



# Unlocking Data to Drive Digital Transformation and Organizational Change

Strategies to Support Innovation

We will begin at 1:02 p.m. Eastern  
Time once everyone has joined!



# Today's Presenters



**Erin Scallen**

*APS & Edify Strategic Leader*



**Danielle Yardy, PhD**

*Director, Strategic Research*

# Chat and Q&A Features in Zoom

The image shows a Zoom meeting interface. At the top left, there is the EAB logo (a blue circle with a white building icon) and the text "EAB". Below this, the main content area has a dark blue background with a pattern of overlapping circles. The text "EAB Virtual Session" is displayed in white and teal. Below the title, the year "2020" is shown. Two callout boxes with orange borders and lines pointing to the bottom toolbar contain the following text:

- Use the Chat feature to send messages to presenters
- Use the Q&A feature to ask questions

The bottom toolbar is dark grey and contains the following elements from left to right: "Audio Settings" with an upward arrow icon, "Chat" with a speech bubble icon, "Q&A" with a speech bubble icon, and "Leave Meeting" in red text.

- 1 Defining Digital Transformation
- 2 Digital Transformation Investments to Power Your Strategy
- 3 Centralized Data Ecosystem
- 4 Questions and Closing

# Is This What We Meant By Digital Transformation?



5

**IE University** deploying a fleet of UV ray robots to disinfect buildings at night and thermal imaging scanners to monitor temperatures of students entering buildings

**Oakland University** instructing students and staff to wear BioIntelliSense's BioButtons, which measure heart rate, temperature and respiratory rate—and predict early signs of COVID-19



'Since the pandemic started, I've heard daily from vendors with a new technology they want to sell me—and they all either cost six figures or were seemingly developed in a garage.'

*CIO, UK Russell Group University*

**University of Southern California** investing \$2M in AV networking products from Audinate, Crestron and Shure to enable fully hybrid classroom instruction

**University of Rochester** installing sensors from Occuspace to monitor campus foot traffic and density and inform students about available and non-dense study spaces

**Guam Community College** partnering with startup QU-in to handle capacity and line management in high-traffic areas (e.g., registrar office, libraries, gyms, cafeterias)

# So...What Is Digital Transformation, Then?

**Digital transformation** is the process of using **digital tools**—specifically data and technology—to **deliver value and drive change**.

Not technology for technology's sake

The emphasis is **not on specific technologies** but on the application of those technologies to **core strategies or operational challenges**.

The **scaling and widespread adoption** of the solution in turn creates a culture of **continuous improvement** and sets the stage for further transformation.

Digital transformation is not one-and-done

Solving big problems everyone agrees upon

# Seismic Shifts in Scope and Opportunity



## What We Said Pre-Pandemic

## What We Believe Now

Investments can differentiate your institution in the market and expand value



Investments are necessary to avoid falling behind the pack

You're spending 80% on change management and 20% on implementation



You're spending 20% on change management and 80% on implementation

Initiatives are designed to move analogue products and services onto a digital platform in response to 'digital native' demands



Initiatives should replace and streamline transactional services while enhancing and supporting the learning experience

Focus on improving the campus experience through interconnected applications and tools



Expand student and staff access to a digital campus regardless of geographic or financial barriers

Use digital tools to unlock a new operational end-state



Unlock an agile operating environment in which you can pivot between modalities, based on need

# An Industry Like No Other



## Higher Education's Complexity Creates Barriers to Transformation

“**Higher education is essentially three businesses in one:** quasi-governmental administration, teaching and learning, and research.

From a technology perspective, **it's like a Rubik's Cube;** you can easily align for one of those priorities, but **it's difficult to get all three sides the same color.**”

— CIO, Canadian Research University

### Success Is Relative

*Students' Primary Measure of Success, EDUCASE 2020 Report*



*Percentage of respondents*



# Student-Centric Alignment Driving Change

## Institutional Leaders Betting on Student Experience

“**There will be no return to the old normal** but rather an advance towards new structures and solutions built with new tools.

[...] institutions must fashion creative and rapid-response innovations. There will be no more fixed five-year budgets or plans.

