DIVISION OF INFORMATION TECHNOLOGY
Office of the Vice President and Chief Information Officer

June 28, 2022

MEMORANDUM

TO: M. Katherine Banks, Ph.D.
President

FROM: Ed Pierson
Working Group Chair

SUBJECT: Implementation Memo – Working Group #36

Recommendation to be Implemented: Establish a university-wide Help Desk and ticketing system

Strategic Considerations:
A new Help Desk and ticketing system will become the main point of contact for all IT issues for faculty, staff, and students to ensure higher quality, consistent customer service. To ensure high quality, help desk calls and support should be assessed with a follow-up survey after each transaction.

The issue addressed by this committee was that the distributed nature of IT often causes Information Technology customers on campus to not know where to turn to get support for their computing needs. The lack of an enterprise level ticketing system on campus means that the various IT departments cannot redirect incidents to the appropriate party. This causes delays in response time, and even in requests being lost or shuffled around without the customer receiving the assistance that they need.

The vision for a unified IT Help Desk at Texas A&M is to provide consistent, intuitive, and dynamic customer experiences through access to subject matter experts on first contact. To achieve this vision, it is important to establish a single-point-of-contact model for all IT services on campus, promote resolution on first contact, and offer robust and comprehensive self-service options.

The committee recognizes that a Help Desk is not the solution for all support issues. Therefore, they have also identified the need for the development and implementation of an Academic “Rapid Response” Technical Support Team. This team would implement a rapid classroom support dispatch method that efficiently routes requests to ensure academic success. The team would be composed of student workers/interns managed by a team of full-time subject matter experts in classroom support managed by a TBD number of FTE staff members with a primary goal to provide timely and efficient technology support within time sensitive learning environments.

The expected outcome from these recommendations is that the Information Technology customers will experience increased levels of support and decreased response times to their requests for assistance, both for classroom technology support and for general computing requests.

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Logistical Issues Addressed:

One key aspect of the ability of any IT department to provide quality customer service to its community is the utility, clarity, and effectiveness of how it communicates. From contact, acknowledgement, internal communication, resolution, to satisfaction confirmation, communication is the lifeblood of how good processes become good service. Consistency, accuracy, and timeliness are all required for each of the recommendations here. Continual feedback on how communication contributes or distracts from our goals is essential to maintaining proper maturity and effectiveness of IT services.

For communication with our campus members, we considered their points of view: What is expected and desired from IT, being able to consistently know the status of open issues, how to proactively discover/avoid future issues, how to contact the IT team, and how to self-help intuitively are all areas requiring continual attention.

These recommendations also consider how the IT organization can function without silos, maintain physical presence in distributed buildings and campuses, and how to progress to issue resolution efficiently and quickly with a minimum of adverse impact to campus members.

The recommendations are intended to be technology and vendor agnostic in order to provide a comprehensive approach to the recommended standards.

The recommendations for communication are intended to have the following effects: have better informed campus members, increase satisfaction with IT efforts, and continually improve performance by keeping resolutions moving forward, avoiding duplicate work, and increasing transparency of IT's desire to support campus members.

The appropriate levels of support resolutions also need to be identified, such as response times for help desk incidents as well as classroom support, remote vs. face-to-face (F2F) support options, and needs identification. The faster the F2F response time desired, the more staffing will be required; the need for numbers can be lessened by forming contactless or remote resolutions to common issues.

Budget Impact

We have no true way to estimate how much we are currently spending on Help Desk support across the campus. However, we anticipate that the budget will be impacted by the proposed recommendations. As the consolidation moves forward, it should be possible to gain a better understanding of the current costs and the projected budget for a unified Help Desk.

Key Logistical Issues and Proposed Timeline:

We anticipate that initial value will be delivered to the university community within 6-9 months. A new Enterprise Level Help Desk ticketing system will be selected before the end of Fall semester 2022. Platform design and configuration of the new system is anticipated to begin January 2023 and a phased migration of campus member groups will begin Spring 2023. The migration of campus member groups

and full implementation of these recommendations will take place over the course of approximately 18-24 months. The proposed phases are below:

Phase 1: Define: June – December 2022

- Create well defined IT career paths.
- Restructure Tier I Service Desks to promote a single-point-of-contact model.
- Develop plans to mitigate employee turnover and burnout.
- Expand the methods used to communicate with both internal and external customers.
- Begin requirements gathering for an Enterprise Level Help Desk ticketing system.
- Identify and sunset impractical tools and confusing processes.
- Identify a rapid classroom support dispatch method that efficiently routes requests.

Phase 2: Evaluate: July 2022 – January 2023

- Start the RFP process for an Enterprise Level Help Desk ticketing system.
- Begin to develop robust and comprehensive self-service options.
- Review customer feedback process.
- Plan and target appropriate deliverables for short term improvements and longer-term goals.
- Designate a location for a single "Home Base" headquarters for the rapid response team phone operators and locations for "support outposts."

