

**Professional Services Customer Advisory Team**  
**Meeting Summary**  
**March 31, 2021**

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|--|-----------------|
| • Subcommittee Report – MarComm & Digital Ed | Susan Ballabina |
| • Feedback Email Address                     | Susan Ballabina |
| • Virtual Support Position, AgriLife Events  | Rebecca O’Neal  |
| • Quality Management                         | Rick Vierling   |
| • Service Catalogs & Service Metrics         | Open Discussion |

**Subcommittee Report**

- The key words gleaned from feedback from the committee in January centered around the following five topics.
  - Confusion
  - Simplify
  - Fear
  - Communications
  - Consistency
- Upon discussion at the January meeting, a subcommittee was formed to discuss particular elements of confusion regarding how to work between the Marketing & Communications and Digital Education units. Members included:
  - Tiffany Dowell Lashmet (Extension)
  - Roel Lopez (Research)
  - Rick Vierling (Research)
- This subcommittee provided excellent and candid discussion and cleared up some “myths” about the two units. It was also clear that there was still work to be done in developing the path forward to address confusion and the desire to simplify working with the teams.
  - The primary outcome from the discussion was development of a simple web-based form for individuals to submit for any type of work request. This eliminates the guess work of determining who in each unit to contact for specific requests. This form is a first-step solution to provide a simple initial point of contact for all users.

Shortcut: <https://tx.ag/requests>

Digital Education Website: <https://digitaleducation.agrilife.org/contact/>

Marketing and Communications Website: <https://agrilife.tamu.edu/marketing-and-communications/contact/#contact>

- Comments from Holly Shive
  - The form is now live & has been introduced to AgriLife Extension, AgriLife Research, and College of Agriculture and Life Sciences. Extension employees received

communication from Angela Burkham. Research and College employees received a memo from MarComm. Human interaction with the units is still vital to success and the communications sent out also detailed specific team members in the MarComm unit as point of contacts for each AgriLife group.

- This form was developed in response to the feedback in our ongoing efforts to be nimble and adaptive, as the AgriLife North Star guides.
- Comments from Caitlyn Calvert
  - Digital Education has a goal of creating service agreements so individual groups have a better understanding of services available to them and their specific needs. These will be created in collaboration with the individual unit.
  - The Extension service agreement is already in place and can be found on the website.

<https://digitaleducation.agrilife.org/extension-service-agreement/>

- Feedback from the Group
  - Rick Vierling used the form today. He applauded the ease of use and noted that acknowledgment of receipt of the form was received within a couple of minutes.
  - Mary Bryk asked if faculty returning to campus for Fall 2021 should use this form for the transition from eCampus to campus. Caitlyn responded affirmatively. Dr. Bryk and Caitlyn will be meeting separately to discuss timelines regarding this specific service to ensure this large-scale transition for faculty is completed successfully.

### **Feedback Email Address**

- The idea of a feedback email address was presented to Dr. Ballabina by Dr. Patricia Klein, department head for horticulture, as a quick and simple way for customers to provide feedback about any unit.
- The address is now live and can be found on the Organizational and Professional Service Units website. This address is monitored daily; all feedback is routed to Susan Ballabina for evaluation and response.
- Feedback is welcome in the form of ideas, suggestions, reports of specific interactions with the units, etc. It is an additional effort to support our desire for transparency.
- The email has been used but, to date, not regarding any topics relevant to the professional services units.

<https://agrilife.tamu.edu/professional-services/>

[feedback@ag.tamu.edu](mailto:feedback@ag.tamu.edu)

### **Virtual Support Position, AgriLife Events**

- With the vast increase in virtual events since the onset of the pandemic, the demand for support and knowledge regarding virtual platforms has become apparent. In response, AgriLife Events has added John Chivvis to the team as a virtual engagement specialist.
- AgriLife Events will provide users AgriLife-wide with resources and support for live events.
  - Training and best practice guides are being developed now to assist all AgriLife users with successfully executing virtual events.

- Hands-on live support for events can also be available (based on group reach, production needs, event size, etc)
- Recommendations for elevated productions

## Quality Management

- Rick Vierling will be assisting the service units with methods and processes for managing the quality of services provided.
- Dr. Vierling has a wealth of knowledge of and experience with ISO (International Organization for Standardization). This organization develops standards for many systems, including quality management. The implementation of some of the general principles that ISO includes can assist the service units with providing and maintaining superior levels of service to customers.
- Currently, the first three (3) principles most critical to Professional Service units are:
  1. Customer Focus
  2. Continual Improvement
  3. Evidence Based Decision Making
- Dr. Vierling will be working with unit leaders to create standards specific to these three principles.
- Questions & feedback from the group
  - Matt Taylor asked if an auditing system would be external or internal.
    - Dr. Vierling is already an ISO Certified Auditor and audits will remain internal within AgriLife.
    - Formal adoption of the ISO standards is not planned. This is a costly undertaking. Generally adopting common principles of ISO adds no additional costs to our organization and provides us with what is needed to provide superior service.
  - 2. Elizabeth Parker asked how this audit fits in with the numerous University and System audits that various AgriLife units undergo regularly.
    - The term audit, as it applies here, is less formal. It should be viewed as a report and conversation with unit leaders. It is not a stringent formal audit process and only affects the Professional Service units.

## Service Catalogs and Service Metrics Discussion

- All unit leaders have worked hard to begin defining service metrics and developing service catalogs so it is clear what is offered in the form of deliverables.
- Prior to the meeting, each unit leader provided information regarding their unit to the team for review in preparation for discussion and feedback. That document can be viewed below. Most content shared is also available on the units' websites for users as a resource to all of AgriLife.



Unit Updates -  
Service Catalogs & M

- Matt Taylor and Jared Conrad questioned the clarity of some information included. One specific example is Business Services as it pertains to contract and grant management. A general concern is that faculty may become confused about the use of AgriLife Business Services versus TAMU Sponsored Research Services (SRS).
  - Steve Schulze recognized the concern and shared that his unit serves as a resource for faculty and a conduit to TAMU/System and can assist faculty in working with groups like SRS, as the Business Services team members work closely with TAMU and System offices.

- There is agreement that some wording can be adjusted in many areas to more clearly define the role of the service units to limit confusion.
- David Baltensperger expressed interest in encouraging faculty to communicate/participate more and asked for suggestions from the unit leaders.
  - He suggested one potential opportunity is for MarComm to potentially use some regularly generated reports from Research to reach out individually to faculty to build rapport and relationships to encourage more communication.
  - College department heads can also assist with identifying faculty who can become ambassadors of the service units, encouraging others to seek out assistance from the units.
  - Dr. Baltensperger and Marketing and Communications will be meeting to further discuss strategies to gain greater participation from faculty.
- Matt Taylor questioned where responsibilities lie specifically for Marketing and Communications and Digital Education, i.e. the role of the College departments versus the role of the service units
  - Caitlyn Calvert expressed her unit's vision for avoiding this concern. The creation of more unit specific service agreements, like the one now in use with Extension, can help define those roles. With input from department heads, these can be created for the College.
- Roel Lopez highlighted the progress being made by the units, describing the work done at this stage by the unit leaders as a "leap in the right direction".

## **Adjourn**