

Internal Consulting Services Leads To Internal Best Practices

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Abstract

The senior leadership of the Georgia Institute of Technology created an internal consulting function, Georgia Tech Consulting Services (GTCS), to address Institute and local campus needs for an effective consulting resource. Not only is GTCS a resource for the Institute's senior administration, but GTCS consultants are an affordable but effective resource for local departments, through a low cost fee-for-service model.

GTCS capitalizes on the varied talents and experience of five consultants to provide services such as: conducting process improvement projects and organizational assessments; designing and administering web-based surveys; developing content for and facilitating retreats and focus groups; managing projects providing change management services; and conducting benchmarking and best practice identification studies.

In 1996, senior leadership at Georgia Tech created GTCS with three consultants. The group was then focused solely on support of Institute process improvement projects. After the success of Institute projects, local departments began to request GTCS' services in their own units. In order to apply a disciplined structure to the projects, and to manage workload, a low-cost fee-for-service arrangement was applied for departmental projects. This structure allows GTCS to continue its first priority of supporting Institute needs, and still serve large and small departments who could not otherwise afford a consulting resource.

Each project has a disciplined approach, with proposals, deliverables, and timelines agreed to by consultants and clients prior to an engagement – whether funds are committed or not. This helps to define the scope and lifecycle of the project, and ensure buy-in from the client before work is undertaken. Using this structure, GTCS consultants have completed over 150 projects for the Institute and local departments.

GTCS focuses on providing successful outcomes for the client on each engagement; but holistically, GTCS has provided a greater benefit to the entire Institute. Through partnerships with GTCS, many local departments have become more effective and efficient, or provided better services to their customers. Overall, however, GTCS has begun to drive local best practices at the Institute through coordinating the Institute's responses to statewide competitions; developing and coordinating a local best practices competition for the campus; and growing a repository of the best practices identified through their work in local departments across campus. Since GTCS is brought in at the request of departments, leaders are open and cooperative in assessing how they can improve and learn from other units. Client attitudes, the support of senior administration, and local consulting resources create a powerful partnership in identifying and applying best practices throughout local departments and at the highest levels of the Institute.

Introduction of the Organization

The Georgia Institute of Technology is one of the nation's top research universities where more than 16,000 undergraduate and graduate students receive a focused, technologically based education.

The Institute offers many nationally recognized, top-ranked programs.

Undergraduate and graduate degrees are offered in the Colleges of Architecture, Engineering, Sciences, Computing, Management, and the Ivan Allen College of Liberal Arts. Georgia Tech consistently ranks among *U.S. News & World Report's* top ten public universities in the United States. In a world that increasingly turns to technology for solutions, Georgia Tech is using innovative teaching and advanced research to define the technological university of the 21st century.

Statement of the Problem / Initiative

Challenge

In 1994, Georgia Tech brought in new leadership. Our new president, Dr. Wayne Clough, and new senior vice president for administration and finance, Bob Thompson, arrived on a campus which did not have the same reputation for administrative excellence as it had for academic excellence. In response to a clear need for improvement in administrative processes, our leaders turned to internal consulting resources to assist and lead improvement initiatives across

campus. A new unit, Georgia Tech Consulting Services (GTCS), was formed under the leadership of Dr. Hal Irvin.

Initiative

GTCS formally emerged as the result of innovative staff participation in support of a project sponsored by the Institute's Administrative Excellence Task Force (AETF), an advisory group formed by President Clough and chaired by Vice President Thompson. AETF members attended a NACUBO reengineering workshop, and realized that the administration needed to commit resources to achieve the service excellence desired by the campus. As a result, Georgia Tech hired Coopers and Lybrand (now PriceWaterhouseCoopers) to facilitate process improvement efforts in purchasing and hiring. In an innovative step, two Georgia Tech staff members were assigned to support the project and learn the reengineering methodology. The project proved so successful that the employees were reassigned on a full-time basis to the new GTCS office. GTCS was then charged with assisting the senior administration in process improvement projects – without outside assistance.

