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Industry and Campus webinar: Transform Your Staff into Retentioneers

Tuesday, June 18, 2019

1:00PM – 2:00PM Eastern

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>> Throughout the last twenty years her career and experience has had a common thread. To align strategic goals and impact student success in higher education. Prior to joining black box, she concerned as assistant vice enrollment and served within the higher education of software industry. Let's begin our transform your staff into retentioneers. Over to you, Michelle.

>> Thank you, Adam. And higher education professionals we are faced with these numbers every day. And daily digital transformation and changing at the risk of indicators for nutrition. Offer and enrollment management plan student education has begun. We need to be agile. Digital transformation with how we engage with both internal and external audiences and changes the way we work, live and interact and educational institutions need a strategy to embrace this shift, your students are waking up to smart watches, exercises and having food delivered by Uber eats and getting movies served up to them on Netflix based on previous viewing habits and all of these experiences are shared across the always on social networks. These daily life experiences are shifting students expectations in how they engage with your institution and one with another across your campus and because an engaged student is a retained student this digital evolution is on top of mind for all of us and I'm sure many of you on the phone are probably out there nodding because you feel what I'm saying here. You are seeing it every day how students are very connected to these tools and these resources and we need to be connected to them as well. Here's some statistics that just really explain to us how the market is changing. 94% of college aged students own a smartphone. I was surprised that I didn't see one hundred. 82% of college students use their smartphone for school related tasks and 62% of Millennial's believe that automation will improve productivity and these are just some of the statistics that show how our world is changing and depending on your age and when you attended college it may have done college registration on paper and paid by check. I remember the days when they would release the classes and we want stand in line and wait and who knows how all three of those sheets ended up but that is not where we are today. Now it's the norm of your student /SKP-Z faculty and staff to want 24/7365 days a year access to information on their Padlet or watch. Viewing habits weren't done on a computer. Those are things done with a watch or your Padlet or TV and digital transformation is touching our off lives outside of what you see on your computer. If you are not having a conversation about how to transform with these trends it is time to start one. If this resonates with what you are seeing at your institution now, I need to ask, how well is your institution positioned to act? In other words, is your institutions software easily accessible by phone so that you can connect and build a relationship with today's college generation and are your teams ready embrace challenges that come with this digital shift? But what if you could leverage this digital transformation so I'm pact your retention rate and what if faculty and staff saw technology as an enabler? Step one is to raise awareness that all faculty and staff have been promoted to retention years. Now for those of you English majors out there, do not Google me. Retentioneer is a made-up word. You cannot find it in the dictionary but when you think about what is a retentioneer, it is an architect and engineer of retention strategies. Seeing here a retention air is a sworn ad advice airy to student success and anyone on campus can and should hold this title. You can read this list of synonyms here, really anyone who influences your student population on campus or at their home, they are retention airs. We want to foster a culture of retention at your campus. For academic leaders recruiting and solidifying the right students is a top priority. Who are those students that will be successful at your institution? A Forbes' article cited two million first time full-time students who began at college each year dropout before earning a diploma. Does your institution have a comprehensive retention plan to keep your students engaged and help them reach their academic goals? Those comprehensive plans look different at campuses today. The days think of them being in a three-ring binder sitting on a /SHEFT are probably behind us. Now plan exists in the forms of pow point track it in solutions to make sure you are on task. Your faculty and staff play a critical role in these plans. What if you could turn them into retention airs for your institution? In a previous institution where I was our pro V OS T wanted to include a paragraph in the December description. She saw it as everyone's job. She wanted to be specific. It's clever. Always be specific but all the recommendations were manual and reactive. It would have been a workload burden for everyone with no way to enforce or track our ideas. Today let's talk about proactive initiatives. A first step is an inventory of all of the touch points that are manual. A reminder for a student to meet with an advisor. Currently is it initiated on your campus because somebody remembers to do it, or do you have it automatically scheduled in conjunction with open registration? After completing a list of all of your manuals at campus, look at your processes. Next let's define success. Develop long-term goals for retention. So where do you need to be in three to five years? Many of you on the phone today probably have ten years or twenty-year vision but we have a five-year shorter plan of where we want to see those numbers. When we look at success and our conversation today, I'm not talking about the overall retention rate for your institutions that's reported. So, what does success mean on your campus? Specifically? Is success increased graduation rates or is success student complete their identified educational pursuit? Depending on the type of institution a community college may have students that their educational pursuit is two or three classes to gain a particular skill to advance at their workplace. A different definition of success on a campus may mean a greater impact on a minority group specific. If there are a hundred of you on the call today and if each of you e-mail me or put in the chat what is success, I guarantee you we're going to get one hundred different answers because we serve different populations. Geographically we have different majors and needs. Where do we start? Re your retention ears are limited to your IT staff, data analysts, advisors, faculty and all of your student services personnel. Each person will share a different perspective because they aren't looking at a number. Each number represents a real person. And the result of their influence will be actionable items that are targeted