DukeEngage Detroit: Systems Innovation Recommendation

Megan Fong | Rafael Adi
DukeEngage Detroit Fellowship Project

Executive Summary

TechTown Detroit

- TechTown Detroit (**TTD**) is an **incubator**/accelerator that helps **local businesses** and tech **startups** grow.
- **Company Goal**: **Revitalize Detroit** through company **support** and local business **development**
- TTD offers **services** and programs that include:
    - Capital, workshops, coworking and office space, networking events, and meeting/event space

Systems Innovation Team

- Tasked on **SI Team** to provide **researched recommendation** on **long standing issue**
- Fairly **new** staff on SI **Team** that **realized** project **problems** during **onboarding**/transition
- Currently the team is primarily **tasked** with technological **system management** for the organization, **data** analysis, and **strategy** development

Problem 1: Employee Onboarding and Offboarding

- SI team uncovered **issues** with TTD's current **technical onboarding/offboarding** functions.
- New **employees** are often **confused** with certain company **platforms** such as Zoho One, Microsoft Office, etc. when onboarded due to the current limitations of the process
- During employee **offboarding**, **two** central questions arise
    - What to do with employees access to company platforms and materials?
    - How can we improve the transition from exiting member to new member?

Problem 2: Platform Access Levels and Redundancies

- **Initially**, this problem was viewed as a **byproduct** of the **offboarding issue** discussed above
    - However, it **soon** became its **own** larger problem in need of analysis
- Currently, TTD's technical **platforms** are **not managed** by **one** singular **department**
    - This has made the process of **editing access** levels, **problematic** for the SI team.
- The decentralized nature of TTD's technical platforms have also brought issues of **application redundancies** and **interdepartmental miscommunication**

Project Process

Staff Interviews and Survey

- **Conducted interviews** with all department directors and additional relevant staff (Appendix I)
  - Evaluated **knowledgeability** regarding **submitting requests** to appropriate departments and **platform provisioning**
  - Recorded **employee experiences** with platforms
- Distributed **company-wide survey** regarding platform usage (Appendix II)
  - Tracked both general application and Zoho specific usage
  - Generated **resource** with departments and **corresponding platform usage**

Peer Interviews

- Reached out to multiple **peer organizations** structured similarly to TTD
  - Utilized **best practice resources** provided by peers
- Discussed situation with relevant figures and brainstormed **solutions informed by experience**
  - Learned about **similar issues** faced by other nonprofits and their corresponding solutions

Platform Analysis

- Researched all **applications available** to **TTD** employees via **WSU Email** Address (Appendix III)
  - Compared available platforms to those offered and funded by TTD
- Using **interviews** and **surveys**, **redundancies** became evident with applications such as **Zoom, Microsoft 365, Adobe**, etc.
  - Developed recommendations based on this issue
- **Zoho One** platform **analysis**, emphasized **Problem 2**

Combining Perspectives

- During interview process, hypothetical **recommendations** were **discussed** with TTD **directors**
  - Including perspectives from **SI Team**
- **Used** these varying **perspectives** to **develop** integrated **midterm recommendation**
  - **Focused** especially on perspectives from **TTD's SI and HR and WSU's C&IT departments**, as these are the most involved teams with employee onboarding/offboarding

Onboarding Recommendation

Platform Instruction

- **Additional aspect of orientation** involving walk-throughs of company-wide platforms
    - Tour of **modes of communication** with an emphasis on channels in Teams
    - **Introduction to platforms** used org-wide
- General instructional **introduction to Zoho**
    - Tour of **frequently used applications** in Zoho and brief walkthrough tutorial to orient new employee

Onboarding Timeline

- Timeline for an employee's **first two weeks** at TT
    - Details the **onboarding stages** for the employee to expect and meetings that will take place
- Information regarding **who and where to check-in** with at various checkpoints
    - Newly onboarded employee can r**eference timeline to seek out help** if a task is incomplete

Initial Software/Hardware Checklist

- Checklist **distributed to department director** before arrival of new employee
    - **Broken down** by tasks for **SI/HR/C&IT**
    - Supervisor may **check off the platforms** & Zoho One applications and the corresponding access levels for the new team member
- Access will be **provisioned accordingly**

