LEVELING UP

6 IT LEADERS IMPROVE SERVICE MANAGEMENT

IT leaders in education, the public sector, and healthcare are finding new ways to overcome demand derived from rapid tech spend.
BOUND BY THE COMMON CHALLENGES OF RESOURCE CONSTRAINTS AND A RAPID INCREASE IN TECH SPEND, IT LEADERS IN EDUCATION, THE PUBLIC SECTOR, AND HEALTHCARE ARE FINDING NEW WAYS TO MEET THIS DEMAND.

... THESE ARE THEIR STORIES.
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Michigan Technological University Improves Self-Service and IT Satisfaction .................................................. 4

Aligning Resources to Strategic Vision at Covenant HealthCare ................................................................. 6

Improving Project Portfolio Management for 3,000 Employees at Frederick County ........................................... 8

Five Keys to Better IT Change Management at Nova Scotia Community College .............................................. 10

Journey Toward Successful IT Project Governance at Miami University ...................................................... 12

Stepping up IT Maturity to Support the Tech Strategy at Denver Public Schools ............................................ 14
At Michigan Technological University, improving self-service is helping us meet our goal of delivering more efficient IT service and increasing satisfaction for our 7,300 students and 1,890 faculty and staff. One way we have approached this goal is by applying lean management principles to the design of our new knowledge base (a repository of IT self-help articles). We decided TeamDynamix was the right product for this new knowledge base.

Last spring, Michigan Tech IT merged its User Services group and Project Management Office into one combined department, called Service Management. As part of this transformation, we looked at how we could apply our project management expertise to simplify and enhance the ability of students and university employees (our “customers”) to resolve self-service IT issues.

One major success of the knowledge base is the focus on self-service, which allows a customer’s smaller issues to be resolved without consulting an IT technician. By providing a level of self-service, we allow our IT support team to focus on more complex issues that customers encounter. When issues are resolved quickly, a great customer experience is established. The IT organization serves more people at a faster rate—and this ultimately benefits everyone.

The key to improving self-service is having a high-quality knowledge base that customers can consult. If these articles are relevant to customers’ needs, simple to find, technically accurate, and clearly and consistently written, then customers will be more apt to resolve their own issues. Because our project management team has experience with lean management principles, we decided to re-evaluate our knowledge base through a lean improvement lens. Lean management is an approach that reduces waste and emphasizes continuous improvement through a series of incremental changes.

At the time, we were using separate platforms for hosting our knowledge base and for project portfolio management. By consolidating these services within a single platform from TeamDynamix, we were able to save $12,000 in annual licensing costs.

To improve the content within our knowledge base, we used a lean methodology tool called 5S, which is a workplace organization system based on a series of five Japanese words. Loosely translated into English, these concepts are “Sort,” “Set in order,” “Shine,” “Standardize,” and “Sustain.” Here’s how we put this methodology into practice.
First, we assessed all of the current knowledge base articles for relevance. We wanted to make sure we weren’t including any outdated information. So, we brought together project management and IT service staff to collectively evaluate our 750 articles.

For each article, we asked: Do we need this? Is it still helpful, or does it describe a system or procedure that we no longer use? Through this process, we pared down our knowledge base to the 300 articles that still had value.

We also revisited the categories of service we were using, to make sure we were organizing knowledge articles in a logical way. We wanted to make it as easy as possible for users to find answers to their problems.

To do this, we enlisted the help of our entire IT department, as well as our customer base—and we used another lean tool, called an affinity diagram, to collect their input. An affinity diagram is a brainstorming tool that is used to gather information and organize it into groupings based on the natural relationships between items. We were able to use the feedback from our customers and other IT employees to better identify and categorize our service areas.

To make sure the information contained in our knowledge articles was accurate and easy to follow, we had help desk personnel polish or rewrite the 300 articles we determined were still relevant. We used a Kanban board, another lean management tool that is used for workflow visualization, to help us keep track of this work.

Before we had our help desk consultants rewrite knowledge articles, we worked with our IT communications and accessibility manager to create a standardized style guide for these articles. The style guide explains how articles should be written so they are clear, consistent, and accessible to everyone, including people with visual impairments or other disabilities.

