The Pathway to Success Strategic Plan

2014-15 End-of-Year Report: Goals 1-3

Goal Initiative #:   Goal 1, Initiative 3

Initiative Title: Sycamore Express One Stops

Initiative Chairs(s): Domenic Nepote, Melissa Hughes, Ann Malloy

1. **Specific accomplishments/achievements since 2013-14 report (*briefly explain using bullet points, noting any changed/adapted*):**

- **On-going maintenance and/or updates to the Sycamore Express websites; these adjustments occur weekly**
- **Initial development work and content evaluation/organization in anticipation of a new Sycamore Express website format**
- **Deployment of payment kiosks and associated cameras in a PCI-DSS compliant environment**
- **Portal enhancement review and recommendation**
- **Functional training delivery to Sycamore Express Offices (twice/year); involves approximately 90 staff members each time**
- **Customer service training delivery with an emphasis on accountability (twice/year); involves approximately 30 Sycamore Express Office supervisory staff members each time**
- **Summer read program; begins with Champion Team members and extends to all Sycamore Express Office staff members**
- **Integration of staff within the Offices of Financial Aid and Admissions**
- **Coordination of customer service operational activities within the Sycamore Express Offices**
- **Marketing Sycamore Express through a variety of initiatives**

2. **Objective/Actions Not Achieved (*briefly explain using bullet points*):**

- **Completion of a new Sycamore Express website format**
    - **Preliminary discussions regarding a timetable had been discussed with University website support, but given the many other initiatives involving website upgrades and changes occurring during this fiscal year, the timetable for support of this project was required to slide.**
- **Disney customer service training**
    - **As part of this initiative, Disney customer service training was brought to campus in February and March 2010. Over 150 people were trained at that time, primarily from the Sycamore Express Offices, but also with select representation from OIT, Sodexo,**

Parking Services, and Human Resources. Many individuals trained at that time are no longer on campus, and leadership of this initiative views this training as a significant catalyst toward enhancing the ISU culture surrounding customer service. Negotiations were held with Disney representatives to secure the best price possible and the timeframe that would work best with campus prior to submitting the budget request for this year. While the costs of Disney training were not funded, the budget review committee did share that decisions regarding future funding of this item would need to be the result of discussions occurring outside of the Strategic Plan.

3. **Benchmark table and benchmark detail:**

Initiative Benchmarks	FY 2014G	FY 2014A	FY 2015G	FY 2015A as of 2/28/15	FY 2015A
Total Sycamore Express Undergraduate website visits	350,000	478,132	400,000	370,151	TBC
Total Sycamore Express Undergraduate website unique visitors	56,000	70,229	60,000	59,628	TBC
Percent of Sycamore Express Undergraduate website users finding the site helpful	85%	85.9%	85%	83.4%	TBC
Total Sycamore Express Graduate website visits	15,800	15,873	15,800	10,302	TBC
Total Sycamore Express Graduate website unique visitors	3,800	4,529	3,900	3,064	TBC
Percent of Sycamore Express Graduate website users finding the site helpful	82%	84.5%	82%	84.5%	TBC
On-line transcript purchases	14,600	14,932	14,600	9,544	TBC
On-line parking permit purchases	3,900	3,982	3,900	4,338	TBC
Electronic check (ACH) transactions	3,900	3,752	4,000	2,636	TBC
Electronic check (ACH) dollars	$5.71M	$6.01M	$5.86M	$5.38M	TBC
Electronic check (ACH) savings over card utilization	$123K	$129K	$126K	$116K	TBC

4. **Total Funding Allocation for 2014-15:**

- **$27,000**

5. **Expenditures as of report date (*include both expenditures and encumbered costs*):**