When the unit was first formed, the major challenges for administrative improvement were campus-wide processes in procurement and non-faculty hiring. In following years, GTCS worked on efforts involving campus parking, staff training, transactions and communications with entering freshmen, and research administration. Although Georgia Tech continues to hire outside consultants for

specialized consulting advice – for instance, in developing the campus master plan – GTCS is used as the resource for on-campus process improvement projects.

In these projects, GTCS conducts the analytical work typically done by an outside consultant to help Georgia Tech's senior management understand how functions are performing, and what needs to be improved. To involve people in the change process, GTCS engaged the service delivery units and their customers in the analysis so they would have first-hand knowledge of GTCS' assessment and recommended path to improvement. This participation unquestionably accelerated the pace of implementation and helped us achieve significant results quickly.

Beyond the need for improvement in Institute-wide administrative processes, individual departments across campus have unique needs for improving their internal processes, and better delivering services to key customers. In the decentralized university environment of Georgia Tech, there had not been an economical solution for departments who needed the expertise and manpower of a consulting organization. In response to this need, and based on demonstrated performance, GTCS has expanded to meet the needs of campus customers by providing internal consulting services on a fee-for-service basis to interested departments.

Over the past four years, this new business model has proven very successful in terms of the number of customers helped. As varied and additional customers have used GTCS' services, they have come to identify more needs than just traditional process improvement. Units now utilize GTCS staff members to:

- conduct process improvement projects and organizational assessments,
- design and administer surveys – almost all web-based,
- develop content for and facilitate retreats and focus groups,
- manage projects,
- provide change management services; and
- conduct benchmarking and best practice identification studies.

Design

Purpose

The purpose of GTCS is to provide an affordable but effective consulting resource to campus units as well as continue to support Institute-level initiatives and projects. By utilizing Institute employees with a wide range of consulting experience, GTCS is able to provide solutions that are tailored to the Institute's unique environment and the needs of the campus community. This internal knowledge of the Institute is a key benefit an internal consulting group has over external consultants.

Another key advantage is affordability. For projects with campus departments, GTCS sells its services on a low-cost fee-for-service basis. This fee has been set by our Grants and Contracts office, based on a rate study. The discipline of a fee-

for-service consulting model is critical for marketing a unit such as GTCS to the campus at large. The number of projects that could be undertaken if there were no cost associated would be overwhelming.

Applying a fee-for-service business model to a project helps define the project scope and lifecycle. GTCS writes proposals for all potential projects. These have an estimated not-to-exceed cost, statement of proposed work, timeline, and detailed list of proposed activities and deliverables. GTCS meets with potential sponsors to review this document and agree to undertake the work. The sponsor at this point agrees to the deliverables and commits to fund the project once the deliverables are received and accepted. This level of commitment helps ensure that sponsors are invested in and supportive of the project before it begins.

Beyond the campus fee-for-service work, however, the core mission of GTCS remains to serve the needs of the Institute. The consulting group undertakes a mix of fee-for-service work and Institute projects. Since the Institute supports this function, GTCS' first priority is still to support Institute projects at the direction of senior administration. Even with Institute project commitments, campus fee-for-service work can be supported by managing the workload and deployment of the consulting staff appropriately.

Resources

In setting up an internal consulting function, consultants were selected based on a framework of education, experience, and skill sets. Either in education or

experience, the ideal consultant would have an educational background in business administration or industrial engineering, and experience in university administration or with an external consulting firm.

Desired skill sets for GTCS include: strong process improvement skills; good communication skills; a working knowledge of information technology; and – a must have – excellent interpersonal skills. A consulting group can be significantly augmented by adding specializations such as web skills, survey skills, and change management skills.

