

Introduction

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Prepare to Engage

1. Please take out your smartphones (or you can do this from your computer)
2. Open a browser
3. Go to www.slido.com

And enter the eventcode: #1903

Also, see Zoom Chat Link.

Be prepared to participate!



Objectives

- Introduce the concept of constituent experience specifically to higher education
- Discuss CX trends within and outside higher education
- Introduce methodologies for improving your CX on campus
- Discussion/Q&A

Dan Feely – TSI's President

- 30+ years of technology strategy, process improvement and OCM
- Led University of Chicago, UI, NIU, ISU and other Higher Ed projects
- Led work at Groupon and fast-growing pharma and high tech companies
- Former President of NIU Executive Club
- Started career at Andersen Consulting; launched TSI in 1995
- B.S. Northern Illinois University – Operations Management and Information Technology



Jessica Schein – Program/Business Analyst

- Work semi exclusively with our higher education clients: University of Chicago, St. Edward's University
- Performed extensive performance-oriented research with national higher education change network (CIRTL Network)
- Lead process improvement/administrative assessment at major research university
- Independent consultant in the Chicago Ed Tech space
- B.S. Butler University, M.S. Purdue University
- Ph.D. candidate in Higher Education Administration



Firm Profile

- Started in 1995 to help **growth-oriented** companies and **progressive** higher education institutions transform, be more efficient, select/use technology and be more effective and service-oriented
- Chicago (and San Francisco) based and service clients domestic and global
- 25+ Experienced Consultants, many from “Big 4” and other “brand name” consultancies
- No relationships with software vendors that would cause a conflict of interest
- **We deliver result focused, pragmatic solutions that withstand the test of time.**



The TSI Difference in Higher Education

WHO WE ARE:

For *progressive* institutions with a recognized need for *change*, TSI stands out because our *experienced thought leaders* will *closely collaborate* with your team and leverage our *cross-industry experience*.

CORE SERVICES:

- Streamlining processes, reducing unnecessary operating costs and **improving the constituent's experience**
- Assessing and improving the function of advancement
- Building and enhancing shared services, program/project management and other important operational and technology capabilities
- Evaluating and improving the function of Information Technology
- Managing mission critical projects; organizational change management.



Recent Higher Education Clients



THE UNIVERSITY OF
MEMPHIS



UNT HEALTH
SCIENCE CENTER

UNIVERSITY OF ILLINOIS
CHICAGO • SPRINGFIELD • URBANA-CHAMPAIGN

**UNITED ARAB
EMIRATES UNIVERSITY**

CAL POLY
SAN LUIS OBISPO



Northern Illinois
University

SIUe

IES
ABROAD.



ST. EDWARD'S
UNIVERSITY
AUSTIN

ILLINOIS STATE
UNIVERSITY



**CAREER
EDUCATION
CORPORATION**

DeVry
University

AUM
American University of the Middle East

Follett

**AMERICAN
INTERCONTINENTAL
UNIVERSITY™**

**EASTERN
ARIZONA**
COLLEGE

Representative For Profit Clients

 Abbott A Promise for Life	 SAGENT	 astellas Leading Light for Life	 avea	 PHONAK
 PEPSICO	 the marketing store	 ContextMedia	 cap	 Walgreens
 REFINERY29	 HYATT	 Old World Industries	 GROUPON	 AboveNet
 TravelClick	 AEROSOLES	 BuzzFeed	 IES ABROAD	 LifeFitness

Our clients include well-known brands, fastest-growing companies and progressive universities.

Tools

Today, what approaches or tools do you use to change or improve how your institution works?

https://docs.google.com/document/d/1HMu2sseHay65NNEiRKiWfv72hZpFnr28YraF4L5_i-w/edit?usp=sharing

JS3

How would YOU define constituent experience?

“Customer experience needs to be seen as all these things, and more. It is the sum-totality of how customers engage with your company and brand, not just in a snapshot in time, but throughout the entire arc of being a customer.” *(TSI suggestion) starting with being a prospective customer.*

Adam Richardson, HBR

Go back to slide

JS3 Interactive question?