Phase 3: Consolidate: February – August 2023

- Develop a training and Professional Development plan for Help Desk employees.
- Establish rewards and recognition programs.
- Establish standardized reporting processes.
- Establish Communities of Practice including event support and a service catalog.
- Establish clear metrics to measure success and identify Key Performance Indicators (KPI's).
- Continue to develop robust and comprehensive self-service options.
- Evaluate and refine implementation based on customer feedback.
- Expand the knowledge base set with scoped audiences to scale this solution across all colleges, support groups and services.

Phase 4: Integrate: September – December 2023

- Establish clear levels of support for Agencies.
- Continue to develop robust and comprehensive self-service options.

Approved:

M. K. Banks

August 13, 2022

M. Katherine Banks, Ph.D.
President

Date

APPENDIX of Sub-Group Reports

Working Group 36: Subgroup 1: Initial Contact for a Unified Help Desk

Recommendation Overview

The vision for a unified IT Help Desk at Texas A&M is to provide consistent, intuitive, and dynamic customer experiences through access to subject matter experts on first contact. To achieve this vision, it is important to establish a single-point-of-contact model for all IT services on campus, promote resolution on first contact, and offer robust and comprehensive self-service options.

Recommendation 1:

Promote a single-point-of-contact model for all IT services by consolidating various IT ticketing systems into a single platform with automated workflows designed behind all IT services.

Recommendation 2:

Provide intuitive and dynamic customer experiences through directed contact support lanes based on customer personas (e.g., Teaching Faculty vs Research Faculty, IT Professionals needing expedited support, etc.).

Recommendation 3:

Offer robust and comprehensive self-service options through a comprehensive service catalog, dedicated knowledge management team, and unified self-service portal.

Recommendation 4:

Promote a dynamic customer experience by offering IT support through SMS/Text and social media, including integration between Microsoft Teams/Slack and the ticketing system.

Recommendation 5:

Promote a consistent and dynamic in-person experience through pop-up Help Desks and existing local IT support locations across campus and the state, expanding and standardizing support offerings and staffing profiles at all locations, including branch campuses (i.e., School of Law).

Recommendation 6:

Promote resolution on first contact by mitigating the use of email as a primary contact method in favor of web forms designed to require the proper information service providers need to resolve issues or fulfill requests.

Further details, including strategic considerations, major challenges, and stakeholder impacts related to these recommendations can be found in Appendix A.

Strategic Considerations

With more than 80 distinct email addresses and phone numbers, and an unknown number of web pages and web forms used to contact IT support, knowing how to reach the best support group for any given IT issue can be confusing and frustrating to campus members.

Initial contact mechanisms considered include self-service/self-help, email, telephone, chat, SMS/Texting, social media, dedicated support hotline mechanisms, and face-to-face contact.

When evaluating initial contact methods, consideration was given to communication preferences exhibited by the wide variety of groups we serve, and the variety of functions we support. We recognized that some functions may require a different set of initial contact options than others.

We expect that narrowing the overall number of contact avenues will result in a simplified contact experience. This will be accomplished by focusing those mechanisms on the customer groups while expanding the number of available contact mechanisms. A simplified experience will hopefully result in lower frustration and higher satisfaction among IT customers.

Logistical Issues Addressed

Anticipated challenges associated with the proposed recommendations

- Time to choose the new ticketing system and to implement changes.
- Changing existing or creating new workflows to accommodate a unified ticketing system.
- Training staff and customers using the new system.
- Standardizing support offerings.

Mechanism for Implementing the Recommendations

- Implementation team with appropriate subject matter experts

Customer/Stakeholder Feedback Mechanisms

- Customer surveys
- Stakeholder Town Hall Meetings (i.e., ITAC, Faculty Senate, Student Government, University Staff Council, etc.)
- Creation of a Client Experience Team throughout the migration process
- User Acceptance Testing

Budget Impact

- Current funding does not exist to support these recommendations; additional funding will be required.
- Budget for unified ticketing system and training of IT professionals.

Major Challenges Encountered and Resolution

- Unifying and training staff resources effectively in a new unified Help Desk that will be slowed by new expectations and unfamiliar workflows.
- Migration, training, and adoption efforts for new ticketing system and any new AI (Artificial Intelligence) chatbot technology.
- Staffing for a dedicated knowledge management team.
- Time and effort to create a unified and comprehensive service catalog.
- Standardized training for Help Desk service points.
- Resistance from stakeholders to be overcome when changing what is familiar to customers.

Stakeholder Impact

There is risk of confusion and general angst as Help Desk support and technology is unified. Communication with stakeholders should be clear and frequent with regards to implementation timelines and new procedures. Information and training should be presented in a variety of different formats such as a dedicated project website, email, IT newsletter, open houses, online presentations, optional TrainTraq modules, Faculty Senate, open town halls, University Staff Council, Student Government Association, etc. Additional IT presence throughout the migration in the colleges and departments should be considered.

Key Logistical Issues and Proposed Timeline:

- The timeline for implementation will depend on information gathered from SME (Subject Matter or Technical Experts) and assessed by Project Managers.
- New business process maps, standard operating procedures, business impact analysis, disaster recovery plans, service level agreements, and training of staff and customers are all key items to address throughout as things are implemented or changed.
- Impact analysis for organizational changes should be considered and contingencies for split duties and cross training to mitigate service failure during role transitions.
- Key performance metrics should be identified and measured to define levels of success.
- Customer Experience surveys should be used for feedback from migrated units to help inform migration improvements efforts throughout the project.

