Final Consulting Report

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Executive Summary

This report was generated by five University of Michigan School of Information students in the first year of their Masters program. During the academic course titled Contextual Inquiry and Consulting Foundations this team (W Design) was arbitrarily assembled by the professor and assigned to work with The Center for Youth Program Quality to perform research regarding a problem concerning workflow in their office.

After the team members from W Design conducted six interviews with a variety of employees at the Center for Youth Program Quality, they listened to each interview and took notes. The notes were then individually considered and grouped into clusters and then meta clusters. This clustering process is called an Affinity Diagram, which helps bring to light common themes found across all of the interviews.

The result of the qualitative research performed by this team included six key findings. The need to satisfy each client's individual demands made it difficult to streamline the process of working with a client because project managers cannot autonomize aspects of the relationship. The I-Drive is difficult to use because it is disorganized to a point of distraction and is adding time to employees workflow. The Client Relationship Management in the office, which is Microsoft Dynamics, is a robust and potentially very useful tool but little access is given to employees and few people are knowledgeable about how to use Microsoft Dynamics. There is a need for standardization of organization-wide procedures. And finally, the chat software Teams is a tool that could be better incorporated into the work culture to help maintain communication and keep the workflow process.

Recommendations for The Center for Youth Program Quality fall into two categories: short-term and long-term. Short-term recommendations include increasing access to Microsoft Dynamics while also educating employees on how to effectively use the software, adopt a digital task management tool, and adjust how Teams chat program is used in the office. Long-term recommendations include a re-organization of the I-Drive, and organizing a company retreat which would allow for all members of the team to be onboarded to the same information management process.

It is W Design's belief that implementation of all or some of these recommendations will increase the quality of workflow for employees at The Center for Youth Program Quality.

Introduction

Our client is the David P. Weikart Center for Youth Program Quality (CYPQ) located in Ypsilanti, MI, established in 2008. It is a non-profit organization that aims to help children and youth increase their quality of life and succeed by empowering leaders of after school programs. They accomplish this by providing quality assessments in the US and abroad of current after school programs, and publishing books and guides on how to implement their teachings and research based methodologies. The center believes that youth need to thrive in a safe, supportive, interactive and developmentally engaging environment. The center works under the larger umbrella of Forum for Youth Investment, headquartered in Washington DC. The Center for Youth Program Quality is facing several challenges but most pressing is the need for an optimized workflow management system.

The CYPQ is growing and hopefully will continue to increase the number of contracts it holds annually without needing to hire more staff by streamlining the current system of workflow management. The center renews contracts with programs annually and all the information on the protocols are saved in the shared drive. Most of the protocols are long but provide steps which guide staff in the process of completing a workflow. Once a contract has been initiated by the sales team, there are many steps that need to be completed involving several different people once a deal has been made with an organization.

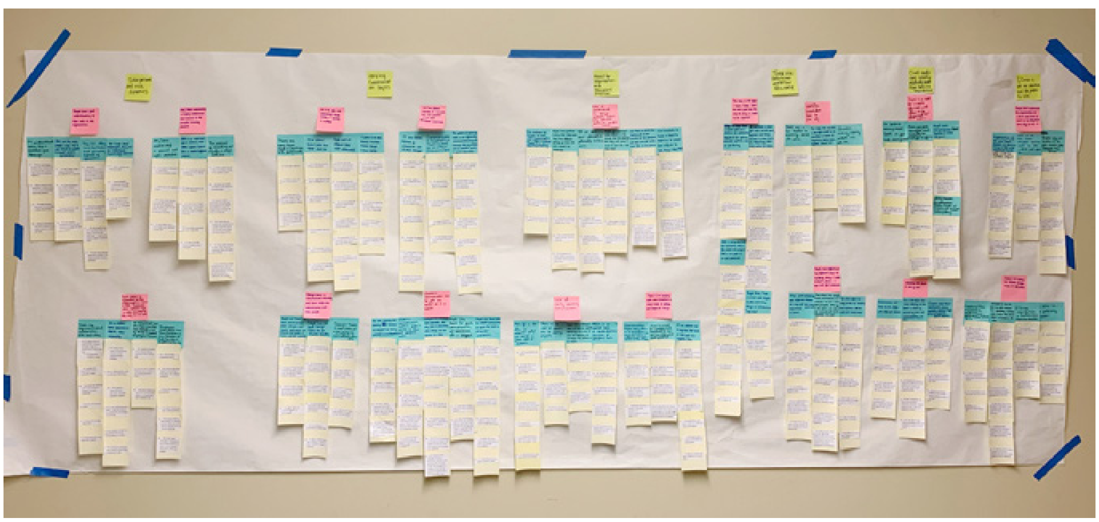
However, it becomes challenging because the center has a complex network of protocol documents that live in a disorganized folder on a central drive held on the organization's server, the I-Drive. There are many documents that state the same protocol information and when a task is completed it is often not notated on each of the relevant documents. This may lead to confusion among the staff and result in the same task being completed twice. When there is a lack of clear communication about completing the task, there is potential for double the effort to be expelled which is completely unnecessary and counterproductive. Very little technology is used to support the process, particularly only a few staff are trained to use the Customer Relationship Management (CRM) software, which is Microsoft Dynamics, causing inefficiencies when staff track work progress on different tools.

