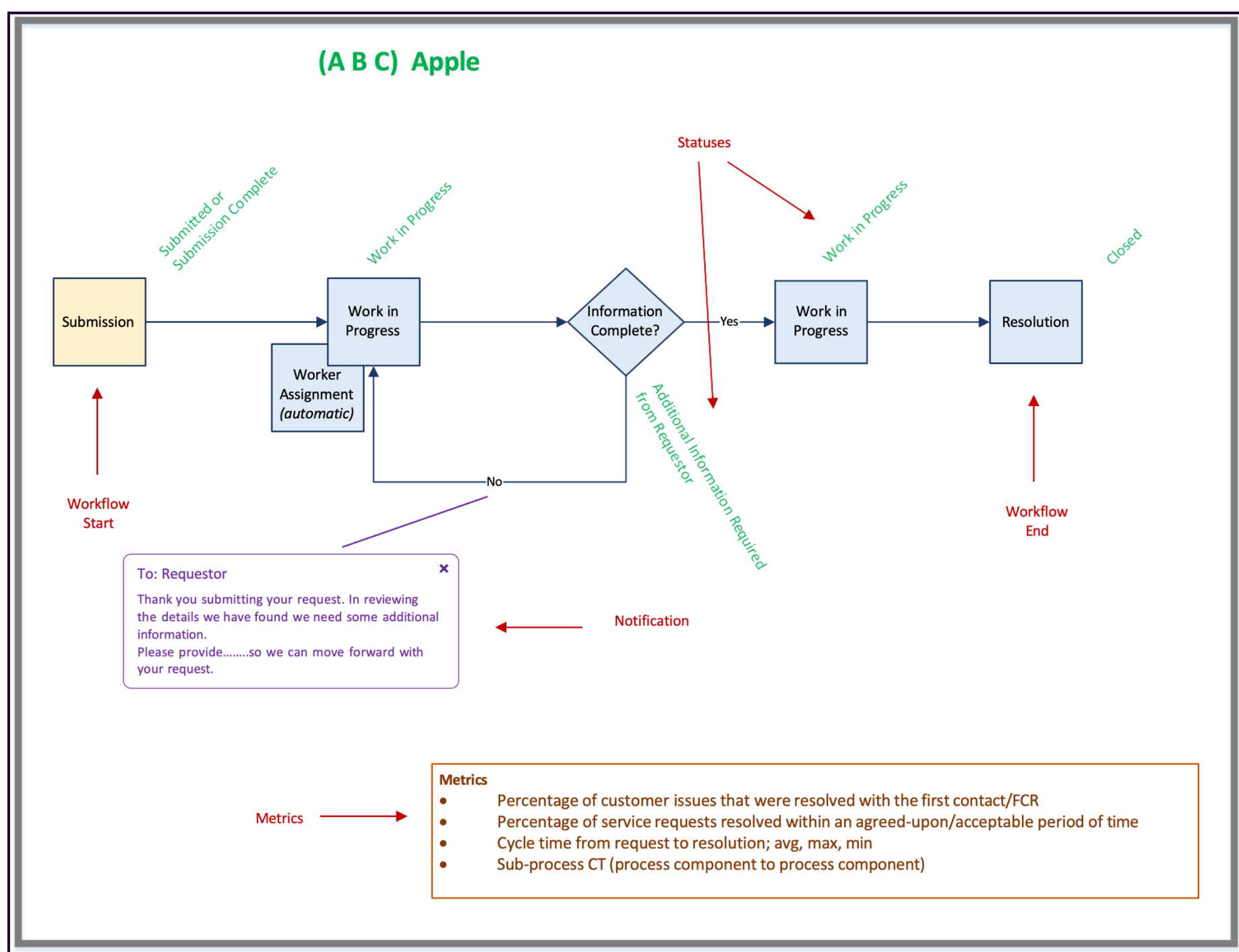
Session Activities Part II

- Defined processes are copied onto butcher/plotter paper using post-its and taped to the wall and given a reference letter
- As new workflows were defined, they were added to those posted on the walls
- One off questions were captured on a parking lot to be addressed with configuration

EXAMPLE

Workflow 1

(A B C) Apple



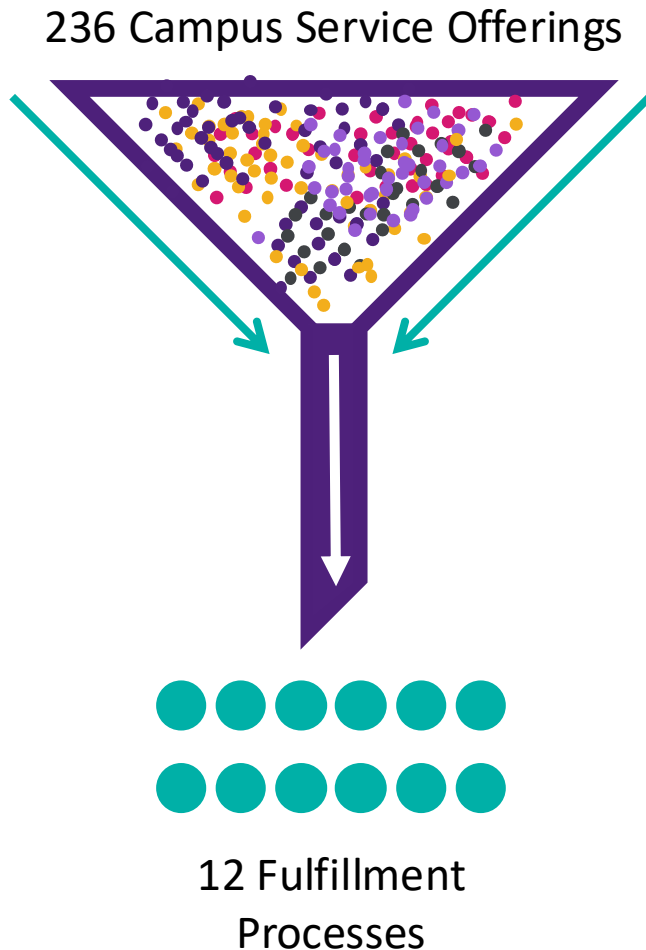
Workflow 1* Processes

- Analysis for Finance & Procurement Systems
- Create an institution email group or distribution list
- Edit a location on the interactive campus map
- Phone upgrade
- Physical jack installation
- Pre-approval to engage an Independent Contractor
- Request a new computer account
- Request access to Facilities Management systems
- Reserve parking permit renewal
- Rideshare enrollment



**Submission, Work in Process, Resolution*

Final Results



Fulfillment processes

- Captured roles for each workflow (e.g. Recipients, Approvers) and assignments
- Added details to each process including:
 - Status'
 - Notifications
 - Process performance metrics

Time/Effort:

- Pre-work, materials and overview training: 4 weeks
- Defining processes and associated requests: 3 weeks

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Questions? Comments?

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