Appendix A - Subgroup 1

Supplemental Information

Initial Contact for a Unified Help Desk

The vision for a unified IT Help Desk at Texas A&M is to provide consistent, intuitive, and dynamic customer experiences through access to subject matter experts on first contact. To achieve this vision, it is important to establish a single-point-of-contact model for all IT services on campus, promote resolution on first contact, and offer robust and comprehensive self-service options.

Recommendation 1:

Promote a single-point-of-contact model for all IT services by consolidating various IT ticketing systems into a single platform with automated workflows designed behind all IT services.

Establishing a single-point-of-contact model built on automated workflows for IT across campus allows seamless routing of tickets directly to subject matter experts without the experience of bouncing customers from one 'system' to another. This also gives IT leaders the proper visibility to effectively monitor and address operational deficiencies.

Recommendation 2:

Provide intuitive and dynamic customer experiences through directed contact support lanes based on customer personas (e.g., Teaching Faculty vs Research Faculty, IT Professionals needing expedited support, etc.).

Customer personas and directed support lanes will allow IT issues to be addressed by the appropriate experts, in the most timely and intuitive fashions. Support lanes should be presented to customers through information captured during initial contact (e.g., UIN or NetID) and used with identity demographics to provide optimized choices, routing customers directly to the proper Subject Matter Experts (SMEs).

Recommendation 3:

Offer robust and comprehensive self-service options through a comprehensive service catalog, dedicated knowledge management team, and unified self-service portal.

A comprehensive service catalog should define each service provided by IT, associated costs, applicable service level agreements, and provide intuitive request forms for customers. Establishing a dedicated knowledge management team will ensure help documentation is properly life cycled and the most relevant information provided to customers, mitigating the need to contact IT for assistance. Providing a

self-service portal that offers a unified view of a customer's issues, requests, and access to relevant IT resources reduces the need for status updates and gives customers visibility to IT service history.

Recommendation 4:
Promote a dynamic customer experience by offering IT support through SMS/Text and social media, including integration between Microsoft Teams/Slack and the ticketing system.

Campus members and IT often have a much easier time communicating through SMS/Text or social media platforms for simple inquiries and are often more convenient than logging a ticket through traditional channels. Establishing integrations between widely used platforms like MS Teams/Slack will also simplify support and promote ticket resolution.

Recommendation 5:
Promote a consistent and dynamic in-person experience through pop-up Help Desks and existing local IT support locations across campus and the state, expanding and standardizing support offerings and staffing profiles at all locations, including branch campuses (i.e., School of Law).

Meeting customers where they are and intentionally bolstering local IT support through pop-up Help Desk expertise during IT initiatives that impact large groups of customers will drive down calls from campus members and improve the customer experience. Standardizing service and support at existing locations will promote a consistent in-person experience for customers no matter the location.

Recommendation 6:
Promote resolution on first contact by mitigating the use of email as a primary contact method in favor of web forms designed to require the proper information service providers need to resolve issues or fulfill requests.

Due to the vast number of existing help desk related email addresses in use on campus, email routing workflows should be designed to move emails sent to these addresses into a unified system, preserving how customers are currently used to contacting support, with the intention of transitioning them to more preferred methods over time.

Appendix B - Subgroup 1
Supplemental Information
Helpdesk Platform Requirements

IT Service Management (ITSM) Tool

- Role Based Access Controls/Access Control Lists
- Agent/Operator Workspaces
    - Combines several operational modules into a single workspace
- Incident Management
    - Ability to pull caller information from a directory
    - Impact and Urgency to establish priority for each incident
    - Classifications
    - Assignment Groups
    - Notifications
    - Customer Visible and Internal Work Notes
- Problem Management
    - Link to Incident records to publish solutions or work arounds
    - Capture Root Cause Analysis Activities
- Change Management
    - Change Calendar (Change Freeze Periods)
    - Change Advisory Board (CAB) Approvals
    - Publish IT Alerts from Change Record
- Major Incident (P1) Management
    - Scramble Team
- SLAs (or Service Level Targets/Objectives)
    - Service based SLAs (Response Time/Resolution Time)
    - Escalations/Notification Thresholds
- Request Fulfillment (Request Catalog)
    - Dynamic multi-team task-based workflows
    - Request portal/catalog
    - Request tracking
    - Dynamic updates
- Knowledge Management
    - Internal and External KBs (Knowledge Bases)
    - Usefulness rating
    - Searchable
    - Role Based Relevancy
- Walk-up Experience (Kiosk style capabilities for in-person support)
- KPI/Metrics/Forecasting/Analytics
    - Data Collections (Daily, Historical Jobs)
    - Indicators (Automated, Manual, Formula)