to specific populations on your campus. These are individuals you can pull together to have that conversation around what is defined success. Defining success means bringing together all of your retention airs, and then bring them together to determine what numbers your institution will now measure. Next, we need to analyze and identify our dropout drivers and success indicators. We'll talk about this in two parts. Now that we have success on our campus defines, how do we achieve that number? First, we can begin by assessing national trends and then review your institutions historical data to identify dropout trends and success indicators and bring that home. When I was writing my first retention plan, I felt bad that I was constantly in IT asking them to help me slice data. For those of you on this webinar from IT I'm sure you have a Michelle on your campus. Someone you see coming and you go, here we go again, she needs to slice this another way. I started taken them one dozen donuts and the IT director told me I needed to stop with the donuts. I stopped doing that and moved to candy. Data is important even if you have to do it with candy and donuts so your most trusted retain air will be your data analyst. Depending on your goals we must go into sub segments. For example, courses with fail rates, degree and majors do have different retention and graduation rates and sophomore slump, financial planning and housing attrition numbers and student activities are a good indicator. This is a list of dropout indicators and it's long but the data your IT department can access will tell the attrition on your campus. It's just an indicator. We want to know what is this story that this data tells us and how we can impact that. Dropout indicators are just half of that. Now we need to look at your students on campus that are successful. Have you profiled your successful students? Looking at those students who graduate and meet their graduation requirements or achieve the goal that they attended what do those students look like and what do they have in common? I did this once at a campus and it's a much longer story that we don't have time for today, but we looked at indicators in the data of success and then I held focus groups with the successful students. One of the trends was a sub segment of a gender and a specific race and they had 100% retention. You normally don't see that. It was 100%. I stopped and looked at it again. It wasn't something that jumped out at me. There was one unique statement made by all of the students in that group. When I asked them to tell me their major they did not. They told me what they were going to be. So, to quote Steven coffee they were beginning with the end in mind and nothing and I mean absolutely nothing was going to get in their way to do this. Dig deep to identify success strategies and then take those success strategies that are working on your campus in one population and replicate them throughout your campus. Next, we need to bring everyone together. Now we're back to give that role of retention airing across your campus. Share your findings with all stakeholders, staff, faculty, administration and students. Make sure to include those students. Encourage them to work together to develop an action plan and create a student focus group. I found it helpful to temperature check all of our ideas. I'm embarrassed to say I can't count the number of times that we thought we had idea of the century and the students told us that they would never use the service or even laughed and said it was silly. Make sure those ideas of the century you run a temperature check with those using the service to see if it will fly. Most importantly you need to know your technology and know what can be automatized. Robotic process automation is a trend. By lifting the repetitive task from your staff, they can elevate impact with fulfilling work. Retention airs provide judgment and engagement. I'd highly encourage you to practice RP A on your campus. We automated the application process so instead of graduated assistance manually entering data they were on the phone coaching students so we made them graduating assistance but admission coaches and through the process they would answer questions about degrees, navigate those one off questions and coach students to the point where they were ready TO ENROLL in their graduate program and this directly impacted our numbers and our graduate assistance were considered our frontline retention airs and they had really high job satisfaction. I did not at all have any turnover with my graduate assistance's in the time I was there. They loved that job and it provided that high value. So early on in the presentation I asked if your teams were ready to embrace change. And that comes with the digital shift. So, I'm sure if I could see your faces, some of you are shaking your head no and some yes. I personally witnessed our team embrace technology because they were able to see it freed them to do what they were hired to do which was empower students to succeed. If you are able to show your teams that technology can automate the mundane and free you to do what you were really called to do and that's empower these students that's where you can get more buy-in from those teams. Empower your faculty and staff to engage with students in the way that they expect. Digitally. Today's students are accustomed to information and communication tools. E-mail, text, social media, mobile apps, the list is long but all their fingertips. The national survey highlights key engagement insights that lead to positive learning experiences. I would encourage you all to read that paper. The high-impact practices are study abroad, senior experience, internships, learning communities, service learning and research with faculty are just to name a few. Each of these enriched experiences can be life altering but without the right technology can be labor intensive and inconsistent. Bring in the retention airs in charge of all of these activities that I just mentioned and do a business process review of each process. That process map showing you step, A, B, C, and D, that will show you all of the steps involved, and you can highlight what actions can be automated or delegated to your software. This is where we want to use our software as a retention air as well. We can automate with the software many of these steps. Since you are leveraging technology staff and faculty will have time to delight and exceed student expectations with meaningful face-to-face interactions. Equip faculty and staff with tools that will facilitate and track every interaction whether it's digital or face-to-face. Retention airing should be intrusive. Normally we're taught don't be in truce I have. I've never heard my professor cared too much and they remembered my name and e-mailed me about my homework. Engagement matters and it leads to the cap and gown. How do we increase the digital impact at every stage of the student lifecycle? Some of you today on the call are from the admissions area so you are familiar with the funnel and moving students from stage to