



THE BIG PICTURE

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SSC LEARNING AND COMMUNICATIONS



How the U-M Shared Services Center Makes
Blue Go Through Providing Ridiculously
Awesome Customer Service.

Supervisor Edition

Lean Team

Lisa Frye

The line-of-sight for Lean wasn't always clear to me. However, the more I learn about Lean and practice Lean thinking, the clearer it becomes. As we all know, Lean is about managing and improving work, engaging and developing team members, and delivering outstanding value to our customers. So for those who practice this system, they can usually connect what they're doing with the mission of their department, their school/college, and the university. To illustrate this, Krista and I are currently helping a team from Student Life begin practicing Lean in Daily Work. It is quite amazing to see and hear about the many processes they have that touch so many at the university. So when they decided to take a look at how they could improve their process around student terminations, it was quickly evident that this was a pain point for a lot of people. And, even though they knew it will be a lot of work and sometimes challenging to make improvements, they understand the impact of making it better, easier, and faster, for everyone involved. And, by removing the waste and improving the process, precious time will be freed up to do more of the value-add activities that positively affect teaching and research. In addition, a part of the university's mission is to "create leaders who will change the present and enrich the future". So, when all team members are encouraged and free to speak up, be a leader, and make change through Lean; line-of-sight becomes crystal clear!

Supporting Medical Research

Nicole Sleight

As a research administrator (RA) in a former role, my goal was to provide the best support possible to my faculty member that transferred to my department from a Med School. She was promised the same level of research support as she had been receiving at the Med School (and let me tell you - they're good at what they do!). Little did she know, I was brand new... I spent my days at work learning my new role, and reaching out to senior RA's to seek advice on what faculty value in a RA (the stuff they don't tell you in any training manual). I spent a number of evenings at home reading articles and watching YouTube videos of presentations and news interviews of my faculty to try and understand her research and the big picture problem she was trying to solve. I quickly learned that her research was being used nationwide to inform public policy and influence legislation. I was able to walk into our first meeting with confidence, knowing I was well prepared and could speak intelligently with her about her research and all the things she needed behind the scenes to make it happen. It was because of this positive first impression that she was able to quickly establish trust with me and allow me to take responsibility for the administrative and grant components of her work-allowing her to get back to what was important to her-the research! In my last days in that role, she requested that the department find a way to keep me on as her RA, as it would be "hard to ever find another RA as competent" as myself. It is rewarding to know that my efforts not only benefited this faculty, but, in turn had a broader impact on the countless individuals impacted by her research.

Supervising Reconciliation

Malorie Lauzon

One of the teams I supervise processes payments related to student organizations: paying reimbursements to students, making payments to suppliers, processing holds, transfers, etc. One of the student groups we worked with, Student of Choice, brought in a speaker for an event. One of the first things we check for is to make sure the student group has sufficient funds in their account. Unfortunately, the group did not have enough money in their account to pay for her honorarium and travel costs. The group had been promised funding by the Central Student Government, but that system requires proof of the expense before disbursing the funds. Although it was a busy time of year and we didn't understand the process fully, we investigated the situation. We then walked the student group through the process of submitting our eForm, which assisted in them getting the necessary funding. In the meantime, we make several arrangements to process the speaker's mileage reimbursement request right away. There were several roadblocks and obstacles for the speaker and the student group along the way, and the situation escalated, causing the student group leaders considerable stress during finals. To ease the stress on the student's we took over all communications with the speaker. We worked with Accounts Payable, Travel & Expense Audit, and the SOAS office to rush the requisition and wire transfer processes to get the speaker paid. The student group was extremely happy with our efforts and the speaker was ultimately paid before her trip.

Accounts Payable - PO

Leann Swales

I received a call on a Wednesday afternoon from Michigan Medicine Procurement. They had obtained a notice that a Learjet we were leasing was going to be sold off to another company on the following Friday, unless we were to buy the jet outright. After purchase orders were created, invoices collected, and approvals were made, the payment was released to the supplier. The following week my family informed me that my aunt was being rushed to Michigan Medicine on that jet. A week after that it was my partner's step mother who utilized the jet. Without the ridiculously awesome partnership and amazing collaboration of the Shared Services Center and Michigan Medicine, none of this would have been possible.

Employment Team

Kelli Szczepanski

On Thursday before the fall '17 semester began, an HR representative reached out to the employment team regarding a background check for a newly hired lecturer. The background check had been delayed due to the degree verification process at another university. Typically, without the official verification of degree history, the employment coordinators cannot complete the hiring process. If the process is not complete, the employee will neither obtain a UMID nor a uniqname. Without these things, they are unable to create and publish information for a U-M course. Because this was an incoming academic lecturer, Academic HR would have the ultimate say in granting any exceptions to the rules. An Employee Processing Coordinator (EPC) reached out to AHR to ask if they would approve of moving forward with the hire, with the contingency of termination should adverse information be confirmed. Because AHR and the school had both been in contact with the candidate regarding the degree, AHR agreed to allow this hire to go forward with proof of diploma. The EPC handling this situation could have told the school factually that we can't control the length of time it takes for a degree to be confirmed. Had the EPC not reached out to our partners in AHR to do what we could, hundreds of students would not have been able to take the section of the course the new lecturer had agreed to teach. We are all employed because students select U-M for their higher education. At the end of the day, all HR departments are involved in working together to support a greater cause. In this case, that was putting students in their seats. And, because of the EPC, that was able to happen on the first day of the semester.

