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Teaching Case

IT Disconnect at Cascade Sustainable Energy

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Abstract

The IT or IS department of a business or other organization exists to serve the larger organization and support other parts of the organization in working to achieve departmental and organizational goals. This case explores a situation where the IT organization has lost focus on the need to serve and support the rest of the organization. The case explores problems with the technology system used to support the new employee orientation process at Cascade Sustainable Energy and follows a new IT employee as he explores the problem and looks to improve the connection between IT and the HR staff responsible for the orientation process. The similarities between a corporate new employee orientation process and the new student orientation processes used at most colleges and universities should allow students to understand the case. The case is setup to allow students to engage in developing ideas for improving the technology supporting the orientation process and to look at the existing disconnect and how it might be solved. This case can also be used to support discussion of recent studies showing that a sizable portion of business leaders have concerns about their IT organization's ability to support the company's business strategy.

1. GETTING ORIENTED

As Ryan finished his breakfast, he thought ahead to what should be an interesting day. Today would be his first day as an IT business relationship manager at Cascade Sustainable Energy. He had learned a little about the job during his interviews but wasn't completely sure what he would be doing. He did know that today would be very different from the first day at his previous jobs where he spent the day being shuffled from office to office to fill out forms, hunted down login credentials, and worked to clear out the accumulated stuff in is new cubical. At Cascade Sustainable Energy, he would join a number of other new employees in a two-day orientation process.

Even though he wasn't completely sure what the new job would involve, Ryan was excited to be working at Cascade Sustainable Energy with the opportunity to help them with their mission to bring green energy to anyone and everyone. As

Ryan drove to the local conference center reserved for the orientation sessions, he thought about the research he had done to prepare for his interview with Cascade Sustainable Energy. Cascade was the market leader in providing green energy solutions to residential and commercial customers. While Cascade had started with solar energy, they now worked with many types of renewable energy including solar, wind, geothermal, and hydropower.

During his interview, Ryan had received a good overview of how Cascade Sustainable Energy worked with their customers and the value of team work. Once a customer contacted Cascade Sustainable Energy, a cross-functional team would work with the customer to develop a solution meeting their needs. This involved working with the customer to identify the mix of energy sources that would work best in the customer's location. The Cascade team also addressed requirements for local zoning, historic preservation commissions, environmental

assessments, and obtained all needed permits. The Cascade team could also help the customer find financing including available tax incentives, model financial payback, and help with marketing campaigns.

As Ryan entered the conference center, he was surprised to see a full breakfast buffet with hot and cold foods rather than the coffee and stale donuts he had expected. Clearly, Cascade wanted to make a good impression on their new employees! At the registration table, he was greeted and given a brief overview of the day. The first activity would be a welcome session. It would start soon, but that left time to grab a snack and look at the packet of information he had been given.

That evening, Ryan looked back on what had been an interesting day. Starting with the welcome session, the day had been active and full of surprises. Cascade Sustainable Energy's three co-founders and most of the company executives presented the welcome session. After the founders gave a brief history of how Cascade Sustainable Energy started, they asked the audience of new employees to help them imagine the company's future. Ryan got a clear idea that the company valued collaboration and wanted all employees, even the newest, to contribute.

The welcome session included an overview of how Cascade worked with their customers. First, they meet with the customer to understand their needs and assess the local physical and political environment to identify a mix of renewable energy solutions for the customer. Then the team considers the finances – payback periods, return on investment, available tax credits, etc. – to focus on the best solutions. Next, the team does a design of structural and electrical details for the project and while assembling the needed components, the team works to obtain the needed permits and if requested, starts a marketing campaign to help the customer spread the word that they are "going green." After delivery, the components are assembled, tested, and put to work generating power. A key part of the overview was the focus on how each team members focused on their specific specialty area but also worked collaboratively with the team to deliver a successful implementation for the customer.

After this, there were sessions where new employees learned more about their designated specialty – Ryan joined a group focused on the technology tools used by the Cascade field teams and the technology provided to let Cascade's customers monitor their green energy systems. A couple of experienced field team members led the session and worked through the IT details of a sample customer project. Ryan thought it was interesting that all of these tools were cloud hosted and developed by third parties rather than by Cascade's internal IT team.

In addition to the detailed session on their specialty area, the new employees also rotated through sessions covering the other specialty areas including finance, marketing, environmental (Ryan now knew his parent's house wasn't a good candidate for wind power but had some potential for solar power), and all aspects of design and engineering – mechanical, electrical, and civil. The focus of these sessions was not to make everyone an expert in every area, but to provide some basic cross training. Once again, the importance of team work and collaboration were stressed.