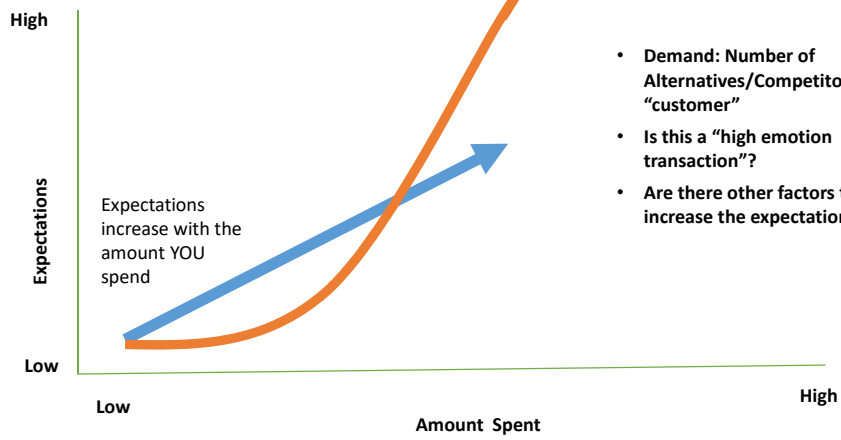
Jessica Schein, 8/23/2017

Constituent Experience in Higher Ed

- University constituent groups are *diverse* and *dynamic*!
 - **Internal Constituents**
 - Those who work in your unit
 - **External Constituents**
 - Faculty and staff
 - Students
 - Prospective students
 - Alumni
 - Donors
 - University Hospital Patients
 - Sport fans
 - Arts supporters



Correlation?



- Demand: Number of Alternatives/Competitors for that "customer"
- Is this a "high emotion transaction"?
- Are there other factors that increase the expectations?

