

Goal 1 Initiative 4 Work Plan

Create Sycamore Express One-Stop Centers

Introduction/Background – What?:

This initiative team is comprised of leadership from six core service offices – Admissions, Bursar Operations, Financial Aid, Registration and Records, Residential Life, and the College of Graduate and Professional Studies. While some universities have co-located functions to create one-stop centers, it was decided to take this concept to the next level as more and more students rely on e-commerce and other online services. Thus, “One-Stop” has been defined from the student experience perspective, given their growing utilization of technology, rather than from the physical elements. This virtual approach takes full advantage of online capabilities, making it as convenient as possible for students to access a myriad of services and information from locations most convenient to them – on-campus, at home, or at the local coffee shop with internet access. While a virtual one-stop center has been the primary focus, it has been complimented by the establishment of physical One-Stop locations within each core service office as well. Given the belief that well-trained employees that focus on delivering quality customer service enhances this initiative, there has also been a focus on functional and customer service training as well. A Champion Team was defined at the outset of our initiative that serves as a model to other colleagues within their respective units.

Proposal/Purpose/Justification – Why?:

It is believed that students will be more successful if the information and services they need can be readily available whenever they need them. As part of this initiative, both students and employees have been empowered to do more on their own. Students have been given self-service tools to find answers and conduct business with relative ease, while employees have been empowered to provide exceptional quality service, supported by technology and on-going training. Students are able to focus on their academic endeavors without the level of administrative concerns they once encountered, which should help them realize their educational goals. This should not only increase retention and graduation

rates, but their improved satisfaction should also result in the sharing with others of the educational opportunities available at ISU, which should have a positive impact on recruiting. The One-Stop website, known as Sycamore Express, provides these services to not only existing students, but it also supports prospective students in their college search process.

Work Plan – Action Steps – Process – How?:

Our team focus for Year Four will be to continually monitor and enhance the Sycamore Express website, inclusive of the completion of the Graduate Knowledgebase system project. As an example of responsiveness to feedback from the website's pop-up survey, a shopping cart concept has been developed that will allow students to compute estimated cost of attendance, inclusive of not only tuition, but room and board charges, parking, etc. The monitoring and enhancements of the website are intertwined with marketing of the same and infrastructure issues, such as Payment Card Industry (PCI-DSS) compliance. Marketing this valuable tool is an on-going responsibility, and in association with our physical One-Stop customer service stations, there have been on-going efforts to ensure PCI-DSS compliance that have involved initiative leadership, e-commerce team members, OIT, and Payment Card Industry compliance auditors. Additional e-commerce and self-service initiatives will be examined and pursued as may be appropriate. One such initiative that will be reviewed will be adding the self-service feature of immunization reporting. Current thinking is that this will be done in conjunction with the consulting firm, Strata Information Group (SIG).

Functional training for core service office staff continues to be viewed as a very important component of this initiative, and as such, will be on-going. Core service offices are to be emphasizing within their individual units the need for a basic understanding of many of the services and responsibilities that exist within the other respective core service offices. Prior to the delivery of functional training, each core service office is responsible for updating their material, ensuring the accuracy and timeliness of the information to be provided.

Customer service training will also be on-going. Core service offices are to be emphasizing quality customer service within their individual units at all times. The initiative team continues to meet weekly as it has since October 2009. A customer service team has also been established, with representation from each core service office, and meets approximately every two weeks. In addition, the Champion Team continues to meet approximately quarterly in order to ensure that quality customer

service remains at the forefront of everyone's actions. Leadership speakers have been utilized, personal accountability books have been identified and provided for required reading, etc. In order to ensure the priority that must be given to the delivery of quality customer service, discussions will be held with Disney representatives about opportunities that might exist to build upon the solid foundation they established as a result of their training during Year One of the Strategic Plan.

Reporting and Deliverable Schedule – When?:

The Graduate Knowledgebase system will be completed in Year Four. It was released in March 2012 for internal testing with 102 articles available. It is currently planned to have it available to the public in August 2012.

PCI-DSS compliance actions in association with physical One-Stop customer service stations are in the initial stages. Plans include having a general security package in place prior to the next compliancy audit. Negotiations are currently underway that will hopefully result in a February 2013 audit.

