



UC SANTA CRUZ

Matrix Management at ITS

Building the Bridge ...

April 5, 2006



Workshop Goal

To enable each of you to answer the following questions:

1. What is matrix management?
2. Why is matrix management necessary for ITS?
3. What does matrix management mean in terms of how we will do our jobs in the future?
4. What does it mean for ITS to become a “Process Driven Organization”?



Agenda

Topic	Planned Timing
Agenda and Session Objectives	1:00pm – 1:30pm
Breakout 1: Working in the Matrix	1:30pm – 2:15pm
Break	2:15pm – 2:30pm
“Walkabout”	2:30pm – 2:45pm
Breakout 2: “In a Nutshell”	2:45pm – 3:15pm
Debrief, Summary and Close	3:15pm – 4:00pm



Agenda

Topic	Planned Timing
Agenda and Session Objectives	9:00am – 9:30am
Breakout 1: Working in the Matrix	9:30am – 10:15am
Break & “Walkabout”	10:15am – 10:45am
Breakout 2: “In a Nutshell”	10:45am – 11:15am
Debrief, Summary and Close	11:15am – 12:00pm



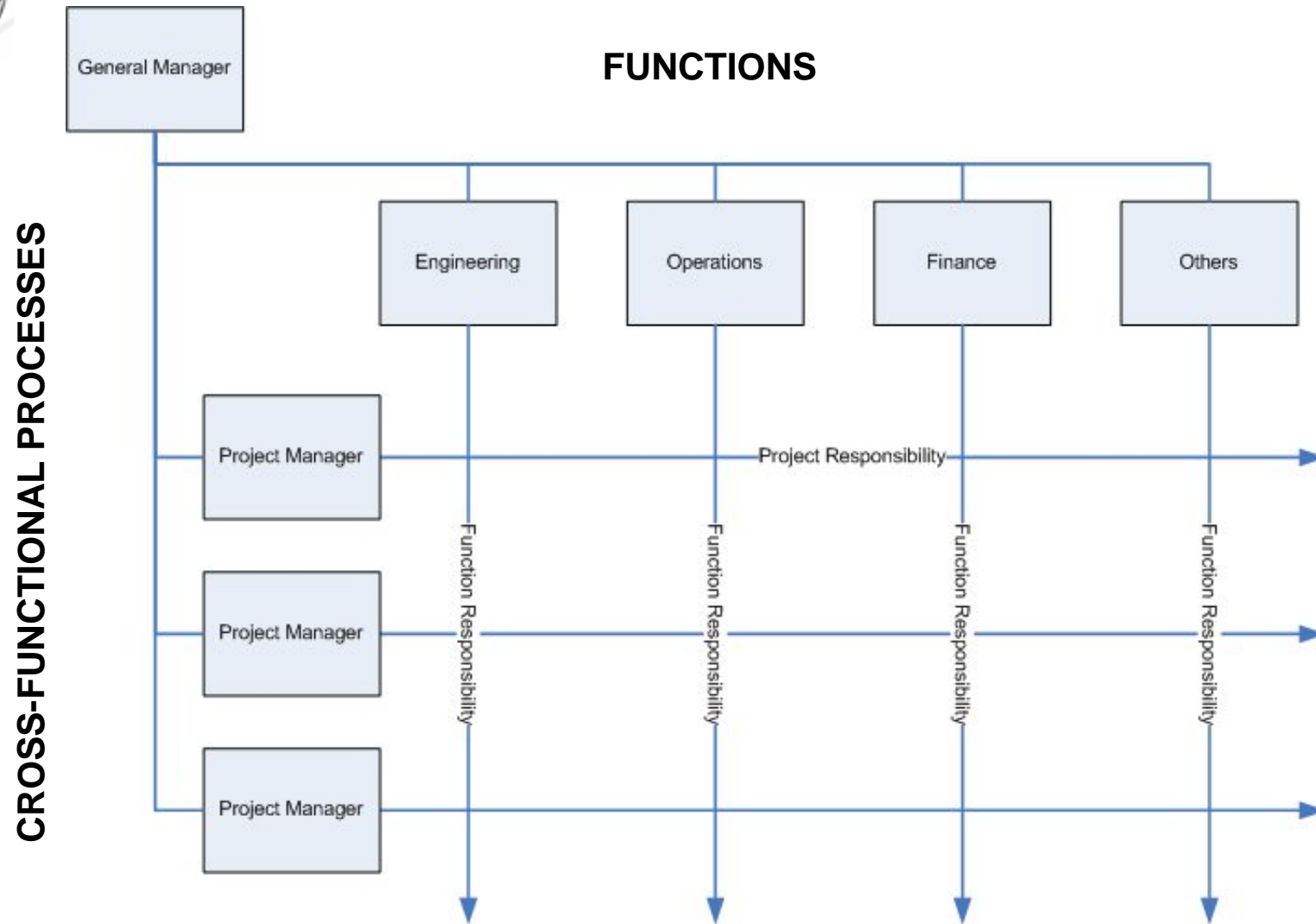
“Process Driven” ITS Organization:

- **Has repeatable, agile, documented processes for IT Service Delivery and Management (Based on the ITIL Framework)**
- **Demonstrates a commitment to continuous process improvement**
- **Has clear division of roles, responsibilities and authority**
- **Is viewed as one seamless organization from the customer experience point of view**
- **Can accurately measure and monitor process performance and service levels**

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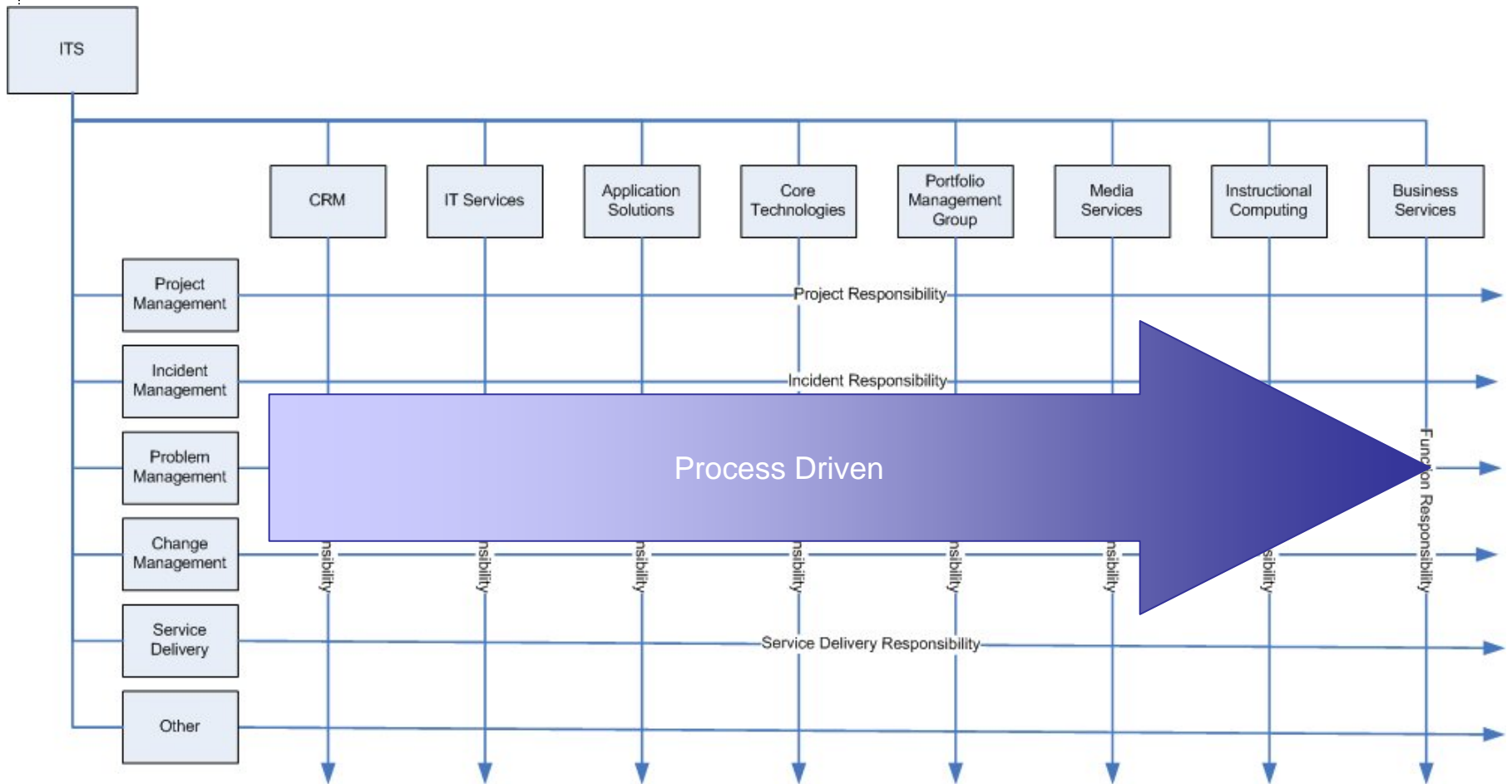
Matrix Management