Instead, **we must move to continuous planning and change our structures to address student and societal needs more immediately.**”

Gregory Crawford | *President, Miami University*

### Customer Centricity Pays

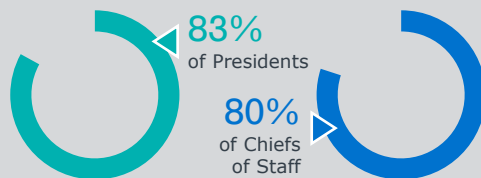
 **+60%** more profitable

 **+5.7x** more revenue

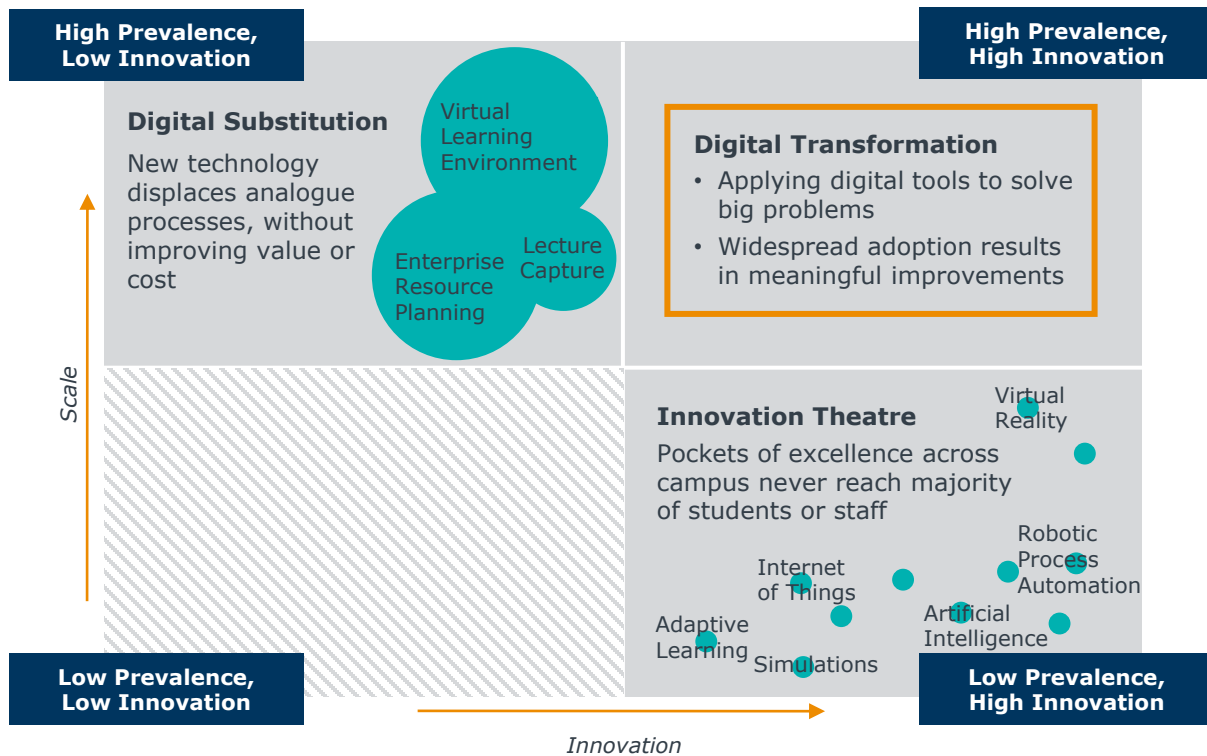
 Build loyalty and retention

### 'Total' Student Experience Tops the Leadership Agenda

Rank “total student experience” as their top priority in 2021:



# Genuine Transformation Frustratingly Elusive



1

Defining Digital Transformation

2

## Digital Transformation Investments to Power Your Strategy

3

Centralized Data Ecosystem

4

Questions and Closing

# What Is a Digital Strategy?

A **digital strategy** focuses on **problem-solving innovations in service of the university mission**. It should be rooted in business needs rather than the latest-and-greatest vendor pitches.

A **digital strategy** is not an IT department strategy that has been renamed 'digital'. While IT strategy is about infrastructure service, cybersecurity, and systems, digital strategy is about **business, value, and the customer**.

## Quick Poll

What is the **biggest barrier** to digital transformation at your institution?

# Six Domains of High-Impact Digital Transformation Investments



Enrollment



Student Support



Teaching and Learning



Administration



Campus Experience



Advancement



Personalized, Multichannel Prospect Communications

Frictionless Student Services and Success-Oriented Interventions

Multimodal Instruction for Career Exploration and Lifelong Learning

Institutional Processes Aligned with Student Needs

Operations, Facilities, and Space Management

Curated, Value-Driven Alumni and Donor Engagement

# Personalized Recruitment Messaging

Mix-and-Match Video Content Tailored to Applicant Interests

## Cal Poly San Luis Obispo's Personalized Video Campaign



# CAL POLY



1

Jane attends a summer band camp at California Polytechnic University as a high school student



2

Cal Poly logs Jane's interest in band and music in their CRM system



3

Videos promoting Cal Poly's music program and activities automatically pushed to Jane across junior year



4

Video campaign culminates with "invitation to apply" to Cal Poly

1,000

Interest-specific videos available to push to prospective students

50%

Recipients who forward videos to friends, leading to more applications



### Sample Video Customizations

#### Recreational sports offerings

For athletes not recruited to collegiate teams

#### Introduction to College of Science

For science camp attendees

#### Working on the university's newspaper

For students interested in journalism

#### Life in the university's town

For international students



# A Complex Road to Data Activation

Software is Only as Powerful as the Data it Holds



A CRM feeds on information. It can't do a thing for you until it's integrated with the ERP, and other campus information.