Even though it had been a long day, the orientation process had energized Ryan and he felt excited to be part of the Cascade team. Tomorrow promised to be another busy day with teams of new hires working through a simulated customer project. After that, there would be a "team-building" activity – rumor had it that the company executives would be joining them for a scavenger hunt around town.

Although it had been a good day, Ryan had noticed a number of ways that technology could help improve the orientation process and he wanted to make some notes. For example, he noticed that participants received numerous paper documents. This seemed odd for a company that valued the environment. He had also noticed that the orientation staff did not always have current information. In his session focused on IT tools, a couple of people did not belong there and the orientation staff had to re-direct them to a different session. There had also been a session in a room that reminded him of his college computer lab where he was parked in front of a computer and given a paper list with links to different online forms he needed to completed to sign up for benefits, payroll direct deposit, and other standard new employee paperwork. Finally, there was a poor mix of new employees in the different specialty areas and Ryan wondered how that might affect tomorrow's customer project simulation. He had taken some finance classes in college, but hoped he did not have to fill the role tomorrow!

Questions to consider:

1. How could technology be used to improve the orientation process?
2. What is the value of the orientation process for the new employees and for the company?
3. What is the cost of the orientation process?

2. FIRST DAY IN THE OFFICE

After his orientation, Ryan was eager to get started. His first day in the office was off to a good start. A desk was waiting for him along with a laptop that was set up and ready to use. He had logged into his e-mail and found a message from Nick, his boss, welcoming him and telling him to stop by his office once he had settled in so they could talk about Ryan's role as an IT business relationship manager.

Ryan sent off a quick e-mail to a couple of people he'd met at the orientation confirming plans to meet up that night and set off in search of Nick's office. Fortunately, he still remembered the layout of the IT offices from his interview visit and easily found Nick's office.

Nick welcomed Ryan and they briefly talked about the orientation sessions – Ryan was the first corporate office IT employee to go through the orientation process. Then they got down to business – what exactly would Ryan be doing? As Nick explained it, the IT business relationship manager position came out of a recent external review of all of the operations areas in Cascade's corporate headquarters. Apparently, in talking to other areas – finance, human resources, purchasing – there were comments that IT did not have a good understanding of these areas' strategic priorities and was hindering progress towards corporate goals.

Nick commented that this had been news to IT, but "you know consultants – they have to find some problems to justify their fat fees, and IT is always an easy target." One recommendation offered by the consultants was to extend Cascade's use of the IT Infrastructure Library (ITIL) by developing the Business Relationship Management process. Nick rambled on some more about consultants while Ryan remembered that one of his college classes had covered ITIL. He'd have to do some research to remember the details, but he did recall that business relationship management focused on making sure that IT understood the customers' needs and was delivering the needed services.

Ryan turned his attention back to Nick in time to hear him comment that he did not really see the need and expected that Ryan would really serve more as a business analyst. Ryan remembered his ideas about how technology might improve the orientation sessions and suggested that he could meet with the orientation staff to discuss these. Nick thought this was a good idea and told him to give it a try.

Ryan headed back to his desk. He needed to work on his ideas about how technology could improve the orientation process. In addition, he thought the orientation paperwork he had received might have the contact information for the person responsible for the organizing the orientation sessions.

Questions to consider:
1. Why does the IT organization need to understand what the other parts of the business do?
2. What might happen if IT continues to hinder progress towards corporate goals?
3. What do you think about Nick's comments about the consultants?

3. RELATIONSHIP BUILDING

Ryan had found the contact info for Maggie Franklin in his orientation packet and setup a meeting. Maggie worked in the Cascade HR department as the Onboarding Manager. As Maggie explained when they met, her job started once a candidate had accepted an offer from Cascade. Her department's goal was to make new employees feel at home at Cascade and turn them into productive, engaged employees as quickly as possible. She explained that both aspects of this were important – the company leaders were very interested in making sure the new employees were "earning their pay" as quickly as possible but also focused on engaging employees so that they would stay at Cascade.

Ryan told Maggie that he had greatly enjoyed the orientation process and that it was better than the welcome he had received at the other companies. He mentioned that he had some ideas for how technology could improve the orientation process.

Maggie was interested to discuss his ideas, but as he worked through his list, he realized that Maggie had already thought of most of them. Since it seemed like she was very interested in using technology to improve the orientation process, Ryan asked when they expected to introduce some improvements.