For instance, instead of creating section headings in bold type, it is important to format the words as headings so they may be read by screen reading software. The style guide also ensures the use of common and consistent language throughout our knowledge base, especially as it relates to technology terminology.

After we improved the usability of our knowledge base, our next step was to create a review and auditing process to make sure we can continue to meet these high standards with all future content we create.

Brian Hutzler and Heidi Reid are assistant project managers in the IT Department at Michigan Technological University.
Aligning Resources to Strategic Vision at Covenant HealthCare

HC Innovation interviews Frank Fear, CIO, Covenant HealthCare

As the CIO, I have IT resources, and I need to assess their capacity. I look at what capacity do they have to work on projects, to work on change requests, to work on support requests. At the 40,000-foot level, having a comprehensive project management solution that also operates with the IT service management platform, allows me visibility for insight into those areas, and allows me to plan for project-based work based on the capacity to handle support requests and change requests. We use the ITIL framework which buckets elements into support incidences versus change requests; it can help determine whether a request will require the establishment of a new project or not.

The Impact of Digital Transformation in Healthcare

Like other businesses, we’re becoming a digital business that provides healthcare, just as Tesla is becoming a digital business that provides cars. Our customers need our support so the demand is escalating and it’s only going to increase.

A huge element in the acceleration and intensification of demands on his IT department and on the IT departments in hospital-based organizations nationwide, has to do with the post-EHR operational environment.
Just a small number of years ago, a relatively small percentage of patient care organizations in the United States had digital health records, so naturally, the first step was to implement EHRs. And the government came in with HITECH to help us become electronic. We’re now over 90-percent fully electronic in our processes. So now, we need to learn how to work different, and we need to leverage information technology to help create those process and performance changes.

**Resource Capacity Planning**

The desire for new technology solutions to support change and other processes, is insatiable; it far outweighs the capacity. So I need to be able to clearly articulate what my IT organization’s capability is. And, it’s very important for me to be able to sit down with those in governance, to evaluate our full capacity, and manage the governance around what is possible.

**Bringing IT Service & Project Management Together for a Single View**

IT service management and project management must be conceptualized at the highest levels of an organization, and must be governed actively and consciously, in close relation to the organization’s core business objectives and needs. In this area, technology is inseparable from technology management and from governance.

In healthcare, the needs will only accelerate dramatically in the coming months and years as the shift from a volume-based payment system to a value-based one accelerates and intensifies. CIOs and other healthcare IT leaders can no longer rely on anecdotally based, guesstimated evaluations of needs and resources in their organizations. A more evidence based, quantifiable and quantifying, set of processes, is needed.

An organized, comprehensive, strategic process of service management and project management needs to be delivered in an integrated way, via a flexible, supportive platform. Cost-effectiveness, efficiency, and improved clinical outcomes, are all becoming essential to survival – it is vital that we have a clear picture of how IT will support.

Frank Fear is CIO of Covenant HealthCare, a healthcare system centered around a 540-bed community hospital in Saginaw, Michigan. Covenant encompasses 4,500 employees, and serves patients across a one-and-a-half-hour radius extending out from the main hospital campus. The health system supports the IT needs of a large number of physician offices and facilities in the region, including approximately 340 providers in the area.
Improving Project Portfolio Management for 3,000 Employees with 200 Different Apps

By Rick Little, the manager of Application Services for the Interagency Information Technologies Division of the Frederick County, Maryland, government.

The Interagency Information Technologies Division for Maryland’s Frederick County was managing projects for 18 divisions with a mix of spreadsheets and a SharePoint environment. But this was a time-consuming process that made it hard to plan effectively around resource capacity. Moving to the TeamDynamix platform has solved these problems and increased the efficiency of IIT staff.

As the software integrators for all of Frederick County, Maryland’s government entities, the Application Services team within the county’s IIT Division acquires, develops, rolls out, supports, and maintains software for all 18 divisions within the county government. In effect, we’re supporting 18 different businesses with mission-critical applications such as financial systems and 911 emergency dispatch systems. Failure is not an option for our department.