You can run the tool, **but it's worthless without the data.**"

CIO, Public State University



Disparate  
Sources



Complex  
Formats



Limited  
Resources



# Data Audit Serves as Impetus for Data Clean Up

## Standardizing Max Caps and Course Types for Smarter Course Planning



### Cleaner Data Supports Data-Informed Course Planning Decisions

#### High Maximum Capacity Variation

14%

of sections with enrollments > than the max cap



No insight into actual fill rates or an academic unit's instructional capacity



- Held data review meeting with College of Arts and Sciences leaders
- Developed **policy** by agreeing on caps across all departments

#### Proliferation of Course Types

23

distinct course types



Difficult to obtain accurate snapshot across departments



- Determined which course types were irrelevant or overlapped
- Reduced down to **11 course types**



# Embedding Data in Program Review Process

Empowering Faculty to Surface Opportunities for Growth

## Streamlining Program Review



### CHALLENGE ▶

#### Leaders Lacked Data and Insight in Previous Process

- Heavy reliance on IR Office to provide faculty with data
- Faculty did not have easy access to data
  - With the data they had, they scrambled to find relevant data points and struggled to interpret the data

### SOLUTION ▶

#### 1 Created Standardized Report and Provided Guidance

- Reviewed existing Program Review Self-Study Guidelines
- Created templated self-study report requiring specific data points, along with a how-to guide with instructions

#### 2 Trained Program Leaders

- SL led guided training, walking users through the templated report and how-to guide

### IMPACT ▶

- ✓ Enhanced communication between Senior Leadership and program leaders
- ✓ Surfaced areas of excellence
- ✓ Uncovered opportunities to support growing or shrinking programs

## 180 hours

saved in manual data collection and analysis

# Blending AI and Human Support



## Staffordshire University's Beacon App Nudges Students to Success

- ▶ First AI assistant in UK HE sector
- ▶ Responded to 10K queries in the first month (January 2019), from ordering ID cards to locating lecture halls
- ▶ Student-driven product roadmap leads to new skills, like recommending clubs and societies
- ▶ 'Nudges' seek to non-intrusively intervene and promote success-oriented behaviors

## → Sample Beacon 'Nudge' Campaign



### Problem

Unengaged students at risk of failing or dropping out



### Institutional Knowledge

Relationships with assigned personal tutors improve attainment, retention



### Nudge

Did you know your personal tutor is Dr. Staffs Beacon? You can reach out to her for advice!



