Information Resources Service Partner Program

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***Several important issues confront Information Resources (IR) groups today, among them the important issue of providing meaningful, relevant services to an expanding user base. In an increasingly technological environment,* people*—both client groups and IR department staff—are an important component of successful implementation strategies for information technologies.*[1]**

Our Information Resources organization at Pepperdine University is proud of the relatively good relationship we have developed with our user communities. We have, with their support and participation, successfully deployed administrative and academic systems throughout the University. We have also been successful in deploying systems directly to the faculty and student populations, thus bypassing many of the bureaucratic hurdles that formerly were in place. For example, students routinely register by phone, and faculty members access student data directly from our computer systems.

However, from a University-wide perspective, several issues confront the IR support organization. They include the following:

- While many client groups are being serviced by the IR group, there are many other client groups that are not being serviced at all. Historically, groups that are being serviced well include groups that are directly touched by the host-based administrative applications. For example, while the admissions, registration, and finance groups are all being served, the central plant operations, student services, and athletics groups are not.
- Many of the client groups that are being served well by the IR group have specific personnel who are responsible for working with IR in support for our service offerings. These people provide direct input regarding the needs and desires of their groups. Client groups that do not have (and in many cases cannot afford) personnel dedicated to this role, experience a diminished level of support from the IR organization.
- To many clients the IR organization seems confusing and distant. For example, users frequently express frustration in not knowing which IR service unit to contact for a specific service. Who's responsible for PC repairs? Whom do I contact for a network connection? When my telephone doesn't work, who comes to fix it? These are frequent questions, and frankly, our answers are often too complex.
- Pepperdine's IR organization experiences a very low personnel turnover rate. Many of our employees have been employed for ten years or more. While on the surface this would appear to be a positive factor, it does have negative components, such as job burnout and limited institutional perspective and awareness. At the same time, technology changes have occurred, and some of the IR staff have not been involved with those changes, nor do they understand the implications of those changes for the University or for the IR service organization. It is our desire to expand staff awareness and cross-training opportunities for these staff.

Initially we spoke of these issues as separate problems with separate solutions. The only solution for the first and second issues that seemed possible was a massive increase in IR staffing, to account for the need for additional service representatives to the client groups that were not being represented to the IR unit. However, we knew that in this age of declining budgets and stable staffing levels, this was not really a viable option.

As we worked through these issues, it dawned on us that perhaps we could address all of them with a volunteer service representative program, pulling from the existing ranks of the IR organization. Thus was born the Service Partner Program (SPP).

The Service Partner Program objectives

The Service Partner Program (SPP) provides Service Partners (SPs) to selected Information Resources client groups. The program is open to staff members of the IR division on an invitation basis. Any IR staff member can be solicited to become an SP, in addition to their regular job assignments.

The objectives of the Service Partner Program are as follows:

- Improve customer contact and service
- Improve customer service orientation within IR
- Simplify the appearance of the IR organization to customers
- Provide job diversity to IR staff
- Provide cross-training to IR staff

Participation in the program is optional, except in a select few cases where the job being performed by a staff member is essentially the same as the SPP duties. We decided to make this a volunteer process because we wanted to ensure that the people who functioned as SPs and who would thus have direct contact with clients would be those who had a personal interest in doing so. These volunteers, we felt, would be the ones who would look forward to the job diversity and cross-training opportunities that this program would provide. There is no additional compensation at this time for those serving as SPs.

SP duties

Each SP is the primary (but not necessarily the exclusive) contact for one or more client groups with the services and staff of IR. The SP acts as a facilitator to ensure that appropriate services and customer needs are adequately considered in the planning and implementation of IR program offerings. As such the SP has a responsibility to:

- communicate on a regular basis with the client group and its management, providing a professional and formal bi-directional channel of communication regarding global technology concerns and IR announcements;
- partner with the client group in a planning process about information technologies to the extent that is allowed by the client group;
- understand the business of the client group and understand how information technology can be applied to the business needs of the client group; and
- follow the terms and conditions of the SPP and maintain good job performance in regular job duties.

Perhaps more than anything else, the SP acts as a conduit of information both from IR to the various client groups and from them to our organization. Each SP is given a minor budget that enables hosting a lunch for his or her client management periodically to encourage dialogue about the services of IR.

SPP management and oversight

The SPP is managed by an oversight committee that meets on a semi-annual basis, represented by the associate provost of information resources, the three line directors of the Information Resources division (Telecommunications Services, Computer Services, and Support Services) and one or more representatives of the client community. This oversight committee provides strategic and tactical direction for the program. The client representatives provide customer input into the process.

In addition to the oversight committee, an SPP Management Committee, composed of the three line directors and an administrative aide, provides operational management oversight to the program. This committee meets on a monthly basis.

SP application

A four-step application process determines who within IR will participate in this program as a Service Partner:

Step 1: Identification of potential participants ("applicants")—The first step is to identify applicants for this program. Potential participants can be identified by the SPP Management Committee, by various supervisors within the division, and by aspiring SPs themselves.

Step 2: Supervisory feedback—The SPP Management Committee then contacts the potential applicant's supervisor to ensure that the applicant's participation has the endorsement of the supervisor.

Step 3: Solicitation—The SPP Management Committee then solicits the potential applicant's participation in the program.

Step 4: Application process—Any IR staff member who is solicited to become an SP then submits a resume and statement that answers the following questions:

- Why do you want to become a Service Partner?
- How do your skills apply to this program?
- What kind of training would you need to fulfill the responsibilities of an SP?
- What potential problems do you anticipate in becoming and fulfilling the responsibilities of an SP?