Mandatory Two Step Onboarding Process

- Required employee onboarding process that involves **getting provisioned with access** and also a **requisite orientation/training**
    - Mandatory orientation will be communicated more clearly to new employees and **require confirmation**
    - Given that an employee misses orientation, they will be **required to make up for the session**

Applicable Resources

Zoho One Training

- Easily **accessible Zoho tutorials** for employees to utilize as a resource whenever desired
    - Both a **general overview** of Zoho usage and also **application specific** tutorials

Updated Provisioning Request Form

- A provisioning **request form** that **ensures validity** of the request
    - Creates a **centralized** place to place requests in a **streamlined** manner
    - Only accessible to department directors and sent directly to appropriate figure(s) for help

Help Reference Guide

- A **company-wide interactive page** that tags a department/individual **who is responsible** for assisting with a **specific change**
    - Also **holds the staff responsible** for completing the task and **creates a strict distinction** in roles between departments

Accountability Chart

- A chart with a description of each employee's **top five responsibilities**
    - Can be used by other team members when they are **seeking assistance**
- The accountability chart would **help define what would normally be used** by the employee
    - Would assist SI & HR in **defining** what the employee's **typical role** would be

Offboarding Issues and Recommendation

TechTown's Wayne State Obstacle

- On the surface all **TTD** employees have **WSU-based email** addresses
  - **"Because of the emails, TechTown staff are essentially Wayne State Employees without officially being Wayne State Employees"** - Eric Dau (WSU C&IT)
  - However, there often times is an **issue** with **offboarding** these emails due to miscommunications
- Dau suggested, **theoretically** making **TTD** staff **WSU employees**
  - Although this may be unfeasible it would **solve** several issues concerning employee **offboarding**, along with making other **processes simpler**
  - Is there a more **conservative** solution?

Transition Plan

- Upon notification of offboarding, create a **Teams channel** with **relevant employees** who would be **impacted by the offboarding**
  - Figure out what **responsibilities** would have to be **picked up by other team members**
  - Delegate **unattended responsibilities** to appropriate figures within department/organization
- Create **offboarding checklist** with relevant tasks that must be completed
  - **Affected team members** can **add tasks** to this checklist based upon transition plan discussed in Teams
  - Include a **checklist of programs** that need to have **access revoked** from

| Summary | Onboarding | Resources | Offboarding | Long Term Plan | Recommendation |

Removing Redundancies

- Currently **multiple** platform **redundancies** exist between **TTD** and **WSU**.
  - Multiple accounts for apps such as Zoom, Adobe, and Microsoft
- Potentially **removing** the excess **accounts** and **utilizing** the **platforms** provided by **WSU** could **fix** the **SI** team's **budget** issues
  - SI is responsible for purchasing TTD's tech. platforms

Organized Routing Checklist

- **Similar** to the **provisioning request form**, however more organized and detailed
- **Every employee** will have **access** to this **checklist**
- When something **technical** is **requested** (hardware, access level changes, application downloads, etc.) in the form, the **request** is **automatically forwarded** to the team **director**, prior to reaching any other department
- **After** director **approval**, the **form** is then **routed** to either **SI or HR (later C&IT)** depending on the request

Zoho One Platform

- **Zoho** One is one of the most **popular** platforms **used** by the organization
  - Also serves as the **central application** for TTD due to its **multifaceted purpose** and suite of **40 programs**
- However, **multiple departments do not use** the platform
  - Most that do have several **complaints** about certain functions
- Thus, long term, **replacing** the **Zoho** suite that that of **Microsoft** Office 365 could **remove** issues of **access levels** and even **application redundancies**.

Individualized Platform Training

- Beyond the proposed easily **accessible Zoho tutorials** for TTD employees, a **training program** for other applications within the company suite
  - This **includes unconventional applications** within **Microsoft** Office 365, other than the renown Word, Spreadsheet, etc.
- Could drastically **save time** for the **SI** department in the **long run,** as they will no longer act as "firefighters" for TTD's technical problems

Recommendation Summary

New Member Onboarding

- Mandatory two-step onboarding process involving platform provisioning via **checklist** and a **broader orientation** involving increased detail regarding company-wide practices
- **Detailed timeline** resource for newly onboarded employees with **specificity** regarding with who and how onboarding processes will take place

