Finding the Balance:

Outsourcing Vs. Insourcing Tech Support

TECH*FORWARD*

Becket Family of Services

Youth Driven • Family Centered • Community Focused

Caveat: Every situation is unique

Outsourcing vs. Insourcing

Outsourcing =

Consultant or Support Company

- Expensive (OpEx)

- Has expertise

- Conflict of interest
    - Best for client or best for company

Insourcing =

Hiring your own tech staff

- Expensive ('CapEx')

- Need to build expertise

- No conflict of interest

- Control of Tech planning

The Situation

...at Becket roughly eighteen months ago

Becket Family of Services – January 2018

- ~1200 Employees

- ~ 10 Independent programs each with it own Executive Director

- ~ 50 Facilities across 4 New England states

- 1 support vendor (owner + 6 employees)

- 0 Becket internal technical employees
  and

- A lot of very unhappy people

Becket Frustrations (from Exec Director interviews)

- 'Not feeling supported'

- Vendor 'did not understand' their situation

- 'They never call back'

- No idea of current inventory (worries about missing machines)

- 'We can't do our work'

- 'What happened to my computer?!'

- No news was *not* good news

Vendor Frustrations

- Not feeling appreciated

- Conflicting messages

- 'They never call back'

- No visibility into the company

- Poor communication ("it's not working…")

The Question

Should Becket Insource Some Portion of Tech Support?

Should Becket Hire its first Tech employee?

- Executive Directors viewed this a more expense for central office

- Was it necessary?

- Would it help?

…when in doubt, gather more information…

- Becket decided to hire a consultant to see if they needed this position

Becket Hires A New CTO

…and the games begin

Launch of CTO

- Documentation scare and out of date
- Vendor quite hostile
- Admin 'sort of doing tech' gets hired away 4 weeks in
- Many, many fires that needed stomping
- Several '3 envelope' moments

The First Step

Creating the RITA program

RITA Program Goals

- (Re)Build Trust
- Improve communication
- Control spending
  - New vs. refurbished
- Create technology 'ownership'
- Create a virtual technology department
  - βeta testing new software

"Becket's Regional IT Associate (RITA) program was created to allow better communication between the Becket employees working at Becket facilities, the Becket Chief Technology Officer (CTO) and the IT support vendor for those facilities. The RITA acts a liaison for matters relating to technology including technical support, hardware and software provisioning and any other technical issues. **It is fundamentally a communication and project management role***."*

Regional IT
Associate
(RITA)

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- Constantly Evolving
- Some Sections Empty
- Not training but discussion

RITA

1	Overview
2	Tech Support
3	Hardware
4	Software
5	Networks
6	Office 365 / SharePoint
7	HIPAA & Tech
8	
9	
10	FAQ

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- Purchase approval
- Single Point of Contact
- Local 'voice of technology'
- Key in planning process

Director Checklist

One primary task of a program's RITA is to be the single point of communication between the Executive or Program Director, the BFoS Chief Technology Officer and the applicable technical support vendor.

The purpose of this document is to make sure the Executive Director or Program Director (ED/PD) is clear about the RITAs tasks and responsibilities. Please initial each item as proof that you have read and understood each statement.

Director Initials	RITA Initials	
		All purchase requests (hardware, software or services) from the RITA to the vendor or CTO are made with the approval of the ED/PD. Any such request from the RITA will be acted upon without further authorization. It is the responsibility of each RITA to either get discretionary technical budgetary authority from the ED/PD or check with the ED/PD for each purchase. Please cc: the CTO on all vendor communications
		Becket employees are to contact the appropriate support vendor for specific hardware, software or network concerns but general, system concerns (slow Internet, poor service) should go through the RITA and the CTO.
		The ED/PD and RITA are responsible for drafting an announcement about this new program and distributing it to everyone within their program that has a computer. This communication should clearly mention the launch date and provide all relevant contact information.
		The RITA and ED/PD will work with the CTO and the central office on an annual basis to create technology budgets and multi-year strategic technology plans regarding both infrastructure and program-specific technology use.
		This is a new program. We do not want to overwhelm the RITA. Concerns about quality or particularly the quantity of work should immediately be shared with the CTO. We will be running this trial program for several months and then reevaluating whether to keep it as is, shut it down or expand it.
		Start Date: _____

_____
[Signed]   [print name]

Executive Director

_____
[Signed]   [print name]

RITA

- Why
- Introduce RITA
- ED backing
- How it works

RITA Introduction Letter
[Example]

Hello Everyone,

I am emailing you to let you know we are starting a new way of providing better technical support for [insert program name]. In the past, we have sometime experienced difficulty getting resolution to technical problems in a timely manner. To make sure there is better communication between our facility and our support vendor Thrive, we are launching the Regional IT Associate or RITA program as of [insert date].

The RITA for our facility is [insert name]. As your RITA, [insert name] will be there to help with communicating with Thrive if you are not available, if you work hours when the provider is unavailable or any other reason.

For simple support issues, you can email or call All Access Infotech directly but please make sure you cc: [insert name] so s/he is in the loop.