Higher Ed Trends in CX

Student Experience

- Retention
- Enrollment
- Student Services

Constituent Experience

- Employee Experience
- Alumni Relations and Development
- Athletics



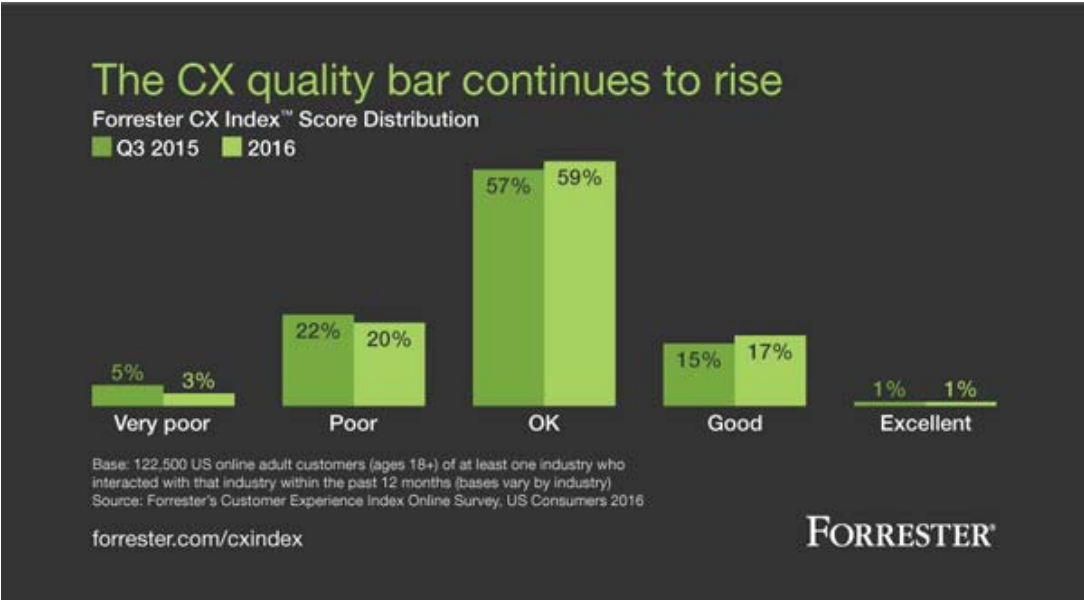
Journals and Resources

- Journal of Hispanic Higher Education
- Studies in Higher Education
- College Student Affairs Leadership
- Nurse Education in Practice
- Times Higher Ed
- Chronicle of Higher Ed
- Inside Higher Ed
- American Educational Research Association
- Association for the Study of Higher Education

Trends in CX – For Profit

- 5-10 years ahead
- Service-based businesses:
 - The experience is the product
 - Experience transcends actual service and administrative services
 - More than just technology
- Product-based business:
 - Use customer service to differentiate when products are commoditized and price becomes the primary issue





Constituent Experience on Your Campus

JS1

- What constituent experience areas, based on your strategic plan, are you or your institution **targeting** to improve some facet of their experience?
 - Who is the constituent?
 - What is the experience?
 - What is the goal?

[Google doc Link](#)

Slide 18

JS1 This will be a discussion question like a break out and then we will discuss-- should take about 10 mins

Jessica Schein, 8/23/2017

CX Map – 3 Components

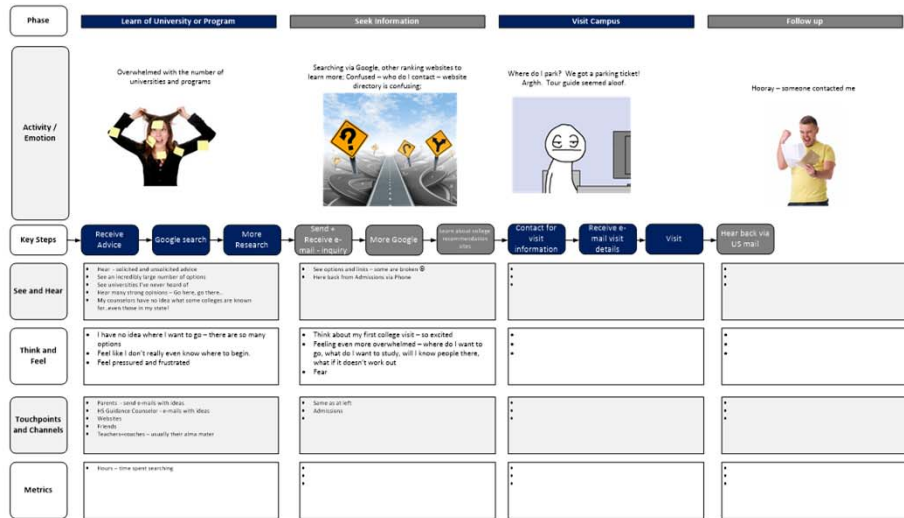
1. Voice of the Constituent
2. University Analysis
3. Future State Design

Constituent Experience Map



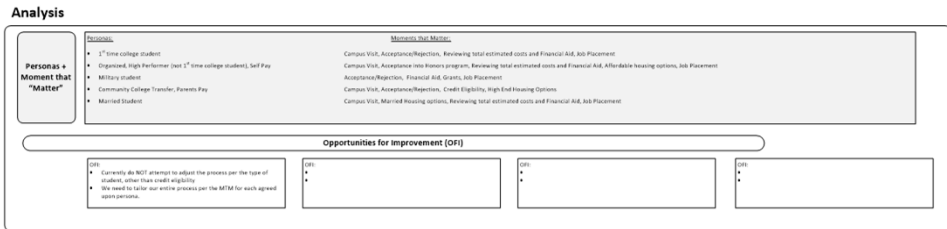
Customer Experience Map: Inquire about admissions; Campus visit Current State

