One Stop 2.0: Continuous Improvement with Integrated Student Services

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University of Minnesota
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Presentation Overview

• Project Stages: strategic vision, planning and development, and implementation

• Continuous improvement stage: assessment, reflection, lessons learned, best practices
Strategic Vision Stage

- What problem are you trying to solve?
- What are the potential costs/benefits?
- Who needs to be involved?
- What should we focus on first?
The Planning Stage

You’ve created a vision – now you need to document a strategic plan.

• Keep the end goal in mind
• Involve students and staff
• Create a mission statement
• Document your critical success factors
• Determine the budget
• Provide on-going communications
• Build enthusiasm
The Planning Stage

Create a project plan and designate a project manager

- Meet regularly and keep momentum going
- Set a timeline and periodic milestones
- Understand and gain agreement on project objectives, deliverables, scope, risk, cost, and approach
- Identify and manage potential problems
Implementation Stage

Considerations:

• Staffing
• Training
• Technology
• Branding
• Communications
• Physical/Virtual Presence
Service Integration

Organizational: Can we integrate organizationally to reduce service silos?

Physical: How can we improve how students receive service in our offices? How can we make it more student friendly and accessible?

Virtual: What online self-services and web applications do students want? Can we implement a virtual “one stop” by consolidating information from various offices?
University of Minnesota, Twin Cities

- Located in the heart of the Minneapolis - St. Paul Metropolitan area
- Largest of the 5 campuses
- Made up of 17 colleges and professional schools
- Offers more than 370 degree programs including bachelor, masters, doctoral, and professional degrees
- Enrollment for Fall 2012 was 51,853
What problem were we trying to solve?

Student survey showed:

• Strong dissatisfaction with service
• Student runaround required for services
• Lack of teamwork among offices
• Perception of uncaring staff

We also wanted to improve retention and graduation rates.
Paradigm Shift

Old Process
• Silo structured
• Transactional focused
• Limited access

Re-engineering and business process redesign

New process
• Integrated seamless delivery of services
• Student focused
• Increased access
Silo-based service common in higher education

Result = Runaround and unhappy students
Modes of service delivery

- Web, Portal, Social Media
- Customer Service
- Phone
- E-mail
- In-person
U of M Focus: Virtual Integration First from “In-Line” to “On-Line”

1995
- Computerized self-registration

1997
- Web registration begins

1998
- One Stop Web site implemented for students, staff and faculty
- One Stop Student Service ‘brand’ established
The Organization’s “Brand”

• Sets the identity and image of the institution

• Creates loyalty

• Instills a promise of value and service experience

• Is communicated at every point of contact
# Developing Self Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration</td>
<td>View/update hospitalization information</td>
</tr>
<tr>
<td>View classes</td>
<td>View and pay bill</td>
</tr>
<tr>
<td>View grades</td>
<td>View financial aid awards</td>
</tr>
<tr>
<td>View holds</td>
<td>Parent/Guest access</td>
</tr>
<tr>
<td>Change privacy settings</td>
<td>Parking</td>
</tr>
<tr>
<td>Transcripts</td>
<td>Housing</td>
</tr>
<tr>
<td>View/change addresses</td>
<td>Forms on-line</td>
</tr>
<tr>
<td>View advisor information</td>
<td>View degree audit</td>
</tr>
<tr>
<td>View/update personal information</td>
<td>View student account</td>
</tr>
<tr>
<td>Graduation Planner</td>
<td>Scholarships Search</td>
</tr>
<tr>
<td></td>
<td>Direct Deposit update</td>
</tr>
</tbody>
</table>
Web Culture Builds…

• University One Stop page receives millions of page views each month
• 97% of the student population registers for courses on the web
• 100% of the students accept financial aid via web
• 99% of the incoming freshmen apply on-line
• 80% of enrolled students paid tuition bill on-line
• Student electronic billing is mandatory

Also...
• University assigned student e-mail account is official communication avenue for students
Outcomes from Self-service

• General questions/concerns resolved online
• Complex problems need personal attention
• Staff need wealth of knowledge to resolve problems
• Skills/experience in communication, education, psychology, business, etc.
• Need to establish professional relationships with campus offices to solve complicated problems
Old Process

- Generalists
- Specialists
- Self-service

New Process

- Generalists
- Specialists
- Self-service
The University of Minnesota Model

**Goal:** To provide integrated services for registration, financial aid, and billing in three locations

**Steps:**

- Redesigned our business practices and cross-trained staff to handle problems from start to finish
- Increased the level of access for staff
- Provided technology, tools, and training to support the change
- Allowed staff to make more independent decisions and apply professional judgment
One Stop Student Services
Mission Statement

To provide quality and professional service in the areas of enrollment, financial aid, billing and payment to support students’ academic and financial objectives.
One Stop Student Services Organization
Developed Cross-Functional Training Program