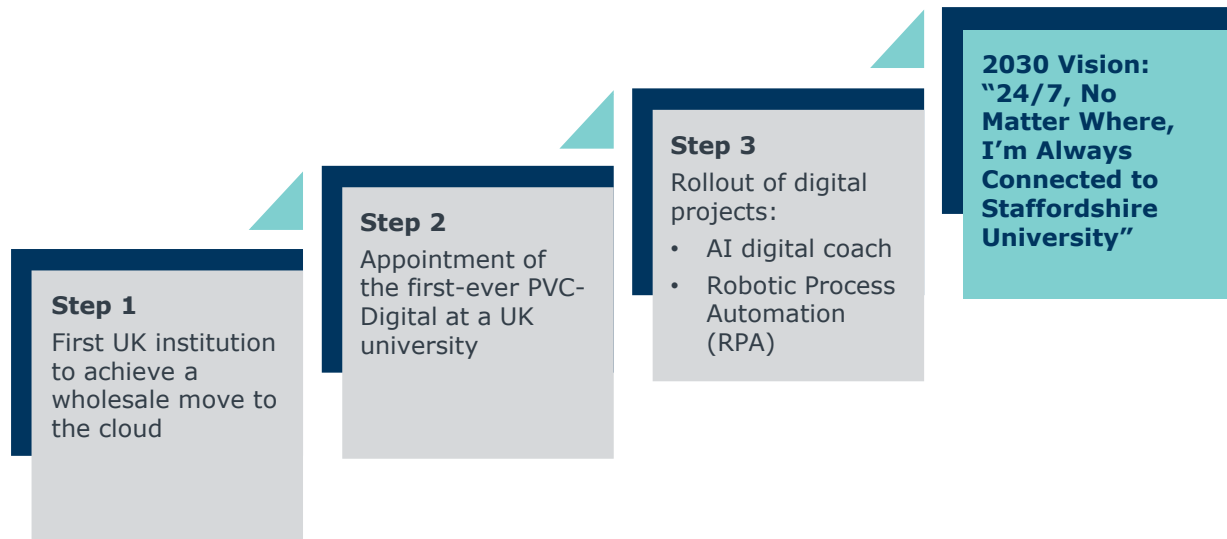
### Result

300 new relationships formed between students and personal tutors

# Laying Groundwork for True Transformation



Staffordshire University: An Institution of Firsts



# Spectrum of Catering and Nudging

## In Developing AI Assistants, HEIs Strike Balance Between Catering to Students' Wants and Nudging Them Towards Success-Oriented Behaviors



### Arizona State University (U.S.)

"Sunny" answers prospects' routine questions related to financial aid and enrollment



### University of New South Wales (AUS)

"Question Bot" flags students at risk of dropping out based on early warning signs and directs them to support

Catering

Nudging

SAINT LOUIS UNIVERSITY.



### Saint Louis University (U.S.)

"SLU"—via Amazon Dots installed in every student room—provides details about campus life and community events

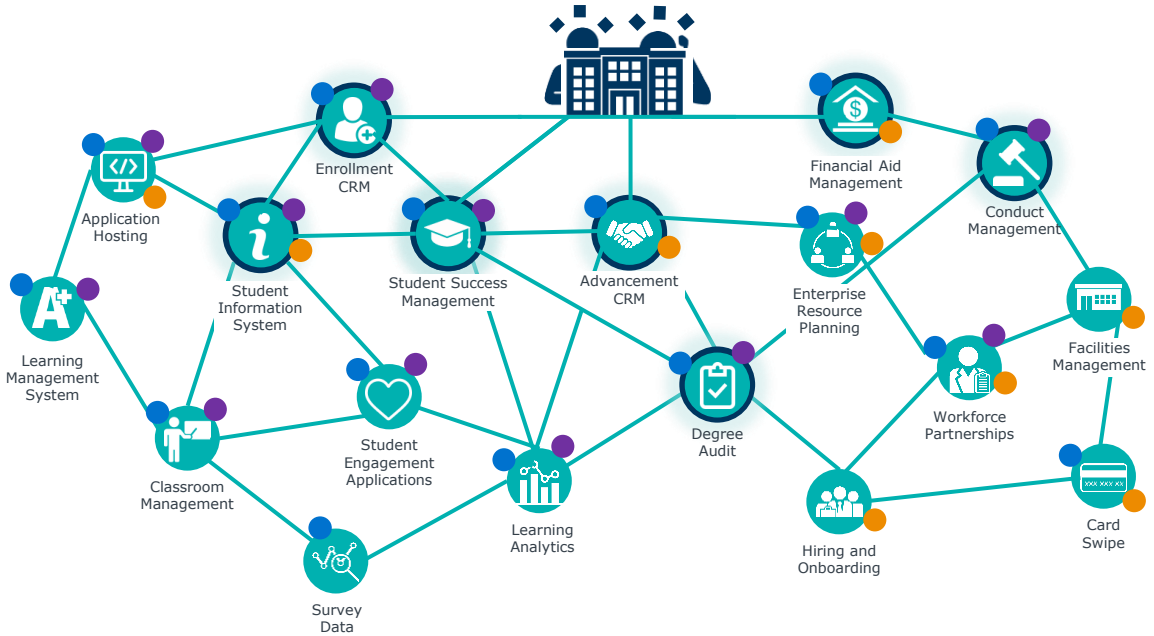


### Lancaster University (U.K.)

"Ask L.U." interfaces with LMS to provide academic support, e.g. playing past lectures and delivering assignment feedback

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# Siloed Innovation Causes Digital Sprawl



