Strategic Plan – Initiative Work Plan FY2015

Initiative Name **Create Sycamore Express One-Stop Centers** **Date** **5/21/14**

Goal # **1** **Goal Chair(s)** **John Beacon, Carmen Tillery, Josh Powers**

Initiative # **4** **Initiative Chair(s)** **Domenic Nepote, Melissa Hughes, Ann Malloy**

Thesis Statement **The primary purpose of this strategic initiative is to provide self-service tools to empower students and their families to find answers and conduct business with relative ease while at the same time empowering employees to provide exceptional quality service supported by technology and on-going training.**
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1. 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 the core service offices, which have recently had Sycamore Express payment kiosks added 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. A Champion Team was defined at the outset of our initiative that serves as a model to other colleagues within their respective units.

2. 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.

3. Discussion of Past Years Results – Benchmark Successes?
(This section needs to be as long as is necessary to assess whether funding should be continued.)

Benchmark results to date indicate several successes associated with this initiative. The Sycamore Express website continues to have widespread acceptance, with a cumulative undergraduate site visit count exceeding 1.3 million since its May 2010 launch. It is highly probable that cumulative undergraduate visits will surpass the 1.8 million mark by the end of FY 2015. Graduate site visits began being tracked separately in late 2011.

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While it would appear that graduate site visit growth may be stabilizing, the number of unique visitors seems to be growing. Website satisfaction levels are at 85.9% for the undergraduate site and 84.5% for the graduate site.

The ease of conducting business thru the many e-services that have been developed and implemented in conjunction with this initiative is appreciated by many. As of May 2013, on-line transcript purchases have grown 677% over the number purchased in this manner in FY 2011, and it would appear that FY 2014 will replicate FY 2013 transaction counts. Another example would be on-line parking permit sales, which have almost doubled between FY 2011 and FY 2013, with FY 2014 on-track to exceed FY 2013 transactions. An area that has seen significant growth, which has also resulted in significant savings for the University, is usage associated with ACH (electronic check). One reason that recent growth in this area has been as significant as it has been, is the introduction of electronic billing. FY 2013 transaction counts were up 86% over FY 2011, while transaction dollars were up 130%. Both transaction counts and transaction dollars in FY 2014 are anticipated to exceed FY 2013 rates. FY 2014 savings associated with ACH/electronic checks totals $122,000 thru early May 2014, bringing the total savings since implementation to $363,000.

Working toward PCI compliancy with PCI-DSS credit card requirements within the core service offices has again been a major undertaking this reporting period. Having developed the plans last reporting period, this reporting period experienced the actual implementation of Sycamore Express payment kiosks in each of the core service offices. The project was and continues to be complex in both depth and breadth of requirements that exist in conjunction with the services offered thru the payment kiosks. Additional work is required in this area that will carry into the next reporting period.

Examples of other achievements occurring this past year include the re-introduction of job shadowing, AACRAO SEM conference presentation, Service Initiative meetings with most core service offices, broadened marketing efforts, and identifying by category who is visiting the Sycamore Express website and understanding what the implications of this knowledge might be. Perhaps the most significant success has been the continued growth in cooperation and mutual respect among the core service offices associated with this initiative.

While several successes have been noted above, this initiative's leadership continues to believe that 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. As such, both supplemental functional training and customer service training continue to be a priority of this initiative.

4. Work Plan, Next Fiscal Year – Action Steps – Process – How?

Our team focus for Year Six will be to continually monitor and enhance the Sycamore Express website, inclusive of a review and subsequent development of a new website design. Preliminary conversations have taken place with web developers during the current year, with some information due from the core service offices in the near future.   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 and their newly deployed Sycamore Express payment kiosks, 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. While much progress has been made in regard to PCI-DSS compliancy in the last year, there remain a few items that will need to be completed in the coming year. Additional e-commerce and self-service initiatives will be examined and pursued as may be appropriate. One such initiative that will be undertaken will be to explore mobile friendly virtual service capabilities. An initiative that was undertaken last year was to further understand who is visiting the site and what the implications of knowing and understanding this might be. Additional analysis is still needed in this area. For

example, there seems to be a correlation between the number of visitors from other countries and the number of enrollments we subsequently get from those countries – this needs to be further monitored and understood.

Supplemental 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 supplemental functional training, each core service office is responsible for updating their material, ensuring the accuracy and timeliness of the information to be provided. A concerted effort was undertaken this year to enhance the delivery of supplemental functional training, in order to keep employees more fully engaged. Enhancements made proved to be positive changes based on the many positive comments collected from training participants.

