UNIVERSITY OF KANSAS: A SURVIVOR’S GUIDE TO IMPLEMENTING SHARED SERVICES

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KU EXPERIENCE WITH SHARED SERVICES

Stay adaptable!

- Initial model had 9, then 8, then 5
- Total waves of implementation across five shared service centers: 18
- Implementation strategy was consistent, but details evolved
### Pharmacy & Biomedical Research SSC (PBR-SSC)
- Bioengineering Research Center (BERC)
- Higuchi Biosciences Center (HBC)
- Core Service Lab Support
- School of Pharmacy

### Engineering, Technology & Environment SSC (ETE-SSC)
- Information & Telecommunication Technology Center (ITTC)
- Biodiversity Research Institute (BRI)
- Center for Environmental Beneficial Catalysis (CEBC)
- Tertiary Oil Recovery Program (TORP)
- Center for Remote Sensing of Ice Sheets (CRESIS)
- KS Biological Survey (KBS)
- KS Geological Survey (KGS)
- School of Engineering

### College & Professional Schools SSC (CPS-SSC)
- College of Liberal Arts and Sciences
- Hall Center for the Humanities
- School of Architecture
- School of Business
- School of Journalism
- School of Law
- School of Music

### Campus Administration & Operations SSC (CAO-SSC)
- Academic Affairs
- Administration & Finance
- Business & Financial Planning
- Diversity & Equity
- Edwards Campus/Continuing Ed
- Enrollment Management
- Facilities Services/DCM/EHS
- Graduate Studies
- Information Technology
- International Programs
- Office of Research
- Office of the Chancellor
- Office of the Provost
- Parking & Transit
- Public Affairs
- Student Affairs
- University Press
- Libraries
5 Key Elements

- Defining Roles and Cost Savings Objective
- Communication and Feedback
- Partnership and Collaboration with a Champion
- Flexibility and Innovation
- Team Building
DEFINING ROLES

Why Roles and Responsibilities Meetings are Essential

- Acknowledgement that transition of workload is occurring in near future
- Provides a comprehensive review of transition, commitment to service, and staffing assignments
- Clearly communicates roles that will be supported by the shared service center after the transition date
- Provides a forum for customers to ask SSC leadership for clarification of roles and responsibilities
Defining Roles

Timing of Roles and Responsibilities Meetings

- Unit and school leadership should meet one week prior to transition date
- Unit support staff should meet one week prior to transition date, preferably after leadership meeting
  - Useful to hold separate meetings as viewpoints and workflows can vary
  - Allows unit support staff the opportunity to ask very specific questions regarding processes

Who should attend?

- School and unit leadership
- Any unit staff that will be affected by the changes
- SSC leadership
- SSC support staff
DEFINING ROLES

Information to be covered in a Roles and Responsibilities Meeting

- Well defined agenda will guide conversation
- Discuss all areas that will be affected by the transition
- Staffing assignments
- SSC staff introduction (if possible)
- Stress the need for open communication and cooperation during the transition
COMMUNICATION AND FEEDBACK STRATEGIES

Why is effective communication so important?
- Open and honest communication is the foundation of successful implementation
- Good relationships with customers = adaptability during implementation
- Transparency to entire process
  - Successes and Mistakes

What is effective communication?
- Develop a communication plan prior to implementation
  - Who to communicate with:
    - Internal
    - External
      - Stakeholders/Customers
      - Leadership
      - Campus

“Communication must be HOT. That’s Honest, Open, and Two-way.” - Dan Oswald
COMMUNICATION AND FEEDBACK STRATEGIES

How to communicate:
- Varies by constituent
  - Media multiplicity (use multiple channels)
- Examples
  - Email updates
  - Staff meetings
  - Group meetings
  - One-on-one meetings
  - Website

What is the message?
- Day-to-day happenings
- Success stories
- Pain points
- Honesty

Having effective communication helps ensure open and honest feedback in return
Navigating Constructive Feedback

Constructive Feedback enables us to:

- Build trust with customers
- Identify systemic problems
- Brainstorm solutions

External Methods

- Electronic surveys
- Emails
- Portal for unsolicited feedback

Avoid Anonymous Feedback

- Isolate specific issues
- Determine whether it is an isolated issue or a larger systemic problem
  - Ex: travel for a specific unit with unique requirements
Navigating Constructive Feedback