With the help of W Design team recommendations, it is our hope that the Center for Youth Program Quality will be able to work smarter, not harder in order to create a more effective workflow. When the Center does the essential task of standardizing their workflow, they will be on the first step down the best path towards achieving a more efficient workplace.

Methodological Overview

In order to get the most useful insights from the employees at CYPQ, we developed three versions of the interview protocol, or script, depending on the position of the person being interviewed. We conducted six interviews with CYPQ employees including two Project Managers, the Director of Design and Innovation, the Vice President of Business Strategy, the Senior Director of Field Services & VP, and one Design and Delivery Specialist. For each interview, two W Design members were present. Each member took a turn to be either an interviewer or a note-taker. We asked questions related to their responsibilities, project management, team relation management, and interaction with clients. Additionally, we observed their daily workflow to get a better understanding of the dynamics of the office. Each interview lasted between 60 – 90 minutes. We recorded all of the interviews upon the interviewees' permission and anonymized their information and debriefed shortly after the interview.

Upon completion of each interview, our team met together for interpretation sessions to analyze our findings by reviewing the interview recordings and taking notes, minute by minute. Once all of our six interviews were interpreted, we transferred those interpretations to individual sticky notes. We created an affinity wall by grouping similar findings from the interviews and synthesizing common themes.



W Design affinity wall for the CYPQ

Methodological Overview

Our affinity wall gave us a way to visualize our interviews in a hierarchical structure. Yellow notes were interpretations from our interviews. Blue notes were themes that characterized clusters of yellow notes. Pink notes were meta–clusters of blue notes, characterizing themes among clusters. Finally, green notes were super–clusters—the six core findings from which we will base our recommendations on and will describe in further detail throughout this document.

Findings

1 – Satisfying clients' needs

One major finding we established after completing the affinity wall was that employees said it was difficult to standardize the workflow process between the CYPQ and its clients because clients' needs vary greatly from one case to the next. This finding is based off gathering similar statements from interviews with Project Managers and people who deal directly with the client.

When there is variation from client to client it can be challenging to create one standard for workflow process when working with clients in general. If an organization prides themselves on being able to provide a tailored experience for each client job then what is being prioritized is the tailoring and attention to detail. For CYPQ, whose goal it is to streamline workflow in order to make it easier to increase their client pool, they in some ways might be doing themselves a disservice by providing that much attention to detail for each client interaction.

Although, if the paperwork process of dealing with clients was centralized it could save Project Managers and others time by not requiring them to search for documents in several locations. There is a theme observed from most of the interviews, where each interviewee created their own strategy as to how to manage their tasks and documentation because whatever system existed for task management has either failed them or is too cumbersome to understand and therefore not able to be easily adopted. One interviewee was quoted as saying they would like one place to go to learn what they need to know about their client as opposed to over half a dozen spreadsheets.

The current volume of clients paired with the disorganization of files and lack of task management means employees have to work at a breakneck speed to keep up and don't have time to slow down and assess their workload.

2 – I-Drive is not an intuitive tool for people to use

Another theme that emerged from the data was the frustration with the disorganization of the I-Drive, where all the protocol documents and many other important organizational documents are stored. Based on the interviews, it seems as though protocol documents are not effective because the information they contain cannot always be trusted. Protocol documents have been duplicated and multiple versions exist making them difficult to update, causing confusion about which version is the most accurate.