Maggie admitted that she would love to implement some of the ideas but first wanted to just get the current system working. She described several problems that caused additional work for her staff and complicated the orientation sessions. One issue was that while her staff could set limits on the number of people with each specialty who could register for an orientation session, the system seemed to randomly ignore these. Maggie mentioned that this had affected Ryan's orientation session, which had too many electrical engineers and not enough marketing and finance specialists. She also mentioned a periodic issue where a new hire would have to cancel their registration for an orientation session, but this did not result in the cancellation of the person's hotel room, resulting in Cascade paying for an empty hotel room.

Maggie admitted that it was a challenge to get IT engaged in a discussion about changes to the process. She mentioned that since Cascade was mostly hiring new college graduates, they spent the summer holding orientation sessions and then in the fall would try to get IT engaged in making improvements to the orientation system.

The first challenge was finding someone in IT to talk with. She usually started with the last person who had done work on the orientation system, but always found that they had been moved to another project and did not know who was currently responsible for the orientation system. After several phone calls or e-mails, Maggie could manage to track down a manager who would agree to talk to her.

Then she would need to explain the orientation process and the orientation system. The manager would then spend several weeks trying to learn what he could about the system and who had done work on it. Eventually, they would be ready to discuss what changes Maggie wanted. Ideally, this would include both new features as well as fixes to existing functionality, but time constraints usually led to a focus of fixes at the expense of new functionality. IT then prioritized the work using a process that seemed to involve Maggie's boss, the VP of Human Resources, and other VPs.

Once work on the orientation system was prioritized, the IT staff member assigned to the project would eventually contact Maggie. Unfortunately, it was always a different person, so Maggie would need to spend time explaining the onboarding process and explaining how the orientation system worked. She was surprised that there wasn't much documentation on the system.

Maggie noted that work on fixes and improvements to the orientation system would typically start in mid-winter and since planning and setup for the next summer's orientation sessions usually started in mid-spring, this did not leave time to implement many of her requested changes. Adding in the winter holidays and the fact that the IT person assigned was often was pulled off to work on other projects, Maggie said the improvements were usually limited to fixing any major problems found in the last orientation system and adding one or two small new features.

Maggie commented that a few months ago, the VP of Human Resources (HR) had talked to the CIO about the ongoing challenge of improving the orientation system and IT had agreed to do a review of options for improving the system. This has resulted in an in-depth discussion with IT about the desired features for the orientation system and a promise to review the options for making these features available for the orientation process. The VP of HR had also provided information about a couple of promising vendor solutions that Maggie had seen at an HR professional's conference and asked IT to include them when they reviewed the options.

Ryan asked if Maggie had seen the results of the IT review of options for the orientation system, but she had not. Ryan said he would try to track them down, thanked Maggie for her time, and headed back to his office.

Questions to consider:
1. What problems can you identify in Maggie's interactions with IT?
2. Who should be responsible for fixing these?
3. What skills are needed to fix these problems?
4. What is Ryan thinking after his meeting with Maggie?

4. REVIEWING THE OPTIONS

Back at his desk, Ryan found an e-mail from his boss. Nick had remembered that IT was working on a review of options for the orientation system, and offered a couple of people who might know more about the effort.

After a couple of tries, Ryan found Don Katz who said he had finished the review a few weeks ago but had not had a chance to send it to the VP of Human Resources. He offered to send the report to Ryan and let him deliver it to HR.

A day later, Ryan had a spreadsheet titled "Orientation Options Analysis" to review (see Appendix 1). From what Ryan could see, the analysis looked at how to implement the orientation system in four systems that Cascade currently used – the Customer Relationship Management (CRM) system, the Enterprise Resource Planning (ERP) system, a conference scheduling system, and a more general room and resource scheduling system. For the ERP system, the analysis actually considered the next release of the ERP system. Ryan had heard that work on the upgrade was underway, but that it was a "big" upgrade.

Reviewing the analysis, Ryan was a bit puzzled. It was hard to tell which, if any, of the options were recommended. There was no information about the relative importance of the requirements, but a rough count of the number of requirements met seemed to indicate that the solution based on the new version of the ERP was the best fit.

Even if the next ERP release was the best of the four options, it was not clear how good an option it was. For several of the requirements, the solution appeared to involve custom reports, interfaces, or processes like extracting data and using mail merge. Would these be acceptable? Ryan was also concerned that the analysis had no indication of the effort needed to build any of these solutions. While there was value in a better orientation system, he expected cost would be an important consideration. And what about the vendor solutions that Maggie had found? It didn't look like these had been evaluated. Ryan headed off to see if he could find some additional information before he met with Maggie to discuss the analysis.

