Tool #21: Stakeholder Process Improvement Forms

Staff left out of the CRM decision and planning processes are more likely to be disengaged with or even resistant to adoption, which can be crippling to any unit's CRM implementation. This tool highlights resources for garnering staff input, for fostering buy-in during planning and implementation, and for efficiently stewarding training resources (after assessing which staff are resistant to process or technology change).

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Roadmap for Involving Staff

The timeline below shows basic implementation phases to the left of the arrow and corresponding staff management steps to the right. The ✓ directs readers to resources within this tool and within the larger toolkit. The right-most column outlines staff roles explained in Tool 32: CRM Leadership Structure Guide.

Implementation Phases	Staff Management Steps	Description and Toolkit Resources	Staff Involvement*
	Identify CRM Leaders and Stakeholders	Identify CRM leadership team and organize staff into user groups according to job function ✓ *Planning Worksheet 1 in this Tool, p. 3*	• CRM Program Lead • IT Representative • Business Analyst
Review Business Processes		Understand the gaps between units current state and end-vision state ✓ *Tool 22: Guide to Understanding Your CRM Needs*	• Steering Committee
Plan Timeline for Implementation		Anticipate implementation milemarkers and hurdles ✓ *Tool 29: CRM Risk Point Map* ✓ *Tool 23: Example CRM Implementation Timeline*	• Implementation Team
	Collect Staff Input	Collect recommendations for process improvement in these areas: communication, technology, and organization. ✓ *User Group Activity 1 in this Tool, p. 4*	• CRM Program Lead (if possible) • Departmental Champions/Subject Matter Experts

* See Tool 32: CRM Leadership Structure Guide for an explanation of responsibilities and qualifications of the roles described here.

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Stage	Activity and Tools	Stakeholders
Craft CRM Goals and Roadmap	Plan for CRM adoption ✓ *Tool 28: CRM Resource Intensity Comparsion Chart* ✓ *Tool 39: CRM KPI Builder* ✓ *Tool 26: Vendor Selection Scorecard*	• Steering Committee
Select a Vendor	✓ *Tool 26: Vendor Selection Scorecard* ✓ *Tool 27: Vendor Selection Committee Guidelines* (for selection committee members who are seeking input from their teams)	• CRM Vendor Selection Committee
Announce CRM; Collect Staff Input about Goals	Announce decision to adopt CRM, showing staff contribution; announce vendor selection (if applicable); collect and incorporate staff input about goals. ✓ *User Group Activity 2 in this Tool, p. 5* ✓ *User Group Activity 3 in this Tool, p. 6*	• Program Lead • Departmental Champions • Steering Committee
Design, Test System	Determine implementation timeline ✓ *Tool 23: Example CRM Implementation Timeline*	• Steering Committee
Identify Reticent Staff	Identify resistant staff and accommodate them with specialized training ✓ *Planning Worksheets 2 in this Tool, p. 3*	• Department Champions
Initiate Training	Survey staff about training preferences and deliver training ✓ *User Group Activity 4 in this Tool, p. 7* ✓ *Tool 35: CRM Training Curriculum Outline*	• Department Champions • User Trainers
"Go Live"		

* See Tool 32: CRM Leadership Structure Guide for an explanation of responsibilities and qualifications of the roles described here.

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Staff Management Resources for Leaders

Use the worksheets in this section to plan user group activities and special training for staff resistant to change.

Planning Worksheet 1. Assigning Staff to User Groups

Directions: Select the functional areas that should be represented in each user group. Consider these job functions: marketing/recruitment staff, admissions staff, IT staff, academic and retention advisors, and faculty members, and program directors.

User Group Name	Departments Represented	Staff Names
Example: Pre-enrollment Users	*Marketing specialists, recruitment advisors and/or admissions counselors*	*John Mustard, Sylvia Peacock, Richard Green, Mildred White*

Planning Worksheet 2. Training Development for Resistant Staff

Directions: Use the table below to outline special training for reticent staff. Consider the following when designing training:

Content

- Exercises that build empathy between the staff member and the student (e.g., role play)
- Practice time with new technology in a sandbox
- Case studies that illustrate how process and technology changes will improve staff's productivity and increase quality of work
  - http://emaspro.com/wp-content/uploads/2011/11/SNHU-Case-Study_v1_01-07-11.pdf
  - http://www.jisc.ac.uk/media/documents/programmes/bce/teeside_casestudy.pdf

Delivery

- Contacts recommend an informational tone with little to no discussion of punitive repercussions
- One-on-one conversations allows for better professional development
- Consider pros and cons of trainers: peer, supervisors, non-departmental personnel

Staff name	
Content	Activities that meet guidelines above:
Delivery	Intended tone, format, trainer:
Frequency	
"Mission Accomplished" Indicator	

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Staff Buy-In Activities

User Group Activity 1: Staff Input on Process Improvement

"Suggestions Box" Worksheet: User Group Meeting, mm/dd/yy

As we plan for the future, Example University's COE unit is in the process of evaluating its communication with prospective and current students, including staff-student interaction. We would like to hear your suggestions about how we can change the unit's communication processes and technology to help you do your job better. We know that you work hard to serve prospective and current students; by putting in place right tools and system improvements, we hope to help you and, in turn, improve communication with students. Please complete this worksheet and return it to your supervisor by mm/dd/yy.