For bigger issues such as needing new hardware and software or problems with the entire facility such as no internet availability, you should contact [insert name] directly so s/he can decide whether to resolve the issue by reaching out to Thrive or to Bryant Patten, our new company Chief Technical Officer.
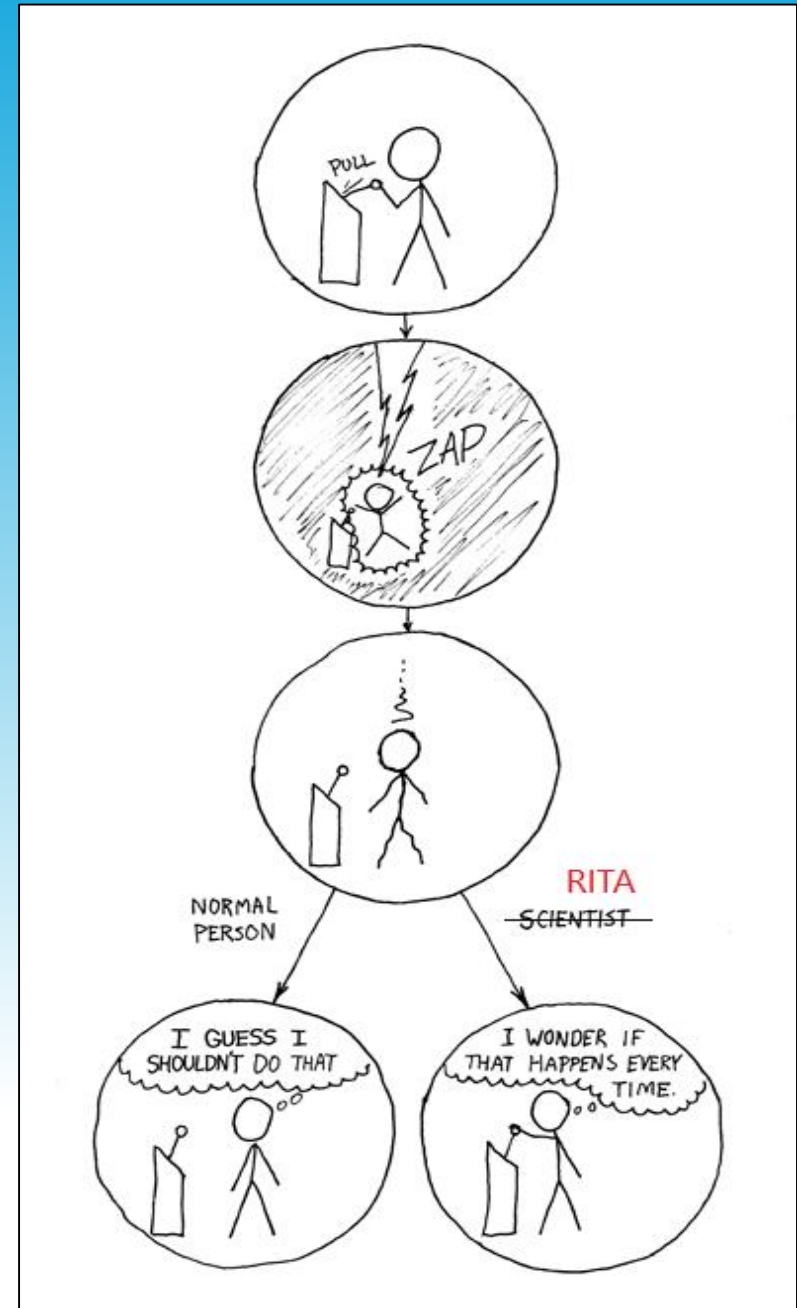
If you have any questions about this new program, don't hesitate to reach out to [insert name].

Sincerely,

[insert name of ED]
Executive Director

- # Not 100% Serious Content

  [with thanks to Randall Munroe]

Launch issues

- Getting EDs to identify RITAs varied widely

- EDs always asked if the central office was going to pay

- Central office did not see the need

- Get vendor cooperation for transparency

- Time
  - *'Running down the street holding your bicycle because you don't have the time to stop and get on it'*

Launch lessons

- Point out that they are already doing this work – now we are creating a structure to support them

- Executive Directors often assigned their best people

- Language matters - renamed from 'administrator' to 'associate'

- Make sure <u>everyone</u> knows the RITA is a volunteer

- Leverage RITAs intimate knowledge of business unit
  - What do they REALLY need, who should get it

- For larger business units, try to get two

Results – at one year into the RITA program

- Trust seems to be coming back
  - No longer hoarding technology
- Everyone seems happier with tech procurement
- RITAs in a support role, start to see the other side
- 'Ownership' has increased – 'my inventory…'
  - Several cascading deployment plans
  - Many 'I couldn't believe it when they said…'
- Vendor is happier with Single Point of Contact (SPoC) at each site
- RITAs appreciate ability to show value
  - One RITA hired as full time as tech admin for my team
- Still no budget

Things to avoid in Year One

- Over committing

- Under communicating

- Do not become a volunteer employee for your vendors

- Do not ignore expectation management

Beyond RITA – Insourced CTO Wins

- Internal user advocate and ombudsman to vendors

- Strategic technology planning

- Moving away from continuous crisis management model

- Lots of cost savings
  - Cancelling ghost accounts and services
  - Negotiating with vendors from position of experience

- Executive Directors reaching out to discuss options

- Starting to explore tech as something positive

Summary

- Insourcing/Outsourcing Tech Support will always be along a spectrum
  - Move slowly in either direction
- Find people already motivated to be part of your virtual tech team
  - Enjoy the tech though not 'techie'
  - Enjoy the access and support
- Point out the value of the project to all parties

Questions?

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