stage and enrollment but then after that enrollment, after we have that perspective student and they are now students on our campus we begin that student lifecycle journey and we want to engage with students throughout that lifecycle. In the next four minutes I'm going to share specific examples of the engagement lifecycle and it begins with the deposit of new students and every valuable interaction builds equity and that will produce returns over a lifetime in the form of alumni. So, let's begin with that 360-degree view of your student. Retention is a priority for all of your staff regardless of their role. Through technology we're empowered to look at connections by giving all of your departments a single source of truth for each of your students. If I want a picture of my student, I want to know everything going on in their life and how I can impact or help them I need a single source of truth. I'm sure all of the institutions on the webinar today have a student information system that houses all of your student records and if everyone uses the student information system, we do have one version of the truth. So, the enemy of the 360-degree view of the student system are shadow databases that are not integrated and not on the raider of IT as a solution. Shadow bases with valuable information could have benefited an attrition of students. An important action that you can take away from today's conversation is your enrollment engagement process do an assessment and synchronize initiatives to ensure that students are receiving one, clear and consistent message from their retention air /SKP-Z that your retention airs have one version of the truth about that student. Next, we want to personalize communications. I don't want to get generalized communications. I want it to feel personal and important. I remember when my niece was applying for colleges, she got a letter that said dear, and then there was a space, colon and then a formed letter and she showed it to me and said, they don't even know my name. Obviously, it was a mail merge and there was a little mistake, but it impacted her and out of all the letters she showed me that was the one that she showed me first. So, students now are accustomed to personalized engagement and consistent collaboration and information at their fingertips and they want access to all of it on their mobile device. They’re actively engaging with your faculty and staff but where are they doing it from? Are they doing it in shadow data-based off to the side or are you using tools on campus to engage these students so that your faculty and staff have specific information so they can make that student feel visible and important? To ensure that you have a platform to tailor your communications to your students and their interests. On the screen are a few examples of our student portal where you can have video announcements, giving personal announcements welcoming a student to your campus, targeted information to students, campus news and current events. You keep the information dynamic, relevant and personally customized. From that we want to enable collaboration. Once we've communicated with the students, we move into having them communicate back and forth. According to the satisfaction survey, supportive encouraging interaction with peers on a campus is key to engagement and a critical factor in student retention. To go a step further and expand your student groups into digital spaces where you can promote membership to AN EXTENSIVE audience. Instead of putting that poster up and saying let's meet in the library and everyone can just go for that one meeting we want you to expand that using your campus portal so they can meet online and in person. Your library and student center have hours of operation and 24/7 collaboration providing a student collaboration when they are awake. You need to inventory all of your retention services and bring awareness of those resources together into one space. Use this platform, this collaboration location. Buildings can't come together but resources in a portal can. Just like now when I do not know how many inches are in a mile or I have a question that I can't answer I go to professor Google. The professor Google for your students is your portal. Have them go there to get the answers. They've become accustomed to it and then you are able to push out valuable information related to retention. Now we need to look at our data. Are we being successful? As you mentioned earlier you have a wealth of data at your fingertips whether it be your institutions or national data. Make it a priority. You don't want to die under a mountain of too much data but be able to understand which engagement tactics are the most successful and are there any correlations between these tactics and student characteristics? As I mentioned earlier, I had one student segment that had 100% retention, but it was specific to a particular race and gender and I learned that by diving deep into the data. These were just a few of the touch points from portal communication collaboration zones. There are a few of the touch points in that digital journey, in that lifecycle where you can attract, solidify and sustain engagement from prospect to alumni. We have here as you can see on the screen, a picture of an info graphic and you can download that from the resources. We have lots of examples that we didn't have time to go through today but throughout the different stages there are many touch points, leveraging technology that your campus can use to continue to foster that important relationship. Next, we want to measure our impact. And I love this picture here. You can see it's under a green filter but this graduate, she is happy, elated and she has worked, two, four or six years to get that degree walking across that stage and that was important to her and made a difference and changed her life. We want to measure the impact that our retention strategies have had on this student as they walk across the stage. It all comes back to your data. Analyze it to understand what strategies were most effective and this is one of those situations you just rinse and repeat. You just go through and do those again and again when you find something that works on your campus. As I stated at the beginning of the presentation, retention engineers are the sworn ad advice airy of student obstacles. The most important action of all. If all of the ideas we've shared today and the advice and ways that we can impact students I would say this is the most important. Lean in. You need to celebrate your retention airs. Celebrate their contributions and all of your initiatives and your implementations and victories. If you have a team working on implementing a new solution, celebrate them when they are done. If you have a retention team and you've seen the needle move and that number go up and you've articulated more students, celebrate that. Make sure to give your retention airs exactly what they came for and that's successful students. I'd like to thank you for your time in talking about strategies and retention airs and ultimately your students.

