

**Program: Relationship Management**

The Information Services and Technology (IS&T) Relationship Management program was created and implemented to help establish strategic partnerships across the Institute and to assist customers in navigating the highly varied service offerings. This program provides the opportunity to have staff dedicated to working directly with clients on their overall IT needs. A key component of the program focuses on intra-IS&T communications to ensure bi-lateral communication across central IT as well as with the client. Relationship management also serves to augment existing relationships, but does not make decisions for the operational and service teams.

**Relationship Management:**

- Advises customers of available IS&T services and other options
- Brings the key IS&T individuals and customers to the table to explore options and identify solutions
- Identifies opportunities for future IS&T services
- Provides comprehensive management of the IS&T/client relationship by coordinating cross-functional IS&T activities for customer
- Learns about customers' IT initiatives to help influence their direction
- Is a resource for customers who don't know the appropriate contact for IS&T services
- Defers decision-making to the appropriate operational and service teams

**1. Accomplishments for Q2 2008**

- a. MIT community engagement (selected examples)
  - i. Continued liaison work with existing clients
    1. Team has established relationships, at different levels, with 10 of the 23 (43%) MIT organizational entities (Schools, Deans, VPs, etc) covering 95 of 192 DLCs (49%)
  - ii. Engaged by SAIS and DUE to conduct a survey of Student Systems Steering Committee (SSSC) members to gather feedback in order to inform the evolution of the committee and its work
  - iii. Represented IS&T at ACCORD meetings (with other IS&T reps)
  - iv. Active participant on the MIT IT Capital Plan Project
  - v. Connected Urban Studies with Alumni Association to discuss alumni-student-faculty discussion groups
  - vi. Collaborating with Facilities to develop an IT Strategic Plan
  - vii. Conducted several meetings with DUE to plan for technology upgrade for transcript microfilm
- b. Established Client – IS&T connections (selected examples)
  - i. Connected DSL and SAIS regarding Time and Attendance Systems
  - ii. Chemistry with DITR and NIST to address IP issues
  - iii. CBI with Server Operations
  - iv. MIT Museum with Mobile Devices
  - v. Facilities with Mobile Devices
- c. Specific collaboration efforts with IS&T (selected examples)

- i. Continued RM integration with IS&T directorates by inviting service providers to RM team meetings to discuss the service, client feedback, strategic direction, etc.
    1. DCAD, Survey Services, Server Virtualization, eCommerce, Energy Initiative, Google Service, ATIC lab, eCommerce, etc.
  - ii. Collaborated with Student Systems Vision Project, ISDA, and DCAD, to conduct and publish the results of an investigation project into MIT's departmental administrative systems - includes tools used for faculty administrative purposes
  - iii. VOIP
  - iv. Residential Network Wiring with DSL/Housing
  - v. Partner with ISDA and SAIS to finalize systems' health criteria definition for MIT Capital Plan project
  - vi. Engaged by CSS to help plan and facilitate a Software Licensing Focus Group
  - vii. Working with IS&T's HR team, facilitated the creation of an HR calendar
  - viii. Partnering with OIS to determine ongoing model for construction and renovation projects: Sloan School, PDSI, NW35, the Cancer Research Center, and the new Media Lab.
- d. Specific collaborations outside of MIT
- i. Continued collaborating with other universities and industry programs via the Relationship/Account Management Community of Practice to share best practices and lessons learned. The Community of Practice includes Bose, Stanford, Cornell, and MIT. A separate, local, CoP has been created with Bose, Eaton Vance, Endeca, and MIT
  - ii. Presented *RM: Stronger Partnerships to Inform IT Planning at Educause 2007*
- e. Communications and other projects
- i. Developed and published an IS&T Services Usage matrix to illustrate clients' use of published IS&T products and services.
  - ii. Conducted cross-directorate IS&T focus group to discuss integration of RM function within IS&T and to receive feedback on the program
  - iii. Presented the quarterly RM Update to VP staff to discuss RM clients and review new service opportunities
  - iv. Completed a survey of existing RM clients
2. Goals for Q3 2008
- a. Publish results from the RM Client Survey
  - b. Interview and hire a new Relationship Manager
  - c. Present the quarterly RM Update to VP staff to discuss RM clients and review new service opportunities
  - d. Continue conducting cross-directorate IS&T focus group to discuss integration of RM function within IS&T and to receive feedback on the program

- e. Continue to partner with OIS to determine how to handle construction and renovation projects
3. Goals for the Remainder of FY 2008
- a. Continue to manage established DLC relationships
  - b. Continue to work with clients and IS&T on existing and newly identified construction projects – as appropriate
  - c. Assess existing client portfolios and outstanding client universe to determine opportunities for additional engagements by June 2008
  - d. Continue to facilitate strategic conversations between IS&T and DLCs as needed
  - e. Promote early awareness of new IS&T services and projects to DLCs
  - f. Continue integration of RM function within IS&T
    - i. Communicate RM efforts across IS&T
    - ii. IS&T staff continues to proactively engage relationship managers on strategic level projects and for high-level issue resolution
  - g. Continue supporting development of relevant IS&T resource materials as collateral
  - h. Continue evolving metrics to measure the success of the RM program
  - i. Continue evolving the Relationship/Account Management Communities of Practice to enable ongoing collaboration among universities and industry programs in order to effectively evolve our program