CRSP

(Customer Request to Solution Provided)

Process

CRSP Project Executive Summary
May 13, 2007
University of California, Santa Cruz
Executive Summary

Project Purpose
The CRSP Project was commissioned by Larry Merkley, Vice Provost Information Technology in October 2006. The goal of the project was to design a single, unified ITS process for handling all customer requests and the response to those requests in a timely and effective manner. The acronym CRSP stands for Customer Request to Solution Provided. The resultant “CRSP Process” is a cross-functional process that begins with any type of customer request and ends with the provision of a specific solution or answer for the customer. In the course of its execution, the CRSP process integrates and orchestrates the individual roles and work of multiple ITS units to provide a single coordinated response to a customer's need.

Project Deliverables
A multidisciplinary team was assembled from various ITS units to perform the work. Over the course of seven months, the project team created detailed CRSP Process Design and a set of CRSP Team Recommendations for implementing the CRSP process.

CRSP Process Design: High Level Process Flow

Figure 1 below represents the CRSP process flow at its highest level of abstraction.

All Customer requests are accepted through a common Work Intake step that determines the work type and the best route for it to follow through ITS. It is not the intent that this work intake step is a “bottleneck” performed by a single person or unit. The team recommends that ITS staff should be trained and be capable of identifying the appropriate initial routing of a customer request in a consistent manner. In practice it is anticipated that the majority of CRSP requests may flow through the ITS Help Desk or directly to ITS service providers where the correct service provider is already known to the customer. The IT Service Catalog will aid this process.

Four of the five request types are directly routed and dealt with, these are:

- Service Request (No Consulting Required)
- Incident
- Information Request
- Complaint

Some Service Requests requires little or no consultation with the customer and therefore can be directly invoked with the right ITS service provider e.g. new Account Set-up. Other service requests may require some degree of consultation with the customer to determine their specific needs and match it to the right service. In these cases, the Understand the Customer Need process step is performed. In most cases this step will be the responsibility of the designated Divisional Liaison (DL) for the customer or the PMG (Portfolio Management Group) if the request does not fall into a specific DL jurisdiction. The purpose of this step is to understand the customer need and to be able to clearly express it as a Problem/Opportunity Statement that can be addressed by an IT Service. This Problem/Opportunity Statement is identical to the information that is currently collected on ITS Project Proposals.

The request is then routed to the following self-contained processes:

- Work Order Process
- Project Management Process
- New Service Development Process
- Service Delivery Process (Altered)

The routing of a request to either the Work Order or the Project Management Process is determined by the scale of the effort involved to develop the solution. According to current ITS Project Management standards, any effort greater than 80 hrs of work effort would be considered a Project, efforts below this would be a Work Order. Requests for New Services would go to the ITS Service Management unit and requests for delivery of slightly altered existing services would go to the specific ITS Service Delivery team responsible for the service.
The **Capacity Management** process is an entirely new support process that would help the ITS management team match human capacity to the work that ITS needs to perform. The CRSP team vision for this process can be found in the full CRSP Project report.

Finally, all the separate process steps provide the particular solution to the customer be it the resolution of an Incident, a new enterprise application, a new report, a new service or the answer to an information request. The customer request is satisfied.

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![Figure 1 CRSP Process High Level Flow](image)

**Figure 1 CRSP Process High Level Flow**

### CRSP Team Recommendations

In addition to the design of the CRSP process, the team developed 11 major recommendations:

1. Develop and Implement a Work Request Process
2. Adoption of an ITS Work Classification Key
3. Mandatory IT Service Process
4. Assign Key IT Service Touch points
5. Use a single system to log and track all ITS work intake
6. Develop and Publish an ITS Service Provider Guide (Internal IT Catalog)
7. Rationalize ITS Service Offerings
8. DLs should be Account Managers
9. Develop and Implement a Capacity Management Process
10. Develop a Policy for One-Time and Ongoing Funding of IT Projects
11. ITS Project Requests and Priorities must be visible to users

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1. **Develop and Implement a Work Request Process**
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ITS needs to design and implement a Work Request Process for tracking and managing work that is below the 80 hour “Project Threshold”. This would be a new process to track and make visible all ITS work requests that are too small to be tracked by a project management system but nonetheless represent bona fide work that that ITS is authorized to perform. At present there is no common means of tracking these routine work requests or work orders and yet they consume a significant amount of ITS staff time

2. Adoption of an ITS Work Classification Key
   The team recommends that an “ITS Work Classification Key” should be used at the front of the work intake process to provide consistency around how incoming customer requests are routed. All ITS staff should be trained to use the key and it would be used to classify, assign and route all work flowing into ITS. The key classifies requests into the 5 major types handled by the CRSP process, namely:
   - Service Request (Off-the-shelf IT Service)
   - Incident
   - Service Request (Consulting Required to use the service)
   - Information Request (General inquiries)
   - Complaint

3. Mandatory IT Service Process
   The SMT should require that every IT Service have a formally defined “Service Delivery Process” to ensure that when it is invoked a predictable and consistent outcome occurs for the customer. This would prevent requests falling into organizational “Black Holes” and improve predictability and responsiveness to customers

4. Assign Key IT Service Touch points (Service Managers) for all IT Services
   Key Service touch point staff should be identified for every ITS service provider group to support the CRSP work intake process. This would consist of a Service Manager and a Service Team. This information should be included in the ITS Service Provider guide (Internal IT Catalog) and specified in Operating Level Agreements (OLA) between ITS units.