    - Targets/Thresholds
    - Breakdown Metrics
    - Element Filters
    - Dynamic Analytics Hub for collected data analytics
    - Shareable/Unified Dashboards
    - Export to CSV, PDF
- Historical Reporting
    - Shareable
    - Automated Reports
    - Report Templates
    - Export to CSV, PDF
- IT Asset Management
    - API integrations with hardware inventory databases
    - API integrations with endpoint management technologies
    - Data Normalization (e.g., Dell, DELL, dell)
    - Ability to Assign Users, location, state, campus, building, floor, room (in use, in stock, disposed), departmental ownership, support group, etc.
    - Movement tracking/inventory certification
- Event Management (for system monitoring alerts in the Data Center)
    - Service Mapping
    - Alerts/Alert Intelligence
    - Anomaly Detection
    - Alert Queries

Call Center

- Cloud Based
- Call Recording/QA
- Interactive Voice Response (IVR)
- Skillsets/Call Routing by Role
- Call Monitoring
- Call Barge-In/Flagging
- Remote Agent Support

Chat/Remote Support

- Attended & Unattended remote access
- Chat transcript integration with ITSM Tool

Workforce Management Tool

- Timecard/Clock In & Out

Working Group 36: Sub-Group 2: Communications for a Unified Help Desk

Executive Summary

The expectation of a unified IT help desk at Texas A&M is to provide consistent, clear, and timely communication to external and internal customers. To meet this expectation, communication mechanisms, styles, and frequency must be defined and utilized in a manner that best meets customer needs and preferences, thus enhancing and creating new paths of communication.

Recommendation 1

Provide the customer with an intuitive and comprehensive interface to interact with Texas A&M Information Technology groups and services.

Recommendation 2

Clearly define escalation routes and triggers to provide timely support and notification of impactful issues.

Recommendation 3

Expand post-contact feedback survey channels.

Recommendation 4

Establish standard contact guidelines regarding status of issues, response times, and additional communication.

Recommendation 5

Establish centralized external and internal knowledge bases with a full-time knowledge management team to manage and configure them.

Recommendation 6

Expand the methods used to communicate with both internal and external customers.

Recommendation 7

Empower the customer to define their communication preferences on a per-issue basis.

Strategic Considerations

One key aspect of the ability of any IT Department to provide quality customer service to its community is the utility, clarity, and effectiveness of how it communicates. From contact, acknowledgement, internal communication, resolution, to satisfaction confirmation communication is the lifeblood of how good processes become good service. Consistency, accuracy, and timeliness are all required for each of the recommendations here. Continual feedback on how communication contributes or distracts from our goals is essential to maintaining proper maturity of IT services and service.

For communication with our campus members, we considered their point of view: What is expected and desired from IT, being able to consistently know the status of open issues, how to proactively discover/avoid future issues, how to contact the IT team, and how to self-help intuitively are all areas requiring continual attention.

These recommendations also consider how the IT organization can function without silos, maintain physical presence in distributed buildings and campus, and how to progress to issue resolution efficiently and quickly with a minimum of adverse impact to campus members.
These recommendations are intended to be technology and vendor agnostic in order to provide a comprehensive approach to the recommended standards.
These recommendations for communication are intended to have the following effects: Have better informed campus members, increase satisfaction with IT efforts, and continually improve performance by keeping resolutions moving forward, avoiding duplicate work, and increasing transparency of IT's desire to support campus members.

Key Logistical Issues

- Determining appropriate tools for all IT support teams to jointly use.
- Modifying IT member behavior to use unfamiliar tools and unlearn previous habits.
- Advertise changes to our campus members without causing change burnout.
    - Assessing whether implemented changes provide improvement.

Mechanism for Implementing the Recommendations

- Use of a coordinated communication channel to apply changes simultaneously, and for encouraging adherence to new standards.

Customer/Stakeholder Feedback Mechanism

- Regular leadership collaboration meetings with IT and Departments.
- IT announcements and notice of changes to campus members in a positive light.

Budget Impact

- License reclamation of current tools being sunset.
- Appropriately sizing license count for unified systems and leveraging Microsoft 365 tools where applicable.
- Additional spending on new communication paths and supporting tools (e.g., text bots, voice response messages).
- New suggested focus for employees to focus entirely on improving knowledge articles and organization.

Major Challenges Encountered and Resolutions

- **MC 1 -** Correctly identifying appropriate vendor tools to use to achieve success.
    - **R 1 –** Complete unbiased RFP (Request for Proposal) process and evaluate options based on utility and not preference.
- **MC 2 –** Ensuring adoption of communication tools and processes.

    - **R 2 –** Continually leading campus members to communication paths. Committing to performing quality and timely work to reinforce new processes.
- **MC 3** – Newly emergent industry trends and innovative technologies.
    - **R 3 –** Evaluating trends and technology for smooth and effective adaptation into Texas A&M support. Maintaining an openness to adjust and improve currently successful processes.
- **MC 4 –** Maintaining communication path stability and system redundancy without causing conflicting tools.
    - **R 4 –** Creating an implementation team representative to campus members and various IT disciplines. This diverse team would be able to agree on tools and processes that work for all parties involved.

Key Logistical Issues and Proposed Timeline

Rules/SAPs to be updated, personnel to be moved in organizational structure, personnel/labs to be moved to new physical location, required documentation submitted to Texas Higher Education Coordinating Board, communication plans, performance metrics, etc.

