Transforming the Student Experience: Tools and Techniques That Matter

January 31, 2017

TSI – Transforming Solutions, Inc.

www.transforming.com
Objectives

You will leave this work session:

1. **Thinking** differently about your customers/students/constituents;

2. **Understanding** what your customers go through;

3. **Knowing** how to use a tool to define the current customer experience.
Warning
Caution

Is a student a customer?

How about a parent?

Grandparent?

A corporation?

NOTE: Will refer to these key constituents as “Customers”
“We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.”

In highly competitive environments, brands are judged not for product price or quality, but for the experience they build around it. (Jeff Bezos, Amazon)
Agenda

• Start
• Learn about Customer Experience: Definition and Analysis
• Finish
Recent Higher Education Clients

- The University of Memphis
- Cal Poly
- University of Illinois
- SIUE
- United Arab Emirates University
- Northern Illinois University
- AUM (American University of the Middle East)
- Follett
- IES Abroad
- UNT Health Science Center
- Illinois State University
## Representative Clients

<table>
<thead>
<tr>
<th>Client</th>
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<tbody>
<tr>
<td>Abbott</td>
<td>SAGENT</td>
<td>aveva</td>
<td>astellas</td>
<td>PHONAK</td>
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<tr>
<td>Pepsico</td>
<td>ContextMedia</td>
<td>cap</td>
<td>F5 Networks</td>
<td>Groupon</td>
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<td>Refinery25</td>
<td>Hyatt</td>
<td>IES Abroad</td>
<td>HP Packard</td>
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<td>TravelClick</td>
<td>Aerosoles</td>
<td>BuzzFeed</td>
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## What We Do: TSI's Core Service Offerings

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Customer Experience (CX) + Process Improvement (PI)</strong></td>
<td>Designing an experience that leads to a competitive advantage, while building a culture of continuous improvement that streamlines operations, enables growth, and creates value.</td>
</tr>
<tr>
<td><strong>Program / Project Management</strong></td>
<td>Assessing and improving all aspects of Portfolio, Program, and Project Management (P3M) to improve project delivery, and to execute the strategy of the organization.</td>
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<tr>
<td><strong>CX, PI and Change Management Training</strong></td>
<td>Training employees to assess and improve organizations; creating self-sufficiency in an organization and remove barriers to change.</td>
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<tr>
<td><strong>IT Strategy</strong></td>
<td>Creating a technology roadmap; Aligning technology to ensure technology enables the strategy of the business.</td>
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<tr>
<td><strong>Software Evaluation / Technology Assessments</strong></td>
<td>Objectively assessing critical technology; ensuring strategic alignment and evaluating ERP Platforms.</td>
</tr>
<tr>
<td><strong>Organizational Design and Change Management</strong></td>
<td>Aligning “the people” dimension and ensuring Delivered Results “Stick” by maximizing adoption - Change Management is critical to project success.</td>
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#Trending

- Customer Experience
- Student Experience
- Alumni Experience
- Faculty Experience
- ...

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• Why do you think this AWARENESS of Customer Experience has been receiving the attention it has?
Hypothesis

The “better” you can define and consistently deliver your customer experience, the:

• More LOYAL your customers will be
• More likely to tell others about it
• More likely to “buy” again
• Less likely to leave you
• More likely to pay more

AND

• Revenues will grow
• Costs will decrease
• Profits/Budget surplus will grow.
Correlation?

- Demand: Number of Alternatives/Competitors for that “customer”
- Is this a “high emotion transaction”? 
- Other?

![Graph showing correlation between expectations and amount spent.](image)
Target Benefits

• Enrollment
• Retention
• Cost per Student Acquired
• Cost per Student Admitted
• Improvement in Student Satisfaction
• Alumni passion
• Quality of education (as level of bureaucracy diminishes)
Environmental Challenges
CX Components

- Desired “Unfair Advantage”
- Current State
  - Personas
  - Expectations
  - Environment
  - Process/Flow
  - Roles/Org Structure, and
  - Technology
- Desired Experience
- What else?
• What does a prospective student experience when (s)he has a question about your institution?
• To apply to your institution, obtain information about financial aid and scholarships, seek availability about housing, understand the total cost of earning a degree, learn about potential employers, how many different departments and/or people might this prospective student have to engage with?
  • 1?
  • 2?
  • 3?
  • Possibly even 4 or more?
• When applying, then registering for classes, then housing, and finally financial aid... how many times would one student provide the same information (name, address, SSN, parents’ info...) to your institution?
• How disparate or coordinated is the information your institution shares with the student?
How Do You Rate?

