Case Study

University of Oxford

Leading university embarks on an IT transformation programme to deliver improved levels of service excellence

University Service Desk

Phase One

The University of Oxford is the oldest university in the English-speaking world. Most undergraduate teaching at Oxford is organised around weekly tutorials at self-governing colleges and halls, supported by classes, lectures and laboratory work run by university faculties and departments. Oxford was ranked first in the world in the Times Higher Education World University Rankings for 2017 and 2018.

As one of the leading universities, the IT Executive Management Team (EMT) embarked upon an IT Transformation programme designed to ensure it remains at the leading edge.

Problem

With a need to provide improved levels of service to over 40,000 IT users, they identified an opportunity to create a vision of the future based upon operational efficiency.

The university is comprised of 38 independent colleges, with over 100 departments, including research, university staff and library support. There were three key IT departments offering services as well as local IT officers in each of the colleges, each autonomous and able to make purchasing and management decisions both on infrastructure and support.

Customer Benefits

- A clear and concise roadmap
- An improved procurement process
- Business simulations that help to secure management buy-in
- Consolidation of the service desk
- ITSM Toolset selection support
- SME support
- Improvement of IT services

Organisation Profile

Industry:	Higher Education
Employees:	24,000+
Locations:	100+
Founded:	1096

University of Oxford:
Consistently ranks among the top ten universities in the world.

UNIVERSITY OF OXFORD

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Approach

The EMT was responsible for driving the initiative forward, and already had an overall vision of the desired future state, but was looking for independent and objective advice on how to manage the transformation project to the most successful outcome.

The following key activities were defined:

- Analysis of existing, but very different, support models in use. There are three distinct support models in use by the three departments and each supports a different user 'audience' and provides support for different services
- Identify existing best practice and potential for improvements in other areas
- Assess whether the existing three service desk databases can be merged and/or imported into a new system
- Identify any gaps or potential areas for improvement which exist in the current setup. E.g. live chat, level 0
- Self-service (e.g. for logging/tracking tickets, searchable FAQs)
- Determine a set of requirements for the introduction of a new service desk (when considering the requirements for a service desk, possible future needs emerging from IT service management processes should be kept in mind)
- Assess how these requirements may develop for the future with possibilities for new approaches and emerging systems and technologies
- Consider and compare these requirements against existing service desk systems
- Consider and compare these requirements against what is currently available on the market
- Provide for move to a single service desk model
- Indicative costs to be used in a business case

> **"The goal was to deliver improved efficiencies and offer a single point of contact for their user base"**

With over 20 years' service at the university, Deputy CIO Dr. Stuart Lee and the serving CIO were both aware of the increasing need to implement effective changes to the manner in which IT Services were provisioned. A key part of this programme was the consolidation of three independent help desks.

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They approached UCISA, an organisation that represents higher education in the provision and development of academic, management and administrative information systems. With best practices at the core of Pink Elephant's philosophy, meetings had already taken place with UCISA which meant they were recommended along with five other potential service providers, equipped to assist with the project.

> "Pink Elephant provided clear, precise information on the phases of work required to deliver the expected outcomes, based upon real world experience"

From the initial list, invitations to tender were sent out and a shortlist created, with the three best candidates presenting their proposal to the EMT. Dr. Lee explained why Pink Elephant made the final selection to win the work:

"The presentation delivered by Pink Elephant provided clear, precise information on the phases of work required to deliver the expected outcomes, based upon real world experience. They demonstrated that they understood the nature of the issues faced by University of Oxford and how to address them through provision of a solution tailored specifically to our project. They offered a clear, concise roadmap of how to action the solution."

Solution

To initiate the project, Pink Elephant facilitated a vision workshop, focusing on the service desk provision, to assist the EMT in defining their long- term view and short-term objectives and priorities for the new consolidated service desk. Any major programme of change requires a compelling vision so that employees can understand, support and deliver the required changes to organisation structure, culture and working practices.