Another important factor in GTCS' success has been consultant loyalty to the Institute. Consultants are not only members of the campus community, but customers of the solutions they deliver. A successful consultant realizes these relationships, and invests time improving the environment for themselves and others on campus. Several of GTCS' key hires have been Institute alumni who have gained outside industry experience after graduation. Beyond loyalty to their alma mater, these alumni have the added advantages of seeing administrative processes from the student customer viewpoint and bringing new ways of thinking back to the Institute.

The consultants in GTCS are collocated, but spend much of their time out on the campus meeting with clients and conducting projects. As needed, GTCS also deploys staff in a flexible manner. Some engagements, particularly change management, have required closer integration with the client. For these projects,

consultants maintain a “toehold” seating area in GTCS’ office, but physically relocate to the client site for the duration of the projects. This has helped better integrate consultants during the engagement, allowing them to work with a cross-section of campus employees.

To date, GTCS’ full-time consulting staff has included only staff members. Several graduate and undergraduate students have been hired on an assistantship or co-op basis, to provide support during projects. These students provide very highly skilled technical assistance on projects, and participate at a lower cost in the fee-for-service model where appropriate on projects. Faculty have typically not been involved in these projects, because of availability and because their fee structure would be less economical.

Methodology

GTCS has committed itself to growing to meet the identified needs of clients. In the past four years, GTCS has expanded its client base to include campus departments in need of project work within their own units. Clients have included Dean’s Offices, school academic offices, central business units, and affiliate organizations. GTCS has conducted a variety of services for these organizations, including: organizational assessments, process improvement projects, surveys, retreats, and focus groups.

As mentioned earlier, GTCS uses a standard consulting agreement methodology to propose work and complete agreed upon deliverables for campus clients. In

the past, these agreements focused on work at the assessment and redesign phases of a project. The implementation, although laid out in reports and briefings with the sponsors, was left to the discretion of the sponsor.

The past two years have seen more and more sponsors requesting GTCS' involvement in and assistance with the implementation phase of a project. To that end, GTCS consultants have become more involved, at the sponsor's request and to the level that they desire, in the implementation. Participating in this area led GTCS to recognize the need for change management resources to assist clients.

Consequently, senior administration at Georgia Tech expanded Georgia Tech Consulting Services to include this capability. GTCS now includes the two change management resources on campus: one primarily focused on technology-based initiatives, and one focused on addressing organizational and cultural issues.

This extension of services to meet an identified need has led to new initiatives for GTCS – both in support of the Institute and its campus clients. Projects can now include change management assistance early in the project lifecycle, and continue that support through implementation if desired by the client. By expanding their skill sets, GTCS has grown to meet new customer needs.

For any institution, starting an internal consulting organization requires:

- an institutional commitment to improvement supported by the executive leadership team;

- an individual to begin the organization who has experience in consulting, analytical skills, and a professional demeanor;
- a funding model consistent with the organization's values to "institutionalize" the new department; and
- the creativity to select the talent necessary to support the projects.

Implementation

Over the course of GTCS' eight years, consultants have worked on a variety of projects that combine the various services offered as appropriate for each. Some particular project implementations are described in the following sections.

Project One: Mapping an Organization for New Leaders

Every institution of higher learning experiences it: a change in leadership. It can happen at the level of President, Provost, Dean, or Chair. But for each new transition, a new leader has to learn the roles and responsibilities of a new organization, as well as what services it provides. Many organizations also have hidden strengths and weaknesses that new leaders are not aware of when entering a position. This is where a campus consulting resource can perform a great service for the new leader.

GTCS has worked with several new leaders to perform organizational assessments of their units. These projects typically include:

- interviews with administrative faculty and staff to identify roles and responsibilities
- documentation of the current organizational structure

- identification of the strengths and weaknesses, as judged by employees and/or GTCS
- customer satisfaction surveys to identify top issues and to assess service delivery
- recommendations for how to move forward in addressing any areas for improvement

A successful project includes quantifiable and qualifiable measures of success. In some cases, the quantifiable measures are derived from the customer satisfaction survey. These can be measured over time to track trends in improvement as initiatives address problem areas. Qualifiable measures can include recurring work for the consulting unit, particularly when they are involved in follow-on projects in the areas being targeted for improvement. A less measurable success comes when external parties feel that the new leader has successfully transitioned into a new role.