5. Use a single system to log and track all ITS work intake
   A single system should be implemented to track all work flowing into the ITS Division. The system should be capable of capturing all types of ITS requests, not simply Incidents. The current IT Request system may be a candidate for this purpose but this and other alternatives should be formally examined. Ideally this information should be made visible to customers on the ITS web site like tracking a FEDEX package.

6. Develop and Publish an ITS Service Provider Guide (Internal IT Catalog)
   The IT Service Catalog is key component of the CRSP process. The stronger and more complete the catalog is, the quicker the CRSP process will flow, especially at the front end of the process. The CRSP team recommends that a more detailed version of the Service Catalog be available to internal ITS staff as a reference for service delivery. This reference would identify and list “who does what” and “who knows what” inside ITS. Much of this work has already been conceived and prototyped by the IT Services group, we simply need to implement it to support the CRSP Process.

7. Rationalize ITS Service Offerings
   The CRSP team feels that there are too many current service offerings in the combined Global and Local catalog to efficiently relate CRSP work intake against. For example, 70 global and 572 local services have been identified by ITS. We need to rationalize and reduce this set so that the referral of work is efficient within ITS. An effort was begun by the DLs to agree on common terms, service names and granularity of the services that they deliver. This work should be completed as a prelude to service specification. For example, some local services may be better grouped and referred to and a single service provided by the DL and ITS.

8. DLs should be Account Managers
   The DL is the primary Client Relationship Manager and is critical to the CRSP Process. The goal of account management is to build long-term, mutually beneficial client relationships through value added service delivery. The “Account Manager” aspects of the DL role have been envisioned from the very beginning of the IT Transformation Program (ITTP). The CRSP team recommends that this needs to be reinforced for successful CRSP implementation. Acting in the capacity of Account Manager, the DL should be the primary channel for understanding the needs and requirements of clients and moving them through the CRSP process. The DL should have their “finger on the pulse” of the Division, they should understand and be able to predict various technology needs and issues across the Division, and work with the DL council and ITS to identify and satisfy needs that involve multiple Divisions.
9. **Develop and Implement a Capacity Management Process**

   The team recommends that a new Capacity Management Process be defined and implemented for ITS together with a new role of **IT Capacity Manager** to define and perform this process. The goals of the capacity management process would be to:

   - View capabilities, commitments and availability of staff
   - “Lock” and “Unlock” staff resources for projects
   - Enable DLs and IT directors to commit and assign ITS people outside of a division to a project
   - Maintain an accurate ITS work inventory database and a staffing database

10. **Develop a Policy for One-Time and Ongoing Funding of IT Projects**

    ITS needs a policy and approach to established for dealing with the issue of one-time and ongoing funding for IT projects.

11. **Make ITS Project Requests and Priorities more visible to users.**

    ITS project evaluation, priority setting must be more visible to users. The team recommends that a UPS or FEDEX style web application be developed that would allow our customers to see where their requests are in the CRSP process.

**Conclusion & Next Steps**

Since the scope of the CRSP process is so broad, the team recommends that CRSP implementation be subdivided into smaller implementation work packages with the creation of an overall CRSP Integration Committee to oversee the integration of these separate efforts and ensure that they come together effectively to implement CRSP. The following table represents some initial thoughts by the CRSP team on these efforts.

**Table 1 Recommended CRSP Implementation Work Packages**

<table>
<thead>
<tr>
<th>CRSP Implementation Work Package</th>
<th>Recommended SMT Sponsor</th>
<th>Related ITS Initiatives and Projects</th>
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</thead>
<tbody>
<tr>
<td>CRSP Work Intake Process</td>
<td>Bill Hyder</td>
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<tr>
<td>CRSP Training and Communication</td>
<td>Larry Merkley</td>
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<tr>
<td>Capacity Management</td>
<td>Mark Cianca</td>
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<td>Service Catalog 2.0</td>
<td>Janine Roeth</td>
<td>IT Service Catalog</td>
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<td>PM Methodology Changes.</td>
<td>Mark Cianca</td>
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<td>Release Management</td>
<td>Pat LeCluyer</td>
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<td>Work Order Process</td>
<td>Mark Cianca</td>
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<tr>
<td>SLA (Service Level Agreement) and OLA (Operating Level Agreement) Implementation</td>
<td>Larry Merkley</td>
<td>DDSLA</td>
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<tr>
<td>DL Account Management</td>
<td>Bill Hyder</td>
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The PMG should be asked to examine the individual implementation efforts listed above and recommend the appropriate implementation vehicle for each one e.g. assign to an existing project, commission a new project, or handled as a direct management initiative by the Senior Management Team.

**The CRSP Project Team**