>> Wonderful. Thank you, Michelle, for taking the time to speak with everyone today. I'd like to remind you all that we've set aside time now for Q&A. If you have any questions, feel free to type them into the left side of the chat. Michelle, I'm curious. We all know that students are on tablets and watches and many staff are not yet. There can be resistance to that change. How do we get higher adoption from that community?

>> I wish there was a silver bullet for this because this is a challenge that we engage here. I work at a software company and I have colleagues and it is hard to get them to adopt new solutions when we want to communicate internally. I have a few responses here. Just on experiences. So, depending on how big a campus initiative is or if it's a big technology project, I'd recommend a formal change management course. If it's big and you are getting ready to make big decisions on your campus you might want to bring in a professional, sometimes getting a consultant from outside your campus, a different voice, face, someone who is an expert they provide legitimacy to the topic and your teams might adopt a little bit better. For a smaller scale if you have a new technology or even social media and it's not getting adopted and you can't get your faculty or staff to adopt it, I go back to the educator side of me. There are different degrees apprehension. It comes from a lack of knowledge. I don't understand so I'm going to pushback. I'm using air quotes, a mandatory fund, hands on learning activity would be effective. For example, if you have all of your faculty that you want to learn from the new, maybe you want them to learn how to post on Twitter, create a familiar format. Twitter is new. We're going to use several familiar strategies to pair with that. If they are used to a particular auditorium, use that auditorium, a regular room they use for faculty senate, use that room. Use things that are comfortable and begin with a student sharing how much they love this tool, how they use this tool all the time, why they use the tool, what they get from the tool. Start with the value that the student has and begin the training with that. Possibly, you know, you have your training lead by a trusted leader so maybe it's a faculty member who has adopted Twitter and they can teach their peers and have it co-taught with the students and have that students perspective and then I'll revert back to bring donuts. I know I mentioned it before. I love donuts and snacks. Bring lots of donuts.