Robert C. Ford and W. Alan Randolf Cross-functional structures: a review and integration of matrix organization and project management., 2003.



Matrix Management at ITS





Breakout 1: Working in the Matrix



Breakout Exercise 1: Purpose

1. Build our understanding on the interplay of ITS processes with the ITS Matrix organization.
2. Identify potential matrix problems and solutions.



Breakout Exercise 1 Instructions:

- 1. Pick a cross-functional process that interests you and join your chosen facilitator.**
- 2. Group should nominate a recorder or note taker.**
- 3. Facilitator will provide a brief explanation of the definition and scope of their cross-functional process.**
- 4. As a group, identify potential problems that could prevent the process from working across the matrix. Use the following categories to help you identify potential problem areas:**
 - A. Roles, Responsibilities, Decision Making Authority.
 - B. Communications
 - C. Policies, Standards, Processes & Procedures
 - D. Resources (People, money, facilities, equipment)
 - E. Schedules
 - F. Priorities
 - G. Other
- 5. As a group, identify potential solutions for each problem.**



Process Facilitators

Process	Facilitator
Project Management	Ann Berry-Kline
Problem Management	Paul Sosbee
Change Management	Janine Roeth
Incident Management	Linda Rosewood
Service Delivery	Bill Hyder
Service Definition	Aaron Melgares
Performance Management	Mark Cianca



Example Problem & Solution:

Performance Management Process

Problem:

“How will we evaluate people if they work for multiple people in the matrix in the course of a year?” (Category: Roles, Responsibilities, Decision Making Authority)

Solution:

“ITS should establish a policy that Managers will conduct annual performance evaluations, but anyone assigned to a project for more than ‘x’ number of hours will receive a formal evaluation by the Project Manager that will be input to the process.”



Example Problem & Solution:

Project Management Process

Problem:

“How will I know how much time I have to devote to projects?” (Category: Roles, Responsibilities, Decision Making Authority; Resources; Schedules)

Solution:

“ITS should establish a policy that Managers will evaluate on an ongoing basis each staff person’s capacity balancing time for day-to-day operations, project contribution, training, vacation and sickness.”



Example Problem & Solution:

Incident Management Process

Problem:

“How will we make sure that workarounds and fixes invented by "level 2" and "level 3" support is effectively captured in the knowledge base and shared among ITS staff? (Category: Policies, Standards, Processes & Procedures)

Solution:

“We train and empower the Support Center staff to note tickets that contain new workarounds and employ a process to quickly approve them into new FAQs. The process also determines if they are visible to the public or not.”



