



Customer-centric IT is not an oxymoron: Here's how one nonprofit organization did it.

CHANGE REQUESTED

Help improve collaboration and customer service within a nonprofit's IT function

CHANGE ENVISIONED

Develop a unified IT vision and mission to eliminate inter-departmental silos and establish IT business alignment to improve customer service

CHANGE ACHIEVED

Removed obstacles to collaboration and revamped helpdesk system with carefully considered behavioral changes; reduced average helpdesk resolution times from days to hours; improved communications with the business; created a self-service portal for internal customers and an executive dashboard with key metrics to track performance.

When perception of the information technology (IT) function of one of the country's largest nonprofits turned unfavorable — as IT teams put the onus on other IT teams to deliver high-quality customer service — the organization's CIO decided to replace the IT-centric playbook she inherited with a decidedly more customer-centric approach. The new plan introduced a behavioral transformation that fostered much greater collaboration among the IT function's three major divisions: the helpdesk, the customer service group that collaborates with business partners on analytics efforts and similar capabilities, and the IT infrastructure and systems maintenance group. This resulted in impressive gains in performance and services — most notably, helpdesk requests that once took days to address can now be closed in hours.

“Other executives have sent messages to the CIO commenting on the positive changes their teams have noticed after working with individuals from IT,” notes Kathie Topel, a leader in Protiviti's Business Transformation practice.

Customer Centricity vs. IT Centricity

Shortly after taking on her new role within the organization, the CIO discovered that the IT function's three divisions tended to operate independently of each other, often with little interaction. This lack of communications was troubling, given that nearly all customer service issues ultimately required collaboration across the three IT divisions. As fingers began to point at who was falling short on customer service, the CIO acted quickly.

Lack of collaboration between functions and customer service challenges are hardly unique to IT functions within the nonprofit sector. However, nonprofit leaders tend to have fewer incentives at their disposal, compared to executives

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in other sectors, especially when it comes to enabling transformation and motivating behavioral changes. Salary raises, bonuses, promotions and other financial incentives are often more difficult to dispense in mission-driven organizations with necessarily tight budgets. Nonprofit leaders seeking to change behaviors and to transform organizational cultures often must find other solutions.

The IT function within this particular nonprofit organization served internal customers while also providing technology services and support to personnel at roughly 200 distribution centers throughout the United States. The size and variety of IT’s customer base, the CIO recognized, required her function’s three primary groups to significantly improve how they aligned with the organization’s strategy, and with each other.

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Cross-Functional Teams and Quick Deliverables

For the transformation to take hold, the CIO recognized that her people should own the effort, embedding change into their existing responsibilities. Quick improvements also were essential to success.

“One of our top priorities is to respect their time,” says Topel. “Rather than pulling IT staff out of their daily work, we helped them integrate changes into their daily activities. We also positioned ourselves as facilitators — our client’s IT organization really led the charge.”

Identifying specific 30-, 60- and 90-day deliverables was crucial to moving ahead quickly. “That cadence helped create a consistent rotation of projects and resulting improvements,” Topel adds. “It also created a more agile environment within the IT function.”

Topel and her team wanted to conduct their work onsite to help the organization’s IT staff address daily challenges in a practical, hands-on manner — an approach appreciated by the executive team. Next, Protiviti partnered with the CIO to organize cross-functional teams to perform the work, which started with the development of an overall IT mission and vision that aligned with the nonprofit’s vision and mission. After developing an action plan with Protiviti’s assistance, the cross-functional project team identified three improvements — the 30-, 60- and 90-day deliverables — that would enable the IT function to execute its mission.

A key deliverable centered on improving the speed and quality of the helpdesk service. The cross-functional team created a process map for helpdesk service activities, which helped illuminate the root causes of delays. For example, the

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team determined that significant time was being spent responding to helpdesk clients' questions about progress on their IT issue. To reduce this back and forth, the cross-functional team implemented a new system through which IT customers can conveniently track the progress of helpdesk issues. The team also introduced a self-service portal that quickly limited the number of questions helpdesk professionals received, further reducing helpdesk processing time.

Another deliverable related to the development of a new performance dashboard that tracks key performance indicators (KPIs) directly related to the achievement of the new IT mission. All IT professionals are now held accountable to these metrics, which they actively monitor throughout each quarter. This improvement has also engendered higher levels of peer accountability among IT employees.

Interdependencies Replace Silos

The cross-functional and agile nature of the effort enabled the nonprofit's IT professionals to partner with colleagues they had never worked with previously. This partnering also helped IT employees sharpen their presentations skills. These groups collaborated on projects that generated measurable improvements tied to the achievement of a new IT mission that aligned with the nonprofit's mission. For example, helpdesk tickets that previously took days to resolve are now resolved in hours. Another effort, related to document storage governance, helped reduce the amount of storage capacity, eliminating unnecessary servers and reducing cloud storage costs.

"Once everyone in IT began working together in the service of a single mission, they realized that the success of their individual group hinges on their collaborations and communications with colleagues in other IT groups," says Topel.

The CIO agrees. "When I look back to where we started versus where we are today, the change is remarkable and the potential is endless," she says. "Protiviti helped guide us down a path that has helped everyone think and act differently, which creates a lasting change. I've never been an advocate of offsite team development — until now. This approach enabled what we needed."

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