VALUES
Implementation Guidebook

- Diversity
- Innovation
- Integrity
- Service
- Stewardship
- Teamwork
**SERVICE**

**THE VALUE OF SERVICE**
We are customer service oriented and offer responsive, reliable, and seamless support.

**GOAL**
Create a comprehensive service framework for the FAS portfolio by August 2020 that sets clear expectations to meet customer needs and support the overall university mission.

**DEFINITION**
**Service**
Providing business functions and goods to fulfill customer needs.

**VALUE PROPOSITION**
Provide service excellence for our customers by implementing processes and measures used to drive improvements.

**OPERATIONAL STRATEGY**
The Service Strategy will provide a framework of good practices to measure and improve customer experience, service efficiency and effectiveness, and establish clear expectations for employee success. Metrics and performance indicators common to all affiliated units will be consolidated at the FAS portfolio level.

**OPERATIONAL APPROACH**
The Service framework can be used to onboard new services or validate existing services to determine any gaps.

**Milestone – Service Implementation Design Team**
This milestone represents the analysis and work accomplished by the Service Goal Implementation Design Team in the completion of the Guidebook.

- Develop initial FAS list of services - be more specific on what should or should not be in the service list
- Define Service vocabulary and definitions
- Research what other KPI and metrics are reported by peer universities
- Provide supplemental documentation, examples and tools
- Suggest operational approach
- Create Guidebook
Service success is reflective on both employees and customers. Customers will enjoy responsive, reliable, and seamless support. Employees will benefit from increased engagement, productivity and clear expectations for achieving goals.

A key success of a service provider is most effectively described as delivering “what the service provider was hired to do.” The following diagram depicts the value network and can be a useful organizing principle.
IMPLEMENTATION TOOLS

In the appropriate section of the Service guidebook, various tools have been provided to assist with a successful implementation of the Service Goal. Following is a tool list for ease of access and reference.

**INITIAL SERVICE LIST**
Use this to validate and update services and record metrics and KPIs.

**MEMORANDUM OF UNDERSTANDING (MOU) TEMPLATE**
The MOU is an agreement between two or more parties outlining the items and details of understanding between the parties.

**SERVICE VALIDATION CHECKLIST**
The checklist can be used to ensure production readiness prior to a service “go live” or to validate existing services.

**RACI CHART (RESPONSIBLE, ACCOUNTABLE, CONSULTED, AND INFORMED)**
A RACI chart is a simple matrix used to assign roles and responsibilities for each task, milestone, or decision on a project.

**SAMPLE KPIS AND METRICS**
Use this document as a reference for sample KPIs and Metrics

**SAMPLE BUSINESS PROCESS WORKFLOW DIAGRAM**
Use this as an example for creating a business process workflow.

**COMMUNICATION PLAN TEMPLATE**
Use this template for planning communications for releases of new or changed services.

**CONTINUAL SERVICE IMPROVEMENT TEMPLATE**
Use this document to record identified service improvement opportunities.

**SAMPLE SURVEY QUESTIONS AND RESOURCES**
Use these tools for example questions and how-to resources

**TRAINING- DEVELOPING METRICS AND KPIS**
- Measuring Business Performance at LinkedIn Learning
- Service Metrics for Customer Service at LinkedIn Learning
- How to Find Key Performance Indicators at OptimizeSmart.com

**DEFINING SERVICES**
- Service definition process from UC Santa Cruz
- Is it a Service? From UC Santa Cruz
INITIAL FAS SERVICE LIST

In order to have a clear picture of the range of services, it is advisable to develop a structure capturing an inventory of services and offerings. An initial list has been created for the various FAS departments. Use this as a baseline. Verify and modify accordingly.

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<th>Description</th>
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DEFINE SERVICE ATTRIBUTES

A service is defined by a set of attributes. Some attributes are common to all service instances created from one service definition and are therefore set during service definition time. Other attributes are specific to a service instance and must be set in the service order.

Definition

- Description
- Level of Service
- Category/Group
- Related Services

Roles

- Customer Base
- Owner
- Support Roles
- Consumer
- Provider

Operation

- Cost to Provider And Customer
- Frequency
- Hours of Operation
- Communication
- Service Duration

Support

- Training
- Who to Contact
- Which Unit (or Individual) Provides the Service?
- Business Process Workflow
- How To Request Service
  - Confirmation of Request
  - Escalation Procedure(s)
DEVELOP PERFORMANCE STANDARDS

Service Level Agreements/ Memorandum of Understanding (MOU) (make this a hyperlink to the template)
  • Defines service commitments between the customer and the service provider.
  • Identifies service levels
  • Defines what level of service should be expected, frequency, and escalation.
  
  *Questions to Consider:* What are the service levels and are resources allocated appropriately?

