

# Integrating Services

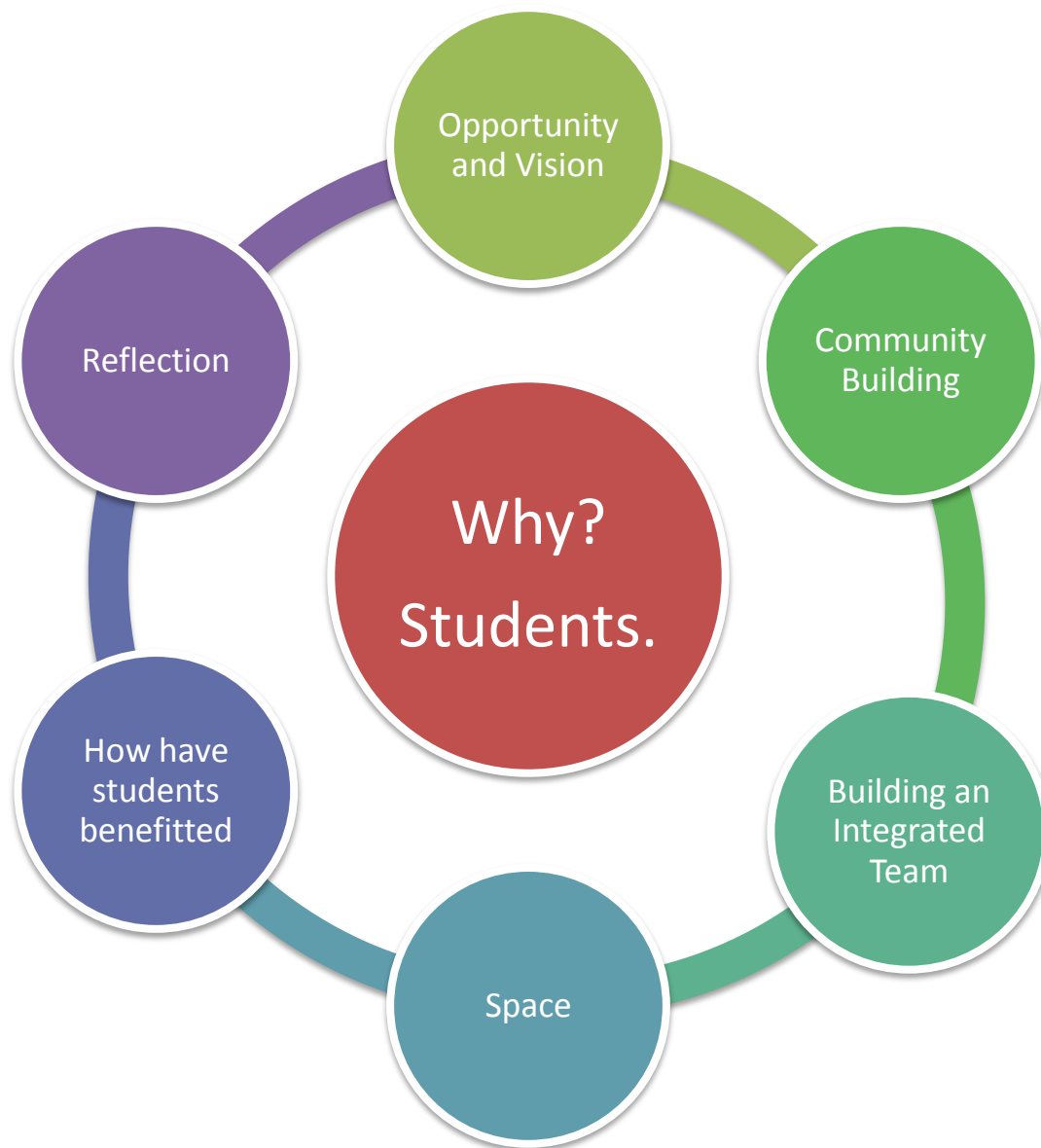
The unvarnished story



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McGill University  
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## Presentation road map

- Vision
- Implementation
- Students
- Reflections – what we learned
- Our best advice
- A song that never ends...
- What do you think? What has worked for you?



# Vision

Students are at the heart of this project:

“The Principal’s Task Force on Student Life and Learning at McGill encourages the University to ensure that decision-making at all levels is informed by principles and goals appropriate to a student- centred, research-intensive University.”

Principal’s Task Force on Student Life and Learning, 2006

The Task Force reported that students were frustrated with bureaucracy and run-around.