Sycamore Express marketing campaigns are on-going, and will take place throughout the year. They will be varied in nature, and will include taking advantage of face-to-face opportunities that may arise.

Functional training will be delivered twice during the year. Presentation materials are reviewed and updated prior to each functional training offering, in order to reflect the most recent information available. Care is also given to ensure that topics that may have been previously omitted are incorporated as may be deemed appropriate.

Customer service training is on-going from an in-house perspective; however, initiative leadership believes it is important to pursue discussions with Disney in hopes of identifying training opportunities that will raise the quality customer service commitment and the ability to deliver the same at the next level. Year Four will be utilized to determine if opportunities do indeed exist, negotiate fees if applicable, and determine scheduling possibilities for the 2013/2014 year.

Budget – How Much?:

No new funding is being requested for this initiative. In Year One, funding was provided for a variety of budgetary needs. As initiative implementation progressed, some funding that was intended for outside support was not used, as the Sycamore Express website was developed totally with existing staff. This saved the initiative a significant amount of money which was re-purposed as alluded to in subsequent TaskStream reports. In addition, funding for the Knowledgebase system was not used in its entirety as well, again, because of some significant internal development. These savings are the primary items funding this initiative's existing balance.

Plans exist for the utilization of this initiative's current budget balance as follows. Please note that not all dollars will be spent in 2012/2013, as some of the intended utilization cannot occur until 2013/2014.

Marketing will be on-going in regard to the Sycamore Express website and physical customer service stations. Marketing campaigns range from providing instructional materials to the utilization of various forms of media to promotional freebies at a variety of face to face events. Marketing expense can be covered this year with **\$4,000** of the existing allocation.

Ensuring that e-commerce activities at the various Sycamore Express physical customer service stations fall within **PCI-DSS compliancy** requirements is currently a work in progress. On-going efforts to ensure compliancy have involved initiative leadership, e-commerce team members, OIT, and payment card industry auditors. While the exact solution has yet to be determined, hardware needs may exist in each of the six core service offices. **\$22,000** of the existing allocation is viewed as on reserve for this purpose.

Additional e-commerce and self-service initiatives are identified and pursued as may be deemed appropriate. Currently, core service offices exist that anticipate working in conjunction with the consulting firm Strata Information Group (SIG) to bring these projects to production. Discussions have not yet occurred with SIG, but it has been determined that **\$10,000** should be reserved for these action items. Developing self-service functionality for immunization reporting is one such example; however, it is anticipated that this one will most likely not occur until 2013/2014. In addition, some core service offices plan to work with student

programmers to further develop self-service functionality and **\$5,000** has been allocated for paying the wages of these students.

Functional training expense has been absorbed by the individual core service offices to date. It is anticipated at this time that initiative budget dollars will not be used for this activity, but instead, departmental funds will continue to be used. Customer service training, however, has had expense covered by initiative dollars. An on-going expense associated with customer service training has been the purchase of books for **required reading dealing with the subject of personal accountability**. Speakers may also be utilized. **\$1,000** has allocated for the on-going cost of customer service training. Pursuing additional Disney training to be offered in 2013/2014 will result in the need for an additional funding request in the future. Should budget dollars remain at the end of 2012/2013, they will be considered prior to asking for additional dollars for Disney training.

Stakeholders and Management Plan – Who?:

Domenic Nepote, Melissa Hughes, and Amanda Hoit, as initiative co-chairs, will be overseeing this initiative and ensuring progress in regard to the work plan. Initiative team members – Troy Allen, Crystal Baker, Les Anne Dant, and April Hay – will be deeply involved in many of the initiative actions. Given the nature of this initiative, significant support is provided by staffing within the core service offices. OIT will be also be involved in the PCI-DSS compliancy project.

Outcome Assessment & Future Testing – How Well?:

Assessment and analysis of the various components of this initiative are viewed as reoccurring priorities, inclusive of the need for appropriate responsive action. The creation of the Sycamore Express website has been a primary focus of this initiative and utilization of the same is closely monitored, as well as the virtual self-serve functionality embedded within the site. Customer service has also been a primary focus, and satisfaction with the same is also monitored. The assessment undertaken in conjunction with the various components of this initiative serve to ensure the continued success of the same.