**Project Title:** ITS Customer Request for Solutions Process (CRSP Project)  
**Prepared By:** Mark Cianca & Mel Barracliffe  
**Date:** October 4, 2006.

**Situation/Problem/Opportunity:**  
ITS does not have a clearly defined process for service providers and divisions describing the process for presentation and evaluation of a customer request. There is ambiguity in both ITS and customer groups around the process of identifying the customer need, presenting, and evaluating proposals and how those proposals turn into an approved project. A gap exists in not having a defined roadmap for customers clearly defining how their needs are routed to ITS for evaluation and consideration as a project. Customers are also unclear of who to contact with their needs.

**Purpose Statement (Goals):**  
This proposal provides the campus with a standardized and normalized process defining and ITS end-to-end process flow from a customer request to an application solution in production.  
ITS and our customers will have:
- Defined initial point(s) of contact in ITS for qualifying customer needs
- A process to determine if there is sufficient cause to form a project
- Assurance that potential project development, implementation and other issues are adequately addressed

**Deliverables (Objectives):**
- Customer Request for Solutions Process (CRSP) Design consisting of:
  - ’To Be’ Process Work Flow
  - Process/Role mapping
  - Process Performance Metrics
- Obtain approval of the CRSP Process Design by SMT
- CRSP Process Implementation Plan

**Success Criteria:**
All deliverables listed above will be developed by the main workgroup and presented to the Focus Group for initial review (see Methods/Approach and finally to the SMT for approval). The team will ensure that the process design addresses the following areas:
- How work (identified customer need) comes into ITS
- Contact points for customer communication to ITS (roles and responsibilities, handoff points)
- How work is ‘qualified’ as a project or not
- How ITS reviews and evaluates each proposal
- How resources are identified and locked for each proposal
- How the process achieves closure
- Defined and mapped roles and responsibilities for this process
- Defined metrics for each stage of the process

Success will be based on final review and approval of process design and metrics by SMT by the end of fall 2006 (December 2006.)

**Methods/Approach:**
There will be a series of facilitated design sessions interspersed with key review and approval points. A three tiered committee approach is proposed:
- Design Team - A workgroup will define the both process and metrics. This working group consists of two Divisional Liaisons, an ITS Service Manager, an Applications Solutions Analyst and a PMG Project Manager under direction of a consultant.
- Focus Group – A QA group consisting of ITS unit directors will provide feedback and expertise. Proposed focus group participants are Mark Cianca (PMG), Bill Hyder (CRM), and Pat Lecuyer (Application Solutions). Others may be added to this group as required.
- Review and Approval Group - SMT is the final approval and review group

**Resources:**
- Design Team members will be: Peter McMillan and Scotty Brookie (DLs), Aaron Melgares (IT Service Manager), Leslie Geary (Application Solutions Systems Analyst) and Ann Berry-Kline (PMG Project Manager). Project administrative support will be provided by Teresa Silva, Administrative Support Specialist. The consultant will be Mel Barracliffe.
- Time – workgroup, consultant and SMT time to meet final review and approval by end of December 2006
- Budget - ??
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| **To Be Completed by Appropriate Manager** - Proposals will be reviewed by the sponsor and manager and forwarded to ITS/PMG by the manager. |

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