### Division of Finance (DoF) • IT Services Strategic Plan Framework

#### MISSION

*The DoF IT Services team provides technology solutions that enable the Division of Finance to engage and serve parents, students, university and external stakeholders with exceptional financial services.*

#### VISION

*The DoF IT Services team will become a valued, trusted, and reliable technology business partner throughout the University of Pennsylvania community.*

#### GUIDING PRINCIPLES

- Customer needs drive every action we take
- Services and products are high value, high quality, and secure
- Strive for simplicity and efficiency
- Consider innovation and best practices
- Everything we do is compliant and consistent with Penn’s mission

#### VALUES

- Reliable and Trustworthy
- Collaborative and Communicative
- Innovative and Objective
- Flexible and Adaptable
- Transparent and Accountable

#### STRATEGIC GOALS

- DoF customers are satisfied with the technology and services provided by DoF ITS
- The legacy DoF and SRFS computing environments are differentiated by software applications only
- The DoF ITS team embodies the necessary breadth and depth of soft skills and technical know-how to support DoF customers and stakeholders
- DoF ITS business processes, DoF technology contracts, third party services and vendors are managed in a consistent, comprehensive fashion
- DoF technologies and services are secure, easy to use, innovative, and considerate of best practices

#### STRATEGIC ACTIONS

1. Enhance and elevate customer service levels
2. Harmonize DoF and SRFS computing environments
3. Increase DoF ITS team knowledge sharing and soft/technical skills
4. Improve DoF ITS business operations
5. Define and execute a technology roadmap with evaluation pipeline that considers best practices

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Tactical Action Plans: FY19-FY22

1. Enhance and elevate customer service levels
   - A. Complete current-state customer experience survey [1,2,3,4,5]
   - B. Review, revise and reissue Policies and Procedures [1,2,3,4,5]
   - C. Develop and execute a long-term ticketing solution replacement strategy [1,2,3,4,5]
   - D. Implement post-ticket satisfaction survey [1,3,4]
   - E. Define and begin measuring meaningful customer service KPIs [1,3,4]
   - F. Enhance and update footprints application for customer benefit as an interim improvement step prior to future replacement strategy [1,2,4]
   - G. Review, revise and reissue Service Level Agreement [1,2,5]
   - H. Review, revise and reissue Technology Standards [1,2,5]
   - I. Develop and deliver updated Information Security training to DoF customers [1,2,4]
   - J. Complete customer service training [1,3]
   - K. Establish Lynda.com customer service training curriculum [1,3]
   - L. Develop a customer technology training program and schedule [1,3]
   - M. Develop periodic walk-through process for all customer areas [1,3]
   - N. Create customer communications and collateral, including annual report with performance metrics [1,4]

2. Harmonize DoF and SRFS computing environments
   - A. Complete initial planning of environment harmonization. Target harmonization complete by FY22. [1,2,3,4,5]
   - B. Prioritize and sequence harmonization action plan [1,2,3,4,5]
   - C. Define 3-5 year server strategy [1,2,3,4,5]
   - D. Consolidate SRFS and DoF server operations and infrastructure [1,2,3,4,5]
   - E. Implement FMAudit solution with goal of monitoring 100% of DoF print fleet [1,2,3,4,5]
   - F. Complete a current-state versus best-practices assessment of data/infrastrucure security, security policies and procedures, and end user awareness [1,2,3,5]
   - G. Reevaluate and rationalize current print fleet [1,2,4,5]
   - H. Reevaluate overall Disaster Recovery and Backup infrastructure, costs and practices [1,2,4,5]
   - I. Take actions necessary to support the continuing evolution of SRFS systems [1,2,3,5]
   - J. Complete successful migration of DoF web properties to Pantheon platform [1,2,4,5]
   - K. Successfully complete migration to South Bank Data Center [1,2,5]
   - L. Apply change management processes to minimize change friction and set customer expectations [1,2]

3. Increase DoF ITS team knowledge sharing and soft/technical skills
   - A. Focus development efforts on: Technical, Customer Service, Relationship Management, and Project Management [1,2,3,4,5]
   - B. Establish primary/owner and backup resources for supported technologies [1,2,3,4,5]
   - C. Incorporate opportunities for DoF ITS staff to learn more about DoF business areas’ function and technology needs [1,2,3,4,5]
   - D. Complete back-filling of open positions; onboard and train new staff promptly [1,2,3,4,5]
   - E. Define a career path framework for staff seeking career advancement [3,4,5]
   - F. Continue support and development of the IT Academy project and TechJobs@Penn [1,3,5]
   - G. Build and maintain a code repository [2,3,4,5]
   - H. Establish soft/technical skill baseline training program [1,3]
   - I. Identify new opportunities for cross-campus collaboration [3,5]

4. Improve DoF ITS business operations
   - A. Develop analytics for management reporting [1,2,3,4,5]
   - B. Implement and adopt a project management application [1,3,4,5]
   - C. Effectuate leader and backup management structure for all major projects [1,3,4,5]
   - D. Create a standardized DoF ITS project intake process for use in customer engagement [1,3,4,5]
   - E. Complete relocation of DoF ITS team to renovated, consolidated workspace as part of Financial Systems move strategy [1,3,4,5]
   - F. Segment supply base: Strategic vs. Preferred vs. Transactional [2,4,5]
   - G. Establish technical and business review cycle with feedback process for key vendor relationships [2,4,5]
   - H. Configure and implement SmartSource sourcing platform to manage IT contract life cycles [2,4,5]
   - I. Reevaluate service desk ticket management and assignment process [1,3,4]
   - J. Lead an effort to execute group computing purchases with other EVP business areas under the Collaborative Procurement initiative [4,5]
   - K. Enable and train customers on independent CMS capabilities where possible [1,4]

5. Define and execute a technology roadmap with evaluation pipeline that considers best practices
   - A. ID and prioritize technologies ready for evaluation and potential change-out [1,2,3,4,5]
   - B. Create a full DoF Technology roadmap [2,3,4,5]
   - C. Consider mobile-based/push technologies in support of SRFS service strategy [1,2,3,5]
   - D. Complete comprehensive WCAG compliance review of all DoF-managed web properties [1,2,4,5]
   - E. Prioritize projects for server upgrades, CRM, information security, remote access, mobile technologies, and imaging re-evaluation [1,2,5]
   - F. Continue participation in Common Solutions and collaboration with other campus technology groups [3,5]

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