Departmental Metrics and Key Performance Indicators (KPIs)
  • 6 Effective KPIs
  • A good KPI has the following SMART attributes:
    1. The objective must be Specific. A vague objective will not trigger a KPI.
    2. The progress must be Measurable. If you can't measure it, then you are farther in reaching your goal than you think.
    3. The goal should be Attainable, realistic, and logical. Weigh the pros and cons and determine if it's realistic to achieve such a goal.
    4. The KPI must be Relevant to the goal of the organization.
    5. Keep in mind the Time-frame when achieving the goal at hand. They should be frequent enough so that timely recommendations and decisions can be made.
  • Establishes baselines
  • Measures for mentoring and coaching
  • See the following SMART Goals:
  
  *Questions to Consider:*
    • How to get past a focus on the minimum expectations in a constricting environment?
    • Do the KPIs tie to any SLAs?
    • Do the metrics provide information that is valuable to the support of the service?
    • Have you documented the KPIs or metrics?
    • Are your KPIs simple and easy to understand and measure?
    • Do you have KPIs that measure performance?
    • Are they timely and visible?

Process
  • Standardizes business rules and processes.
  • States exceptions for opting out and mechanism for requests.
  
  *Questions to Consider:*
    • Can units opt out of directives without business need?
DETERMINE SUPPORT MODEL

Customer

- Define your customer.
- Know your targeted audience.

Questions to Consider:
- Who consumes the service?
- Who can request the service?

Knowledge Management/Content Management

Knowledge Management is the process of capturing, developing, sharing, and effectively using organizational knowledge.

Questions to Consider:
- What is the knowledge needed for your team to support the service?
- What is the knowledge needed for customers to request service and obtain help?
- Do you require third-party support (e.g., Cornerstone, Canvas, Workday)?
- Where is your documentation stored (e.g., knowledge bases, wikis, SharePoint, ServiceNow, askUS)?
- What is the process for keeping your knowledge current (review cycle)?

Training

- Team training is important:
  - Leads to fewer mistakes, clear expectations, efficient workplace, better and consistent service delivery.
- Customer training is important:
  - Teaches customers how to use services/goods, improves understanding, and builds relationships

Questions to Consider:
- From the customer’s perspective:
  » What is the service, and how do I get it?
  » How do I get help?
  » How do I use the service?
  » What does it cost?
  » Who supports the service?
- From the service support team perspective:
  » Is customer service training required (consider the needs of the customer)?

Customer Communication

Administer communications between customers and service providers including the creation, delivery, support and status of the service.

Questions to Consider:
- Do you have the need to communicate service status, new and changed services, help desk updates, and relevant issues?
- Do you have the need for a customer committee or governance group?
- What are your communication channels (email, instant messaging, social media, meetings, Web pages, service catalogs, etc.)?
- Are you communicating to key stakeholders across the portfolio?
- Do you have a communication plan?
Service Transition verifies operational readiness and manages the deployment of services into production (go-live).

**SERVICE VALIDATION CHECKLIST**

Many components are required for supporting services. Creating a checklist will ensure production readiness prior to “go live.” The following is an example that can be used to validate new and existing services. [Click here to access a fillable service validation checklist](#).

![Service Validation Checklist](#)
The intent of continual service improvement (CSI) is to create a culture of continual improvement. CSI involves making changes that result in better outcomes using quality management processes that include learning and evaluating past successes, failures, and metrics. Plan, Do, Check, Act is a four-step model for carrying out continuous improvement and change.

**Metrics and KPIs**
Analyze your metric and KPI

*Questions to Consider:*
- Based on data analysis, what do I need to implement and improve?
- Are the current metrics and KPIs useful?

**Customer/Employee Feedback**
Obtaining information from customers or employees about the satisfaction or dissatisfaction they feel with a product, service, or process

*Questions to Consider:*
- Are you using a customer service approach?
- Are you collecting survey data (avoid survey fatigue)?
- Have you closed the feedback loop?
- Are you implementing improvement in result of customer/employee feedback?
- Are you regularly reviewing opportunities for service improvement?
- Are you working with your FAS and campus partners to determine what the customer wants vs. what are we looking for?

**Strategic Roadmap**
Time based plan to implement, identify improvements

*Questions to Consider:*
- What are the dependencies?
- What is the right priority?
- What is the order of go?
- How long will it take to implement each improvement?

**Financial & Utilization Analysis**
Understanding the cost of your service and the utilization

*Questions to Consider:*
- Do you regularly review and determine the cost your services?
- Are you know the volume and value your service provides for campus?
- Are you considering ending or merging underutilized services?

**Service Strategy**
Defines the strategy and provides guidance to service customers

*Questions to Consider:*
- Are you meeting your vision and long-term objectives for the service?
- Are we where we want to be?
- How do we get there?
- What’s the plan?
- Are there related services that should be considered or combined?
GLOSSARY

Continual Service Improvement (CSI) is a quality management process that continually improves the effectiveness and efficiency of services and processes.

Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively an organization or department is performing. KPIs are used to evaluate success at reaching targets. A good KPI should act as a compass, helping you and your team understand whether you’re taking the right path toward your strategic goals. To be effective, a KPI must:

- Be well-defined and quantifiable.
- Be communicated throughout your organization and department.
- Be crucial to achieving your goal (hence, key performance indicators).
- Be applicable to your organization or department.
- Example KPIs:
  - Customer satisfaction
  - Employee satisfaction
  - Average time to recruit
  - Number of overdue invoices
  - Average time to respond
  - Average time to resolve

Memorandum of Understanding (MOU) is a formal, non-binding document describing the broad outlines of an agreement that is between two or more parties. Though similar to an SLA it is less formal and generally doesn’t contain performance penalties.

Quality Assurance is the maintenance of a desired level of quality in a service or product, especially by means of attention to every stage of the process of delivery or production.

Service is a means of delivering value to customers by facilitating intentional and consistent outcomes or delivery of products.

Service Level is the metrics by which a particular service is measured, provides the expectations of quality and service type, and also remedies when requirements are not met.

Service Level Agreement (SLA) is a part of a standardized service contract where a service is formally defined. Particular aspects of the service – scope, quality, responsibilities – are agreed between the service provider and the service user. A common feature of an SLA is a contracted delivery time (of the service or performance). Similar to an MOU but more formal and often with performance penalties.

Service Level Objective (SLO) are often key elements of service-level agreements as they measure the performance of the service provider. SLOs are the objectives that must be achieved for each service activity, function and process to provide the best opportunity for service recipient success.

Metrics are quantifiable measures that track efficiency, performance, progress, quantities or quality of a plan, process, service or product over time. Metrics help in making business decisions and identify trends:

- Number of incidents and requests per month
- Number of incidents and requests by type or category
- Turnover rate
- Overtime hours
- Inventory on-hand
RESOURCES AND EXAMPLES

Service KPIs/metrics.

- General
  - Customer Satisfaction
  - Internal Process Quality
  - Employee Satisfaction
- Customer Service Departments
  - Inbound average talk time
  - Email backlog
  - Percentage of calls transferred
- Finance Departments
  - Capital expenditures
  - Indirect costs
  - Past-due receivables
- Human Resources (HR) Departments
  - Time to fill
  - Cost per hire
  - Job vacancies as a percentage of all positions
- Information Technology (IT) Departments
  - Service uptime
  - Storage utility utilization
  - First call resolution rate
- Construction Industry
  - Number of accidents
  - Labor costs by type
  - Cost for construction
- Utilities Industry
  - Average cost per megawatt produced
  - Drinking water quality
  - Equipment failure rate
- Example Survey Questions
  - Was your issue resolved to your satisfaction?
  - Would you recommend this service to others?

- Did we resolve your issue in a timely fashion?
- Was our service professional and courteous?

- Informing
  - Wikis
  - Communication plan (FAS Communications)
  - Printed materials (Document Solutions)

- Survey Resources
  - Qualtrics to deploy
  - Statistics and Data Sciences to develop
  - Tableau for visualizing results

- Developing metrics & identifying KPIs (why are we choosing the KPIs? What are they informing?)
  - Measuring Business Performance at LinkedIn Learning
  - Service metrics for Customer Service at LinkedIn Learning
  - How to Find Key Performance Indicators at OptimizeSmart.com

- Defining services
  - Service definition process from UC Santa Cruz
  - Is it a Service? From UC Santa Cruz
RACI (RESPONSIBLE, ACCOUNTABLE, CONSULTED, AND INFORMED)

A RACI chart is a simple matrix used to assign roles and responsibilities for each task, milestone, or decision on a project. By clearly mapping out which roles are involved in each project task and at which level, you can eliminate confusion and answer the age-old project question, Who’s doing what?

- **Responsible:** This team member does the work to complete the task. Every task needs at least one Responsible party, but it’s okay to assign more.
- **Accountable:** This person delegates work and is the last one to review the task or deliverable before it’s deemed complete. On some tasks, the Responsible party may also serve as the Accountable one. Just be sure you only have one Accountable person assigned to each task or deliverable.
- **Consulted:** Every deliverable is strengthened by review and consultation from more than one team member. Consulted parties are typically the people who provide input based on either how it will impact their future project work or their domain of expertise on the deliverable itself.
- **Informed:** These team members simply need to be kept in the loop on project progress, rather than roped into the details of every deliverable.

(Source cited [https://www.teamgantt.com/blog/raci-chart-definition-tips-and-example](https://www.teamgantt.com/blog/raci-chart-definition-tips-and-example))
APPENDIX

TEAM MEMBER NAMES:
Susan Roy, Director, CIO/ITS COO Office
Yancey Young, Project Manager, Project Management & Construction Services
Tracy DeMont, Senior Business Analyst, Workday Implementation Program
Larrimie Gordon, Employee Engagement Program Coordinator, Facilities Services
Kathy Hutchins, Buyer II, Procurement
Justin LaSelva, Network Security Analyst, Information Security Office
Madison Leach, Accounts Receivables Manager, Office of Accounting
Michelle Tanksley, Manager-Operating Accounts, Business & Financial Services
Sue Stewart, Senior IT Manager, Technology Resources