

CASE STUDY

CFI Group Helps University Optimize Its Shared Services

About the Client

CFI Group has the privilege of working with a major state university center which is dedicated to graduate and professional education, focusing exclusively on health sciences and healthcare delivery. With medical centers in three locations in its home city, children's hospitals in the nearby area, an extended network of primary and specialty clinics, multiple professional schools, and graduate programs, the University seeks to bring together the best research, best teaching, and best patient care. Apart from its status as a world-class leader in healthcare, the University is a major economic engine for the region and its city's second-largest employer, producing billions of dollars in economic impact, directly employing over 27,000 people, and generating nearly 43,000 jobs.

The Challenge

To meet the business needs of its physically sprawling and organizationally complex ecosystem of component entities while maximizing opportunities for operational efficiency, the University relies upon its University Administrative Services (UAS) organization. UAS provides a host of shared services to the university community in the areas Human Resources, IT, Finance, Procurement, Campus Life Services, Public Safety, and Real Estate/Physical Environment Services. Many of these functions had previously been distributed across the University's various units, schools, and departments. An ongoing challenge for UAS is to ensure that the diverse voices of its customers among faculty, staff, and students remain front and center in its ongoing efforts to drive efficiencies and add value to its business operations. To this end, UAS designated Customer Experience as one of the

Challenge

A University Administrative Services (UAS) organization is dedicated to ensuring the diverse voices of faculty, staff, and students remain a crucial part of ongoing efforts to add value to its business operations. However, the analysis methodology applied to survey results was not providing the clear and precise guidance needed for improvement initiatives.

Solution

- ▶ UAS worked with CFI Group to implement a customer experience survey using ACSI methodology.
- ▶ The program consists of separate surveys for five UAS components: HR, Finance, Campus Life Services, IT, and Real Estate/Physical Environment.
- ▶ A sophisticated sampling methodology was designed to balance survey invitations to produce representative results each quarter.
- ▶ CFI Group consultants share results quarterly with UAS stakeholders via in-person and telepresence briefings.

Results

- ✓ Four of the five UAS components saw an increase in customer satisfaction.
- ✓ UAS-wide customer satisfaction increased 6% in its University's most recent fiscal year.

pillars of its strategic framework for evaluating the organization's contributions to the University's Mission, Vision, and Values and identified a need for a robust approach to measure and manage stakeholder satisfaction.

UAS had been tracking their customers' experiences using an annual survey, which drilled down into all elements of its services in great detail. While this approach produced some useful data points, it also had several drawbacks. The once-per-year timing of the survey left UAS without insight into the impact of their continuous improvement efforts throughout the year and required a long survey form which discouraged customer participation and depressed survey response rates. The analysis methodology applied to the survey results also did not provide clear and precise guidance to UAS about where their improvement initiatives should be focused.

The Solution

Beginning in 2016, UAS has worked with CFI Group to implement a more refined and robust program to measure the customer experience using the science of the American Customer Satisfaction Index® (ACSI) methodology. The program consists of five separate surveys, one for each of the key UAS components of HR, Finance, Campus Life Services, IT, and Real Estate/Physical Environment.

The surveys are specifically designed and branded for each UAS component and conducted quarterly via email invitations sent directly to potential respondents. CFI Group uses a sophisticated sampling methodology that supports continued customer engagement by limiting the number of times individuals are asked to complete a survey, and ensuring they are surveyed no more than twice per year for any of the five components. CFI Group works closely with UAS to balance survey invitations across the limited customer population (approximately 40,000 faculty, staff, and students) so each component is allocated enough sample to produce representative and robust results each quarter.

CFI Group not only provides UAS with scores for all survey measures, but also guidance on which elements of the customer experience and lines of service will have the most leverage to drive customer satisfaction as improvements and investments are implemented.

Results are shared quarterly with UAS stakeholders for all five surveys via in-person and telepresence briefings by CFI Group consultants and through the CFI Group web reporting portal.

The Results

Though still a relatively new program, UAS' collaboration with CFI Group is already helping to drive several positive outcomes.

Clear focus on areas identified by the survey data and analysis as higher priorities for improvement helped drive a UAS-wide increase in customer satisfaction scores of 6% in the University's most recent fiscal year. These organization-wide gains resulted from significant increases in CSI scores among four of the five UAS components measured. Additionally:

- UAS has seen quarter-on-quarter improvement in CSI scores for several customer groups since the surveys began, most notably for its IT services and among managers interacting with HR.
- 78% of the specific lines of service (processes, web applications, communication channels, etc.) measured across the five UAS surveys posted significant year-over-year score improvements.
- 62% of these lines of service met or exceeded score target thresholds, indicating high performance in the latest fiscal year.
- Improvements in CSI scores have led to increasing feelings of trust in UAS among its customers and perceptions that it acts as a true partner with the university community.

As UAS managers look to build on this initial progress, they continue to make the fullest possible strategic and tactical use of the survey results. For example:

- UAS "True North" metrics including the organization-wide CSI scores are read out regularly to senior University leadership.
- UAS communicates survey results back to the University community to "close the loop" with customers and encourage ongoing dialogue.
- CFI Group analyses of the customer experience are incorporated into strategic decision making about resource allocation and investment of scarce budget dollars within UAS components.
- Survey results are used as inputs to Lean improvement projects within the UAS component areas and feature prominently in A3s.
- Customer feedback about the physical work environments at the University are used to track and address issues such as bathroom cleanliness, noise levels, and perceptions of the availability of private space in newly-opened buildings with "open plan" office arrangements.
- UAS managers consistently share the survey findings with their front-line teams to spur continued performance improvements and identify additional opportunities to better serve customers.
- The sampling methodology and survey approach is continuously refined to maintain consistent and robust survey participation.