- Assessed the required training needed and developed an intensive 10 week program for staff to become proficient.
- Developed four modules across functional areas: Admissions, Registrar, Financial Aid, and Student Accounts/Billing
- Provided student centric training
- Training process: classroom training, mentor training, reading comprehension, hands-on learning
- Incorporated soft-skill training
- On-going refresher training
# Student Life Cycle Training Modules

<table>
<thead>
<tr>
<th>Functional areas</th>
<th>Apply</th>
<th>Pre-semester</th>
<th>Semester</th>
<th>Post-semester</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions</td>
<td>Admission applications: how it’s done, online vs. paper, cost and timelines.</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Enrollment/registration</td>
<td>Web, in-person, fax/mail registrations, and common questions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial aid</td>
<td>How student applies / FAFSA, MILs, ISIRs, Determining COA and EFC, and types of aid.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts receivable/billing/collections</td>
<td>Non-billing of admissions fees.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Staffing

• Created a One Stop Counselor classification with Human Resources
• Posted One Stop Counselor positions
• Hired in 3 phases
• Retained traditional customer service model during hiring and training of new counselors
• Assisted affected staff
Separation of Duties & Staff Empowerment

- Worked with internal audit office to ensure appropriate access level
- Need to ensure appropriate levels of control
- Empowered staff to apply independent discretion and professional judgment
Challenges

• Multiple locations
• Staffing peak periods
• Multiple projects/priorities
• Communications to students
• Different office cultures
Critical Success Factors

• Hire the right people to work for you and represent your organization

• Develop a cross-functional training curriculum – bring in the experts!

• Provide refresher training

• Analyze FAQs and processes after peak periods

• Provide variety for staff by rotating tasks: in-person service, telephones, e-mail, projects, committee work, and outreach
Continuous Improvement “Stage”

- Organizational changes
- Developed customer service standards
- Metrics of success
- Obtain customer feedback
- Productivity measures
- Outreach & professional development
- Leverage emerging technologies
Creating a Promotional Track

- Senior One Stop Counselor
- Four positions added, 3 additional added later
- Opportunity for leadership activities
- More involvement with committees, decisions, and coaching staff
- Base salary increase
Mentor Program

• Welcome and orient new staff
• A “go to” person that can answer questions
• Model good behavior and give advice
• Provides leadership opportunity
Customer Service Standards

• **Knowledgeable**
  – Understand and accurately explain procedures/policies.
  – Verify student’s name/ID and look at student’s record even if their questions appear simple.

• **Efficient**
  – Be comprehensive by looking at all aspects of the student’s record
  – Verify all issues have been resolved

• **Empathetic**
  – Actively listen and be patient with customers
  – Be realistic, but positive

• **Friendly**
  – Introduce yourself during phone calls and welcome students to the counter
  – Use a calm, reassuring tone and make eye contact
Metrics of Success

- Point of service comment cards
- Online comment cards
- Web usability testing
- Tracking problems & resolutions
- Surveys: students, customers, veterans
- Focus groups
- Student Advisory Committee
Point of Service Comment Card

ONE STOP
student services

Your opinion matters!
Your opinion makes a valuable contribution to our ongoing efforts to improve service to University students. Please take a moment to let us know how we are doing by filling out this card or emailing us at onestop@umn.edu. You may return the completed card in a drop box, take it to a One Stop Student Services Center, or mail it via U.S. Postal Service (fold in half and add first class postage to the reverse side). Thank you!

Where, how, and when did you receive One Stop service?
☐ In-person (please circle one campus location) East Bank West Bank St. Paul
☐ One Stop on the Web ☐ Phone ☐ Email ☐ Other

Date (00/00/0000) Time of day

Please rate the One Stop service you received.
☐ Outstanding ☐ Very good ☐ Fair ☐ Disappointing

Purpose of your inquiry/comment

Name of staff who provided assistance

Your comments/suggestions (attach additional pages, if needed):

☐ I would like a reply. Please provide the contact information requested below.

Name Phone

University email address

To request copies of this form in an alternative format, please call the Disabilities Services liaison for student services at 612-625-9578. The University of Minnesota is an equal opportunity employer and educator. Printed on paper made from no less than 20 percent post-consumer waste. Please recycle.

OS009 2/11
Evaluating Student Satisfaction

ONE STOP Annual Student Survey 2012

About the survey: A random sampling of students were contacted to respond to a service satisfaction survey of One Stop Student Services in November 2012. Overall, 98% of students who responded felt positive about the service they received.

Undergraduate:
- Freshmen 18%
- Sophomores 15%
- Juniors 13%
- Seniors 21%

Graduate:
- 25%

Non-Degree:
- 8%

Each figure represents 60 students.

Email response expectation:
- Within a few hours: 50%
- Within one day: 40%
- Within two days: 10%
- Within three days: 0%

Students who preferred contact by means other than email represent 7% of respondents.
One Stop Organizational Productivity Measures

- Wait time in phone queue
- Wait time for walk-in customers
- Turn around time for e-mail inquiries
- Online transaction speed and volume
- Timeliness and accuracy of processing requests
Outreach

• Financial aid nights
• Dean’s receptions
• Prospective student events
• Early awareness
• Student & parent orientation
• Financial literacy
• Welcome Week & Grad Fest
Financial Literacy Initiative

Ditch the Car...