Project Two: PeopleSoft Self-Service Deployment

In 2004, GTCS provided support for the Institute's launch of a web-based Employee Self-Service system. While this change was welcomed by the majority of employees, it presented a major challenge to departments whose employees were not required to utilize computers to fulfill their job responsibilities.

GTCS consultants were responsible for building awareness and understanding of the system and preparing benefit-eligible employees for Georgia Tech's first online Open Enrollment period. In addition to collaborating with the human

resources and information technology offices to coordinate the general campus rollout, GTCS worked closely with departments who needed to help their employees cross the “digital divide”. Arrangements were made to ensure that all employees would have ready access to computers on campus, customized training materials and sessions were developed for these communities, and expanded opportunities for hands-on assistance were scheduled. GTCS consultants also designed a rollout strategy for the Open Enrollment function which promoted the use of the Institute’s new administrative systems portal, enhanced campus communications, and provided user-friendly access to the Open Enrollment function.

Project Three: Continuous Improvement in Auxiliary Services Units

For the past four years, GTCS has assisted with an annual cycle of continuous improvements in Georgia Tech’s Auxiliary Services units. At the request of the Associate Vice President for Auxiliary Services, GTCS designed and administers an annual customer satisfaction survey for all of the AS units. Each year, the results are analyzed and reported back to the AVP and her direct reports. Each unit is then responsible for identifying which areas for improvement will be addressed in the upcoming year, and developing an action plan for doing so. Each unit also looks back at the previous year’s areas for improvement, and how well last year’s plans affected change.

GTCS was involved in developing the planning methodology after the first year’s survey through educating leaders in how to develop an effective action plan.

GTCS consultants also facilitate a retreat each year where the planning phase is kicked off. This cycle of continuous involvement has led to measurable improvements in several areas of service delivery for the campus. Such a prolonged partnership is attributable to senior leadership support for the principles of continuous improvement, and to having an affordable and effective consulting resource available to such leaders.

Project Four: Chemical Tracking System

In order to meet regulatory requirements but, more importantly, to ensure the safety of students, faculty and staff, a current Institute challenge is to provide a campus-wide chemical management system. GTCS assisted with the solution analysis, including a review of historical data, user interviews, other university applications and vendor demonstrations. As part of this effort, the business plan and proposed project, communications and change management plans were developed.

Considered a measure of success, GTCS has now been asked to co-lead project implementation with Environmental Health and Safety. Implementation is currently underway and is anticipated to conclude at the end of 2005.

Benefits

The benefits of having an internal consulting organization are many, and vary on each project. Some are quantifiable, with measures of improvement in terms of cost, efficiency, or improvement in customer opinion. Others are qualifiable, and include general signs of efficiency and organizational health. But all contribute to

the institution's overall administrative health and improved reputation for excellence. These are benefits that would not be realized otherwise; without an affordable and effective resource for local departments to use.

Leading in Best Practices

Another key benefit GTCS provides to campus is driving best practices locally.

GTCS provides this function in three ways:

- By coordinating Georgia Tech's responses to the Board of Regents of the University System of Georgia's annual Best Practices competition
- By developing and coordinating a local best practices contest for the campus community
- By growing a repository of best practices identified through projects in local departments across campus

The first two ways of being involved in driving best practices are the result of senior administration directing OOD's involvement. The third way of driving best practices is even more powerful – because GTCS is brought in by local units to document, assess, and suggest improvements to their functions. In these situations, projects have cooperative sponsors who are open to honest discussion of how they do business. They are also open to learning how other units have succeeded in the same area. An internal consulting function with good relationships and a wide experience base drives rapid organizational improvement.