Voice of the Student

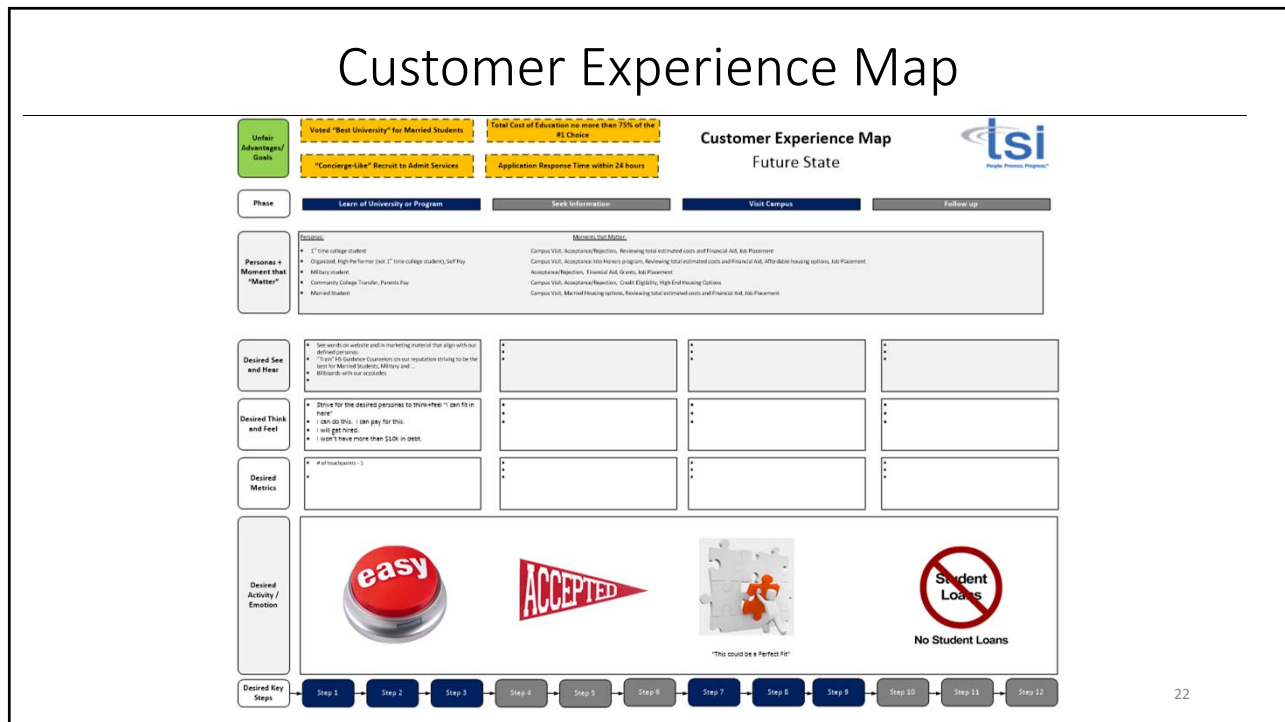


Customer Experience Map

University Analysis



Customer Experience Map



Discussion Questions:

What are the pros and cons of taking a CX approach?

[Google doc Link](#)

Key Take Aways

Actions to consider:

JS1

1. Identify an area: high level of frustration (of key constituents) and strategically important
2. Determine if you can access valid customer input
3. Develop a team: resources, knowledge, approach, capacity to change, senior administrator support
4. Consider joining NCCI's Community of Discovery 2.0 – Constituent Experience
5. Consider TSI's CX training in Chicago, discounted for NCCI members – September 27 - <https://www.eventbrite.com/e/higher-education-student-constituent-experience-workshop-tickets-35522027340>



Slide 24

JS1 This will be a discussion question like a beak out and then we will discuss-- should take about 10 mins

Jessica Schein, 8/23/2017

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Secure | <https://www.eventbrite.com/e/higher-education-student-constituent-experience-workshop-tickets-35522027340?aff=es2>

Apps Suggested Sites Web Slice Gallery TSI-Transforming Sol TSI > Log In TSI-Transforming Sol Phonebooth ITA TSI-Transforming Sol Other bookmarks

"I am paying a lot of money and I don't care that she said they were understaffed. For what I am paying, they should have more staff and better service."
-Student

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Higher Education Student & Constituent Experience Workshop

by TSI - Transforming Solutions, Inc.