Travel & Expense Processing (Team 2)

Nick Siefke

Travel & Expense supports the Michigan Law Clinic by producing reports for the administrative support staff under John Lemmer, Experiential Education Business Administrator. The clinic programs that are supported include the Veterans Legal Clinic, Criminal Appellate Practice, Human Trafficking Clinical Program, and Low-Income Taxpayer Clinic, just to name a few. John was looking for a way to help free up time for the staff who directly support the law students and attorneys who devote thousands of hours helping people who would otherwise not have legal representation. The reports created at the SSC help in two ways. First, the time administrative specialists were spending compiling receipts and building reports can now be used to directly support the attorneys and students working in the clinics for the benefit of clients. Secondly, John is able to spend less time answering questions from administrative staff on reporting issues and able to review/approve reports more quickly, thus saving time and effort because of the quality and consistency of the reports produced by the SSC. John can focus on supporting the 19 clinics he is responsible for in his capacity as an attorney, more directly and effectively supporting the mission of his department.

HR Data Management

Tenia DeWolf

I received a call from one of our business partners after hours, panicking about a personnel action request (PAR) that was not processed to stop a faculty member additional pay from coming out. The employee had been retired for almost a month, however their additional pay was still active (an oversight by the unit). They were hoping we could process the PAR so that it would not show up on their pay, because if it did, then payroll would have to try to retrieve the funds back from the employee (which is not fun). I was willing to process the PAR; however, payroll was running, so I could not. I helped the unit come up with a plan B: contact payroll first thing in the morning to see if they could stop the additional pay. The next day, when I came into work, I followed up with the unit and all was well. Payroll was able to stop the additional pay. The unit was served, then employee was served, and Payroll did not have to try to retrieve the funds after the fact.

Accounts Receivable - Billing

Rashid Abdur-Rahim

We received an email through the Service Management and Quality (SMQ) team for the College of Pharmacy. The request was for an immediate billing to Walmart for a student's scholarship. We had limited resources in General Billing that day, with only back-up individuals available. I immediately called the customer to get a full understanding of the details and our deadline. I also forwarded the email to Deb, our General Billing back-up. She worked with the billing team and the customer to get the invoice out on time so that the student received the scholarship.

Finance Customer Care

April Daley

A team member collaborated with the Administrative & Financial Coordinator of the U-M Housing Bureau for Seniors to acquire emergency funds for one of their clients through the U-M system. Our team member listened to the customer's concerns with patience and empathy. She then provided guidance to help relieve the customer's stress and anxiety. She also coached the customer through various accounts payable processes, helped move their requests along rapidly, and in the end was instrumental in helping them get a check. Because of our team members aid and assistance, they saved a client's home from imminent foreclosure.

Accounts Payable - Non-PO and Research & Outreach

Adam Michoski

Dental students visit low-income and underserved communities in Michigan to provide free dental services. These students stay in hotels while they make these trips. The intent of these trips is to give the students real-world experience to apply the skills they learned, with the byproduct of providing services to people in need throughout Michigan. AP receives invoices and works to get them paid in order to provide this opportunity to students and make sure they have reliable housing. Without our diligence in processing payments, students would be turned away from these hotels and would ultimately not be able to stay to provide these services.

Supplier Management

Megan Lindsey

Since U-M is involved with changing the world, it needs a huge inventory of worldwide suppliers to support all of its work. Sometimes, with the cutting edge medical care and research we provide, there is only one supplier in the entire world that provides the supplies needed. My team shared a story regarding CERN, the European organization for nuclear research. I had heard of CERN's particle accelerator and the famous confirmation of the Higgs Boson particle in their Large Hadron Collider. CERN's labs and colliders are literally one-of-a-kind. The university has a partnership with them allowing us to participate in once-in-a-lifetime research and internship opportunities. Since CERN is headquartered in Switzerland, they are considered a foreign entity, and as such, we are required to have specific documentation on file when we set them up as a supplier. When the documentation requirements became more strict in recent years, the required documents were not being provided by CERN. The department we were working with that provides funding to CERN was concerned that the supplier would be shut down, due to the reluctance to provide the paperwork. However, they had a letter from CERN concerning their perceived status and the reason they would not comply with our request. My team was able to work with our partners in the Tax Department to determine that an exception could be made to allow us to maintain our relationship with CERN, based on some of the information they and the department were able to provide. Being able to say "yes" in this instance enabled us to keep funding amazing research that can change the world and our understanding of it.

