Administrative Services Transformation

Brown Bag Session #3—Service Scenarios, or “A Day in the Life”

February 22, 2012
Previous Brown Bags

✓ **Part 1:** *Customer Service Essentials in Shared Services* (Jan 13)

✓ **Part 2:** *The Role of the Contact Center* (Feb 8)

✓ **Part 3:** *Service Scenarios, or “A Day in the Life”* (Feb 22)
Shared Services Model

The Shared Services model is a collaborative, customer-service focused structure. Based on the activities to be performed by the U-M Shared Services Center, roles and responsibilities within the Central Units and Schools/Units/Departments will change to support a more efficient and effective service delivery model.

Central Units (UHR and U-Finance)
- Proactively design and develop strategic University-wide programs
- Align policies and common solutions across the University, as appropriate
- Monitor leading practices
- Conduct strategic analysis of existing programs
- Provide compliance training, as appropriate
- Proactively communicate policy and/or program changes to employees

Schools/Units/Departments
- Focus primarily on strategic activities, such as budgeting, planning and forecasting (FIN) and organization and leadership development (HR)
- Align workforce competencies & capabilities to school / department strategy
- Serve as central unit strategic partners
- Evaluate services delivered to their School/Depts
- Translate school/unit/department needs’ into HR and/or Finance requirements
- Provide school/unit/dept specific training and communication
Process Example – Administer Employee Leave

**Employee/ School/Units/Departments**

- **Employee utilizes Self-service tool to prepare necessary documents for leave request.**
- **Once submitted via Enabling Technology, leave request goes to School/Unit/Dept approver (as needed).**
- **Upon approval, the leave request is submitted to U-M Shared Services via workflow.**
- **U-M Shared Services receives leave request and validates that employee meets leave requirement and all documentation is accurate and complete.**
- **U-M Shared Services notifies the employee of approval.**
- **Employee’s leave starts.**
- **U-M Shared Services remains in contact with employee during leave and confirms employee’s return to work intent.**
- **U-M Shared Services notifies School/Unit/Dept on leave status.**

**U-M Shared Services**

- **Employee initiates return to work request.**
- **U-M Shared Services processes request and updates employee status in M-Pathways.**
- **U-M Shared Services assists with work requirement set-up (building/system access, etc.) upon return.**
Process Example – Accounts Payable

<table>
<thead>
<tr>
<th>Manage Inquiries</th>
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<tbody>
<tr>
<td>Create PO, Order and Approve</td>
</tr>
<tr>
<td>Receive Goods and Services</td>
</tr>
<tr>
<td>Receive Vendor Invoice</td>
</tr>
<tr>
<td>Process Invoice</td>
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<tr>
<td>Pre-Payment Audit</td>
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<tr>
<td>Remit Payment</td>
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</tbody>
</table>

U-M Shared Services Center (U-M SSC) performs pre-pay review via 3-way match. Exceptions are managed by U-M SSC with input from units and/or central FIN.

Units requisition goods and services. Central Procurement creates PO with approval to purchase. Unit orders goods and services from vendor.

Schools, Units and Departments indicate receipt of goods or performance of services.

All invoices are received in single, central location through the use of unique PO boxes, fax numbers, and/or email address. Invoices are scanned using an imaging application.

Invoices are entered into M-Pathways within Partnership Agreement (PA) deadline. Non-PO invoices are electronically routed to unit.

Payments are made via M-Pathways. Electronic payment is the preferred channel.
Where can I find additional information?

**AST Website**

http://www.ast.umich.edu

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