Employee Resources

- **Zoho One training**, both general and specific, that is **accessible** to all employees
- Standardized **provisioning request form** submitted through department directors
- **Resources** involving references for who to **ask for help** and lists of **responsibilities** of each department/individual

Exiting Member Offboarding

- Further **research** on TTD and WSU **relationship** for a deeper recommendation
- Current issues with **Wayne State email offboarding**
- Proposed **Transition** Plan

Long Term Changes

- Removing **redundant** applications from TTD **technical platform**
- New **routing** provisioning **request** form
- **Microsoft Office 365** vs. Zoho One
- Detailed **training** for necessary **applications** within **TTD's platform**

Summary | Onboarding | Resources | Offboarding | Long Term Plan | Recommendation

Appendix

Appendix I

Name	Program
Amanda Benno	Detroit Urban Solutions
Amanda Saab	Small Buisness Services
Amy Rencher	Entrepeneurial Programs & Services
Andrea Pitcher	Community Ambassadors
Angeline Lawrence	Entrepeneurial Education
Danielle Manley	Economic Development Fundraising
Kimberly Palter	Marketing & Communications
Niki Graham	Systems Innovation
Kimberly Watts	Collaborative Workspace
Marlo Rencher	Technology-Based Programs
Susanna Taylor	SI Team
Tonya Thomas	Systems Innovation
Trina Groce	Human Resources
Wendy Wilson	Facilities
Diana Goode	Finance
Eric Dau	WSU Lead App Tech Specialist

Appendix II

2. What department do you work for?

More Details

🔵	Detroit Urban Solutions	1
🟠	Small Buisness Services	2
🟢	Entrepreneurial Education	0*
🔴	Economic Development Fundrai...	3
🟣	Marketing & Communications	3
🟤	Collaborative Workspace	4
🟣	Technology-Based Programs	3
⚫	Systems Innovation	0
🟡	Human Resources	1
🔵	Facilities	1
🔵	Finance	1
🟠	Other	1
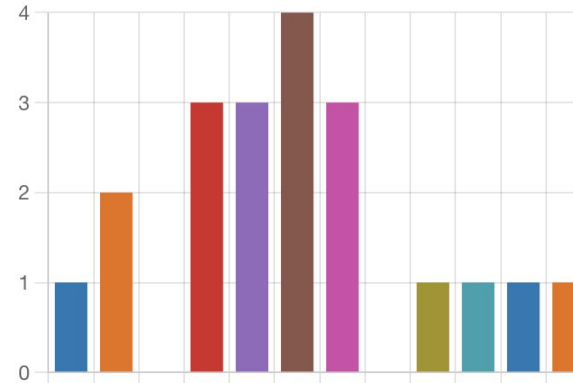
* Note: Entrepreneurial Education has zero responses because we removed the option after the survey had been sent out. It should have one response, being Angeline Lawrence.

11

Appendix II

3. Which of these platforms do you use?

<u>More Details</u>

🔵	Acuity	5
🟠	Adobe Acrobat	14
🟢	Microsoft365 Suite	20
🔴	Mural	10
🟣	Linos	0
🟤	Trello	16
🟪	Zoho One	18
⚫	Zoom	17
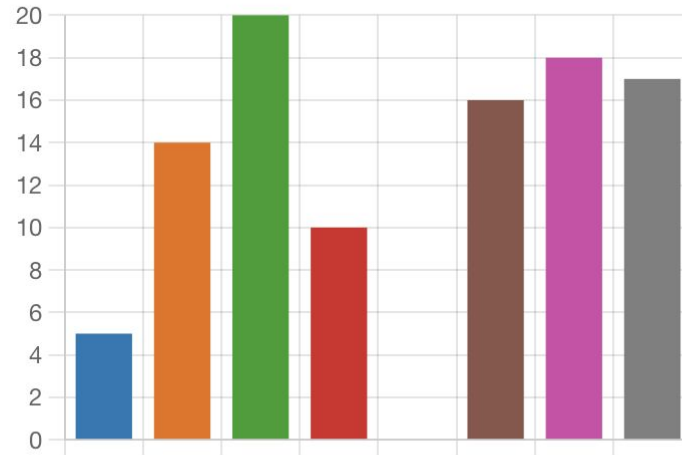
Appendix II