Ryan managed to find Don Katz and asked if he had time to discuss the orientation options analysis. Don said he was between meetings and could talk to Ryan for a few minutes. Ryan noticed that Don's office had a large flat panel monitor on the wall displaying lots of data and chart. He was curious and wanted to better understand Don's role in the IT organization, so he asked about the data display. Don was excited to talk about it and explained that this was the new monitoring system that IT was building. He mentioned that IT had put a lot of work into it over the past year, but had finally gotten it working. The next step was installing similar displays throughout the building so that users could see the current status of all IT systems.

He showed Ryan how the display showed the status of every server in the data center so that at a glance anyone could see if there were issues. He asked Ryan to name a server so they could check its status. Naturally, Ryan asked about the orientation system, but unfortunately, he had no idea what server it was running on. After a few minutes of rummaging through the papers on his desk, Don was able to find a chart that showed what server the orientation system used and they were able to find it on the display. Ryan was impressed but thought it might be useful to view the data based on the systems that IT supported rather than the servers.

Ryan finally brought up the orientation system and mentioned Maggie's interest in getting the current system to work. Don was dismissive – "There's nothing wrong with the system, the users just need more training." Ryan didn't know what to say, so he asked about the most recent project to update the orientation system and the limited progress in adding new features. Don agreed that the project had suffered since resources were needed for other more important projects like the IT monitoring project.

Ryan moved on to ask about the solutions analysis. Don agreed with Ryan's interpretation that the solution based on the next release of the ERP met the largest number of requirements and would be the best fit. When Ryan asked when a new orientation system based on the next ERP release might be available, Don didn't have a clear answer. He explained that first, they needed to complete the upgrade. Since they were still in the planning stage, he guessed it would be six to nine months, but the new release included major changes to the development environment and tools used in the ERP system and it would take time for IT to get up to speed on these. He also noted that since orientation wasn't that important, it would be a low priority and his team might not get to it for a year or more.

An in-house developed solution wasn't sounding very promising, so Ryan asked about the vendor solutions that the VP of HR had asked IT to review. Don mentioned that to review vendor solutions they would have had to develop and distribute a Request for Proposals (RFP) and he had decided that wasn't worth the effort since he expected one of the in-house developed solutions would be sufficient. Ryan was a little puzzled since it sounded like the VP of HR had specifically asked IT to consider the vendor solutions. He didn't think it would be useful to mention that so

he thanked Don for his time and headed back to his cube.

Questions to consider:

1. What do you think of the content and presentation of the options analysis document?
2. What is the best option, and why?
3. How would you improve the presentation of the options?

5. Next Steps…

Back in his cube, Ryan considered his next steps. He should probably meet with Maggie to share the options analysis and get her view on the options. Don had confirmed that IT saw the solution based on the next ERP release as the best option, but it still wasn't clear if it was a viable option since it didn't clearly meet all of the requirements, and then there was the issue that it would be a year or more before the solution was available. Could Maggie live with the current system for one, or maybe two more summers?

And what about the vendor solutions? From Maggie's description, she clearly expected IT to look at these. He remembered learning about RFP processes in his IT strategy course, and from what he knew, it shouldn't take a lot of effort to do an RFP for a smaller system like the orientation system, especially since Maggie already knew about a couple of potential options. Ryan made a note to refresh his memory about RFPs and e-mailed Maggie to setup another meeting.

Maggie greeted Ryan and welcomed into her office. She asked how he was enjoying his new job and he told her it was interesting and he was enjoying it. He gave her a copy of the spreadsheet with IT's evaluation of the options for the orientation system. He'd e-mailed her a copy a couple of days ago but wanted to make sure she had a copy to review as they discussed it.

Maggie commented that she had reviewed the analysis, and like Ryan, found it hard to tell whether any of the options would meet her group's needs. She noted that several of the items mentioned as "possible" or requiring "customization" were key features and the assessment didn't give her a clear indication that these features would be included. She also noted that the assessment hadn't offered any details about when a new system might be available, so Ryan told her it might be a year or more.

Maggie agreed with Ryan that it looked like the solution based on the next ERP version was the most promising option, but had specific concerns about it. A colleague in the HR department had recently attended a conference, and knowing Maggie's interested in a new orientation system, had scouted the vendor area for promising solutions. The colleague had talked to several vendors and found a couple of additional vendor options. He had also talked to Cascade's ERP vendor about using the ERP system as a starting point for developing an orientation support system. The vendor had strongly recommended against that approach. Instead, they suggested a couple of standalone orientation systems that could be easily integrated with current and future versions of Cascade's ERP system.

Maggie asked if Ryan knew whether IT had looked at the two vendor solutions that she had previously identified. Ryan tried to think of a diplomatic way to tell her that they hadn't but couldn't come up with one, so told her "no." After some discussion, they concluded that investigating vendor solutions seems like an obvious next step. "Ok," Maggie said, "let's do an RFP."