Without key support at this stage, many projects fail to deliver the expected outcomes. The workshop involved the key stakeholders of the project and was deemed a successful and positive exercise, delivering value to this stage of the project by clarifying the future desired state of the service desk. With the vision defined, Pink Elephant embarked upon a review of the three existing help desks to identify how the support offerings could be consolidated into a single service desk.

The remit of the assessment also included identifying best practices from the existing three help desks. The university is quite unique in the current climate in that reduction in costs was not one of the key drivers behind the project. The goal was to deliver improved efficiencies and offer a single point of contact for their user base. Through a series of structured workshops involving key IT staff and business users, Pink Elephant conducted a review of the three help desk functions and included an assessment of their ITSM processes such as Incident, Request Fulfillment and Access Management.

The report delivered to the client detailed observations and recommendations to implement improvements in support of the defined vision. The university had previously identified that a more efficient centralised single point of service would need to be underpinned by a single ITSM tool. In parallel with the assessment, Pink Elephant engaged with the client to conduct a PinkSELECT™ ITSM tool selection exercise.

Pink Elephant worked with the university to understand and define how the toolset functionality and capability would support the vision of the future state. Over 500 requirements were captured and collated into a formal request for proposal document for the university to use as an integral part of their procurement process.

"Pink Elephant delivered a cost business case with a supporting high level road map to achieve the university's desired vision"

With the combined output from the service desk assessment and PinkSELECT™ exercise, Pink Elephant delivered a costed business case with a supporting high-level roadmap to achieve the university's desired vision. With the next phase of the project ready to start, both Pink Elephant and the University of Oxford are pleased with progress to date against planned objectives and are confident of a successful completion of the project.

Graham McDonald, Business Development Manager for Pink Elephant said: "This project is a perfect demonstration of how Pink Elephant can work together with customers to deliver specific, measureable results that underpin their programme of change and improvement in IT Services. Our independent, objective advice is always delivered in the best interests of our clients and, as identified in this case, sets us apart from the competition."

Phase Two

Building on the successful completion of the first stage of the Service Desk Consolidation Project in 2012/13, Pink Elephant continued to support the University of Oxford during 2013.

"Years of experience within the marketplace to provide a detailed, but flexible, approach to selecting the ITSM toolset"

The focus of Phase One had been the need for an independent and unbiased assessment of the organisational maturity of the three separate IT departments as they started their journey towards integration as 'IT Services'. It also included assistance with the development of a costed business case relating to the selection and implementation of a single integrated ITSM toolset for use across the new consolidated service desk.

"The business simulation was incredibly effective as a way of getting management buy-in it really showed what we are driving at. It's a way of making it real, bringing people on board" John Ireland

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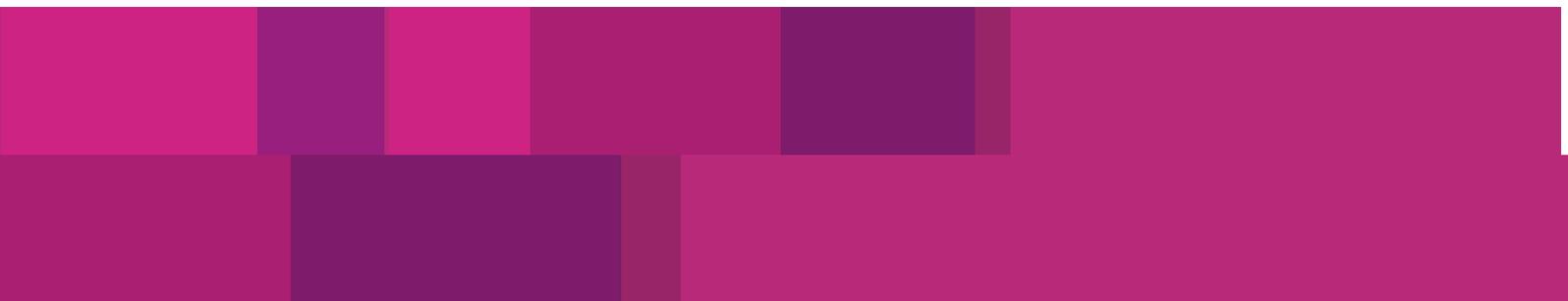
For Phase Two, Pink Elephant was asked to provide assistance with the critical tool selection process, the design and documentation of agreed processes for Incident, Service Request, Problem and Change Management as well as delivering an ITSM Business Simulation for the CIO and her direct reports to bring to life the desired end state.