1  2  3  4  5+

ETDBW  HTDBW
# Tool #1: Touchpoint Count

<table>
<thead>
<tr>
<th>Processes</th>
<th># of Touchpoints (unique people or roles)</th>
<th>List of Touchpoints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruit to Admit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admit through Registration and Housing</td>
<td></td>
<td></td>
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<tr>
<td>Request Counseling and Change Major</td>
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Your Perspective?

• Maintain enrollment for this academic year?
• Create zealots that are loyal to the institution, want to dress their newborns as your school mascot, post those pictures on FB, contribute $ to the institution, brainwash their kids to go there....
• What are you doing to create loyalty to:
  – Prospective students
  – Fresh, Soph, Jr. Senior, Masters, PhD
  – New grads
  – Older Alumnus, or
  – Other constituents
• What are you doing to that diminishes their enthusiasm for the institution?
The Nickel Question

• Who are your constituents and what makes them unique?
• What are the moments that matter to them?
• How can you consistently, cost effectively deliver?
Your Perspective?

• What would the experience “look” like if it was designed by:
  – Incoming Freshman
  – College Transfer
  – Military Student
  – Grad Student, or
  – Professor?
CX Foundation/Layers

- Optimized
- Improving
- Consistent
- UA Defined + Current State is Understood

Maturity Evolution
Customer Experience Approach

Fact-find and develop an accurate depiction while being considerate of customer segments, channels and key scenarios.

Create: Current Customer Experience Map

Analyze: Understand Moments That Matter (MTM)

Learn the MTM, Analyze (SWOT and/or OFI); Understand your desired Unfair Advantage (UA).

Design: Tailored and Transformed Customer Experience

Design your desired CX by architecting an experience around the MTM and SWOT.

Implement: Pilot, Test and Improve

Develop a Business Case/CBA, Define a Proof of Concept/Segment, Pilot/Deploy, adjust/reconfigure if necessary...
UA: Summary of Key points:

Function of: Quality × Originality/Uniqueness × Service × Convenience/comfort/location × Price

Operating in the context of your target customer segment(s) and your service offering

Now you have to incorporate this into key areas of your institution
Tool #2 – Your Unfair Advantage

Netting it out – Describe your NEW Unfair Advantage. Consider the following format:

We (do this/address this/provide this product and/or service)

HOW:

(add clarifying descriptors including how it is better, faster, cheaper than other options)

So that you benefit

(add clarifying descriptors)

Augment by a memorable story and example (potentially this is where you tailor it by industry, company size, region, etc.)
Three Strategies of Market Leaders
from "The Discipline of Market Leaders" by Treacy and Wiersema

Customer Intimacy:
- Deliver what specific customers want.
- Defined by relationship, flexibility, and "personal touch."
- Ex. Nordstrom

Product Leadership:
- Create the best products or services.
- Defined by invention and individual creativity.
- Ex. Apple Computer

Operational Excellence:
- Deliver quality, price, and ease of use.
- Defined by consistency, efficiency, and discipline.
- Ex. Southwest Airlines
CX Map – 3 Parts

A. Voice of the Student
B. University Analysis
C. Future State Design
Tool #3 – Customer Experience Map

Customer Experience Map: Inquire about admissions; Campus visit
Current State

Voice of the Student
Tool #3 – Customer Experience Map
Gaps – How to Capture?

• Look and Feel
• Smell
• Sound
• Logistics, or
• Other dimensions?
Misconceptions + Mistakes

- CX = UX
- Customer Loyalty = Customer Experience
- Focusing only one part of the process
- Not expecting tangible value
- Doing this without outside expertise
  - Staying in your industry
  - Using people who are too close
Customer Experience Approach

Fact-find and develop an accurate depiction while being considerate of customer segments, channels and key scenarios

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Design your desired CX by architecting an experience around the MTM and SWOT

Develop a Business Case/CBA, Define a Proof of Concept/Segment, Let ‘er rip, adjust/reconfigure if necessary...
1. Know what your UA is (or should be)
2. Know Current State
3. Research competition and other sources of influence
4. Think in “lifecycles;” holistically understanding the entire end-to-end set of related processes
5. Define key Personas
6. KNOW what moments matter (MTM)
7. Design amazingness
8. Plan the execution with MTM in the forefront.
Next Steps
Next Steps

• Do you know the MTM (and related processes) where you are falling down the most consistently?
• If yes, start there and follow the process on slide _24_.
• If no, what fact-finding can you do?
  – Online survey?
  – Focus groups?
• Would an outside group that simply runs several focus groups, leads an online survey, performs some objective fact-finding and creates the CX map (30 day project)?
Questions?
Contact TSI

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