- Planning and targeting appropriate deliverables to achieve short term improvements toward longer term goals. Consider an annual or semi-annual release cadence. This would work to improve campus member and IT compliance and participation through a predictable and stable environment expectation.
- Flexibility to sunset impractical tools and confusing processes.
- Maintaining a proper encyclopedic knowledge base set with scoped audiences to scale this solution across all colleges, support groups, and services. This knowledge base set should be continually maintained to ensure information is current, accurate, and understandable by the target audience. These knowledge bases should also support all current security and legal requirements of our computer and data systems.

Appendix A - Subgroup 2

Supplemental Information

Communications for a Unified Help Desk

The expectation of a unified IT help desk at Texas A&M is to provide consistent, clear, and timely communication to external and internal customers. To meet this expectation, communication mechanisms, styles, and frequency must be defined and utilized in a manner that best meets customer needs and preferences, thus enhancing and creating new paths of communication.

Recommendation 1

Provide the customer with an intuitive and comprehensive interface to interact with Texas A&M Information Technology groups and services.

A comprehensive customer portal should exist to enable customers to easily see the status of their issues in a customer portal, including the issues' most recent update times, status, and what group is working on each issue as well as be able to open new IT issues.

Recommendation 2

Clearly define escalations routes and escalation triggers to provide timely support and notification of impactful issues.

Define the criteria used to escalate and transfer issues internally or to create degradations, outages, or problems. These criteria should be clearly defined and adhered to by IT staff. Criteria should be defined per-service. Criteria should be negotiated between IT and CM groups.

Recommendation 3

Expand post-contact feedback surveys channels.

Every customer contact should have the opportunity to gather customer feedback regarding their interaction, including email, telephone, and text. These surveys should be short and optional.

Recommendation 4

Establish standard contact guidelines regarding status of issues, response times, and additional communication.

Each issue should have a clear communication expectation visible to the customer and adhered to by IT staff. Guidelines should be specific to the issue based on urgency, impact, and/or customer preferences.

Recommendation 5

Establish centralized external and internal knowledge bases. Establish a full-time knowledge management team to manage and configure them.

Establish a common public knowledge base for all IT information. Establish an IT staff knowledge base used to collect and share internal IT information. A knowledge management team will be responsible for ensuring that knowledge articles are accessible to the correct audiences and that articles are kept relevant.

Recommendation 6

Expand the methods used to communicate with both internal and external customers.

Utilize communication methods used and preferred by customers including, but not limited to, email, telephone, computer-based chat, text/SMS chat, social media direct messages, organization-wide chat platforms (Microsoft Teams, Slack, etc.), and video conferencing.

Recommendation 7

Empower the customer to define their communication preferences on a per-issue basis.

Provide customers with the ability to select their preferred communication method (i.e., SMS, email, or telephone) and frequency when contacting IT about an issue.

Working Group 36: Sub-Group 3: Academic Services / Research Services / Other Services

Recommendation Overview

A. Identify a rapid classroom support dispatch method that efficiently routes request to ensure academic success

B. Determine the acceptable ratio of local technicians per student/faculty/volume per building to provide equity in support, based on needs.

Recommendation 1: Development of an Academic "Rapid Response" Technical Support Team
Implementation of a learning environment rapid response support team
Summary:

- A rapid response technical support team consisting of student workers/interns managed by a team of full-time subject matter experts in classroom support managed by a TBD number of FTE staff members with a primary goal to provide timely and efficient technology support within time sensitive learning environments.

Operations:

- Rapid response hours of support shall at least match, if not exceed the listed class schedule hours.
- Designate a TBD location for a single "Home Base" to function as the headquarters for the rapid response team phone operators.
    - Designate central campus "Outposts" that student workers/interns will congregate and muster prior to their shift to gather updates and specific daily tasks.
- Student workers/interns will complete physical "rounds" of the learning environments they are assigned during their shift.
    - "Rounds" will consist of proactive maintenance and functionality testing in learning environments with technology.
    - "Rounds" will be the catalyst for keeping student workers/interns members near learning environments resulting in rapid response support to customer needs.
    - Consumable supplies such as dry erase pens and batteries can be replenished by student workers/interns during "rounds" when appropriate.
- Student workers/interns can also be available to provide prescheduled assistance with faculty training or other "IT and or A/V '' related special projects and events with the understanding that rapid response to learning environments is their highest priority at any given time.
- Student workers/interns will be supplied with two-way radios and continuously employ modern communication tools to provide exceptional faculty support. These teams will remain ready to immediately move from "rounds or special projects" to rapid response technical support when contacted by "Home Base".

- Provide predictive services ensuring Rapid Response team is aware of heavy use times/locations or special dates for exams or other important events within learning environments and schedule necessary resources accordingly.
- Rapid response staff leadership should participate with Faculty Senate and related academic governing assemblies to ensure customer needs/ expectations are being met.
    - Number of support members to clientele ratio is dependent on the technology in use, size and capacity of the room, class schedules, and custom metrics in support of respective College learning objectives. *(See Recommendation 2, page 3 below for more information.)*
    - A variety of frequent training opportunities should be provided to instructors which will also assist in meeting student and faculty expectations for customer success.
- Dedicated SharePoint data repository shall be created to house all organizational process assets such as SOP's, Manuals, and "How-to" documentation.
    - All prominent customer facing documents shall be accessible as a download from a rapid response web site.