Alongside these defined work packages was a need to provide ongoing support and assistance to Jonathan Marks, who was the Project Manager tasked with delivering the project. Working with Jonathan, Pink Elephant utilised its PinkSELECT™ product to draw upon their years of experience within the market place to provide a detailed, but flexible, approach to selecting the ITSM toolset that would underpin the integration project.

Within Phase One, Pink Elephant had assisted with the production of the toolset RFP, based upon the functionality and capability that were important for the university. A total of eight vendor organisations responded to the RFP were scored against the outlined criteria, resulting in an initial shortlist of four organisations that were evaluated in Phase Two. An initial round of demonstrations and evaluations would reduce this to two organisations that would be taken forward for detailed evaluation.

Pink Elephant was asked to provide SME support in advance of the initial demonstration by the four shortlisted organisations. Aside from a suggested scoring mechanism, Pink Elephant was tasked with providing use case scenarios, which were as close as possible to how the university wanted to use the toolset. In order to prepare the scenarios, support was drawn from a parallel piece of work which was focused on designing the end state IT Service Management processes for use in the university's IT Services.

In order to ensure a smooth transition to a combined working practice, there was a need for ITIL®-aligned processes to be defined and agreed across all areas. Pink Elephant hosted a series of one- and two-day workshops to agree the framework for the processes that were in place.

"If we had tried to do this ourselves, we would have had a far harder time overcoming cultural differences and internal politics" John Ireland

In each case a high level ITIL®-aligned process, from Pink Elephant's extensive PinkATLAS™ product set, was utilised as a starting point, and then the relevant questions were put to the working group. Decisions were then made to ensure that what emerged was truly owned by those who would have to use it going forwards.
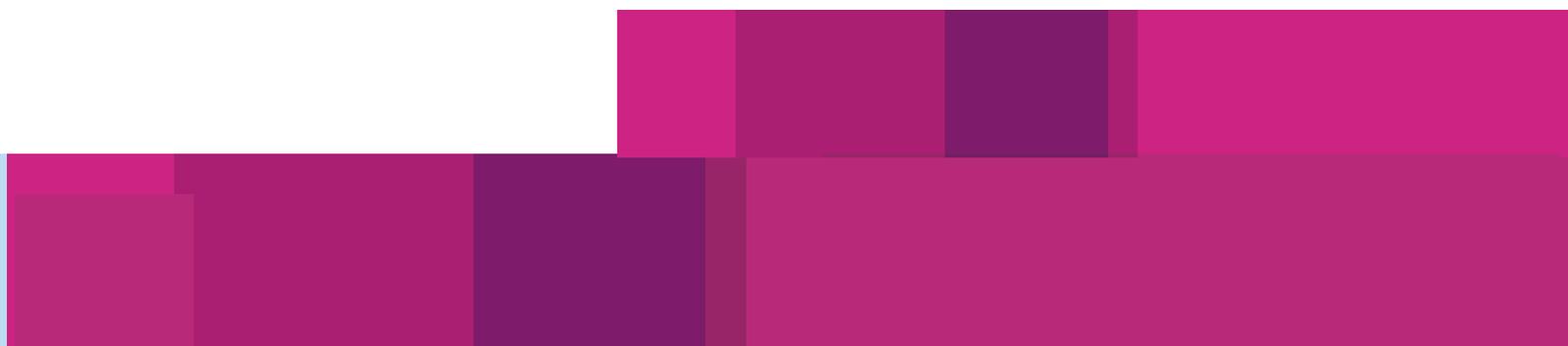
The output of these workshops provided the knowledge required to develop the relevant use case scenarios to support the ITSM tool selection process. Not only did the university now have high level process frameworks in place to support them as they moved forward, it allowed the shortlisted organisations to be assessed against how the university planned to actually work rather than vanilla ITIL or how the toolset worked 'out of the box'.

