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CRSP “The Big Picture”
CRSP – Today’s Focus
Key Topics

• What happens inside “Understand the Customer Need”
• Confirm purpose of problem/opportunity consulting steps
• Who responds when the call comes? (when we know consultation is needed)
  – Responsibility and accountability
  – Issue-gap when request doesn’t neatly fall into a DL jurisdiction
  – Which “somewhere” does it fall in?
• How does the DL participate in the CRSP process?
• What does it mean for the DL to be an Account Manager?
• Confirm things DLs won’t do e.g. Enterprise systems development
• Confirm idea that DLs will confirm collective needs (DL Council)
Key Topics

• Confirm key responsibilities and accountabilities of DLs to make CRSP work such as:
  – DL keeps their finger on the pulse of the division AND as a group; they monitor the pulse of the campus.
  – Confirm idea that DL is the keeper of unmet needs for their division
  – DL must represent and educate on ITS and ITS services
  – DL must be active participant in divisional management meetings (2-way channel to the customers) to bring IT perspective to divisional activities.
  – Reinforce that the DL must build/supplement a strong working relationship with the Principal Officer and division leaders

• Characterize how the process will happen in a speedy but robust way.
  – Applying the core value: agility and speed
  – How do we put boundaries around this so that it doesn’t consume too many resources?
Key Topics

• What happens to work that doesn’t fit into an existing DL jurisdiction but needs to flow through the CRSP process such as:
  – Units exempted from who’s in and who’s out.
  – Who acts as the steward for ITS items like collaboration tools, asset management, and CMDB?
  – What about things that have bigger organization scope than a division? E.g. CCP
• Projected volume of “consulting required” requests – how would this the process?
• Developing and training Account Managers (DL+)
Understand the Customer Need

INPUT

Consulting Required

1.3 Refer for Evaluation

1.4 Select & Mobilize Consulting Team

1.5 Consult with Customer

1.6 VP IT Due Diligence

1.9 Develop the Problem Opportunity Statement

OUTPUT

Problem/Opportunity Statement

NOTES:

1. “Problem/Opportunity Statement” is equivalent to the information captured in the first box on the existing ITS Project Proposal.

2. Process success requires a client dialog with the right expertise in ITS to understand the initial need.

3. Process step is modeled after a management consulting process.
Management Consulting Process Model

Source: Ernst & Young LLP
Key CRSP Concepts

• We will work through an Account Manager (DL+) as the primary channel for understanding needs and requirements of clients
  – Accountable for leading the process step to understand the customer need
  – “DL+” this role is played by DL + small number of pre-designated ITS staff
  – Clear “Rules of Engagement” will be established and need to be followed e.g. Account manager is always “kept in the loop” in terms of communications with the customer so they can maintain the overall perspective of the customer needs

• Use of a consulting team of Subject Matter Experts
  – A “consulting team” of SMEs is used as necessary to understand the customer need and develop the problem/opportunity statement
  – SMEs need to be officially designated as such – a reference list – not everyone

• Process step is time bounded to 1 week elapsed time or less
Goal of Account Management

Build long-term, mutually beneficial client relationships through value added service delivery.
Role of the Account Manager

• Be the primary relationship manager for the client
  – Build a long-term working relationship between the firm and the client that goes beyond individual service requests
  – Be a trusted advisor to the client
  – Help the client build their network and knowledge

• Understand and anticipate client needs and match them to the service offerings of ITS
  – Understand the client’s issues and help them serve their customers
  – Understand the client’s culture, environment and discipline
  – Understand ITS’s service offerings

• Bring the right resources, services and solutions to the client
  – Source and coordinate service delivery from ITS teams and SMEs
  – Oversee service delivery quality and benefit realization

• Solve the clients problems and deliver value!
Account Managers: Skills, Knowledge & Abilities

• Leadership:
  – Can lead the team: proactive, action oriented, takes responsibility for obtaining an effective process result for the client
  – Ability to build trust and respect with client and ITS staff (trust and relationship building allows DL to get involved in an idea earlier in its inception).
  – Strong sense of stewardship (takes care of the clients IT assets and interests)
  – Understand the criticality of their role in the CRSP process and its relationship to other roles
  – Maintains a campus-wide perspective

• Strong client management skills:
  – Have the customer’s best interests at heart and respect their interests
  – Diplomacy
  – Ability to challenge the client’s thinking for their own best interests when necessary (not just an “order taker”, mitigates risk for the client and the campus)
  – Broad knowledge and understanding of the two worlds: Clients world and ITS and the ability to match ITS capabilities to client needs
  – In-depth understanding of customer organization (processes, operating model, terminology etc.) and ITS capabilities
Account Managers: Skills, Knowledge & Abilities

• Team Player:
  – Collaborative - works as a partner with their ITS colleagues and the client for the best result
  – Supports other team members

• Interpersonal and Communication Skills
  – Effective listener
  – Has respect, confidence, optimism
  – Possesses both communication and technical skills
  – Strong communication skills (written and presentation)
  – Negotiating skills

• Objective, analytical and conceptual thinking skills:
  – Ability to objectively uncover client needs and translate them into accurate requirements
  – Ability to put the details into a strategic context and relate them to client objectives (balance 30,000 ft versus street level details)
  – Process driven, rational, methodical in approach without being pedantic.
  – Strong problem solving ability
  – They know how to seek out and find information
Risks

• Lack of customer trust in ITS
• ITS staff lack of trust in each other’s capabilities and their motivation
• We don’t meet the client need by the end of the process
• Potential to make wrong decisions
• Process doesn’t end in a timely manner
Summary & Next Steps