

# Miami University's Winning Client Portal

## INSIDER'S LOOK INTERVIEW

“ We believe everyone has a shared goal to serve our students, faculty, and staff in the most efficient, quality way possible and that can only be achieved through collaboration.”

We reached out to We asked Bob Black, Assistant Director of Service and Project Management, and Jeffrey Toaddy, IT Service Management Coordinator, for the get the scoop behind the website and to see what tips they had for other higher education IT departments.

***We saw the first version of your Client Portal in 2014 and looked great. What motivated you all to update it?***

Our first version was intended as a stopgap for getting people familiar with the interface and was only available to logged-in users. At the time, the only interactions that were possible were limited to a) viewing a particular ticket, b) completing a service form, or c) looking at a project you were assigned as a resource. We had a separate Knowledge Base tool and several website that provide service-related information. In most cases, people did not browse or search our

service catalog--they were deep-linked directly to a form from some external site.

Our most recent project tackled creating a “public facing IT Experience” to provide a single platform for online interaction with IT to enhance the customer experience. In doing so, we focused on the major processes that form the basis of those interactions:

- Knowledge Management: Capturing, creating, sharing, and effectively using organizational knowledge
- Service Catalog: Clearly defined service offerings

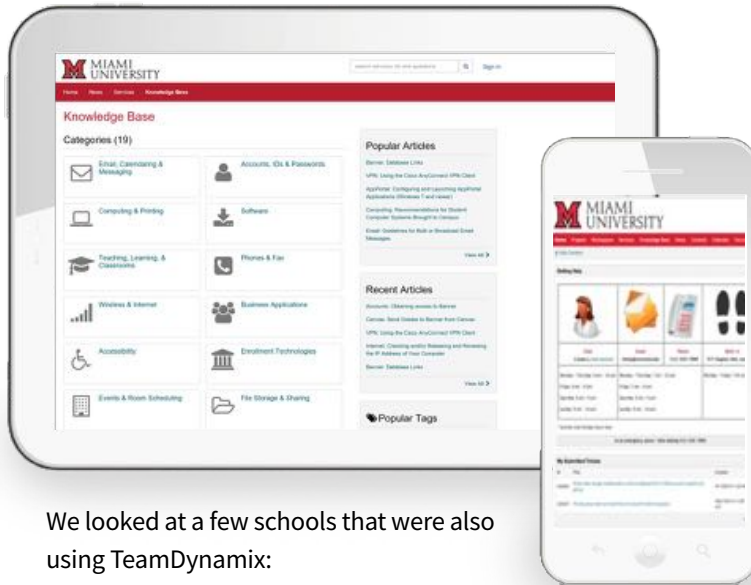


- Request fulfillment: Offer advice or provide subscription or routine transactions for production services.
- Some specific pain points we have been addressing include:
- UIT Website, IT Help, Projects, Outage Information & Service Catalog in separate locations
  - Unnecessary complexity to submit service requests
  - Duplicate, mismatched, and inaccurate information

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## **Did you do any kind of planning or research before launching the new Client Portal? If so, explain what you did and why?**

To start, we looked at the websites of other schools we felt like did a great job of providing the type of experience we wanted to provide.



We looked at a few schools that were also using TeamDynamix:

- [University of Wisconsin–River Falls](#)
- [Michigan State University](#)
- [Stevens Institute of Technology](#)
- [Florida Atlantic University](#)

We conducted a fairly detailed current-state assessment to get a firm grip on what information we had published across a variety of locations, including a review of all 900+ KB cases in the old system. Then we made a decision as to which content needed to be updated, retired, or moved as is, and where it belonged in the new portal. This work has been essential to ensure our new home has only high-quality content, eliminating anything outdated or unneeded.

We then went through multiple iterations of our own design. For each, we got a small group of faculty & staff (students were hard to come by) to give feedback. We made adjustments and refined to come to our final product. For each focus group session, we had a set of very targeted questions to address, sometimes with A or B choices.

Lastly, I should mention that we also took time evaluate the impact our design had with use on a mobile device as well as checking it for any accessibility concerns.

## **What problems or issues are you trying to solve with the new version?**

Some of our specific aspirations are:

- a single place for people to get answers/solve their problems on their own
- the ability to engage for more hand holding
- comprehensive content across all IT (not just our central IT division)

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**“The next possible disruption we foresee with this Client Portal is to include non-IT services and knowledge, such as HR.”**

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## **What are your plans for the next version of your Client Portal?**

We are looking to really tap into the knowledge and services that are provided by our IT partners across the campus. We believe everyone has a shared goal to serve our students, faculty, and staff in the most efficient, quality way possible and that can only be achieved through collaboration. The next possible disruption we foresee with this Client Portal is to include non-IT services and knowledge, such as HR.

## **Can you give your peers some tips?**

- Start with a defined process and identify the pain you are trying to solve up front. Refer back to it when you are unsure how to proceed.
- Engage everyday clients in an iterative construction process.
- There are no perfect answers.

**See Miami University's Client Portal.**

<https://miamioh.teamdynamix.com/tdclient/home/>