“Is this project serving the needs of my institution and do I have the appropriate support?”:

- ✓ Alignment with University’s strategies and goals
- ✓ Support of Senior Executive
- ✓ Students are supportive

## Planning

Project Goals  
Services Goals  
Measurement

## Integrated Services Project Goals

- Enhance the student experience:
  - Reduce the run-around and improve quality of services
- Cohesive services in a prominent place in the heart of campus
- Support and empower our employees:
  - intensive professional development to make decisions on the front line

## Service Goals

- Enhance online services
- Improve quality of in-person services
- Integration and one-stop:
  - A single employee to deal with a wider range of services for students
  - Integrate logical suite of services
- Professional development for staff
  - Create the tools and opportunities to educate staff on increased functional responsibilities and making discretionary decisions

## Measurement - quality, volume, expectations

- Purchased queuing software one year ahead to measure volume
- Telus CCA to measure call centre volume
- Process mapping
- *Heat* – to track email queries more effectively and to report interactions (quality assurance)
- Surveyed the students about existing services

“Is there expertise at my institution that I can engage to work on this project?”

“Am I measuring what matters, those metrics will help us track to our goals?”:



# Implementation

Community building  
Build an Integrated Team  
Space  
Soft launch

# Community Building



- We identified:
  - Partners, subject matter experts, change agents
  - Steering committee – lean, fast decision-making
  - Working group – experts
  - Process group – experts, frontline
  - Project manager position - primary responsibility to move project forward and foster these connections

*Vision – Planning - **Implementation** – Students - Reflections – Advice – Your Feedback*

## Communication and change management:

- Why? Students.
  - Identified a common goal; emotional connections.
  - Repetition.
- Created new venues for communication:
  - Service Roundtables, project website
- Reached out to present to many existing groups (academics, Management Forum, McGill Spotlight on Service conference, administrative units)
- Involved students and staff - contests (logo, name-that-service)

“What is our message and is it meaningful to people involved in the change?”

“How and where will I tell the story?”

“How much communication is enough?”



## Service Point (Integrated Services for Students)

- Project Team Members
- Goals
- List of Services
- Presentations, Resources, and Site Visits
- Space - Draft Plans & Artistic Renditions
- Staffing
- Meetings
- Timeline
- Contests
- Survey for Students
- Gallery
- Media



### The Project:

This project will create an integrated area grouping services currently offered in six different locations in four different buildings. We aim to build on the tradition of excellence at McGill through the enhancement of the student experience.

- To be integrated:
  - [Student Accounts](#)
  - [Enrolment Services](#)
  - Selected services from [Scholarships and Financial Aid](#)
  - Selected services from [Graduate and PostDoctoral Studies](#)
  - Selected services from [Arts and Science Student Affairs](#)
- The new integrated service area will be located in the [McLennan building](#) at street level in the heart of the McTavish student services corridor.
- The revitalized McGill University [Welcome Centre](#) will also be located in the McLennan building, directly adjacent to the new integrated service area. Campus Tours will leave from this new

## Building an Integrated Team

- Organizational structure & Employee selection
- Professional Development & Training
- Culture
- Ongoing support

“What structure, skills, knowledge and aptitudes will be necessary for this team given our new way of providing services?”

“Does attitude matter?”

“How will we develop a new, shared culture?”

# Building an Integrated Team

## What worked

New organizational structure worked  
– Service Professionals make decisions on the spot; succession planning and career development opportunities for staff

Good training leads to operational/organizational flexibility – allow timely changes to services that make sense

Dedicated Training and Communication positions on the team were critical to the success

## What we're still working on

- Difficult to build integrated culture when one partner has more staff in the mix than the others
- Implications of differing deadlines, peaks for the newly integrated services overwhelming



# Space



Vision

What worked

What we're still working on



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# Space

## Vision

(tied to project values and credo)

- Transparent
- Welcoming
- Non-bureaucratic
- Facilitative
- Respectful, dignified
- Flexible (services evolve)

## Implications

- No more front counter – flexible desks and space
- Light and glass
- Close to other services
- Need lots of space for integration
- Luck: street was made a pedestrian mall

“What principals will guide our decision-making about space?”

Before





McGill Service Point - Services / Services  
Info: www.mcgill.ca/mcgill-services  
© www.mcgill.ca/mcgill-services.com



**After**





**SORTIE**















# Space

## What worked

- Windows to increase visibility (internally and to external clients)
- Open concept
- Reusing and recycling building materials
- Managing the move...

Flexibility of new service desks vs old front counter – too early to evaluate

## What we're still working on

- More demand for partnerships and co-location – not enough space
- Compromises – be ready to make them (budget, time)
- Determining seat assignment surprisingly tense on some teams

# Soft Launch



- Space was not ready, but our staff had received 12 weeks of training
- Choice: Delay everything or do a soft launch and build our experience
  - We chose ‘soft launch’
- Went live in existing (cramped) space with integrated services and new team on January 4, 2010.
- Learned a lot from that experience that is informing everything we do as we move forward

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# Benefits for Students



Photo credit: Claudio Calligaris



## Have students benefitted?

- Yes.
  - We've changed our mindset.
  - We're now looking at processes from the student's perspective – Student Life Cycle
- Students don't need to “figure out” where to go; Service Point is their first point of contact
- Service Point offers many services in one place, by one person – reduced runaround and increased self-service opportunities

“Have we asked students what is important to them?”

