

Decision Diagram Explanation

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The Client Management Decision Diagram was constructed to serve as a reference guide for training purposes and new-hire use in assistance with quickly identifying decisions that would lead to the processing of a client request at the Truman State University campus reservations office. The Center for Student Involvement and Student Union Administrative office have been working in the same department under the same management for the past several years. With an organizational structural change to begin the merger of these campus departments that will be taking place in the upcoming semester, there was a major shift in responsibilities for all office employees. The new responsibilities require all employees to participate in processing reservation requests. This issue prompted the need to identify a simplified procedure for routing requests and determining which members of the staff would take responsibility for certain requests and reservations. This new procedure involves the sorting and categorizing of requests based on their determined likelihood for complexity.

The diagram is organized in steps that should occur nearly instantaneously in the processor's mind to deal with client's requests and ensure they have all of the required information and completed steps prior to processing the reservation. The steps involve questions that employees can ask themselves to help make the determination of the routing and assignment procedure. Step A works to identify whether the request belongs to a specific office team or if it should sort through a ranking classification as a normal request would. If the request is not on behalf of a client external to the university and does not involve outdoor space, the request is classified as normal and proceeds to step B. Step B consists of a complexity ranking based on six questions relating to the request. Questions with "YES" answers typically indicate that the request may have an element of complexity. The goal for this classification is to identify requests

that require a more detailed evaluation and should not be processed immediately by employees who do not possess additional training related to reservations processing or event management. Those requests that receive the answer of “YES” twice or more fall on the complexity scale and are then identified as either Intermediate or Complex based on the quantity of “YES” answers they received. 2-3 “YES” answers are considered Intermediate Complexity while 3-6 “YES” answers are considered complex. Step C works to identify what level of complexity will be assigned to what staff member for processing based on that particular staff member’s level of training. Senior Staff and Junior Staff are those employees who have received thorough training and who have worked in the office for a certain time period or have been otherwise identified by a member of the professional staff. Complex reservations are sent to Senior Staff, Intermediate Complexity to Junior Staff, and Simple requests are immediately processed or placed in the reservation inbox by any office staff member. As a contingency, if the reservation has not been classified, it is sent to the Team Lead for processing with questions and then would either be processed or delegated. Step D again works to identify what level of complexity will be assigned to what event staff member for processing based on that particular staff member’s level of training. It also offers an option for contingency should an assignment not occur. Step E consists of basic request processing. It is comprised of 6 main questions and additional steps that require specific decisions on behalf of the processor to successfully complete a request. Each step must be completed individually in order advance and two of the requests have secondary levels to signify additional considerations that must be made prior to the final decisions made before processing a request. Lastly, Step F provides an example of an intermediate situation and the

questions that the staff member should ask in that situation to determine the outcome of the detailed request.

Overall, the diagram serves to provide a visual representation of the procedure that will take place for every reservation request that is brought to the office. As a training tool, the diagram will serve the primary purpose of assisting the communication of responsibilities by providing a visual representation. In addition, the organization of the information will be useful as a reference guide included in the training materials and located with the other informational sheets that are used for answering questions relating to building and room details when specifics cannot be feasibly remembered. It is my hope that this tool will be immediately useful in the office for all staff as it communicates new policy but that it can also grow to include additional details and contingencies that fit in the simplified visualization that I have constructed.