We have more than 3,000 government employees under our domain, and together they use about 200 total applications. As you can imagine, we serve many different user needs. When users come to us with a change request or a capability they need filled, we’ll look to see if we have any software currently running within our enterprise that might solve their needs. If not, then we’ll help them find, procure, and implement a commercial solution—or we’ll develop our own homegrown software.
While our 16-person department has been able to meet the county’s software needs, we did not have an efficient way to manage our projects. We were using Microsoft SharePoint to keep track of the status of projects, and we were tracking the hours that staff were spending on projects within multiple spreadsheets. Updating each of these systems was an awkward and time-consuming manual process, because the tools didn’t communicate well with each other in real time—and therefore we didn’t have very good visibility into the availability of resources.

Not knowing instantly who was working on what project and how many hours they were committed to made it very difficult to schedule projects and allocate resources nimbly and effectively. If we wanted to know who might be available to take on a new project, we had to comb through various spreadsheets and calculate the number of hours that staff had available. As a result, our department was not as efficient as it could be. We were spending too much time on administrative tasks, we had a hard time adjusting on the fly when new issues would arise, and we ran the risk of overworking and burning out our staff.

Resource Capacity Planning Becomes Real

Recognizing that we needed a better approach to resource capacity planning, we looked for a project management solution that would allow us to be more efficient. We found the answer we were looking for in the Project Portfolio Management (PPM) platform from TeamDynamix, which allows us to manage multiple projects and resources throughout the entire project lifecycle with a single, easy-to-use tool.

Having a single view of all projects and the resources that are allocated to them makes it much easier to do resource capacity planning. We can now schedule projects and allocate resources much more effectively. This allows us to balance the workload among our employees more effectively.

Instead of wasting valuable time calculating staff availability, for instance, we can simply run a report to see who has time to take on new projects. And whereas we used to have to update multiple SharePoint pages to usher change requests through the review and approval process manually, now much of this work will be automated. We have about 40 open change requests, and I was spending at least three hours a week on this process. An automated solution will reduce this from hours to minutes.

Bringing Project & IT Service Management Together

Our next step will be to implement the IT Service Management capabilities of the TeamDynamix platform. This will allow us to use a single platform to manage both projects and service requests. Sometimes, service requests grow into full projects, and projects often kick off a series of smaller service requests. Being able to manage all of these tasks on a single platform will allow service requests to seamlessly grow into full projects that we can assign resources to easily.

Moving to a single, automated platform gives us better visibility into projects and resources. It improves our ability to plan and adjust, and it makes our department more efficient. As a result, we can serve our users more effectively—while being responsible stewards of taxpayer dollars.

We have about 40 open change requests, and I was spending at least three hours a week on this process. An automated solution will reduce this from hours to minutes.
Five Keys to Better IT Change Management

Change management is a critical component of IT maturity. Here’s how organizations can leverage change management to reduce downtime and improve IT service.

By Angela McCarthy and Erin Tramble, Information Technology, Nova Scotia Community College

A significant number of IT incidents occur when someone makes a change to one system, and this change then affects other systems in unexpected ways. Organizations can dramatically reduce the chance of this happening by focusing on effective change management.

Change management involves making sure that any proposed change to an IT system goes through a thorough review process before being implemented. This process helps mitigate the risks involved in making a change, ensuring fewer outages and a higher quality of IT service.

Here are five keys to adopting an effective change management process.

**Figure out how much process you need.**

The more risk involved, the more thorough your process needs to be. We both have extensive experience with change management in other industries where IT downtime can be catastrophic, such as utilities and healthcare. In joining a college that doesn’t offer 24-7 IT support—we provide support between 6 a.m. and midnight, seven days a week—we have taken a more practical approach to our change management process here at Nova Scotia Community College.

To ensure buy-in among stakeholders, the process you implement must balance rigor and expediency. You want to collect just enough information to help you make good decisions, but not so much that it becomes too onerous for users to request a change. Understanding the needs and culture of your institution can help you find the right balance.

**Appoint a change advisory board.**

At our college, when staff have a change they require, they come to someone in IT and we shepherd their request through the process. We require a description of the change and the window in which it will occur. We also ask for a step-by-step implementation and backup plan, as well as the names of the team members who will be implementing the change. Someone else in IT then peer-reviews the proposal to make sure it meets our technical standards.