\$150

TICKETS

DESCRIPTION

TSI's Higher Education Student & Constituent Experience Workshop

What thought leaders in Higher Education are saying about maintaining a service-oriented culture within colleges & universities:

"Service in higher education is being compared with service customers are receiving from retailers like Amazon.com and Land's End, entertainment conglomerates like Disney and Princess Cruises; as well as many other companies that now realize service to customers is the key to repeat business and good word of mouth. In highly competitive environments, brands are judged not for product price or quality, but for the services they build around it." *Ernie Richardson, Chairman*

DATE AND TIME

Wed, September 27, 2017
8:30 AM - 5:00 PM CDT
[Add to Calendar](#)

LOCATION

TechNexus
20 North Upper Wacker Drive
#Suite 1200
Chicago, IL 60606
[View Map](#)

REFUND POLICY

No Refunds

Thank YOU for participating!

Dan Feely

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www.transforming.com



TSI Core Service Areas
Detailed View

When to use TSI?

1. Your Team Needs More Bandwidth
2. The Project Requires Objectivity
3. The Environment is Politically-Charged
4. The Work Calls for Specific Expertise (that we have)

Advancement Strategy and Optimization

Service Description

Advancement strategy and processes are rarely coordinated across different units of the institution. This leads to inefficiencies and overlaps/conflicts, ultimately resulting in frustration and unmet goals.

TSI has expertise helping institutions define and operationalize their critical advancement strategies so their resources and efforts yield the best results.

Questions To Answer

- How does our advancement performance compare to our peers?
- How well can we assess key dimensions of advancement performance?
- How easy or hard is it for our key constituents (alumni, corporations, research organizations and others) to interact with the university? How easy or hard is it for the university to interact with our key constituents?
- What is the risk to the university of failure to address this correctly?

Sample Outcomes

- Advancement strategic plan that clarifies the vision, mission and values for the overall function, aligned to the overall institutional strategic plan
- Results-oriented foundation, alumni association and corporate relations operating plans
- Structured change management plans to guide transformation and collaboration
- New organization structures, accountability matrices and job descriptions to support strategies and operating plans
- Implementation of pragmatic technology solutions that enable the advancement strategy

Student Experience Analysis and Optimization

Service Description

A changing student population and increased consumer mindset continues to define student/university relationships. TSI has expertise in capturing the voice of the student, and understanding their view of the college experience. From this point we can work with you to redefine multiple aspects of your operation to achieve an optimized aggregate student experience.

Questions To Answer

- How do our students, staff and faculty perceive current state?
- What inefficiencies exist in current state processes?
- How do we optimize for both experience and efficiency?
- How does our current culture incentivize or disincentive great service?
- Do our organizational structures drive the right accountabilities?
- Do our teams have the right skills and abilities to deliver our desired student experience?

Sample Outcomes

- Voice of the student (customer) measurement system to benchmark and trend experience perception over time
- Process redesign and implementation to streamline and simplify operations
- Cross-departmental hand-off analysis to reduce duplication and simplify a student's journey
- Technology assessment and implementation support to enable automation
- Organization structure, job and task analysis and redesign to embed a student-centric approach
- Service culture implementation and change management strategy to create a common call to action
- Service and job skills training programs to increase effectiveness

Administrative Process Review/Redesign/Cost Reduction

Service Description

With increasing regulation and scrutiny, combined with escalating operational expenses competing for limited resources – all in the context of decreasing enrollment levels and governmental funding. Managing university operations has never been more challenging.

TSI has the expertise required to help you determine a pathway to operations that continually redefine the efficient frontier.