John Ireland, Director of Customer Services, commented: "The use cases were very helpful, they were used in not only assessing the tools but also in getting a broad engagement from teams across our department and getting buy-in from the distributed IT staff who we work with across the wider university."

> **"Alongside these defined work packages was a need to provide ongoing support and assistance"**

A final shortlist of two vendors was selected for a more detailed and longer assessment. Prior to this taking place, Pink Elephant engaged with both organisations on behalf of the university, freeing the project team up to work on other areas at the same time. This helped both organisations understand the complexities and priorities of the university, and ensured that the evaluation was effective and thorough.

As a result of this assessment, the university was able to select a preferred vendor and move into the next phase of implementing their new processes in the chosen toolset. This will ensure that the desired way of working is reflected in the tool as it starts to be implemented.
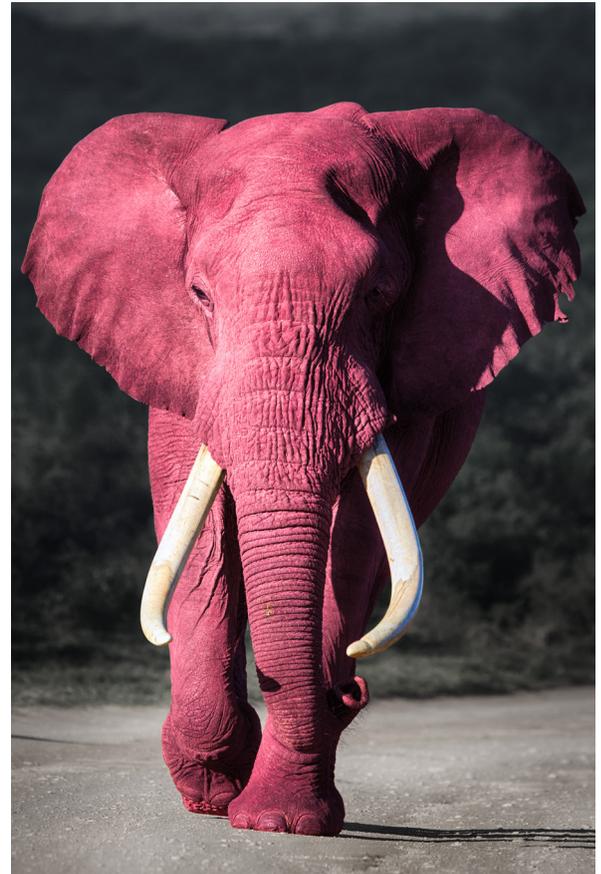
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To raise awareness of the goals of the project, and ultimately to secure senior management buy-in to the project, Pink Elephant was asked to deliver a one-day ITSM Business Simulation for the CIO and her direct reports. The objective of the simulation was to help display – in an interactive, engaging and fun way – how service management could add value to the university's IT Services department as it moved towards its desired state. John Ireland commented: "The business simulation was incredibly effective as a way of getting management buy-in – it really showed what we are driving at. It's a way of making it real, bringing people on board."

Following the successful selection of the ITSM toolset, and high level process frameworks in place, Phase Three is now focusing on implementing the chosen ITSM toolset and launching their new integrated IT service desk.