There is also the issue of losing connection to the I-Drive which occurs when

Findings

there is a power surge. This uncertainty creates a sense of fear that the I-Drive cannot be trusted because access to it could be lost and then workflow is stalled for an indeterminate amount of time.

Some of the interviewees print out documents and write handwritten notes which are not digitized and therefore cannot be easily seen and shared with other people. Others mentioned they need clarification as to what documents on the I-Drive has been finalized. Finally, interviewees mentioned how labeling of documents is unclear. Despite the frustrations with the I-Drive, employees use it everyday because the information on it is essential to the function of the organization.

There is no clear system for organizing documents on the I-Drive. All of our interviewees expressed one set of problems or another with its storage structure. They have either learned to be patient with the I-Drive's shortcomings or they have found a way to work without it.

3 – Tool use determines workflow efficiency

We learned that currently in CYPQ, there are only a few people who have access to the CRM. Therefore, some information is limited. Some interviewees talked about the fact that when they need relevant information, they have to ask someone for it and then wait for the response, which resulted in the decrease of the efficiency at work. Another finding from the interviews and observations is that some of the employees would use whiteboards to manage the tasks, and when others want to look at the whiteboard as reference, there's no guarantee that someone could find what they're looking for on them. We do not know much about the reason why the use of CRM is so limited, and why people choose to use physical whiteboards, but it is safe to say that the usage of tools might influence the workflow in a way and has room for improvement.

4 – Need for organization-wide standard practices

The workflow standards is another critical issue worthy of our attention. We learned that the workflow varies considerably from client to client, and since people in the office are in charge of different parts, their opinions about which tools to use vary a lot. And even for the same tool, they have different ways to use it, which could lead to unstreamlined workflow and cause issues of standardization and efficiency.

Another issue is the disorganized documents. There is no clear standard for how and where the documents should be stored, and oftentimes there are multiple

Findings

versions of the same documents. This makes it difficult for people to retrieve information they haven't worked with before, or a document from a long time ago. In fact, more than half of the interviewees talked about this problem, so we believe that focusing on information management as a core issue is a good place to begin thinking about solutions to improve the current workflow.

5 – Varying communication styles

This is another issue brought by the variation of client needs from project to project. For the people at CYPQ, there is no standard procedure that they can return to. As a result, ways of communication varies across the office. Some people prefer using email, some use chat software, and others get up to talk. While all of these methods are acceptable, tracing back information is harder when there's no central record. And we also noticed that there are already some rules set for changing communication styles. One interviewee mentioned they stop sending messages like "Thank you" to improving the efficiency. Setting up rules like this should be encouraged and applied organization-wide.

6 – Improper use of Teams

People in the office think that Microsoft Teams is overall a good platform for collaboration in communicating and managing files, but in some situations, it can interrupt them from concentrating on the work. This is because the group channels in Teams are very busy and constantly notify them of information that is not relevant to them. Although people can choose to hide some of the group chats or turn off the notification, it may still cause tension and worries about missing some information.

Recommendations

Long–Term

1 Reorganization of the I–Drive

There are multiple approaches to solving the problems CYPQ currently has with the I–Drive. One is to start fresh with a new drive and phase out the use of the I–Drive completely with the idea that at a certain date the I–Drive itself is eliminated. This option may make people feel the need to panic and start hoarding documents off the I–Drive they fear losing and might be valuable to them later on, but if a strategy for this transition is implemented, it could stave off this sense of fear and instead create a sense of clarity and relief.

This process is considered a long–term solution because it will take 4–6 months to complete. It will require employees create new habits and therefore a new rewards system. If their instinct is to search for something in the I–Drive, how can a new habit be built which points them in a new direction? Using participatory design, which is an approach to design that actively involves all stakeholders in the design process to help ensure the result meets their needs and is usable (http://participateindesign.org/approach/what), to create a new strategy or system for how documents are labeled and nested will be helpful in creating buy–in from all employees and establishing a commitment to maintaining the new standard for organization.

2 Company Retreat

There were a number of interviewees who mentioned difficulty retrieving information stored on the I–Drive, among other places. Our observations show that workers are mostly free to store information wherever and however they see fit, but are hesitant and indecisive about breaking the mold. Because not everyone uses the same information storing/seeking systems and habits, there exists a disconnect between how information is stored and received.