1. **Please list the core functions of your job:**
   - *Example for triage desk staff: To answer prospective students' questions about the application process*
   - ____
   - ____
   - ____
2. **Please describe inefficiencies or technological limitations that prevent you from doing the best job possible in the core functions listed above:**
   - *Example for recruitment counselor: I call prospective students to see if they need help applying. I have to scroll through a long spreadsheet to determine their program of interest and 50 percent of the time no program of interest is listed, so I'm working with very little information when reaching out.*
   - ____
   - ____
   - ____
3. **When, how, and why do you communicate do you have with prospective or current students?**
   - *Example for program director: I meet prospective students at corporate events and conferences (about 20 per year) and promoting our online programs for professionals*
   - ____
   - ____
   - ____
4. **What do you think are the prospective and current students' main concerns or complaints about their interaction with staff in your role?**
   - *Example for program director: If a prospective student expresses interest, I pass along the student's name and contact information to the recruitment team but I am never looped in about whether the student applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I generate.*
   - ____
   - ____
   - ____

Please list any other suggestions for improved communication processes or organization.

____

____

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User Group Activity 2: Email Acknowledging Suggestions

This email template offers a model for acknowledging staff suggestions and mapping them to improvements planned with the launch of CRM technology and/or consultant engagement.

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From: CRM Leaders
To: All COE Unit Staff
Subject: Thank you for the suggestions!  We've built an improvement plan around them.
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Dear colleagues,

Thank you for completing the "Suggestion Box" Worksheet at your last user group meeting. Based on your input, Dean Humboldt has directed a team of [insert department names e.g., marketing and IT)] representatives to plan and lead a series of communication and business process improvements based on customer relationships management (CRM) philosophy. Under this philosophy, we will develop smarter processes for communicating with prospective students so that our unit better retains the attention of prospective students, better answers their questions and concerns based on each prospective student's need, and ultimately improves conversion from prospect to applicant to enrolled student.

To accomplish these improvements, we've decided to partner with a technology vendor, [insert vendor name], and an implementation consultant, [insert consultant name]. Both partners have excellent track records and have worked with our peers like [insert peer university names]. We are at the beginning of designing these process improvements with the help of our vendor partners, but we wanted to give you some examples of how your suggestions have informed our first-draft efforts.

Staff's Suggestion (*From User Group Activity 1*) →	**Process Improvement Planned** →	**Vendor Improvements**
1. If a prospective student expresses interest, I pass along the student's name and contact information to the recruitment team but I am never looped in about whether the student applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I generate at conferences.	Marketing staff will generate reports based on lead source and will send reports about conference-generated leads (across unit and across each program individually) to program directors. Program directors and their peers will see the fruits of good conference recruitment.	Vendor technology will allow both program director staff and recruitment staff to access prospective student records.
2. I call prospective students to see if they need help applying. I have to scroll through a long spreadsheet to determine their program of interest and 50 percent of the time no program of interest is listed, so I'm working with very little information when reaching out.	Changes to inquiry form will collect more robust prospective student information	Consultant will devise the best way to collect broad discipline of interest even from the undecided prospects. How can this question be incorporated into an initial or later inquiry form?

Thank you again for you again for your suggestions. We will keep you updated as we finalize our first draft of goals for CRM implementation. Stay tuned for information about your next user group session and training and resources that will help staff take advantage of CRM tools and techniques.

All the best,

Julie Furtado (marketing), Karishma Ackerman (admission), Brian Helinek (IT)

CRM Leaders Team

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User Group Activity 3: Codifying Staff Contributions to CRM Goals

Your Contributions to CRM: User Group Meeting, mm/dd/yy

In this session, the meeting facilitators will review your input from the first user group session and will outline our goals for customer relationship management (CRM) philosophy-informed goals. In the middle column, explain how you can contribute to the unit's proposed goals for improved communication. In the right column, modify or make additions to the goals stated in the left-most column.

	How You Can Contribute	**Goal Additions/Modifications**
Revenue Goals		
Example goal inserted by CRM leaders: reduce cost per lead	*Sample comment from hypothetical recruitment advisor: I can convert more of our pay-per-click advertising leads to applicants by better tailoring phone or email outreach to prospective students' goals/motivations.*	*Sample suggested additions: Improve percentage of pay-per-click leads reached by phone. Improve conversion rates after initial phone conversation.*
Marketing and Operational Excellence		
Example goal inserted by CRM leaders: increase email open rates	*Sample comment from hypothetical information technology specialist: I can work with the marketing staff to develop an A/B test for subject lines.*	*Sample suggested additions: Complete at least one A/B test on subject lines per month.*
Example goal inserted by CRM leaders: increase number of repeat students	*Sample comment from hypothetical marketing director: My staff and I can develop alumni-oriented email campaigns that encourage alumni to re-engage with the unit.*	*Sample suggested additions: Develop at least six new pieces of alumni-oriented email content for pilot campaign. Set goal for open rate and track improvement with each new campaign.*
Goal Category: ______________________		
		.

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User Group Activity 4: Staff Survey about Training Preferences

What Type of Training is Best for You?

Directions: As part of the road to CRM implementation, we'll be offering a series of trainings. Please check *only one box* that corresponds to your *most-preferred* option for each category.

Training Format

- ☐ In-person discussion with take-home computer assignments
- ☐ In-person discussion with computer demonstration in computer lab
- ☐ Self-paced, online module with comprehension quiz and with comments submission via e-mail

Training Audience

- ☐ Mostly unit-wide trainings
- ☐ Mostly department-wide trainings
- ☐ Mostly trainings based on small, job function groups

Training Schedule

- ☐ Intensive format (e.g., over 2-day, in-office retreat)
- ☐ Once per week over 6-8 weeks
- ☐ Twice per week over roughly one month

Resources for Additional Training

- ☐ One-on-one sessions with your department's "super user"
- ☐ One-on-one sessions with your supervisor
- ☐ Shadow days, following a peer with above-average speed of adoption