

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 Q3 2008

- a. MIT community engagement (selected examples)
 - i. Continued liaison work with existing clients
 - ii. Complete SSSC assessment and presented findings and recommendations to sponsors and the committee
 - iii. Established relationship with Office of the Dean for Graduate Education
 - iv. Engaged by the MIT Museum regarding the Museum without Walls project. Piloting a secondary RM model for the MIT Museum.
 - v. Helped coordinate IS&T VP presentation to MIT Medical Senior Staff and attended meeting
 - vi. Invited by EH&S to participate in an Emergency Communications Project.
 - vii. Invited to CBI's Transforming Biomedical Innovation lecture series
- b. Established Client – IS&T connections (selected examples)
 - i. Connected the MIT Press and the Center for Real Estate with the Merchant Services team to move their online commerce offerings to a PCI compliant solution
 - ii. Connected the MIT Press with OIS to discuss new e-mail and calendaring offerings
 - iii. Connect MIT Medical with IS&T's server co-location services
 - iv. Facilitated 3 meetings involving Data Warehouse team and 3 DUE departments to discuss their data needs and corresponding DW services

- v. Facilitated the introduction of DAPER to Thalia and QuickPages personnel
- vi. Connected PSFC with experienced network engineers to inform their Network Segmentation Project
- vii. Connected CSAIL with VoIP Transition Manager and key technical subject matter experts in IS&T
- 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. ISDA Business Manager, Content and Collaboration Services, Back-Up Services, Server and Enterprise Systems Operations, Athena Faces Program, Communications
 - ii. Engaged by CSS to facilitate customer focus group to gather HERMES requirements
 - iii. Requested by Registrar to determine how IS&T can help to improve the MIT transcript delivery process and associated technology. Facilitated several meetings involving SAIS and ISDA to scope project and determine next steps. Transitioned ownership to SAIS.
 - iv. Continued participation on VOIP project team. Facilitated session to refine deployment process and identify lessons learned from Sloan transition. Helped plan VOIP Advisory Board meeting.
 - v. Facilitated kick-off meeting for Libraries' VOIP transition.
 - vi. Residential Network Wiring with DSL/Housing
 - vii. Partner with ISDA and SAIS to finalize systems' health criteria definition for MIT Capital Plan project
 - viii. Working with IS&T's HR team, facilitated the creation of an HR calendar
 - ix. Transitioned ongoing construction and renovation support to OIS: Sloan School, NW35, the Cancer Research Center, and the new Media Lab.
- d. Specific collaborations outside of MIT
 - i. Engaged by Learning Tree International to participate in the development and review of a new class entitled: *Relationship Management for IT Professionals*.
<http://www.learningtree.com/courses/902.htm>
 - ii. 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
- 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. Presented the quarterly RM Update to VP staff to discuss RM clients and review new service opportunities
 - iii. Presented the results from the RM external client survey to VP staff

- iv. Conducted a survey of IS&T Leaders on their work with the Relationship Management Program
2. Goals for the Remainder of FY 2008
- a. Publish results from the RM Client Survey and RM IS&T Leaders 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 on construction and renovation projects
 - f. Continue to manage established DLC relationships
 - g. Assess existing client portfolios and outstanding client universe to determine opportunities for additional engagements by June 2008
 - h. Continue to facilitate strategic conversations between IS&T and DLCs as needed
 - i. Promote early awareness of new IS&T services and projects to DLCs
 - j. 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
 - k. Continue supporting development of relevant IS&T resource materials as collateral
 - l. Continue evolving metrics to measure the success of the RM program
 - m. 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