

Sacramento State

Student e-Lifecycle Business Process Mapping & Digital Strategy

Findings & Recommendations

January 2024

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Introduction & Agenda

- Project Goals, Process & Approach
- Summary of Recommendations
- Key Findings & Observations – by categories:
 - Business Process & Workflow
 - Technology & Tools
 - Student Communications
 - Training & Staffing
- Closing Remarks, Questions & Discussion

Project Goals

- **Engage with university team members**, students and leaders from across campus to assess:
 - Current business process and workflow
 - Associated technologies and tools
 - University communications supporting student success
- **Collect and review data** regarding student engagement to:
 - Identify barriers to success
 - Prioritize opportunities to better measure efforts and support students
- **Develop a Student e-Lifecycle map** with
 - Strategic recommendations
 - Help guide university leadership and campus stakeholders in the
 - Execution of an effective **strategy in support of student success**

Process Summary

Informed by:

- Input and insights from **stakeholders across the University - via**
 - Business Process & Workflow
 - Technology & Tools
 - Student Communications
 - Training & Staffing
- **Quantitative and qualitative data**
- **Focus groups** conducted with current students, orientation leaders, peer mentors and transfer peer coaches in September and October 2023
- About **delivering excellence in the experiences that matter –**
 - Removing barriers
 - Supporting student success
 - University's commitment to excellence in higher education while creating a supportive community for all

Strategic Recommendations Summary

1. **Redesign MySacState Student Portal:** SSO access to key student systems as well as dashboard with targeted notifications, amounts due, holds and to-dos
2. **Address Student Advising:** Streamline and standardize workflow and improve student experience with a consolidated, consistent advising model – and case management approach - across campus
3. **Implement Improved Academic Planner:** Improved outcomes in course planning and registration
4. **Streamline Student Communications:** Workshop series to align on channels by type of communications for clear, concise communications
5. **Develop Student Notifications & Announcements:** Standardize process and streamline the channels/ tools used for each type of communication

Recommendations Summary (Cont'd)

6. **Implement clear transitions for Student e-Lifecycle:** Clarify ownership and implement clearly defined handoffs at each stage of the student e-lifecycle - starting with incoming student process.
7. **Implement Admissions CRM:** Select and implement an Admissions CRM tool to replace the current tool (Hobson's EMT) which is outdated. Coordinate efforts with Incoming Student Process improvements.
8. **Refine Reserved Seating Process & Hornet Launch Program:** Assess reserved seating process to ensure students have seats in required courses in a timely manner; reduce confusion for advisors and students in enrollment shopping cart.
9. **Update University Website and Information Architecture/Navigation:** Create a more compelling experience for site users, especially prospective students, while improving findability of key information. Ensure mobile-first/ responsive design that speaks to target audiences.
10. **Develop Student Communications Calendar:** Map key communications for the first year of the lifecycle for new students.

Findings: University Services Today

- Multiple projects underway - including EAB early alert, OnBase forms and workflow improvements, MySacState updates
- Should make an appreciable difference in the provision of services to students
- Contributing to student satisfaction and student success
- These findings cover the elements of the current student e-lifecycle this consultant recommends the University transform, continuing to:
 - Challenge any practices and tools which are not up to standards
 - Embrace a culture of care, community and continuous improvement
- This is based on qualitative data from meetings with campus stakeholders and reports shared over the summer and fall months – recommendations are not an exhaustive list

Business Process & Workflow Findings

- Limited **investment in workflow** leading to unclear handoff points and ownership at many stages in the student lifecycle
 - Opportunities for better alignment and coordination of cross-divisional workflow
 - Start with prospective through to admitted and enrolled student experience
- **Student advising experience** - inconsistent process and experience depending on major department or program
 - First year students aren't aware they have an advisor
 - Peer mentors and transfer peer coaches report confusion on process as well as unclear major requirements on departmental websites
- Concerns and confusion regarding the **reserved seating process** as well as **Hornet Launch program** in general

Business Process & Workflow Findings – (cont'd)

- **Reserved seating/waitlist process for course registration –**
 - Tight timing in releasing seats to students waiting to register
 - Transfer credit evaluations not consistently made available in a timely manner
 - Confusion results from the current process and end user experience in the enrollment shopping cart itself
- **Inconsistencies and confusion** in many **student-focused workflows** including OnBase form processes such as Add/ Drop/Withdraw and Financial Aid forms/timing
- **'Local' choice and decision-making** lead to a lack of consistency and difficulty in support processes, along with procurement of similar software with overlapping functionality