Contact/ Communication

- Creation of a phone number separate from the centralized help desk for clients to use for support in learning environments.
    - This will eliminate long voicemail trees for those in urgent need.
- All supported areas shall have uniform and consistent signage listing support and communication options in a rapid and easy to use set of instructions.
- Continue to use existing direct communication methods already installed in "some" classrooms. Expanding service when appropriate.
- In-room cameras can still be used for live support by "Home Base" support staff.
- In-room phone support should be provided using peer-to-peer IP phones to eliminate the need for instructors to call a number.

Culture:

- Fun, club like environment for students, focusing on collaboration, innovation, and support for learning environments.
- Dedicated to help and provide proactive, exemplary customer service in learning environments.
- Student workers/interns supervisors should be motivating their team as part mentor, coach, and cheerleader.
- Effective leadership and teambuilding are paramount for the success of this team.

Training:

- An accredited student worker technology course that provides certification and skill sets for support in technology in a higher education institution.

- Consist of 2-week training on A+, Network +, and ongoing hands-on Audio Video training specific to the learning environments they are supporting.
- All student workers/interns team will be A/V generalists becoming efficient with technology troubleshooting for learning technology in all colleges.
- Continual training throughout the program that parallels their specific technology career path to insure advancement and retention after graduation.

Recommendation 2: Development of a Technical Support Staff vs Customer Ratio.
The appropriate ratio of FTE/student worker support staff to learning spaces at TAMU will depend on the number of rooms supported and the scope of the support.

Number of spaces
The number of rooms supported by a central A/V group will be determined by the types of spaces this group is assigned to manage. Will the group support just classrooms and teaching labs or extend that support to include conference rooms, study spaces, or other locations with A/V equipment? Once this is decided an accurate inventory of the spaces will need to be compiled so that both numbers and density of support staff can be ascertained.

Scope of support
Where the responsibility of the A/V group ends and the responsibility of other Support Groups begins needs a clear definition (e.g., instructor computers and software in IMS rooms are supported entirely by OAL, but both are handled by the same people in many of the colleges).
The appropriate levels of support such as response times and remote vs. face-to-face (F2F) resolutions needs identification. The faster the F2F response time desired, the more staffing required; the need for numbers can be lessened by forming contactless or remote resolutions to common issues.

Benchmarking
Information about staffing numbers and responsibilities was gathered from A/V groups at 5 colleges and universities across the country. Support staff to room ratios at the low end came in at 1 FTE per 18 rooms and 1 FTE per 75 rooms at the high end. Student worker ratios were 1:7 and 1:120 at the low and high ends, respectively. The University of Central Florida, which is similar in size to TAMU, has 1 FTE per 34 rooms.

Group Members: Joshua Kissee, Chris Court, William Posey, Mitch Wittneben, Regina Greenwood, Thomas Caron

Working Group 36: Sub-Group 4: IT Employee Focused Issues and Specific Customer Group Issues

Recommendation Overview
Recommendations from the TAMU MGT working group focusing on IT Employee Focused Issues and Specific Customer Group Issues

I. Balance between FTE and student technicians – what roles do each fill?
II. Burnout – how to mitigate it
III. Where on the career path is this role – how do we prepare our staff for future roles?
IV. Event group Support
V. Agency Support

I. Balance between FTE and Student Technicians – What roles do each fill?
The balance between student technicians and FTEs requires a definitive delineation of each role and the importance that each group has in the organization. The professional and ongoing development of each group cannot be overstressed to provide world-class service to the organization while delivering a consistent, intuitive, and dynamic customer experience through access to subject matter experts on first contact.

- **Recommendation 1: Restructure Tier I Service Desks**
  The staffing of Tier I service desks should be staffed with subject matter experts (SMEs) to enable intuitive and directed contact support lanes (i.e., students, research faculty, IT professionals, campus staff, instructors, etc.).

- **Recommendation 2: Mitigate Turnover and Knowledge Gaps**
  Mitigate turnover rates and knowledge gaps at the "Tier 1" level by staffing a higher ratio of full-time employees to student workers (ex. 80% FTE to 20% Student Employees).

  The current staffing ratio for Help Desk Central is 10% FTE to 90% Student Employees with an average student turnover rate of approximately 10% each semester, resulting in significant costs to continuously onboard new student employees. Leveraging more full-time employees for "tier 1" help desk support promotes both consistent service delivery and customer experience by enabling ownership of issues from initial contact through resolution.

- **Recommendation 3: Retention, Education and Professional Development**
  Promote employee retention, education, and skill development by providing and encouraging industry standard certifications, cross-training initiatives, and small service improvement projects aligned with defined IT career paths.

  Emphasizing employee expertise and experience reduces skill gaps, increases job satisfaction, and improves the customer experience through rapid and expert issue resolution and request

fulfillment. Additionally, well-trained full-time staff are better equipped to coach and mentor student employees.