# Reflections

What we learned

Our best advice

A song that never ends...

“Have we accommodated for opportunities to reflect during our project?”

“Have we created a learning organization and how will we demonstrate this?”

## What we learned (it's a long list)

- Our vision was well-aligned with institutional priorities and student priorities
- We communicated well – and still are. You can never communicate enough.
- Living the experience exposed more opportunities than we originally anticipated (for measurement and improvement)
- We didn't measure enough ahead of time
  - Some service areas did not measure call volume or email volume thoroughly
- Process mapping was done, but it was not integrated (which would have shown the overlapping in peak periods and deadlines)

## What We Learned (page 2):

- Level of investment of partners in the success of such a project is variable – our challenge was to keep their interest and support (and to an extent, ownership of success) (popcorn moment!)
- Be careful about assumptions about the ease of creating a new culture – it takes time to create a team of ‘us’ rather than ‘us’ and ‘them’. This is situational and influenced by factors beyond the project. Must occur organically, but also deliberately. Building community – fluidity, flexibility, responsiveness
- Trust is the key.

## What we learned (page 3)

- Operational flexibility is hard on staff – can be overwhelming
  - We learned that it was important to know when to push and when to let up to preserve buy-in of staff. We had discussions and made deliberate decisions about this.
- We learned to tell the story about the evolution – It's important to give participants and partners time to reflect on the change
- Be observers for a moment in time and appreciate the magnitude of the change
- Creating the quads helps to create community.
- Karaoke helps.

## What We Learned (page 4)

Even for developing the space plan, it was important to establish principles and vision first – we needed a principled framework on which to make decisions – there were many decisions.

Determine what will take priority on budget allocation – For us, this was the student-facing area. Don't start the project before budget is allocated.

Partnerships and expertise – work closely with Facilities to hire an architect, complete the RFP, ensure that you have people with the appropriate knowledge and skills involved with the project

It pays to manage the project responsibly. Be as adamant about sticking to budget at the Facilities project manager is.

Start early to communicate to staff about the construction/evolution of the space – pictures, presentations, daily tours.

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## What We Learned (page 5)

- A soft launch to pilot all the changes *quietly* is imperative! Don't announce it, just do it and learn.
- Many services, longer transactions → students experienced longer lines and phone queues during the soft launch
  - Needed better queue management and to refine processes and deadlines. Limited by our old space.
- The value and importance of expectation management of our colleagues across the University
  - Raise awareness - Yes the wait may be longer than each of the individual transactions but many things can get done at once and in one place.

## What We Learned (page 6)

- There will be a Phase 2.



## Our Best Advice:

- **Don't compromise on your vision and principles.**
- Soft Launch – January 2010 was instrumental- learn and develop your sea legs!
- Build your service to be flexible
- 'Knowledge-base' is power
- Look to university partners – saves money and leverages existing expertise
- Learn to be a champion – through thick and thin – *be the believer*
- Critical to have senior level support – money, space, infrastructure
- Marguerita and karaoke moments.

## Our Best Advice

- Use Queue Management software
  - enabled us to implement new tactics, separate short & long transactions and measure our service demand for planning and resourcing purposes.
- Develop a triage role - ensures student is prepared for the transaction and not wait in line needlessly
- Concurrently implement new self-serve functions and improve in-person services
- Find the balance – Automate high volume, simple services to give you time to deal with important, value-added, complex face-to-face services.

## The song that never ends

We have committed to a cycle of planning, executing, evaluating, and changing in order to leverage new opportunities (technology, information etc) and to improve our services.

Telling the story continues...

Monday, June 7

“Innovation begins with someone being smart enough to sense a new need and then to improvise new methods, products, or services to meet that need.”

Rosabeth Moss Kanter

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Your experiences?

What is your advice for us?

## Resources

At <http://www.mcgill.ca/integratedservices/> we have posted for you:

The vision and values

Organizational chart

Position descriptions

Examples of our presentations and other communication to the McGill community

The high level project timeline

An annotated list of the technology we are using.

Photos (before and after) of the space.

Examples of the data we are measuring

A list of our working group membership – with departmental affiliations – to help you with team development

A sample of our student survey

Our commitment to our staff

Professional development schedule

Sample of the daily schedule

And other information that may be useful to you as you develop or refine your services.

Thank you!



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