One long–term recommendation we suggest is an organization–wide retreat that focuses on adopting a unified information management system for file storage systems such as the I–Drive or a CRM.

Suggestions for the contents of a retreat include:

Decide on one information management tool.

Below we offer the potential benefits a CRM could have for the CYPQ. Whether or not the CYPQ decides to adopt organization–wide CRM use, we recommend developing an awareness of information management across the entire office.

Information management is a system of information processing that organizations

Recommendations

can employ to streamline work, structure data, and maintain consistency in work across inter-organization personnel and client-to-organization personnel (Detlor 103).

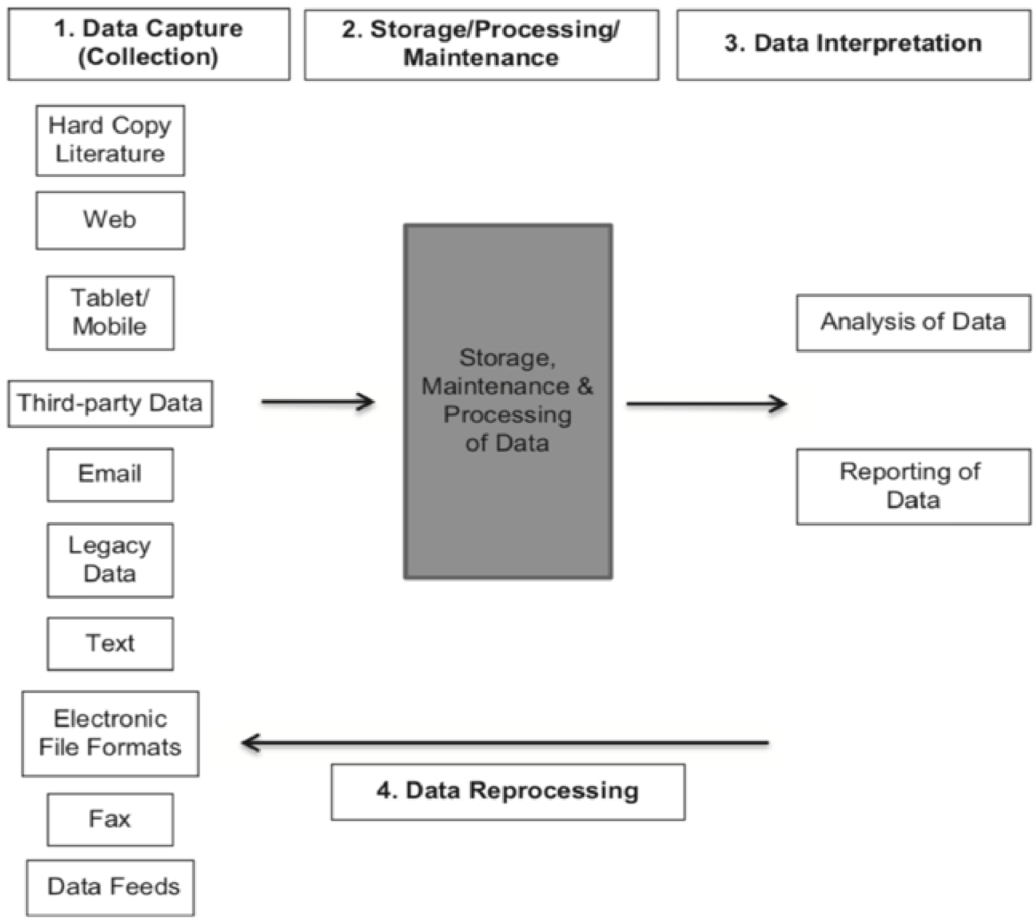


Figure 1 (Boulton 11) illustrates a data lifecycle.

Based on our observations, a lot of information the CYPQ works with stays in the first column (the left side of the illustration), going unlogged/unprocessed/unmaintainanced.

Detlor discusses a few different perspectives on information management and the varying contexts in which it is used. The most relevant perspective here is an organizational one, where information management "concerns the management and control over the full lifecycle of information processes ranging from creation to use for the betterment of the organization itself" (Detlor 104). In other words, for an organization to benefit from information management, there must be a systematic way that organizations structure their information.

Recommendations

Short-Term

3 Increase Access to CRM

Our interviews show that only three out of the 28 members in the CYPQ office have access to the organization's CRM. Furthermore, many interviewees have mentioned the desire to have a central platform on which they can store and locate information and organize projects.