Once the technical reviewer has signed off on the change management plan, it comes to our Change Advisory Board (CAB) for review. Our CAB consists of managers from all of our operational areas. The board meets weekly to review new change requests, and anyone who is requesting or implementing a change must attend the meeting and answer any questions that arise.
Taking a team-based approach to reviewing change requests ensures that someone from each operational area is aware of the change and has an opportunity to weigh in. It also brings more insight to the review process. A CAB works best if its members can review proposed changes from a technical as well as a strategic perspective, and we have found that management-level (as opposed to director-level) representation is ideal.

**Give board members the authority to make difficult decisions.**

In our CAB meetings, board members discuss change proposals, raise questions, and look at our schedule of IT work to make sure there are no conflicts. Then, each member votes on whether the change will proceed—and the vote must be unanimous.

Institutions that struggle with change management often do so because their change manager or CAB has not been empowered with the proper authority and executive-level support to make tough calls, such as requiring more information or denying a change request that might cause a problem.

**Use tools to help you communicate change.**

We use the TeamDynamix online platform to track and manage incidents, service, and change requests, giving us easy visibility into the status of projects and support tickets. We can build high-level public dashboards to show executives what’s happening, and we can create more detailed views that can be shared with our entire IT team so they can see what’s coming down the pipe that might affect them.

If a technician logs in at 6 a.m. and sees that a system is down, one of the first things that he or she does is look within the TeamDynamix change calendar to see if a change occurred the night before. This allows our technical team to identify the cause of the issue and respond to outages much more rapidly.

One advantage of using the same platform to manage incidents, service, and change requests is that our IT staff were already familiar with the platform’s interface from fulfilling service tickets. Therefore, we could focus on the process we would be using instead of the tool.

We also plan to roll out the TeamDynamix asset management module in the coming months, and this will help us make these assumptions more accurately. We’re excited about the impact this will have on our change management process.

**Focus on the ‘why.’**

Convincing people to buy into change management can be challenging, because it’s not always viewed as necessary. Technical staff generally feel like they’re being asked to do too much already, and clients might resent having to go through the process and wait for their requests to be approved. There is often an expectation that IT should be able to make a small change very quickly: “What do you mean I have to wait a few days? Can’t you just press a button and make this happen?”

Communicating the value of change management and building strong relationships with both clients and IT staff are essential strategies that can determine the success or failure of a change management initiative.

If we tell students and staff that their online learning system is going to be down on Sunday night from 9 to 10 p.m. because it’s being updated, then it better be back up at 10 o’clock. Proper change management allows us to meet the expectations we set among students and staff, so they can trust what we tell them—and it helps minimize unplanned downtime. This allows IT departments to spend less time putting out fires and more time fulfilling service requests—which ultimately improves service.

*Angela McCarthy is the Manager of Digital Innovation and Technology for Nova Scotia Community College. Erin Tramble is the IT Service Management Lead for the college.*
Journey Toward Successful IT Project Governance at Miami University

By Jeffrey Toaddy, IT Services, Miami University

Proper intake and governance of IT projects is critical for success. If colleges and universities don’t have a well-designed process for evaluating project proposals and scheduling those that have merit, chaos can ensue—and confidence in the institution’s ability to deliver effective IT services falls apart.

At Miami University of Ohio, we have developed a carefully controlled process for assessing and scheduling IT projects. As a result, we now have a very reliable schedule of the work our IT teams will undertake in the next six months. When a project launches after going through this rigorous vetting process, the chances of it actually landing within the timeframe we’ve committed is extremely high.

While the needs and culture of each institution will vary, and what works for one college or university might not be the best solution for another, here are seven strategies we have found to be effective in creating a strong governance process for campus IT projects.

1. **Have a single system of record for managing project portfolios.**

   Using a single, web-based platform for project portfolio management (PPM) gives leaders easy visibility into the full scope of work being done by IT service teams across the institution, which improves planning and decision making.

   We are using the TeamDynamix platform to make project governance more transparent. Because we can see who is working on which projects now and in the future, we can schedule projects and manage IT resources more effectively.
Limit the number of people responsible for initiating projects.

At first, we allowed representatives from each division to enter project requests into the system. But we found there was no consistency among requests when we took this approach. Often, we did not have all of the information we needed to evaluate, compare, and prioritize requests.

Our experience taught us it’s a good idea to designate only a few select individuals who will oversee this process. At Miami of Ohio, my colleague and I—both senior business analysts for IT Services—initiate all project requests to ensure they follow the same format and can be properly vetted.

