

## Summary of DTAG Service Categorization Discussion

October 10, 2017

### Service Categorization Discussion Questions

- a. How can we improve/rationalize/optimize the campus IT service portfolio?
- b. Can we formulate general principles/drivers to guide the process of improving/rationalizing our service portfolio?
- c. What are key success factors for achieving rationalization and optimization?

### Summary of notes taken at tables

#### *Overall*

- How are we defining “improve,” “rationalize,” and “optimize?” Unsure what the overall goals are.
- The first step should be clearly articulating what the goals are.
- Consistency can’t be overlooked – since the data is self-reported, it’s not clear what is customer facing and what is not.
- Is there something we can do to test interest? There would be high value in rallying around what the campus is interested in.
- What is the campus interest in consolidating services? Web CMS service is an example of coming together. Consortia should be considered for some of these services.
- Concerns around budget & FTE numbers provided – there should be better parity between IT Services and IT Spend.

#### *a. How can we improve/rationalize/optimize the campus IT service portfolio?*

- What is the purpose of doing this? Community should understand it.
- Consistency for consistency’s sake is not a reasonable goal.
- This complements the Project Intake Process (an inventory of what’s out there)

#### *b. Can we formulate general principles/drivers to guide the process of improving/rationalizing our service portfolio?*

- Consider a metric around “customer needs are being met”

#### *c. What are key success factors for achieving rationalization and optimization?*

- Need metrics around utilization and customer satisfaction
- Think through number of FTEs or number of services – what is the balance between the two of them. Does one or the other need to be reduced?

### Recommendations

- Make lists of what units want to jettison the most, compare that with the best use of local CIO’s time. Start with divisional offices – the more localized you start, the more resistance you get. Many units have tried to use centralized services in the past, and they are mostly unaffordable.

- Identify which services are scalable and which ones are specialized (as in which are the services that there can actually be something done about).
- Consider partnering with administrative or teaching & learning areas first – initial steps will take time.
- Be ready when service providers are ready to move. The closer you get to those who feel ownership of a service, the harder it will be to consolidate services.
- Pick one service to analyze and rationalize → develop a process (look for highest impact, dollar amount, FTE, or other metric) → determine what it looks like to “improve” and “rationalize” the service.