How Often?
- Frequency varies
- More often in the beginning stages
- Enough time between surveys to gauge real change

Internal Methods
- Metrics
  - Error rates
  - Turnaround time
  - Transaction counts
- Staff Feedback
  - Concerns
  - Areas of expertise
  - Suggestions for improved processes
EFFECTIVE PARTNERSHIP AND COLLABORATION WITH A CHAMPION

Open Lines of Communication

- Leadership meetings are imperative
  - SSC Director attends Dean’s Office meetings
    - Bi-weekly Leadership Team meetings
    - Monthly Department Chair meetings
    - Meetings with Dean, HR, and Finance Directors
  - CLAS Budget Director attends Monthly SSC Management meetings
    - Discuss issues and concerns
    - Brainstorm new processes and procedures
    - Discuss training opportunities
    - Develop new staffing models to better serve customers
Effective Partnership and Collaboration with a Champion

Conflict Resolution
- Work on department and SSC issues together
- Advocate for the SSC
- Be flexible and willing to compromise

Relationships are the Key to Success
- Bounce ideas off each other
- Trust and confidentiality are crucial
FLEXIBILITY AND INNOVATION

What Does it Mean to be Flexible?

- The definition of **FLEXIBLE** (adjective) is:
  - Capable of being changed
  - Able to adjust readily to different conditions
  - Able to flex; able to bend easily
  - Making or willing to make concessions
FLEXIBILITY AND INNOVATION

If You’re Flexible, You Can’t be Bent Out of Shape

- View things from multiple perspectives
- Proceed with an open mind and willingness to negotiate
- Cultivate ownership with supported units
- Strive for continuous improvement
- Adapt to change
- Solve problems in new ways
Flexibility and Innovation

Pick Your Battles!

- Think outside the box
- Always consider long range goals
- Evaluate risks
- Strive to involve more people in decision
  - (but know how many is too many)
- Learn from mistakes
FLEXIBILITY AND INNOVATION

- The definition of **INNOVATION** (noun) is:
  - The act or process of innovating
  - A new method, idea, product, etc.
  - Something original and more effective
  - Significant positive change

- Synonyms:
  - Creativity
  - Originality
  - Inspiration
FLEXIBILITY AND INNOVATION

Overcome Obstructive Thinking and Predictions

- **Black and white thinking:**
  - “All or nothing” thinking
  - Includes using absolute words such as: always, never, everyone, no one, absolutely, impossible

- **Use shades of gray thinking and terminology:**
  - Include middle of the ground words such as: sometimes, much of the time, rarely, many, few

- **Avoid predictions**
FLEXIBILITY AND INNOVATION

Mental flexibility exercise
STROOP TEST
Effective Teambuilding

The foundation of any successful SSC is their people!

Keep staff involved in both the SSC and the units they support.

Culture and Shared Goals
- Make sure staff know what it is
- Make sure units are aware of staff achievements
- Processes must be clearly defined and boundaries must be explicit
- Agree on Service Level Commitments
EFFECTIVE TEAMBUILDING

Establish a Continuous Communication Strategy

- Don’t underestimate face-to-face interactions
- Track unit contacts and collect metrics
- Attend staff meetings
- Participate in unit social events
- Assist units with occasional unit overtime tasks
- Invite unit contacts to SSC events
- Use technology
**Effective Teambuilding**

**Keep Staff Accountable**
- Solicit and share feedback, both good and bad
- Encourage staff to ask for feedback
  - Train staff on how to solicit and accept valuable feedback
- Make sure staff have all the tools and training necessary

**Involve Units in the Recruitment and Evaluation Process**
- Increases buy-in for new support staff

**Build a Brand**
- Speak using inclusive terms like “we, us” and not “me, them”
EFFECTIVE TEAMBUILDING

Building Teams within the SSC
- Top quality to instill: teamwork
- Assigning a person to a team doesn’t guarantee they think like a team
  - Open lines of communication within the team

Team Building Activities
- Lego Replication
- Riding the Camel
- What are You Doing?
Effective Teambuilding

Collaboration Across the SSC Organization

- Hiring pools
- Social events
- United Way
- Annual picnic
- Annual SSC organizational meeting
- Monthly meetings among directors and managers
- Sharing of process improvements
- Newsletter
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