Business Office

Zachari Broughman

Recently a team member from the Supplier Maintenance team came down with a package that needed to go out urgently so it could be shipped same day. The Business Office team does not have a standard process for something like that so they could have easily told the staff member she needed to go to the Post Office to have this request fulfilled. Instead, the team took the time to investigate how to label this package, contact the Post Office and set up a special pickup to ensure this package would get to its destination on time. Getting this package to its destination on time allowed the payment of goods to get to the appropriate parties. This act of customer service not only helped a supplier and a customer outside the SSC, it saved the Supplier Maintenance team time and frustration.

Document Imaging and Triage

Jeff Dils

Document Imaging was a partner in developing a service called ExamScan. This was a collaboration of LSA, ITS Teaching & Learning, ITS Infrastructure, and Document Imaging. ExamScan is a process developed to assist instructors who give essay exams a way to ensure integrity of the exams and the appeal cycle, by saving the graded exams as a color PDF's which are accessible by the instructors and their designated assistants. By digitizing the exams, it was estimated to save faculty/GSIs grading and distribution time of 15 to 100 hours per exam. It also significantly shortened the distribution time for getting the exams back to the students. By distributing each student's PDF copy to their specific U-M Box account, the likelihood of students reviewing their exams increased. Bar codes with the student's unqname and exam name are added to each exam to assist in the Automated Distribution. Chemistry, Math, Physics, Statistics, and Economics have utilized the process with class sizes up to 2,200 students and 2-7 exams per class. Over 300,000 images have been scanned and distributed in a term.

Benefits Transactions

Jason Tomb

Often times in the benefits transactions world, we have urgent situations arise where there is a problem with benefits coverage. Generally speaking, these events occur at 4:00 pm or later on Fridays. On the Wednesday before Thanksgiving, a customer called and notified us that she was at the pharmacy and they were telling her that she did not have prescription coverage and that she was not able to get the medication her daughter desperately needed. Her prescription was needed before the holiday time off or she would be very ill. This individual was on the phone until after the SSC closed, but luckily, we knew we might need an urgent enrollment. We were able to flag down our partner at Prescription Drug Administration to ask them to stay so we could get her enrollment fixed. We verified her enrollment in the medical plan on our side. However, the problem was that there were only a few folks left here and they were new to the process. Luckily, the customer care team and the benefits transaction team banded together to process and gather the appropriate information from the customer and were able to get her enrollment corrected in time. The customer was so appreciative of our service and more importantly, her daughter was able to get her prescription without having to pay the very expensive out-of-pocket cost.

HR Customer Care

Jackie Adams

The HR Customer Care Center received a phone call at the end of the day from a very distraught spouse of a university employee. The spouse explained that she was out of state and had lost her wallet which contained all of her identification and money. She was seeking mental health services at a facility and was being turned away. She told the representative that she just wanted to die like her spouse had a few days earlier. She gave us her location and we contacted the facility where she was, while keeping her on the phone. We spoke to a social worker who told us that the lady told the center that her spouse had committed suicide a few days earlier. The social worker said that she couldn't change their policy. We continued to be persistent with the social worker and asked to speak to the Medical Director. We kept the spouse on the phone reassuring her that everything would be ok. After thirty-five minutes they accepted the woman as a patient. The Customer Care Team was very concerned and wanted to make sure this person received the care she was seeking. They called her again after everything was settled, just to make sure she was ok. This spouse was able to get the help that she needed due to the actions of the HR Customer Care team.

Accounts Receivable Collections

Stacy Orban

Recently the Service Management and Quality (SMQ) team brought a question to the Accounts Receivable Collections team from Parking and Transportation. Parking and Transportation were invoicing for AVI devices that were not returned when an employee had been terminated or resigned from the university. After speaking with the SMQ team and getting the appropriate contact information, we were able to set up a meeting to go over our process and educate the customer on how we could alleviate burden and collect the owed amount for Parking and Transportation. They were so ecstatic with the estimated 8-10 hours monthly this would save their department, and they began to think of additional ways to utilize Accounts Receivable for debts owed to the university. When the conversation was over, the SSC had also gained the trust of a large department to feel comfortable in using our services and thinking of the SSC as the subject matter experts in all of their collections and payment processing needs.

Audit and Assurance

Camille Stark

In spring 2016, a professor traveled to Turkey for his Notion Archaeological dig. Notion is a well-preserved and almost completely unexplored ancient city in western Turkey. In July, while the professor was in Turkey for this dig, a military coup took place forcing him to leave the country unexpectedly, and without being able to retrieve the remaining funds left from one of his three lump sum advances, totaling \$31,000, that was wired to his bank account in Turkey.

The professor believed that the funds in his bank account in Turkey were still safe and would be available upon his return. However, in preparation for traveling back to Turkey, later in the winter 2017, he requested more funding. In conjunction with Financial Operations and Accounting Customer Service, my team worked to reconcile the receipts and expenses he was able to provide and approve additional funding, due to the unavailability of his funds to Turkey. Anyone who has worked to remove red tape in getting money to people knows the difficulty of dealing with unique situations while maintaining compliance. In doing so, we were able to help the department move forward with their work and contribute to the university's research vision. A big thank you to my team to all they do to protect the university.