Develop relationships with executives from each division and get to know their needs.

We meet informally with the director or associate vice president in charge of each campus division on a regular basis. During these casual conversations, we talk about the challenges each division is facing and how we might solve these with the help of technology.

For instance, in talking with the director of our Enrollment Management and Student Success division, I recently learned that we were experiencing limitations with a long-in-the-tooth course registration system. The division wanted students to be able to walk out of freshman orientation with an eight-semester plan for how to graduate with a bachelor’s degree. This would help put students on a path to success, while also helping the university forecast the demand for certain classes. But our current system doesn’t give us that ability.

Involve seasoned IT professionals in the discussion of project proposals.

Next, we invite the appropriate division sponsor to a “value engineering” meeting with a brain trust of IT professionals who have been with our organization for a long time. Because they have a wealth of institutional knowledge, they know why we have taken certain approaches in the past and how other divisions have solved similar problems.

Together, we discuss the request and what it would entail from a technological perspective. We look into whether we have existing technologies that might fill that gap, and we explore possible solutions out in the market. From this meeting, we decide how the project would unfold architecturally—whether we would be adapting an existing piece of software, for instance, or developing new software, or putting out an RFP for a commercial solution.

Our value engineering meetings solve one of the key problems that IT organizations often struggle with, which is that IT staff often hear about endeavors way too late in the process. This gets IT involved from the start, so that we can participate in vendor conversations and help draft the RFP. We can make sure that important aspects such as security and accessibility are part of the conversation from the outset, protecting the institution without slowing down the process.

Our experience taught us it’s a good idea to designate only a few select individuals who will oversee this process.
Identify the value that each proposed project would bring to the institution.

The next step in the process is to come up with a rough estimate of how much time the project will take and how much it will cost. And we try to assess the value the project will bring to the institution. In fact, we challenge project sponsors to assign a dollar value even to the intangible benefits.

For instance, one of the improved capabilities we have been rolling out is a campus calendar and event marketing platform that students can turn to for a single, coherent list of all the lectures, sporting events, concerts, and other activities occurring on campus each day. Users will be able to click through to buy tickets, reserve a seat, or receive more information about each event.

The tangible value of such a system is easy to measure. Our crisis response team wants to know everything that is happening on campus, so they spend a few hours every day combing through various calendaring applications and other resources to pull together a coherent picture of what’s happening that day. When this application goes live, it will be doing that work for us, and we can assess the dollar value of the time the response team will save.

Intangibly, students might attend more lectures and have more enriching experiences if they have a single source to find this information, which would advance our academic mission. How can we express this value in terms of dollars and cents?

It’s a hard question to answer, but the standard we put to project sponsors is: If you’re in front of a committee of your peers, and you’re arguing for IT time, what is a good-faith estimate you can use in assigning value to the project? This helps us come up with a rough figure we can use to determine the ROI to the institution in moving forward with the project.
Weigh all this information in choosing if—and when—to move forward.

Besides having casual conversations with division leaders to discuss their needs, we also have monthly meetings with them to discuss the status of IT projects. These meetings are where new project proposals are formally advanced, once the necessary prep work has been done.

To evaluate project proposals, we look at the costs and time involved, and we weigh those against the value to determine the ROI. We also look at the IT teams who have the necessary skills to take on the project and see when they might have availability. We use a visualization tool that we developed to run on top of the TeamDynamix platform to make this determination. Projects that we approve and schedule move out of the dugout and are considered to be “on deck.”

7 Create a separate process for smaller projects.

One of the challenges for IT organizations is finding a process for the smaller-sized projects that involve more than a support ticket but will take only a few days to accomplish. Because it’s not worth going through a rigorous evaluation process for something that only requires a few days or work, these types of projects tend to be overlooked unless institutions have a separate, scaled down process for advancing them.

We have built a separate process to address these smaller projects, which we call “pebbles.” We developed a desktop view within TeamDynamix for these pebbles, and we collect less information from the project sponsor: just a name for the project and a description of the problem, need, and benefits.

Having a well-designed IT governance process boosts your chances of success dramatically. Since we have adopted this seven-step process, our IT workflow has become much more sane and predictable. I can tell you who’s going to be in what room working on what project four months from now—and that would not have been possible otherwise.