When asked about the contribution of Peter Hubbard, Pink Elephant Principal Consultant, John Ireland commented: "Peter has the rare ability to genuinely understand how our business works and apply the expert knowledge in a sensitive way that wins trust in his advice. Peter's position as an independent, but highly experienced expert in this field enables him to do this. If we had tried to do this ourselves, we would have had a far harder time overcoming cultural differences and internal politics".
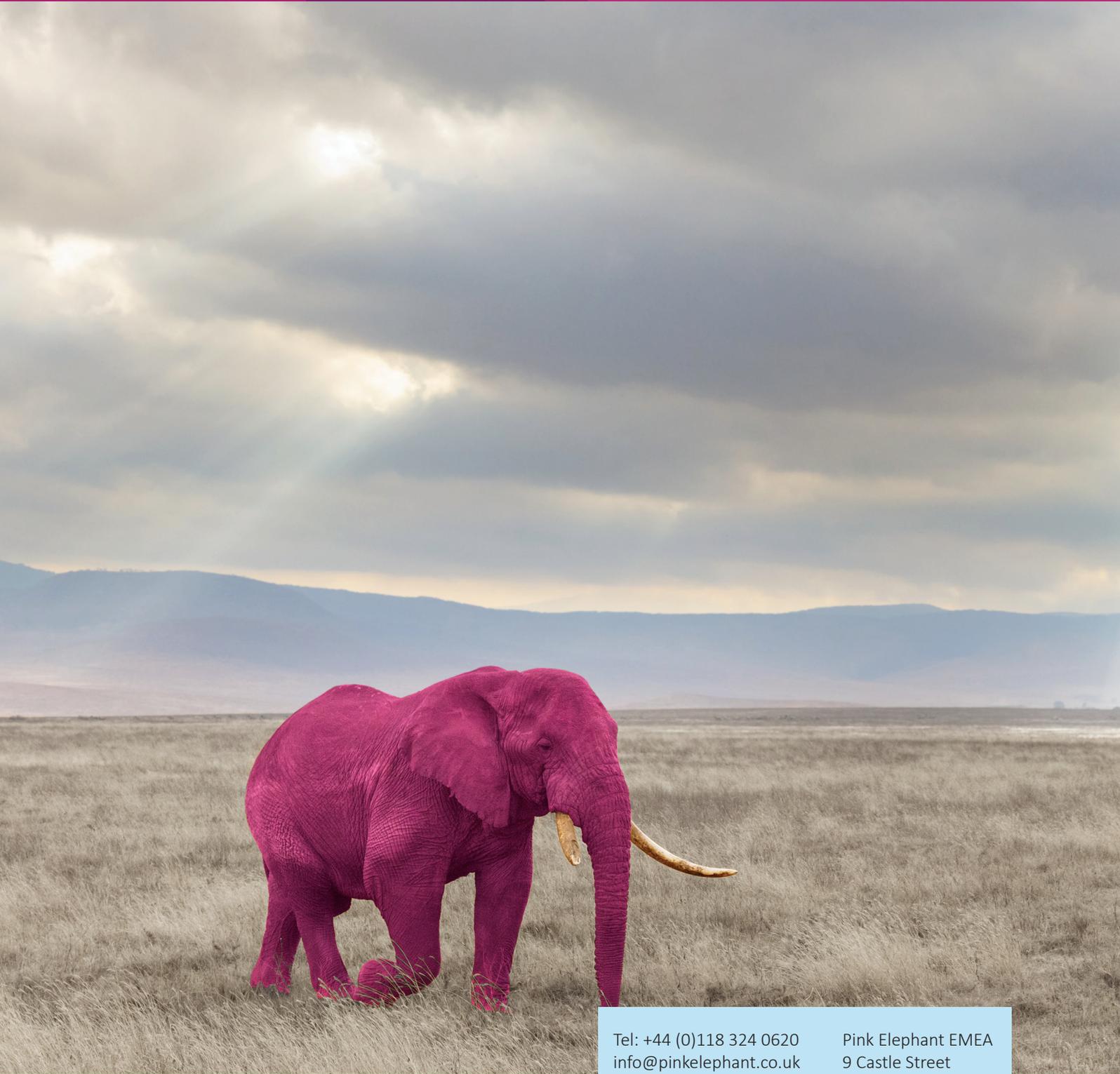
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