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. In addition, the Champion Team continues to meet at least twice per year 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 as required reading, etc. As previously reported in multiple years past, the leadership team continues to believe that it is important to re-introduce Disney Institute training in order to build upon the solid foundation they helped to establish as a result of their training during Year One of the Strategic Plan. As such, conversation has taken place with Disney representatives this year to learn of opportunities that might exist for delivery in FY 2015.

5. Reporting and Deliverable Schedule – When?

The Sycamore Express website is continually monitored, and always will be, as it is a dynamic site that is essentially a work in progress. Content must be valid and current, and a continual increase in utilization is desired. Enhancements are undertaken as deemed appropriate. Current plans include a review of the existing site to be followed by the subsequent development of a new website design. A completion timeline has not yet been determined, as the extent of needed design change is at this time yet unknown. Care will be taken to ensure that those that have become dependent upon the wealth of information available/services offered within the Sycamore Express website, will continue to have the capability to find information and/or utilize e-services without interruption.

PCI-DSS compliance actions are very near the completion stage in association with physical One-Stop customer service stations and their Sycamore Express payment kiosks. Implementation plans were developed by first identifying each Sycamore Express core service office needs and subsequently determining how to best meet these needs in a PCI-DSS compliant manner. Close interaction with OIT, PCI-DSS auditors, and those ISU employees with PCI-DSS knowledge was required. Most core service offices, if not all, will become compliant within this next year.

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. Benchmarks of utilization and satisfaction are always pursued at higher levels than previously reached.

Supplemental functional training will be delivered twice during the year. Presentation materials are reviewed and updated prior to each 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. Changes in delivery that were made to help ensure an engaged staff will be continued into the next year.

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Customer service training is on-going from an in-house perspective, focusing on a Champion Team intended to ensure that quality customer service remains at the forefront of everyone's actions. However, initiative leadership believes it is important to pursue discussions with the Disney Institute in hopes of identifying training opportunities that will elevate the quality customer service commitment and the ability to deliver the same to an even higher level than which currently exists. Year Five was utilized to determine if opportunities do indeed exist, and to discuss fee structures and possible scheduling availability. Year Six will be used to define and refine program structure, obtain firm proposals, finalize contracts and host Disney training in spring 2015.

Assessment and analysis of the various components of the initiative are viewed as re-occurring priorities. In addition, appropriate responsive action, based on surveys analysis, will serve to ensure the continued success of this initiative.

6. Budget – How Much, a General Discussion of Funds Use?

Until now, no new funding has been requested for this initiative since Year One. 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 previous 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 that have been funding this initiative, as carry forward dollars have previously been permitted. Depending on when we can order some equipment required for PCI-DSS compliancy, carry forward dollars can fluctuate by as much as $10,000-$12,000. The budget request for FY 2015 is $125,000, with the bulk of the request being for Disney Institute training.

7. Stakeholders and Management Plan – Who?

Domenic Nepote, Melissa Hughes, and Ann Malloy, 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, Amanda Knerr, and Angie MacLaren – 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 also be involved in the PCI-DSS compliancy project.

8. Outcome Assessment & Future Testing
(How will we know that we were successful?)

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 serves to ensure the continued success of the same.

9. Line Item Budget Discussion that tracks Budget Templates …
(These sections also need to be as long as is necessary to articulate each of the budget line items.)

As noted in Item 6, $125,000 is requested as FY15 funding. Plans exist for the utilization of this amount in the following manner.

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Marketing will be on-going in regard to the Sycamore Express website, physical customer service stations, and Sycamore Express payment kiosks. 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. New signage is also required from time to time in some physical customer service station locations. Marketing and signage expense can be covered this coming year with **$8,000**.

Ensuring that e-commerce activities at the various Sycamore Express physical customer service stations, especially in conjunction with Sycamore Express payment kiosks, fall within **PCI-DSS compliancy** requirements remains a work in progress. On-going efforts to ensure compliancy have involved initiative leadership, e-commerce team members, OIT, and payment card industry auditors. Solutions were identified and have been underway for several months. Some PCI-DSS hardware has not yet been acquired.   It has been determined that PCI-DSS hardware needs exist in the core service offices, and approximately **$18,000** will be needed to acquire this hardware over the next several months.

Supplemental 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. Pursuing additional Disney Institute training to be offered in FY 2015 is a high priority for the leadership team. HR will be invited to participate, just as they were in 2010, allowing them the opportunity to gain valuable insight that can be used to enhance their in-house training, which was developed from that which they learned in 2010.   Funding for this component totals **$99,000**.