Jeffrey Toaddy is a senior business analyst in the Information Technology Services division at Miami University of Ohio.
Denver Public Schools (DPS) has nearly 14,000 employees - just about as many as IKEA does in the United States or Facebook does in total. DPS is among the 50 largest school districts in the country (and growing) with almost 200 schools and offices and an annual budget of more than $900 million.

Within DPS is the Business Information Systems (BIS) group, an organization which provides support of Financial and HR systems at the district. Like most large school districts, BIS spends a considerable amount of time investing in internal systems and technologies designed to automate manual work and increase efficiency for its customers, track compliance, and provide a consistent set of processes to form the foundation of operations at the District.

Not too long ago, BIS relied on a combination of Google spreadsheets, Google slides, and Google forms to manage project requests and resources. They didn’t even have a central document tracking system. And according to Lynne Ly, the Business Information Systems Program Manager at DPS, even the Google product suite was an improvement from a few years earlier when project requests were tracked on a list as “to dos” and IT requests were tracked by e-mail and SharePoint.
Supporting the Strategic Tech Vision

BIS has a 5-year road map outlining how they want their systems to support and enable academics. Without a global way to view and manage the entire technology backbone, implementing and supporting that vision was a major challenge. “Before, it was difficult for us to manage data, difficult for our senior managers to see and understand what BIS and business departments were doing, and to know what resources were needed and how those could be effectively allocated.”

Not having a proper IT service management platform and business processes made it difficult to prioritize project requests and allocate resources to projects and service requests that provide the highest value to customers.

“Because we were so challenged with our project data, we were spending a lot of time planning and refining project lists and communications” she said. “I was spending 30% of my time managing the portfolio from spreadsheets and extracting data from the spreadsheet to create reports for senior management. Now I spend less than 10% of my time doing that.”

Improving IT Maturity Using a Single Platform Approach

That is a classic symptom of an organization not reaching its full potential in terms of IT maturity. DPS was not using their data to drive operations and get the most out of their infrastructure and learning technology investments, so Ly set out to change the way they were working, ultimately improving efficiency of resources and most importantly, the outcomes for students. Ly and her colleagues’ solution was to shift the entire BIS and IT Service Management operation to TeamDynamix, which combines service and project management on a single platform.

This approach allows different departments to look at and optimize resources across tickets and projects, improves communications, and allows a shift in focus to strategic goals.

System Consolidation Across All Departments

DPS, Ly says, has used the new tool as a resource manager and been able to quickly integrate several segregated systems into one cohesive solution. “In any organization, if you’re struggling to manage projects, it makes sense to take a step back and ask, ‘do you want to have these five different systems or do you want them to come together?’” she said. “Allowing us to integrate all these pieces has made better decision-making possible and been very valuable,” Ly said. “With better data and systems, we can now conduct process improvement evaluations around how our teams and departments and leaders use the tools – we can map it out. And we can be agile and flexible. If something isn’t working, we just say, ‘let’s change it.’ And we change it.”
“We can be agile and flexible. If something isn’t working, we just say, ‘let’s change it.’ And we change it.”
Making Data Driven Decisions

At the same time, it’s been the ability to make better, data-driven, long-range planning and resource decisions, while keeping flexibility, that has been the most valuable benefit of using the integrated TeamDynamix tools. A planning and deployment process that used to be time-consuming and error prone because of a lack of information access and awareness about actual resource allocations, is now happening in real time with real data. DPS can now efficiently make realistic long-range plans and meet them.

With an integrated IT and systems management platform, when someone says they can fix something on Thursday, it actually means Thursday. And when education or business leaders say a new tool will be up and running in 90 days, they are not guessing if the work can actually be completed.

That’s a big shift in information and project management for any organization, especially in such a short time (less than five months). The key, said Ly, was in realizing what DPS had in common with any large organization – they needed better and consistently flexible access to their data, up and down their organization.

“What we do for students and teachers is special,” Ly said. “But data is data and good data and project tools will work if you and your teams give them a chance.”

With their new IT and data tools, DPS is cutting their planning and response times dramatically and making better use of their human resources. According to Ly, this will unquestionably show up in better performance and happier and more satisfied end users, whether they work in payroll, HR, or a classroom.

About the Author:

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