>> That's great. Thank you. We often hear questions around limited time and staffing issues. So, what ideas can you share for institutions that want to dig into student data to look at at-risk populations but have a small ideology department who can't help?

>> Yes, and this is something we've actually looked at the data on this because of the many populations that we serve are a small institution. Small college market. You have a lot of institutions out there that have less than three hundred students which means they have small staff, so this is common. First, if you are on the call today or you listen to this later and your staff is too small to help you dig into that data and look at your segments, leverage national data and white papers. There are so many consulting firms out there and associations that introduce valuable reports. They are free out there, I can click them and download and if there's no way to get your campus data use national data as your first step. If this is happening nationally then maybe, it's happening here for me too. Look at what's out there in different associations and find what's free and look at that. This is something that I did before. Partner with a neighboring school. You might have a school that has a similar population. They could either be close to you or it might be a school that's far away, but you met them at a conference. If you have similar student populations, you could have a joint effort and share findings. You are in the same business. You are not in competition with each other because we're all in the business of graduating students. I'm imagining a situation of two community colleges that might be in close proximity and they would have similar student profiles and each of them get together and share ideas that have been proven for student success. That's one thing. And then another thing is I'd say -- I also had this happen at the last institution where I was. You might have a perfect data analyst right under your nose. You might have a small IT office, one or two people in the IT department that can't run data but there could be an individual that has that skill set. That likes, you know, technology likes data and can get into it. On my last team I had one who could learn anything from sitting down and reading a user manual. She had that gift. I said, hey, I found a training. Do you want to go to this training? She said sure and learned everything from the manual and three months later our entire department was paperless. We didn't have the resources to get another IT person but she did it and learned it and all I did was OFFLOAD daily activities so she could take us paperless and a training for one person is much less expensive than hiring an entire FTE.

>> That's great. Thank you. And I also wanted to point out to our participants. I launched a poll on our screen as well. We have time for Q&A but if you'd like more information you can share your e-mail with our presenter today by typing that into our box. That won't be shared publicly. It will go to our presenter. Let me jump into another question that we have here. You mentioned RP A before. Can you explain a little bit more about what that is?

>> I apologize for using acronyms. Robotic process automation. Jot that one done. RP A for short but robotic process automation and it is when you take technology, the application of technology and you govern business logic. So, whatever you can say, this step happens, and this step happens, and you can create a process or trigger it using technology. There's a website that has a massive list of jobs and careers that are ranked in an order on the percent likelihood that they will be completely replaced by technology. When I first heard about that, it was one of the resources for RP A I immediately went to look and compare what I did for a living to what's on that list. Good news, educators are not on the list. They will not be extinct as a result of RP A but there will be jobs impacted because if there are steps on your role that can be automated, we want to use technology to do that. That's what RPA is, and I would highly encourage anybody reviewing robotic process automation, read about it and talk with your IT department and see where there are areas on your campus where you can take your business process and automate it. We've done a couple of webinars here and they have been well received from the thought leadership perspective of new ideas to help organizations be sustainable, operationally sufficient. We like that.

>> Great. Thank you. I wanted to take a moment to point out HR's observation here in the chat. What we notice is there is a lack of analysts and understanding on the importance of this topic for present and future trends.

>> I'm sorry. Could you say that again. My headset cut out a little bit.

>> Sure. No worries. I was highlighting feedback from one of our participants, HR in chat, noting there is a lack of understanding on the importance of this topic for present and future trends.