Example Problem & Solution:

Change Management Process

Problem:

“Who's responsible for minimizing the risk of negative impacts associated with a change?” (Category: Roles, Responsibilities, Decision Making Authority)

Solution:

“The impacts of a change are identified as part of the change proposal. As the potential impact or risks get bigger, there are roles or functions that contribute to minimize the overall risk. For example, a change that may impact a large number of users may require early and/or periodic communications, coordinated through Lisa Bono.”



Example Problem & Solution:

Service Delivery Process

Problem:

“If I am a DL and I want to change a globally provided Desktop Service priority to high for a particular customer, I need to make a decision on whom I need to alert: the individual performing the work? Their supervisor? The manager of their supervisor? Or do I fix it myself?” ?” (Category: Roles, Responsibilities, Decision Making Authority)

Solution:

“Indicate the specific need to the Service Delivery Manager. Every IT Service will have an identified Service Delivery manager who is accountable for the service delivery quality of a service or set of services. This person will be empowered to make the right tactical decisions to adjust the operating priorities of the delivery staff to meet such requests.”



Example Problem & Solution:

Service Definition

Problem:

“Once a need for a new service has been identified, how do all of the service providers who have a component of the service work together to develop the service definition?”

Solution:

“We will implement a clearly-defined service development process with activities that incorporate requirements, specifications, and impacts from all associated service providers.”



Example Problem & Solution:

Problem Management Process

Problem:

"I have a problem with my email, I get this error message over and over, but the Support Center tells me that this is a problem all over campus, they don't have a solution for me, what do I do? "

Solution:

"Problem Managers will work across the organization to interact with all the areas of responsibility. As problems are discovered by the Incident Management process, the Problem Management Process will go to work at resolving them. First by identifying known errors, then by organizing the correct resources to produce workarounds, fixes, and eventual solutions."



Break & Walkabout



Breakout 2: “In a Nutshell”



Breakout Exercise 2 Instructions:

1. Regroup around the flip charts (you don't have to go back to the same group for this exercise)
2. As a group, develop a **"30 Second Elevator Speech"** on what matrix management means to ITS and why we need it.
 - Index cards will be available if you need them
3. Each group member should think of a **personal example** of how being in the matrix will impact their particular job.
4. Nominate a group member to perform your 30 Second Elevator speech.
5. Each member should be prepared to be called on share their personal example.



Debrief, Summary and Close



Workshop Goal - Revisited

How many of you feel you can answer the questions we posed?

1. What is matrix management?
2. Why is it necessary for ITS?
3. What does matrix management mean in terms of how we will do our jobs in the future?
4. What does it mean for ITS to become a “Process Driven Organization”?



What Will Happen Next?

- **The outputs of this working session will be summarized and posted on the ITS web site (IT Transformation Section)**
 - We will update status of the problems and solutions on an ongoing basis on the web site
- **Matrix Management will be made a working agenda item at ITSMG meetings to continue our identification and resolution of problems that prevent us from making the matrix work.**
- **From onward, please consider today's Process Facilitators as the “go to” people for each process we worked on today.**
- **Over the coming months these Process Facilitators will be approaching you to work on process teams, to implement new procedures, practices, forms, checklist, roles etc.**
- **We need you to support them and work with them to make sure that what we have discussed today becomes a reality.**



Process Facilitators

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Thank You!



Reference/Optional Slides



What we need to do to make this work ...

- **Clear roles and responsibilities for both dimensions of the matrix**
- **Accurate, timely knowledge of staff capacity**
- **Knowledge of specific staffing needs (projects and functions)**
- **The organizational ability to make staffing commitments and to honor them**
- **Need to formalize our staffing assignments**
 - Agree to use a common planning framework/mechanism
 - Reframe the current practice of “volunteerism”
- **Clear ITS policies and procedures:**
 - Conflict resolution
 - Escalation
 - Staffing
- **Raise awareness, understanding and engagement of all ITS staff on this matter**



ITS Organization Chart