Questions to consider:

1. Should Ryan and Maggie move ahead with an RFP?
2. What will Nick and Don say if Ryan wants to do an RFP?

EDITOR NOTES: Teaching Notes are available for this case, please contact the author directly.

Appendix 1

		Potential Solutions			
	Requirements	**CRM**	**Next ERP Release**	**Conference Software**	**Scheduling Software**
1	Handle 500 new employees and 10 Staff Users	Need to be tested	Yes (can handle number but need to create new employee page)	Need to be tested. (Sessions would be open to all)	Yes (Sessions would be open to all)
2	Integration with tablet use for New Employee Check-In.	Has web interface	No, but could write a web interface	Has web interface	Has web interface
3	Messaging (email) ability to notify new employees	Yes	No, but this feature can be achieved by extracting data from specific pages using the data extract functionality and using mail merge feature in Microsoft Word, Outlook etc.)	?	Yes
4	Create affinity groups (new employees from the same university or with the same job function)	Yes	Yes	No, cannot assign small groups	No
5	Sign-in from Corporate Portal	Yes, single sign-on from Portal if we develop new employee web page	Yes, single sign-on from Portal if we develop new employee web page	No, but may be possible	No, but may be possible
6	Collect several pieces of new employee information/preferences related to orientation (e.g., session dates, housing preferences, dietary restrictions, professional certifications, etc.)	Yes	Yes	Yes	Yes

| | Requirements | **Potential Solutions** | | | |
		CRM	Next ERP Release	Conference Software	Scheduling Software
7	Appear as a checklist item in the corporate portal	A link is possible. To mark completed would require customization	A link is possible. To mark completed would require customization	A link is possible. To mark completed would require customization	A link is possible. To mark completed would require customization
8	Import new employee information from ERP (e.g. job offer acceptance status, address, specialization)	No, but we can write a script to accomplish this feature.	No, but can be written with new employee web page	No	No
9	Write information to ERP from the system (e.g. orientation session number)	No, but we can write a script to accomplish this feature.	No, but can be written with new employee web page	No, but we can write a script to accomplish this feature.	No, but we can write a script to accomplish this feature.
10	Send an auto-confirmation when new employee registers	Yes. But only for initial registration. No confirmation for changes in registration	No, but can be written with new employee web page	Unknown	Yes
11	Assign housing	No	Yes	yes	No
12	Run reports downloadable in .csv, .pdf, .xls	Yes	No, Baseline version has limited reporting functionality. But we can modify or write extract that can be downloadable in .csv, .pdf, .xls formats.	Unknown	yes, some standard reports but some may need to be developed
13	Includes a test environment for annual maintenance	No, CRM does not have a test environment for users but can be created.	Yes, has a test environment	Unknown	No
14	Allow new employees to change some of their information (e.g. address, emergency contacts) and updates ERP records	No	No, but customization possible	No	No
15	Show new employees who are not registered for orientation	Yes	Yes	Report may be possible	Report may be possible

	Requirements	Potential Solutions			
		CRM	Next ERP Release	Conference Software	Scheduling Software
16	Allow collection of different info for new college hires and professional hires	Yes	Yes	Yes	Yes
17	Send a daily status report of registration numbers	Yes, custom report is possible	Yes, custom report is possible	Report may be possible	Yes, custom report may be needed
18	Display new employee info on a page, including notes fields for staff to edit. Allow the following administrator actions 1. Look up a new employee 2. Enter new employee orientation data (e.g., sign up someone over the phone) 3. Manually add a new employee who isn't found in the system 4. Look up canceled new employees (who have accepted then declined employment offer) 5. Specify/Change capacity of a session 6. Specify/Change dates of a session 7. Specify orientation hotels/rooms for overnight accommodations 8. Specify/change secondary specialty that new employees may select	No, But a custom application can be written to accomplish these features.	Yes, except change specialty	Partial	Partial
19	Can connect to existing online training for corporate policies (ethics, etc.)	No, but a custom web page can be created	No, but customization could be written	No	No
	Reporting requirements				

		Potential Solutions			
	Requirements	**CRM**	**Next ERP Release**	**Conference Software**	**Scheduling Software**
1	Same as the existing system currently offers	Yes, but custom reports would need to be written	Yes, but custom reports would need to be written	Unknown	Yes, but custom reports would need to be written
2	The ability for orientation staff to create custom reports.	No, would require IT effort	No, would require IT effort	No, would require IT effort	No, would require IT effort
	System and Integration Requirements				
1	Integrate with ERP (realtime desired, nightly required)	Yes, would have to be written	Yes	No, but could be developed	No, but could be developed