

**Creating a virtuous cycle from data production to business outcome:
The case of Request for Service (RFS) management**

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Businesses today are looking for ways to make better use of operational and transactional data to inform business decisions. The amount of data available to businesses both internal, propriety data, as well as external, publically available data is increasing as more and more of the things people do leave digital traces. Not only does IBM sell the value of data analytics to its customers through cognitive and analytic services, but IBM also is increasing its use of data to run its internal business operations. This case reports on one such attempt that began as a technology driven intervention and evolved to employ a more sociotechnical design approach.

IBM executives were concerned that the processes used to respond to the requests from existing clients to add new services to their contracts were not being effectively managed resulting in lost business and unhappy clients. Their solution was to develop a workflow tool to track the progress of the request for service (RFS) business. However, early experience with the workflow tool was problematic in that the data generated by the tool could not be trusted and this created an inaccurate picture of the RFS business. One of the issues that contributed to the inaccuracy of the data was that the RFS managers who were charged with using the workflow tool received no value from use of the tool. In fact, in their minds the tool created extra work for them. There was no compelling reason for them to use the tool or to ensure the accuracy of the data generated by the tool.

The first response by executives was to hold the RFS managers accountable for the data by producing reports based on the workflow data showing the status of the RFSs (e.g. whether an RFS was progressing as expected). Each week they would be sent a report showing the number of RFSs that were behind schedule or were missing documentation and they had to say why this was the case and what was being done about it. There was much complaining and frustration expressed by the RFS managers because the reports did not give an accurate picture of state of affairs and yet they were being assessed as if the information was correct.

My research group was asked to help with the problem. We first did a study to better understand how RFSs were processed and the role the new tool played. By starting from the premise that people will be disinclined to adopt new tools if they received no benefit from using them, we set out to develop a sociotechnical solution that would make the workflow tool more valuable to these RFS managers.

Based on our understanding of the work practices of RFS managers, where creating custom reports and interacting with clients was a key part of their work, we developed a “dashboard” that provided the ability to easily customize reports for particular client situations and collaborate with clients over the progression of

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individual RFSs. Our dashboard made the work of the RFS managers easier and more efficient, with the additional benefit of increasing client satisfaction.

RFS managers were now motivated to enter information into the workflow tool and to ensure that the data reflected in the tool were accurate. By giving RFS manager real time, easy to consume views on to the status of the progression of their RFSs, they could easily see, and adjust, if needed, the status of an RFS. And they could update this status (and the reasons for delays) in collaboration with their client counterparts. As a result the data in the workflow tool now presented an accurate reflection of the status of the RFS business, making executives happy and enabling them to better manage the overall RFS business.