II. Burnout – How to mitigate it

The organization has identified that retention and recruitment of highly skilled and motivated individuals is paramount to the overall success of the organization. The opportunity to mitigate burnout of personnel in existing positions is equally, if not more important, for the health and reputation of the organization. Implementation of burnout prevention strategies can be accomplished with mindful discussions with team members, engagement activities, recognition events and career-oriented discussions. Ideally these actions will include acknowledgement from leadership and an employee's manager.

- **Recommendation 1: Manageable Workloads**
  The University has seen a steady increase in faculty, researcher and student populations which increase workloads on staff. Information technology staffing levels have not witnessed proportional staffing level increases to manage the increased workloads. Failure to increase staffing and better manage workloads will remove time from staff participating in career development, training, and networking opportunities. Tangible time must be allocated to receive, process, and act on management communications to meet organizational expectations.

- **Recommendation 2: Hybrid Workplace**
  The competition for highly skilled technical positions is at an all-time high. To retain and recruit talent, models for hybrid workplace environments should be established. Mindful solutions should be developed for all areas of the workforce, including those holding positions that require hands-on support for classrooms, academic labs, end user desktops and counter support. Creating hybrid roles only for those in administration or cloud-based environments would only serve to drive a deeper division in the workforce. Hybrid work models inherently involve additional overhead and must be thoughtfully integrated into existing work environments to not implicitly add on additional workloads.

  In addition to hybrid models, consideration of compressed workweeks might be an option. In this, employees maintain the 80-hour minimum over a two week pay period by working four 9-hour days and one 8-hour day during one workweek plus four 9-hour days and a day off during the alternate week. This could be structured in a way that full administrative coverage is provided throughout the work period.

- **Recommendation 3: Awards and Recognition**
  As reporting structures for information technology professionals change, it is important that the organization grows in a way that allows for recognition of individualized and team-based accomplishments. By developing recognition programs for staff and student technicians, retention opportunities and career path recognition opportunities will be increased.

Administrative leave with pay used as a recognition of excellent service and significant contributions provides employees with time off and acknowledges their work. Employees may be granted up to 32 hours annually by meeting certain criteria relative to performance. Employees should be encouraged to utilize Wellness Release time. Self-care that includes physical activity has proven to help alleviate stress and increase productivity. Participation affords employees time to focus on physical activity to reap the health benefits which, in turn, helps maintain a healthy workforce.
Encourage and coordinate participation in certification prep courses and set standards for awarding skill enhancement pay upon completion.

- **Recommendation 4: Communities of Practice**
  Communities of practice should be established and where possible recorded to add additional networking and career development opportunities to organizational members. Communities of practice discussions are more focused on career minded individuals providing consistent services and processes to the organization. Communities of practice serve as a mechanism to provide informal mentorship to employees newer to the team.

- **Recommendation 5: Clearly Defined Career Paths and Promotion Opportunities**
  Career paths for team members should be clearly disclosed and job positions updated to better reflect positions posted in the organization. As promotion opportunities become available it is critical that information provided to HR emphasize process improvements, efficiencies, excellence on existing duties, training and development opportunities taken, and less on what additional duties have been added. When focusing on additional duties the likelihood of burnout or overworked situations is likely to occur.

- **Recommendation 6: Professional Communications and Expectations**
  Communication within the organization is critical to the success of and emotional well-being of the team. Communications should be relevant, timely, transparent, and courteous. All communications should clearly state objectives, timelines and expected outcomes.

- **Recommendation 7: Development of Informal Chat and Coffee Hours**
  The Information technology group should provide and encourage information chat and coffee hour. Implementation will facilitate discussions that are not practical in highly structured meeting environments. Innovative ways to structure the meetings such as Zoom brunches, or short-in-person gatherings would be most beneficial.

- **Recommendation 8: Job Shadowing**
  Job shadowing has become an industry method to expose employees to other parts of the organization. As a knowledge transfer tool, job shadowing is a common way to cross-train employees to build organization resilience, handle turnover and fill in gaps for vacation or other long-term absences. One model may include spending a portion of a week with another area, or with a member of the same team who holds a different role. Use the opportunity to review and

refine processes by bringing in another perspective. Job shadowing may be used to help better align skills with needs and broaden the scope of an employee's contributions. Benefits include, gaining insight into the roles and responsibilities of other members of staff and other departments, allows one to see how other staff and teams work and provides a bigger picture about how the organization functions and builds trust and respect among colleagues.

III. Where on the career path is this role – how do we prepare our staff for future roles?

The vision for a unified IT help desk at Texas A&M is to provide consistent, intuitive, and dynamic customer experiences through access to subject matter experts on first contact. To achieve this vision, it is important to prepare IT staff for this role in addition to future roles by creating well defined career paths, actively recruiting employees, and offering professional development opportunities. Internal IT portals for communications and for shared knowledge must be created to connect with and access subject matter expertise.

- **Recommendation 1: Career Paths**
  Create well defined IT career paths. Prioritize annual career path reviews.