All statements are then reviewed with the applicant by the SPP Management Committee to ensure that: the staff member understands the nature of the SPP and to answer any questions the applicant might have; the training needs of the staff member are considered and planned for; and potential problems are understood and mitigated.

It is important to note that the Service Partner

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[1] Albert L. LeDuc of Miami-Dade Community College, in accepting the CAUSE *ELITE* Award for Exemplary Leadership and Information Technology Excellence during the 1993 CAUSE conference, spoke of the importance of people in this equation (see "People Are What Really Matters," *CAUSE/EFFECT*, Spring 1994, pp. 10-14). The CAUSE Current Issues Committee also identified people issues as one of a handful of developing trends of importance to the future of information technology in higher education (see "Current Issues in Higher Education Information Technology," *CAUSE/EFFECT*, Spring 1994, p. 5).

Program, while a volunteer program, is a strategic tool within the service mix of Information Resources. Therefore, the program is rigorous, and the application process is serious. We intend that the decision about an applicant's participation in the program be a mutual consent between the applicant and the SPP Management Committee.

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SP quality issues

One of the most important concerns about a volunteer program is that quality easily suffers. The SPP would not be isolated from such risks unless measures were taken to ensure that quality is pumped into the program at every level. To ensure quality, the following program components were created:

Customer feedback—Periodically a formal evaluation of the SPP program and the SP contact are provided by customer representatives. Included in this evaluation are feedback about such issues as the frequency and quality of SP contact with the client group, how well the SP understands the business of the client group, and to what extent the SP has been effective in acting as a conduit of communication between the client group and IR regarding customer needs.

SP levels—There are three levels of SPs: Junior Service Partner, Service Partner, and Senior Service Partner. SP levels are assigned by the SPP Management Committee in accordance with performance reviews and customer evaluations. Senior SPs are issued palmtop computers to assist them in their work in the program, and to encourage program volunteers to "climb the ropes" of the program.

SP mentoring—Junior Service Partners are assigned to a Service Partner or Senior Service Partner for oversight and mentoring. The purpose of this mentoring program is to provide guidance and assistance for all Junior SPs in "learning the ropes" of the customer service process and the SPP. Service Partners, in turn, are responsible to Senior Service Partners.

Reporting requirements—Written customer portfolios are prepared and maintained by all SPs. These portfolios reflect the business of the customer, their needs and desires, notes from any meetings the SP has with the customer, and logs of any substantive customer problems or contacts. Customer portfolios are passed from SP to SP as client groups are reassigned or as turnover occurs.

Help desk shifts—The University maintains a help desk where all questions and problems are funneled by the client groups. The help desk uses a problem tracking system for logging and managing calls. In order to provide cross training, each SP is required to work at least one one-hour shift at the help desk per week.

In-service training—Every four to six months, the program provides in-service training to all SPP participants. Such training consists of speakers and workshops that provide motivational and skills-related sessions. Participation in these in-service training workshops is mandatory, and impacts SP performance evaluations.

Performance reviews—After three months of participation in the program, each SP is formally evaluated by the SPP Management Committee. Performance evaluations include a review of customer feedback about the SP, feedback from the SP's mentor, and an interview with the SP. Performance reviews are written, are given to the SPs, and are placed in their employment files. If an SP does not agree with the results of the performance review, he or she can submit a statement to that effect that will also be placed into the employee file. Promotion within the program is dependent on these performance reviews. While SPP performance reviews do not affect pay raises, positive reviews may influence the SP's annual review.

Implementation

We are now in a beta test mode for the SP program. Last fall we solicited twelve staff members to act as SPs, from many different parts of the organization. These persons were assigned to a client organization based on their familiarity with the client and based on what we perceived would be good matches.

Some of the twelve were volunteers, while others were "required" to participate based on their job descriptions (essentially their job description matched that of the SP job duties). All of the members, whether volunteer or not, were invited to participate in a series of lunches to dialogue about the nature of the consulting they would be performing, and their input about the program was solicited and folded into what the program has become.

While the intent of the SP program was the long-term development of a relationship between the IR division and a client office, we found that a short-term assignment often made sense in facilitating a specific project with the client. For example, we have had a very specific push to connect offices to the University's network. In this case, quite a bit of consulting was desired to brief the client group on the nature, departmental costs, and expectations concerning the network. In this case we re-commissioned the SPs as "network installation consultants" (NICs) and gave them short-term assignments to visit and consult with specific client groups over a period of two to three months. This consultation covers all aspects of the network connection process, including consulting, facilitation of the physical connection and software configuration, and training. It is not uncommon for a single NIC to facilitate connections for several client groups. This strategy has worked very well for us, and has simplified the process for the client group by providing a single contact point with our division.

In this beta mode, we have not yet implemented all of the application process steps, nor have we been thorough on all of the quality issues. We will seek to tighten these up as we progress through the beta program.

Client groups that have participated in the SP beta program have indicated that they are excited about the program and, in many cases, that they have too long felt "ignored" by the University administrative processes. This is an important indicator for us, in that one of our original intents with the program was to improve customer contact and service to these types of client groups. In addition, IR staff who have acted as SPs and NICs have indicated that their participation in this program has been beneficial in broadening their work experience both in terms of learning what the customer does as well as learning some of the complexities of the IR division and its processes.

Conclusion

Much attention has been given lately to the concept of "flattening the organization," to make it more responsive and efficient and more service oriented. The Service Partner Program model, we think, is one response to this movement. It is our desire that the whole IR organization be re-energized to provide adequate services to the client community. With the SPP, we intend that we become more efficient and more effective, provide better services, broaden our horizons, and form partnerships with client groups. This program will help transform Information Resources from a hierarchical to a more service-oriented organization. C/E

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