>> It is and I work for technology company and I'm surrounded by brilliant people and I feel like I'm treading water some days because something new comes out all the time but that's where what you are doing today, Adam, providing this webinar where we can talk about new topics it will bring to light issues that we'll maybe need to think of and give us better ways to serve our students so thank you.

>> Definitely. Thank you for joining today. Again. I just saw another question pop into the chat asking any advice for institutions that are entirely online with both students and faculty that probably won't every meet?

>> Yes. You might think that online institutions took away and then there are is no personal because it's all online? No, I think that it's just another way in which you'll interact with your student because, you know and I've taken online classes and I can go and get my information, I can read the syllabus and go through all of that but having those tools where you can be specific and personal with those students. For example, if you have, you know, a single mom, she has several children, she is trying to get her homework done probably after they've gone to bed at night and might be enrolled in a program. She needs to ask her advisor or professor questions. She might not be available during the day when they have office hours so the online environment is truly designed for this person and they have tool so that advisor or faculty member can respond to her questions, but they are responding specifically to her. I would encourage whoever wrote this question to hold some enrollment management meetings with your teams on how to learn and get to know your students a little bit better. You have them in a class but if you know some of the nuances of those students then you know how that student will want to communicate with you. Sometimes it may be text. E-mail. But use those tools at your fingertips on your campus to push out to them information that's relevant. I go back to that portal. Always being able to have resources that you can push those students to that they can go get them and access them when they are studying online. They might be studying at midnight but at least you have introduced them to those resources and where they are.

>> That's great. Thank you. Do you have any advice for institutions that are focusing on transformation and being cutting edge but instead feel like they are just chasing trends and feeling behind? How can people get ahead of that?

>> Right. You know, I think the biggest thing is talk often with students. I hear things. One of my colleagues here she has three kids, one in high school and two in college and she is always laughing and saying look at the new apps that I've downloaded because it seems like every couple of weeks her students want to communicate with her in different ways and I'm saying, how did you even know these things existed and she said, I talk to my kids. Talk often with your students and see what they are using but that doesn't mean now you need to integrate with that tool. Don't get overwhelmed by there's a thousand new apps out there. Now we need to integrate with all of them. That's not possible. That's not what I'm saying at all. You look at the tool and say, why is it interesting to the student and what need is it meeting? You might have a tool on your campus that could be interesting or might meet that need. Look and see what's popular. It didn't mean you need to integrate with everything. A bigger issue and this is platform technology is make sure that you are extensible. If you are in the Cloud, if your student information system, solutions are in the Cloud via API you can connect to other solutions more easily providing that agility. If you don't have the ability to do that then you are always writing integrations so maybe in your strategic IT plan look to the future. The future is mobile. You've got to be able to get access on mobile devices and being in the Cloud is the first step to that.

>> Excellent. Thank you for that advice. It looks like we're at the end of our submitted questions for today. As a reminder to participants if you do have final questions floating around feel free to type those into the chat now. Michelle, do you have any closing remarks?

>> Thank you, Adam, for providing us this opportunity to talk about what I feel like is my favorite topic. I love seeing students be successful. I'm always the one crying at graduation. Just seeing those students walk across the stage in their cap and gown after helping them for four years through obstacles, that was a victory and I know that all of the individuals on the phone today probably share a similar experience on their campus and I think if we can get one or two ideas out of today that might impact students we're achieving our mission so thank you for this opportunity and thanks everyone for joining.

>> Wonderful. Thank you once again. We'll move right into our wrap up here and on behalf of EDUCAUSE thank you all for joining us today for an engaging session and conversation. Before you sign off please click on the session evaluation link in the chat window. Your comments are important to us. The sessions recording and presentation slides will be posted to the website later today. Feel free to share it with your colleagues. We're going to put our polyp on the screen for everyone who didn't have a chance to respond to it in the previous slide and we'll leave that up on the screen a little longer as well. On behalf of EDUCAUSE this is Adam. Thank you for joining us today and we look forward to seeing you on a future webinar. Take care

**[End of Webinar]**