Best Practices Summary

Date: April 24/25 Project/Point-Event: Mapping the Adhoc Report Request Process

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Business Need: The current adhoc report request process for Advancement Services is not mapped and lacks structure. With personnel changes on the horizon, there is a need for a more structured procedure in the daily handling of adhoc report requests.

Summary of Event: The team mapped out the current process of how adhoc report requests are handled once they are submitted. It was discovered that there are multiple steps with a variety of factors that move or stall a request in the process. Once the process was completely mapped out, the team used post it notes to identify gaps and opportunities within the current process and labeled each with a 1 (mild irritation) to 3 (very painful) then identified a group of solutions for each. Each solution was rated, reviewed, and those that could be accomplished in our time frame were assigned to each team member. Once the draft documents were typed up they were distributed, reviewed, and corrected where needed. Once the team was happy with the documents, a folder was set up to house the documents and an audit plan and date was selected.

Results: The team created a series of documents that will be used as training and guidelines in handling adhoc report requests. These documents include: Policy for Report Request Handling; Who can Authorize a Report Request 'Stop'; Report Requests Frequently Asked Questions; and Report Request: Review and Tracking.

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