4. Which of these Zoho One applications do you use?

More Details

🔵	CRM	14
🟠	Forms	11
🟢	Surveys	14
🔴	Campaigns	10
🟣	Backstage	12
🟤	Bookings	5
🔴	Expense	3
⚫	Analytics	2
🟡	Sign	4
🔵	Sprints	1
🔵	Other	7
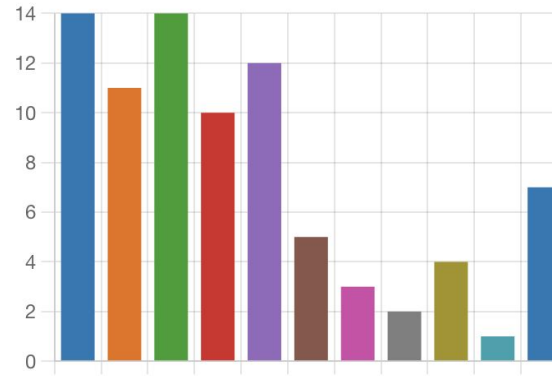
Appendix III

Operating systems

Product	Platform	Supported Versions	Support Level	Description	External Support
Android	Mobile	6.0 and later	Limited	Open Source mobile operating system	
iOS	Mobile	11, 12, 13	Limited	Mobile operating system from Apple	Apple
macOS	Mac	10.15	Full	Operating system from Apple	Apple
Windows 10	Win	10	Full	Operating system from Microsoft	Microsoft

Web Browsers

Product	Platform	Supported Versions	Support Level	Description	External Support
Chrome	Mac/Win	Current Stable Release	Limited	Free Internet browser by Google	Google
Firefox	Mac/Win	Current Stable Release	Limited	Free Internet browser by Mozilla	Mozilla
Safari	Mac	12.1.1 or higher	Full	Internet browser built into macOS	Apple
Edge	Mac/Win	97.0.1072.76 or higher	Full	Internet browser built into Windows	Microsoft

Appendix III (cont.)

Email, Calendar, Contacts

Product	Platform	Supported Versions	Support Level	Description	External Support
Microsoft Outlook for iOS and Android	iOS, Android, Windows Mobile	Current Stable Release	Limited	Sync email, contacts, and calendar with mobile devices	Microsoft
Mail, iCal, Address Book	Mac	Current Stable Release	Limited	Email and calendar built into OS X	Apple
Microsoft Outlook	Windows, Mac	2013, 2016, 2019	Full	Email and calendar included in MS Office	Microsoft
Wayne Connect	All	n/a	Full	WSU web based email system	Microsoft

Enterprise Applications

Product	Platform	Supported Versions	Support Level	Description	External Support
Appworx	Windows only	Current release	Limited	Workload automation	Broadcom
Banner	Mac/Win	Current release	Limited	University records	Training course
Canvas	Mac/Win	Current release	Full	Learning management system	Canvas
Cognos	Mac/Win	Current release	Limited	Analytics software	IBM
Echo360 Universal Capture	Mac/Win	Current release	Limited	Lecture capture software	Echo360
Respondus LockDown Browser	Mac/Win	Current release	Limited	Restricted testing browser	Respondus

15

Appendix III (cont.)

Productivity Applications

Product	Platform	Supported Versions	Support Level	Description	External Support
Adobe Acrobat	Win	17 or higher	Limited	PDF creator/editor	Adobe
Adobe Creative Cloud	Mac/Win	2015 or higher	Limited	Cloud-based creative suite	Adobe
Adobe Reader	Mac/Win	17 or higher	Limited	PDF reader	Adobe
EndNote	Mac/Win	8, 9	Limited	Reference manager	Thomson
Esri ArcGIS	Windows	10.1-10.4	Limited	Mapping platform	Esri
Microsoft Office	Mac	2016, 2019	Limited	Office productivity suite	Microsoft
Microsoft Office	Win	2013, 2016, 2019	Limited	Office productivity suite	Microsoft
Microsoft Office 365	Mac/Win	-	Limited	Office productivity suite	Microsoft
Microsoft Teams	Mac/Win	Current release	Limited	Messaging and file sharing platform	Microsoft
SAS	Win	9.2-9.4	Limited	Statistical analysis	SAS
SPSS	Mac/Win	24, 25, 26	Limited	Statistical analysis	IB

Questions