Our background research finds that CRM use is most effective when everyone in an organization adopts the technology. Below are suggestions for office-wide CRM use.

Strategizing CRM use bolsters functionality.

Kelly Grattan examines the various factors associated with CRM success or failure in nonprofit organizations. She observes that many organizations faultily view CRM as a technology rather than a strategy (Grattan 100). She suggests that reframing the perspective of the CRM as a means to reaching objectives will provide greater longevity and success with CRM implementation.

A committed culture around CRM systems are crucial for sustaining good information management habits.

Understanding the CRM as a strategy rather than a place in which information is stored opens up many new possibilities for the technology. It furthermore engages all members of the organization and encourages the organization to have someone trained to know the CRM well enough to teach other employees how to use it strategically. Reflecting on her own experience, Grattan advises the importance of ensuring "staff at every level understands the organization's strategy for implementation" (Grattan 100). With the right approach, the CRM becomes a mediating force for data management, information management, and aligning all members of an organization so that goals are met with efficiency and coherence.

Sustaining CRM use largely depends on designating someone to champion its org-wide implementation.

For successful CRM implementation, leadership that fully supports the implementation is required (Grattan 106). Grattan finds that if the traits of a transformational leader are missing in an organization, there will be critical difficulties implementing a CRM as a strategic tool (106). "Transformational" can be interpreted here as someone who is willing to make and stick to radical changes in the interest of organizational improvement. Whether this means an autonomous task force for the implementation of the CRM or an enthusiastic executive who supports all of the requirements and practices of implementing a CRM, leadership

Recommendations

within an organization in many ways sets the standard for how deeply employees can engage with a new tool, and thus determines the fate of that tool's success.

To put things more concretely, the CYPQ should **educate its entire staff on Microsoft Dynamics**. One concern that the CYPQ presented us with is an ability to scale their services. Staff-wide knowledge of a CRM will make scaling easier because everyone will be familiar with the same platform.

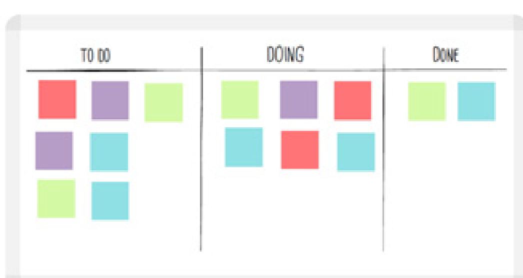
4 Adopt Digital Task Management

We also noticed that some interviewees mentioned they would use a physical whiteboard to help them manage tasks, and other people in the office would take these whiteboards as references. It is not efficient enough and there's no guarantee someone would find what they're looking for on them.

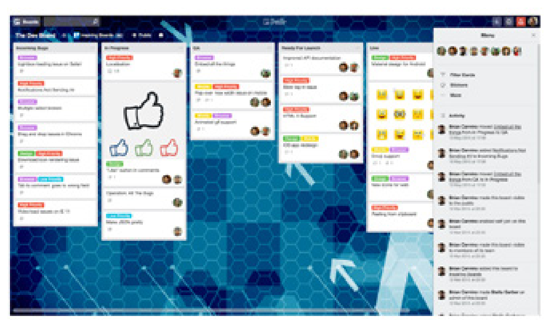
Based on the analysis of the interview notes and observation of working environment, we recommend a org-wide implementation of a task management tool:

Kanban Board

Kanban is a visual system for managing work as it moves through a process. It visualizes both the workflow as well as the actual work passing through that process by listing tasks under three columns, which are to do, doing and done. Currently, a wide variety of organizations, companies, advertising agencies, insurance companies and many others are using Kanban board for streamlining their workflow, reducing waste and improving throughput and quality. And since people at all levels can see and update the board, it will be more transparent about the distribution of the work as well as existing bottlenecks.



An illustration of Kanban board
(https://www.kanbanchi.com/what-is-kanban-system)



Built-in Kanban in Trello
(https://getnave.com/blog/trello-kanban-boards/)

There are many platforms for Kanban board such as productboard, smartsheet, monday.com, etc.. In fact, Trello has a built-in Kanban tool as well. These tools

Recommendations

are easy to use with simple interactions like drag and drop. However, there are still some key aspects that will determine whether the Kanban board is used in the right way:

1. No radical changes to the existing process.
When starting to use Kanban board, it should be applied directly to the current flow of the organization. Changes are supposed to be made in a rather gradual way with the pace that the organization is most comfortable with.