  IT career paths are not clearly defined or in some cases, do not exist at all. Career planning is sporadic and often overlooked. Better defined IT career paths will allow employees to understand how to progress up their chosen career path. Opportunities for internal, positive career transitions must be clearly defined by use of career tracks and milestones.

- **Recommendation 2: Recruitment**
  Actively recruit student techs and entry-level positions from within the university, particularly within IT-related fields of study. Retain experienced student technicians and guide them into career paths within the Division of IT. Be competitive with starting wages.

  There is a scarcity of qualified IT job candidates. Entry-level compensation is not competitive with the global market resulting in a smaller, less reliable pool of qualified IT candidates.

- **Recommendation 3: Professional Development**
  Offer professional development opportunities for student technicians trying to choose between IT or other roles and for entry-level IT positions. This could include certifications, job shadowing, self-training courses, internships, and other on-the-job training.

  Student technicians are unable to qualify for full-time entry-level positions even though in many cases we have invested in their training for several years. Offering career development opportunities will allow student technicians to move into full time IT positions with the required skill set in place. This will allow the institutional knowledge and experience these employees have gained to stay within the Division of IT.

- **Recommendation 4: IT Portal**
  Build an internal IT support portal with an integrated service catalog that routes tickets to the appropriate group.

  Communication between IT Professionals is often confusing and non-transparent. IT Professionals and application administrators currently report issues through Help Desk Central or directly to a specific service email address. Once the issue is elevated, there is virtually no ability to communicate other than by email. This can result in incorrect routing or delays due to back-and-forth emails. In some instances, there is no way to confirm the ticket has been elevated to the correct group or to check the ticket status.
  To resolve customer issues most efficiently, IT Professionals should have entry portals that allow for direct communication (phone/chat/email) and visibility of ticket history with the groups responsible for working on tier 2 or higher problems.

- **Recommendation 5: Knowledge Repository**
  Create a central repository of documentation, guidelines, and procedures for similar job duties. (Exchange admins, identity management, network admins, etc.).

  There is no central repository of documentation and procedures between departments performing similar job duties or using centralized administrative interfaces. This affects the level of consistency between customer experiences. A central repository of documentation and procedures will close this gap and result in IT staff using the most efficient procedures in addition to using common terminology and practices.

IV. Event Support

For many, attendance at an event - either virtual or in person - may be the first exposure to Texas A&M University. This interaction and all future interactions should highlight the preeminent status of Texas A&M University. Event support for Texas A&M requires a thorough understanding of the expectations and delineation of services between the events services team, marketing and communications, venue support and information technology.

- **Recommendation 1: Event Definition**
  Clear definition must be established to what constitutes an event. Such parameters to consider are size, venue location, audience, presenters, virtual and/or in-person, etc. Adequate time for set up and tear down will be needed for a successful event. Planning and communication are essential.

- **Recommendation 2: Service Catalog with Service Level Agreements**
  A service catalog for event support must be generated to fully develop the service offering. Key aspects of the catalog will include what role each entity (event services, information technology, etc.) will support and a lead role in the process. Service level agreements must be implemented

between the service providers to ensure known accountability is in place.

- **Recommendation 3: Technology Logistics**
  As the number of spaces available to be used for events at Texas A&M is large, a well-defined list for booking should be identified by the organization. Creating a catalog of rooms will provide customers with location, parking, capabilities (technology, food service, etc.) and booking services to provide professional service delivery.

- **Recommendation 4: Technology Support**
  Planning guides should be provided to consumers of the service and the events team to give guidance to the type of on-site information technology support required. Depending on the scale of the events, this may include a comprehensive package of audio/video broadcast services down to a less intensive local computer presentation.

V. Agency Support

Due to the way an agency functions, IT support requirements might differ from traditional academic research IT support. Agencies can vary, not only in how an agency and university operate but there are also differences within the agency's centers and research areas that might require diverse support. Some of these factors are physical location, operational logistics, equipment, and security restrictions. While agencies coincide with a college or department, the agency still functions as a research facility. Consideration should be given to the similarities in how an agency and university require support but with a focus on uniqueness. Coordinating and aligning IT support structures will be key in successfully supporting agency projects and administration. Automation, innovation, and transparency in all IT processes is key to customer understanding, (including models for IT planning, support, delivery, security, and infrastructure).

- **Recommendation 1: Product Licensing**
  Agency product licensing (i.e., Qualtrics, Adobe, Zoom, etc.) should be incorporated into large scale purchasing contracts implemented by TAMU or TAMUS. Effective service delivery depends on a standard service model for the entire organization.

- **Recommendation 2: Logistics**
  A reproducible process for the procurement, configuration, and shipping of devices should be established to meet organizational expectations. Agency members may be physically located on property outside the normal purview of TAMU/TAMUS - for example leased spaces.

- **Recommendation 3: Local Support**
  In person support options should be carefully thought out as virtual options may be all that is available to most. Consideration should be given to those who are hybrid and not always in the office. This complicates IT support (local or remote) and does not always necessitate having in-person support.

- **Recommendation 4: IT Coordination Requirements**
  Typically, IT's first involvement with a project is after something has been deployed, fails to operate, or does not integrate with the hosted environment. Involving IT from the beginning should be a requirement in the startup of any project.

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