Find more information at: http://onestop.umn.edu/livelikeastudent

Campuses are designed for students who walk, bike, or ride the bus.

Live like a student now so you don't have to later.
Financial Literacy Initiative

If you do take out a student loan, use it only to pay for school expenses. A student loan isn’t money to blow on spring break or to pay off your credit cards.

Find more information at:
http://onestop.umn.edu/livelikeastudent

LIVE LIKE A STUDENT NOW
SO YOU DON’T HAVE TO LATER.
Financial Literacy Initiative

Prepare for your career

It's a smart move to take jobs throughout college that will get you ahead in your chosen field once you graduate.

Find more information at:
http://onestop.umn.edu/livelikeastudent

Live like a student now so you don't have to later.
Buying coffee every day at $3 per cup will cost about $60 a month!
Save yourself $700 annually and brew your own stuff.

Find more information at:
http://onestop.umn.edu/livelikeastudent
Social Networking

Do you know about the 13-credit policy? If you're a degree-seeking undergraduate, you pay a flat tuition rate based on 13 credits, regardless of your credit load. This means that any credits you take beyond 13 are free!

If circumstances prevent you from registering for 13 or more credits, you can apply for an exemption by the end of the fourth week of the semester.
Social Networking

One Stop
@UMNOneStop
Providing student services in the areas of enrollment, financial aid, billing, and payments, in support of students' academic and financial objectives.
University of Minnesota  http://onestop.umn.edu/index.html

Tweet to One Stop
@UMNOneStop

Tweets

One Stop @UMNOneStop
Planning ahead can save you time and money. Do some exploring this summer to find what degree program interests you.
onestop.umn.edu/degree_planning...
Expand

One Stop @UMNOneStop
Were you selected for financial aid verification? Turn in missing information to get your aid for fall. webapps-prd.oit.umn.edu/fastatus/initi...
Expand

Student Unions UofM @umnSUA
#UMN Freshmen! Don't forget to submit your completed Stay & Play booklet for a chance to win $500 to the Bookstores!
zm.umn.edu/8cv
Retweeted by One Stop
View video
Mobile Web Development
Customer Relationship Management (CRM)

- Contact management
- Case management
- Workflow and escalations
- Email management and templates
- Knowledge base enhancements
- Imaging and fax integration
- Database consolidations (comment cards, Ask One Stop, outreach)
- Enhanced reporting and statistics
- New survey capabilities
- New methods for internal communication
CRM Case Management

[Image of a CRM software interface showing a case management system with fields for Case Number, Contact Name, Subject, Case Reason, Case Owner, Account Name, Priority, Description, and a Suggested Articles section with an article titled "Why am I charged out of state?" and "How can I pay my fees?"]
CRM Dashboard Analytics

Site Usage Dashboard

Daily Request Time Usage

Current Month

Daily Origin Bandwidth Usage

Bandwidth Usage

Page View Usage

Top 5 Sites Based On Page Views

Top 5 Bandwidth Consuming Sites

Top 5 Resource Consuming Sites
Science Teaching and Student Services Center
One Stop Student Services Center
One Stop Student Services Center
Self-service computers and queuing display
Check-in Kiosk
Digital Display with Queuing Information
Welcome, swipe your U Card to check-in.

No U Card?
Touch Here
<table>
<thead>
<tr>
<th>Enter student ID</th>
<th>No ID?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5 6 7 8 9 0 Del</td>
<td></td>
</tr>
<tr>
<td>Q W E R T Y U I O P</td>
<td></td>
</tr>
<tr>
<td>A S D F G H J K L -</td>
<td></td>
</tr>
<tr>
<td>Z X C V B N M</td>
<td></td>
</tr>
<tr>
<td>Cancel Continue</td>
<td></td>
</tr>
</tbody>
</table>
Welcome STUDENT X., What can we help you with today?

Transcripts / Certifications
Registration/student record requests
Form drop off: Registration
Form drop off: Other
Financial aid questions/counseling
Scholarship Checks
Billing / payment questions
Other or multiple issues

Cancel
Digital Display with Queuing
On the Horizon

• CRM Expansion
• Strategic Planning – Phase II
• PeopleSoft project and new portal
• Automated workflow for student forms
Variety of One Stop Models

Common Themes

• Redesigned processes
• Student/customer centered
• Self service and web-based service
• Team project
• Cross-functional focus
Student Reactions

• “Excellent service, not only did you take care of the problem, you took care of me as well.”
• “The staff here are great, pleasant and go the extra mile.”
• “You say ‘no’ in such a nice and informative way.”
• “You all know so much. How do you do it? You must be in training all the time! You guys should run the federal government.”
• “You could give some stores a few lessons on service.”
Contact Information

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