Leverage Your Client Engagement Strategy
Build Collaborative Relationships That Work

Nicole Snethen
Service Delivery Manager
Shared Services Organization (SSO)

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Case Study Participants

Katya Rodriguez
HR Analyst, Office of the Chancellor and Provost

Jane Quiring
Business Analyst, Admissions
Top Three Things
Top Three Things

1. How to build relationships through consistency in communication
Top Three Things

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2. How feedback helps identify actionable implementation
Top Three Things

1. How to build relationships through consistency in communication
2. How feedback helps identify actionable implementation
3. How to create tools for your clients that establish mutual accountability
Building Relationships through Consistent Communications

- External focused
- Solution-minded collaboration
- The evolution of workgroups

“Boots to the Ground” Approach
Take Us Back...

Inconsistent Communications as a key theme

- Lack of trust
- No acknowledgement of errors
- Misplaced expectations
Feedback Helps Identify Actionable Items

- Solicit feedback and measure service levels
- Identify common feedback themes
- Define and prioritize goals
- Implement your plan
When Change Began...

 Trusted Partnership as a key theme

- Proactively work towards collaboration
- External focus provides clients a voice
- Trust develops through honest conversations
- Feedback results in higher standards
Develop Tools that Establish Mutual Accountability

<table>
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<tr>
<th>Common Themes</th>
<th>Survey Feedback</th>
<th>Tools and Feedback Implementation</th>
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<tbody>
<tr>
<td>Processing Time</td>
<td></td>
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<tr>
<td>Time to submit a request</td>
<td>Functional Area Checklist Tool</td>
<td>In Progress</td>
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<td>SSO work doesn’t offset department level work</td>
<td>Client Newsletter</td>
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<td># of days to process</td>
<td>Partner Workflow Tool</td>
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<td>Urgent matters – Quick to Respond</td>
<td>✓ SSO Doing Well</td>
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<td>Processes/Workflow</td>
<td></td>
<td></td>
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<td>AggieService Topics and Categories</td>
<td>Knowledgebase</td>
<td>Implemented</td>
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<td>Case Submissions (What’s required?)</td>
<td>Functional Area Checklist Tool</td>
<td>In Progress</td>
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<td>Inconsistencies between processors</td>
<td>Accountability Matrix</td>
<td>Action Needed</td>
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Continuous Improvement as a key theme

- **Proactive Communications:** SSO teams don’t assume, they ask. This establishes trust.
- **Improved Technology and Metrics**
- **Workflow Notifications:** Case management (communications linked to the case)
- **Subject Matter Expertise:** Service levels have increased as SSO improves understanding of departmental protocols and profiles
- **Time-To-Complete:** SSO workflow clearly communicates timeframes and priorities
Lessons Learned

6 Ways You Build Collaborative Relationships That Work

1. Establish mutual accountability in client partnerships
2. Be honest and build trust in your relationships
3. Seek and embrace customer feedback
4. Offer workable solutions when mistakes are made
5. Promote client advocacy in partnerships
6. Let your clients know what is going on and what you are doing
Three Things We Showed You Today

1. How to build relationships through consistency in communication
2. How feedback helps identify actionable implementation
3. How to create tools *for* your clients that establish mutual accountability
Questions?