Questions To Answer

- Where are we inefficient and wasteful?
- What recommendations will reduce expenses and streamline operations?
- What “shared service” opportunities exist where there are redundant and decentralized operations today?
- How many “hoops” do our administrators and faculty need to go through to do their work?
- How do I improve student-facing and other administrative processes so that we can attract and retain more and better students, in the face of increased and new competition?

Sample Outcomes

- Operations Review and Redesign of mid-sized public institution
- Organizational Cost Assessment and Implementation Plan
- Implementation of recommendations resulting in:
 - Reduced OPEX – TSI has implemented recommendations saving 14-35%
 - Faster completion of work/processes
 - Improved Quality, Accuracy and Service Levels
 - More consistent compliance with regulations

Organization Design and Development

Service Description

Higher education is, put simply, a people business. Our product is defined by the ability of our teams to deliver a consistent, academically rigorous experience that delights our constituents. TSI brings expertise in crafting the right organizational design, with the right roles, incentive structures and collaborative practices to align your talent profile, culture and strategy.

Questions To Answer

- Does our organization structure support our strategy?
- How does our culture incentivize or disincentive our target behaviors?
- How effectively do we collaborate across different colleges, campuses or departments?
- Do staff and faculty clearly understand what is expected from them regarding both what they do *and* how they do it?
- Do we have the right talent mix to achieve our objectives? If not, how might we build or buy that the needed talent?

Sample Outcomes

- Redefined organization structures such as organization charts or matrix organization designs
- Job analysis and refinement
- Updated job specifications, performance management systems and RACI matrices
- Linkage analysis between organization mission, vision, strategy, culture, values and talent profile
- Incentive system implementation
- Numerous culture alignment initiatives designed to address both knowledge and desire states
- Success profile and selection system implementation
- Leadership development training
- Executive coaching

Organization Change Management

Service Description

The most challenging part of implementing change is often the act of leading your team through the transformation. Process improvement, technology implementation, and strategic planning are only useful to the extent that the core elements of change can transcend into the daily activities of those doing the work. TSI has a proven track record of crafting action-oriented change management strategies that engage both the hearts and minds of teams at all levels.

Questions To Answer

- Who are the key stakeholders of this change, and what are their current and desired levels of influence and support?
- What is the institution's current capacity for change?
- Does the team have the appropriate level of awareness, involvement, desire and knowledge to move through this change?
- Do your leaders have the appropriate skills and empathy to lead change?
- What reinforcement is needed and planned to avoid regression once we reach the future state?

Sample Outcomes

- A stakeholder analysis and heat map
- Change readiness survey and analysis
- An vision that clearly articulates the need for change and creates urgency
- A detailed change management plan and activities
- Change leadership training for key organizational leaders
- Communication plans and collateral
- Retention strategies for key positions and individuals
- Skill-based training plans for contributors
- Reinforcement plans and enhanced performance management systems

Technology Strategy Creation and Analysis

Service Description

With increasing dependence on effective technology to operate a university, it is critical to select, implement and continually improve an institution's technology investment strategy. As the number of technology enabled student and alumnus touch points increase, usability and reliability of technology are paramount.

TSI has deep expertise helping universities solve this challenge in a cost effective manner.

Questions To Answer

- Why does it appear we are not as progressive in the use of technology as we should be?
- How much do we currently spend in IT/IS?
- How integrated or disparate are our applications?
- How extensively are we utilizing technologies we have spent significant money on? What can we do to improve our performance in this area?
- Do we have the proper governance structure, processes, staffing, etc.? Is our Technology Infrastructure adequate given our strategic plan?

Sample Outcomes

- Information Technology Roadmap and Strategic Plan
- Assessment of IT/IS:
 - Technology Infrastructure
 - Organization and Staffing Levels
 - Processes
 - Governance
 - IT Expenditures that occur both in and outside of IT/IS
- Implementation of recommendations to transform how IT operates so it is in alignment with those constituents it serves