2. Limit the number of tasks in progress.
By controlling the number of tasks, team members are encouraged to finish what they are doing before taking up new ones. Moreover, Kanban board can not only help to visualize the workflow, it can increase efficiency by limiting the workload to a reasonable scale. It could remind people there is limited capacity to do work for any team so that they would plan carefully what work team should do. Typically, a team can start with as many tasks as 1 to 1.5 times the number of people working in a specific stage (Digite, 2019).

5 Adjust how Teams is used in the office

Microsoft Teams is a consolidated online platform designed for communication and collaboration. Microsoft Teams allows users to do persistent workplace chat, virtual meeting, collaborative file storage, and application integration (Microsoft Teams, “Home”).

Although Microsoft Teams is a popular system for business collaboration, it has a number of disadvantages, which resulted in some inefficiency at the CYPQ office. According to our findings, our recommendation on the use of Teams would come from three aspects:

1. Make an agreement on the way to use Teams Group Channels.
The initial purpose of creating Teams group chat was to reduce the trouble caused by the cluttered emails that overwhelm and distract people with noisy replies or unnecessary information. However, Teams Channel is causing the distraction just as the emails did in the CYPQ office.

2. Standardize creation and use of Teams channels.
For example, some people use emails to communicate while others are using Teams to update each other. Some teams mainly rely on communicating via Teams group chat while other people rarely look at Teams channels.

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This causes repeated information or it causes people to drop information.. Make sure to create useful chat channels for each team based on their work streams, topics or collaboration relations. Then, people will be less distracted by unnecessary notifications.

3. After creating the right channels, educate people on how to search for important information.
In our research we found that some people are struggling with pulling up past conversation in Teams. However, Teams actually allows people to do exact search.

4. Unify the way to manage files on Teams.
In our research we found that Teams has the overall better user experience than I–Drive in file management, but sometimes the file structure in Teams is not intuitive enough so people find it hard to retrieve documents. In this sense, we recommend the CYPQ office to reorganize the file structure in Teams, and potentially move files from I–Drive to Teams after that.

Conclusion

In summary, while CYPQ is dedicated to providing services to satisfy their clients' needs, the office experiences challenges to optimizing their workflow and communicating effectively. Based on our interviews, along with background research and affinity wall analysis, we found that the center's server for file storage is not intuitive for staff who are not familiar with it. Additionally, we noticed that the variation in CYPQ's communication style and tools they use to track work progress cause inefficient responses across the office. All of our findings led us to provide five recommendations to improve their workflow and task management. We believe these recommendations are a significant step forward in helping the CYPQ achieve its mission to strengthen youth development.

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Appendices

Introduction Script

My name is ( ), and this is my teammate ( ). We are team W Design. I will be responsible for asking questions and ( ) will take notes during our meeting. We'll begin by introducing you to our project and its scope. Our team is trying to enhance the workflow management. We want to interview you to understand your work so we can formulate methods to improve that process. We're interested in learning how your organization disseminates and collects information. We're also curious about the relationship between you and the tools you use to communicate with your team. We'll focus mostly on references to and creation of protocol documents, how people handle customer relationship management (CRM), and the overall workflow from system to system.

This interview should last roughly 60–90 minutes. During approximately the first half, we'll ask you some questions. Then, we hope that you'll walk us through your work, step by step. We're interviewing you because making field observations of your day-to-day activities is a great way for us to witness the nuances of your work. Many of the tasks you work on may be second nature to you, but for us it is very important that we see every step of the process. It may feel awkward at first, but we'd like to engage with you very closely while you're working, asking questions along the way.

A note on confidentiality: our discussion will be completely confidential. We also would like to record our conversation as a reference when we conduct analysis later on. It's only for this project and will not be shared beyond my team. Are you ok with that? Any recordings, note taking or audio, will be anonymized. If we use your insights in our final report, your name will not be used, nor will your role be mentioned. This interview is voluntary. If, at any time, you want to stop the interview, please tell me. Of course, there will be no consequences for this. Further, I can throw away any notes or recordings I may have taken up to the point of stopping.

Do you have any questions for me? All right, let's begin.