Technology & Tools Findings

- **Students currently lack a single, secure, central online location** to find critical online services, time-sensitive messaging and online support across divisions.
- Students struggle to find key information on digital properties such as the **MySacState online portal or the University website**—or find similar but inconsistent or out-of-date information.
- Students and advisors struggle to use **existing academic planning tools** to develop accurate roadmaps and to register for necessary courses to stay on track for graduation.
- **EAB has significant traction as a CRM-like tool** to support advising and student case management but lacks consistent utilization across departments and individuals; could be further leveraged for programs such as Hornet Launch.

Technology & Tools Findings – (cont'd)

- Many areas have a **continued reliance on non-digital solutions** or numerous technical solutions to the same practical issues
- **Academic calendar** not currently part of the main, shared campus event calendar (Trumba) creating:
 - Difficulty for students in locating critical dates and deadlines – such as course registration windows – related to their academic journey
 - Uncertainty with students and support staff as to whether calendar is up-to-date
- **Overlapping tools** providing the **same practical services** create:
 - Confusion and barriers for students
 - More work for faculty and staff to ensure information is updated/consistent across technologies
 - Higher costs for the University

Student Communications Findings

- **University is over-communicating** with students: Opportunity to reduce complexity/increase effectiveness in communications across channels.
- **Students are overwhelmed** by the high volume of email from the University, resulting in important emails not being read or acted on.
- **Need clear guidelines and governance for internal communications with students.** Faculty and staff request guidance on which digital offering(s) or channels to use for various communications and how to more effectively reach students.
- Students would benefit from **well-timed messages for key actions throughout the calendar year** such as:
 - Course registration reminders or
 - Financial Aid communications, timelines and action items, along with
 - Messaging targeted to specific student populations

Student Communications Findings – (cont'd)

- **SacSend email** is perceived by many students as “junk mail” and not relevant or important enough to read.
 - Students report receiving **multiple communications from faculty and staff on the same topic** – with differing information and guidance
 - **Lack of accurate message targeting** results in students receiving messages or opportunities that are not relevant for or available to them
 - Creates confusion and disappointment, unintentional barriers
 - Does not build a sense of belonging or care for the individual student
- **Opportunity to use student-focused language and student-friendly labels** campus-wide:
 - Heavy reliance on acronyms and administrative or departmental language unfamiliar to students
 - Creates additional confusion and barriers to success



Findings: Training & Staff

- Users are often **not aware of where to find training materials and documentation** - or materials are not available for more advanced levels
- **Single-points-of-reliance**: Significant institutional knowledge of tools, workflow and process, is lost when a staff or faculty member leaves
- Human **resources are stretched thin**, leaving minimal bandwidth to support process or technology improvements
- **A need for training and development** in areas such as:
 - Systems used across campus and the desired workflow
 - Assisting a student in crisis or with non-academic support
 - Guidelines for student communications

Recommendations

What Student Services & Workflow Can Look Like

- Supporting student success as the foundation which drives workflow and digital services delivery across all areas.
- Decisions prioritized based on positive impact on student success and alignment with the University strategic plan.
- By placing students at the center, Sacramento State can frame its understanding and design of digital offerings and workflow so that students' unique attributes and needs are met.
- Improved digital policies and workflow can remove barriers and help students successfully complete studies.
- **Decisions also driven by efforts to streamline and consolidate digital offerings:**
 - Over time, the University can provide better execution and ongoing support to the tools available – from chatbots to email tools to ticketing or case management systems -
 - while reducing long-term costs of purchasing and supporting technologies with overlapping functions.

Recommended Approach

These challenges and opportunities give a sense of the student e-lifecycle workflow and strategy to move toward standardized, streamlined, intuitive solutions that enable new ways of working while making more effective use of limited resources.

- Recommendations are not intended to be set in stone
- Intent is to continue projects, partnerships and conversations initiated with this project
- Gain traction by coordinating work effort with existing initiatives where possible
- Ensure alignment with strategic imperatives
- Continue to get students, colleagues and teams talking about exactly what they want and need from workflow and student digital services – and
- Consider how best to budget for and deliver on these goals

Questions & Discussion

Thank you!

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