# Ongoing Evolution Through Tech Partnerships



## EdTech “Disruptors” Powering Cycles of Innovation

300+

**Tech vendors** across 40 market segments in higher education

\$2.2B

**Raised by US EdTech firms** in 2020, across 130 separate deals

30%

Increase in **EdTech venture capital investments**, 2019-2020



**CLASSVR**<sup>®</sup>  
Virtual Reality for Schools

canvas

**RE**  
blackbaud<sup>®</sup>

slate



Blackboard

YOU | VISIT

wisr



# Consider Your Data Across the Full Learner Lifecycle

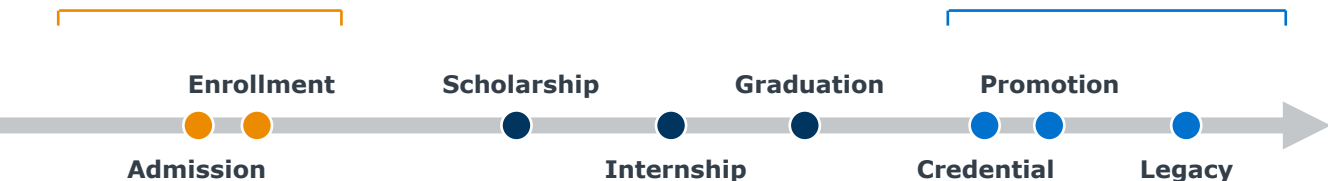
## Best-in-Class Tools Adopted Throughout Educational Organizations



Enrollment CRM  
Virtual Visit  
Financial Aid System



Advancement CRM  
Labor Data Services  
Events & Ticketing



Learning Management Systems  
VR and AR Technologies  
Retention & Advising Tools  
Career Services & Planning

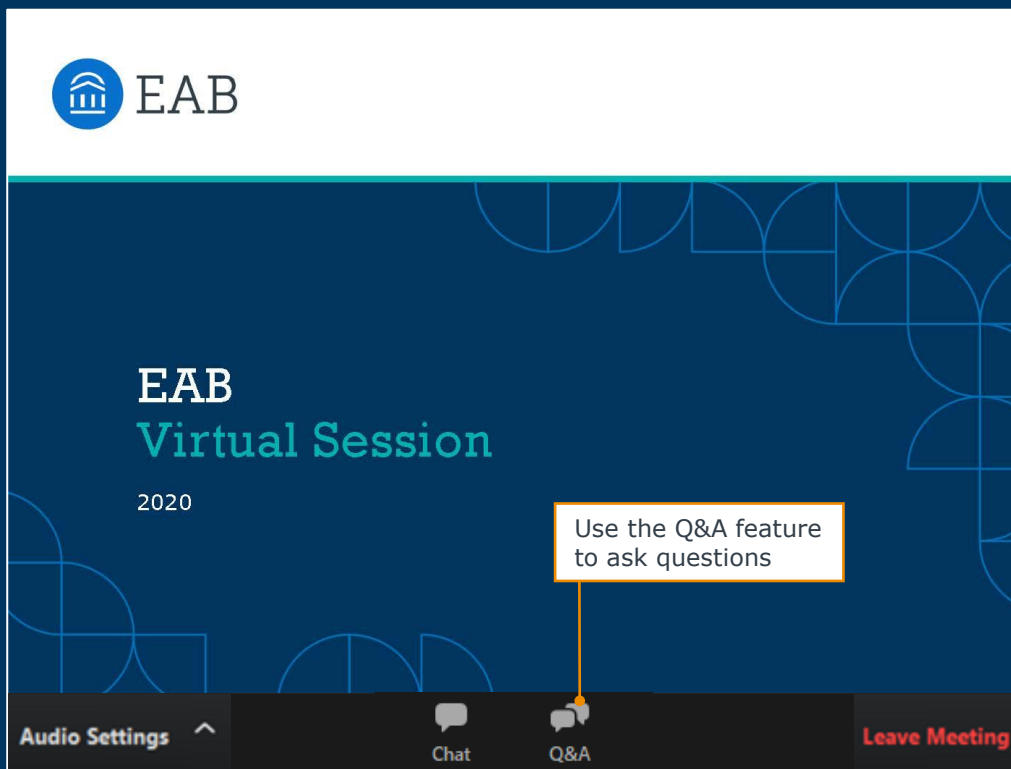
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# Three Quick Polls

- 1 How was today's session?
- 2 Would you like to speak with an EAB expert about tech innovation?
- 3 Would you like to receive a copy of EAB's new Digital Transformation whitepaper?

You will receive a follow-up survey later. We appreciate your feedback!

# Use the Q&A Feature to Submit a Question



The screenshot displays the EAB Virtual Session interface. At the top left, the EAB logo is visible. The main content area features the text "EAB Virtual Session" and "2020". A yellow callout box with a line pointing to the Q&A icon in the bottom navigation bar contains the text "Use the Q&A feature to ask questions". The bottom navigation bar includes "Audio Settings", "Chat", "Q&A", and "Leave Meeting".

EAB

EAB  
Virtual Session

2020

Use the Q&A feature to ask questions

Audio Settings ^

Chat

Q&A

Leave Meeting



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