Obeservation

Would you mind pretending that you were doing your daily work, and talking through what is going through your mind as you doing it? Tell me about what you're thinking, how you're feeling, and so on.

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Conclusion

That concludes all of our questions for today. If you have any concerns or questions of your own, please feel free to email me at wdesign-si501@umich.edu. If we have any follow-up questions, we may reach back out to you via email. Once we've finished our report, we'll send it your way. Also, we will be presenting our findings at your office, so we look forward to seeing you then. Thank you again for your time!

Protocol 1

Interview Protocol 1
Project Manager

Overarching question

How do you feel about the project managing workflow?

Key Questions

• Responsibilities

How do you manage different teams in your daily work?

How does your role interact with the Director of Field Services and the VP?

• Project Management

I'd like you to think back to the most recent project you worked on, can you tell me how you managed the most recent project?

How did you make the process effective?

How did you get everyone updated the last time you managed this project?

What are the tools you use to manage a team?

What are your thoughts on the current tools for project management?

If you feel bad about them, could you tell us what specific point that frustrated you?

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What are the positive aspects of the current tools for project management?

Could you think of a few ways in which you would improve the situation?

About how many projects do you work on at once?

How do you track each project to make sure they are all in good progress?

Were there any conflicts among projects? How would you manage them?

Can you talk about how you managed the schedule and budget of your last project?

• Team Relation Management

Are the members on each project different? How do you manage the job role, skills and cooperation among these different people?

Can you talk about the last time that people on your team had problems with their work? What was the problem?

When people on your team have had problems with their work, how did you help them with the problem?

• Additional Questions

Have you ever experienced any challenges or difficulties during your daily work?

Do you think there are ways that the workflow could be accomplished better?

Protocol 2

Protocol 2

Director of Field Services

Overarching question

From the perspective of your role, where are the complications in workflow occuring?

Key Questions

Appendices

• Responsibilities

Can you explain a basic workflow and also what your role is in that workflow?

Thinking back on the last time you participated in this workflow, approximately how long did that workflow take?

How does your role interact or not interact with the PM and the VP?

Reflecting on the last week or two, what was the frequency of your interaction with each role?

• Your role as Director of Field Services

Can you tell me more about how your role updates protocols and documentation related to your work?

What does your interaction with your clients look like?

What are the services and products your role manages and provides on behalf of the company?

How do you measure the effectiveness of services you and your team are providing?

How did you communicate your feedback on managing client relationships with your colleagues?

What was their reaction?

• Interaction with the tool

Thinking back to the most recent project you have worked on, what kind of tools did you use to manage the project?

Can you walk me through the whole process?

How do you feel about the working process and the tool?

If you feel bad about it, could you tell us what specific point frustrated you?

What are some things you find helpful about the tools?

Appendices

Could you think of a few ways in which you would improve the situation?

Can you tell me how you used the tools you mentioned to keep track of the progress of projects?

How did you keep everyone updated?

Can you talk about the last time that your team had problems with the tools during the process? What was the problem?

How did you solve it?

Protocol 3

Protocol 3
Vice President

Overarching question

How do you oversee the office workflow, and how do you maintain current updates with all of your colleagues?

Key Questions

• Responsibilities

What is your main responsibility in the office?

How do you keep everyone aware of new initiatives, policies, or other organizational happenings?

How often are you engaging with stakeholders?

How do you build relationships/connections with stakeholders?

How do you maintain those relationships?

• Project management

Who do you usually work with on a project?

What does your communication with these people look like?

Can you walk me through exactly what you do to relay information

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to and receive information from your team?

Has there ever been a time when communicating with your team or staying up to date was difficult? Why?
can you tell me more about a specific time this happened?

How do you design or conceptualize new projects for the organization to take on?
Can you walk me through the process of the last project or initiative you created?
Do you normally work alone or with others?
[for either answer] How does it feel like to work alone?/How does it feel to work with others?

Are there any particular advantages or challenges when you work alone? / work with others?

What are some examples of specific projects you work on?
Can you tell me about the most recent project you're working on now and how do you collaborate with other teams or assign tasks to them ?

• Team relation management

Can you describe the management of workflow for yourself and your staff assigned to your team?

How do you feel during your workflows?
Are there some that you prefer? are there some that you don't prefer?
What about those do you think is not/working?

How do you lead proposal process for new business opportunities?

How do you manage work plans and internal staffing?