- **$26,893**

6. **Anticipated Remainder June 30, 2015:**

   - **Less than $0**

7. **Initiative accomplishments since inception of strategic plan:**

   - **Development and continued maintenance of an undergraduate Sycamore Express website**
   - **Development and continued maintenance of a graduate Sycamore Express website**
   - **Development and implementation of several e-commerce initiatives**
   - **Portal re-design**
   - **Disney customer service training**
   - **ID card production in the Student Recreation Center**
   - **On-going marketing of Sycamore Express**
   - **Deployment of PCI-DSS compliant payment kiosks**
   - **Deployment of Sycamore Express customer service workstations within each Sycamore Express Office**
   - **Annual functional training – twice/year**
   - **Annual Champion Team customer service training – twice/year**
   - **Focus group for HR Customer Service Training Program development**
   - **Development of a knowledgebase system**
   - **Enhanced communication and collaboration in and among the Sycamore Express Offices**
   - **Created SharePoint team site for Sycamore Express Offices**
   - **Nurtured mutual respect between the Sycamore Express Offices**
   - **Initiated a customer service culture change that continues to move forward**

8. **Looking ahead, what recommendations do you have for the future of this initiative:**

   - **Continuation of maintenance/enhancement of the Sycamore Express website**
   - **Creation and deployment of a new website format for Sycamore Express**
   - **Continuation of functional training for Sycamore Express Office staff**
   - **Continuation of customer service training for Champion Team members**
   - **Continuation of our summer read program emphasizing personal accountability**
   - **Exploration of options to bring Disney training back**
   - **Continuation of marketing Sycamore Express, inclusive of payment kiosks**
   - **Evaluation of further integration of staff within appropriate Sycamore Express Offices**

- **Evaluation and possible development of an emergency response plan**
- **Evaluation and implementation of appropriate electronic services**
- **Further collaboration with Human Resources for customer service training**
- **Continuation of our migration forward on our path of cultural change**

9. **What barriers do you anticipate for full implementation of these recommendations?**

   Some components require funding, especially marketing and the maintenance of the payment kiosks. Should reconsideration be given to funding Disney training thru Strategic Planning, future negotiations may not result in as favorable proposals from Disney as were obtained in this last fiscal year. And, there are always multiple priorities with limited time.

10. **At this point in the implementation of the strategic plan, do you believe that there are new points of emphasis for your initiative? If so, please explain.**

    The underlying foundation that supports the success seen by the Sycamore Express Initiative is the focus that was emphasized from the beginning on the need for personal accountability and the delivery of quality service by all employees. This is our primary point of emphasis, and it drives all else that we do.

11. **Looking back from this point in the implementation of the strategic plan, do you see any missed opportunities related to your initiative?**

    Leadership from the core Sycamore Express Service Offices has faithfully met every Monday since Fall 2009. While there are probably opportunities that have been missed, we address both challenges and opportunities in a timely manner. As such, we are unable to identify anything with specifics that was missed.

12. **Has this initiative been sufficiently integrated into your operations?**

    This initiative is unique in that it does not have any one office or Vice Presidential area responsible for its actions. It is a collaboration of customer service offices that have reporting lines inclusive of Academic Affairs, Business Affairs and Enrollment Management. In order for it to be integrated into operations, Sycamore Express Office leadership would all have to remain committed to the various components of the initiative. As staff turnover occurs, it would be extremely important that new leadership embrace the concepts of this initiative in order for it to continue. Current leadership has discussed baseline funding with concerns falling on both sides

of the issue. If baseline funding were to be implemented, it could not be merged with any Sycamore Express Office's existing budget. It would have to be maintained as a separate source of funding not tied to any specific Sycamore Express Office, other than from an administrative perspective, with the sole purpose of supporting only initiative actions. The question exists as to whether or not all offices would remain committed to the ideals of this initiative, over the long term and/or as staff changes occur, if the concept were to be no longer embraced as a Strategic Plan Initiative.

13. Do you see opportunity for this project to work more closely with another initiative(s) or University department such that greater impact might be possible (*briefly explain)?*

This initiative is actually all about embracing such an opportunity. There is already extensive collaboration in and among several University customer service offices that cross three different vice presidential lines. In addition, plans are in place for continued discussion with representatives from the On-line Learning Office to see how the Sycamore Express initiative might be able to enhance the on-line student experience.