CU I&E Submission: Standard Operating Procedure Tool [1]

Who

Our office has work-groups that focus each year on specific projects, and the idea for this tool came from the 'Innovation and Technology' work group made up of Michaela Erickson, Kristine Grosland, Kelly Mason & Rebecca Fazzari. However, the ongoing development of this process tool is truly a team effort by all members of CU Conference Services (names below).

- Michaela Erickson, Business Services Manager
- Kristine Grosland, Conference Coordinator
- Kelly Mason, Conference Coordinator
- Rebecca Fazzari, Assistant Director
- Dan Dykstra, Director
- Christina Patarino, Conference Coordinator
- Virginia Schultz, Conference Coordinator
- Nikki Joy, Registration Services Coordinator
- Lauren Clark, Sales & Marketing Coordinator
- Andrea Kragerud, Assistant Director

What

Our Standard Operating Procedures (SOP's) tool provides a centralized location for information detailing our department operations, including everything from how our office conducts daily tasks, to how we serve our clients from beginning to end. We have created the SOP's utilizing Microsoft OneNote, a cloud-based application that allows a mass of information to be organized and accessed easily, while having the ability to integrate valuable tools like Word, Excel, Visio, and web-based links.
Some of the greatest benefits of this tool include:

- Reduced learning time for new and current employees with increased understanding of roles & responsibilities within our office
- Easier understanding of CU policies and procedures as they relate to our particular operation
- Consistency in the performance of duties, helping guarantee excellent customer service
- Overall business continuity and efficiency with the ability to cross-train and learn easily, while avoiding duplicated responsibilities

Why

Outdated & duplicated information, forgotten processes, constant changes & too many emails! All of these issues drove the need for a consolidated place for information.

Our operation relies on every single person to work together to get a job done, with each of us having a unique way of doing things. However, there is always a standard procedure that needs to be followed, and the SOP's provide access to that standard procedure, empowering each to feel confident in their position.

We no longer fumble around new staff training as the SOP guides us through each piece of our operation allowing new and current staff to see the big picture. Process changes are no longer dreaded because they can be adapted to quickly, using the SOP's as a reference to what the change is and where it comes into play. Standardized processes & policy can be referred to and understood, giving confidence that the most up to date information is provided.

Where

The CU Conference Services team, along with our student employees, are currently using this tool. We are also working on sharing this tool with the Residence Life staff that work very closely with us during the summer. Because Microsoft is a cloud-based application, OneNote can be accessed by anyone we invite, anywhere, on a mobile device or via desktop. If something is modified, then it will sync everywhere instantly, allowing real-time info to be provided.

When

We started the creation of the SOP's in the Fall of 2016, and we have been working diligently to input the processes throughout Winter & Spring 2017, sifting through the massive amount of information that we have in our emails, shared document drive and in our heads! Simultaneously we have been reviewing processes and making necessary changes as we input the info, which has provided a unique opportunity to discuss each piece of our business operations, to ensure efficiency & effectiveness.
The development of the SOP's will be on-going throughout the year as we finalize the framework and modify the content. Eventually, the SOP's will be maintained with updates as necessary, and the initial investment of time will have been well worth it.

Submitted by

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