APS
Summit Series

SEPTEMBER 17
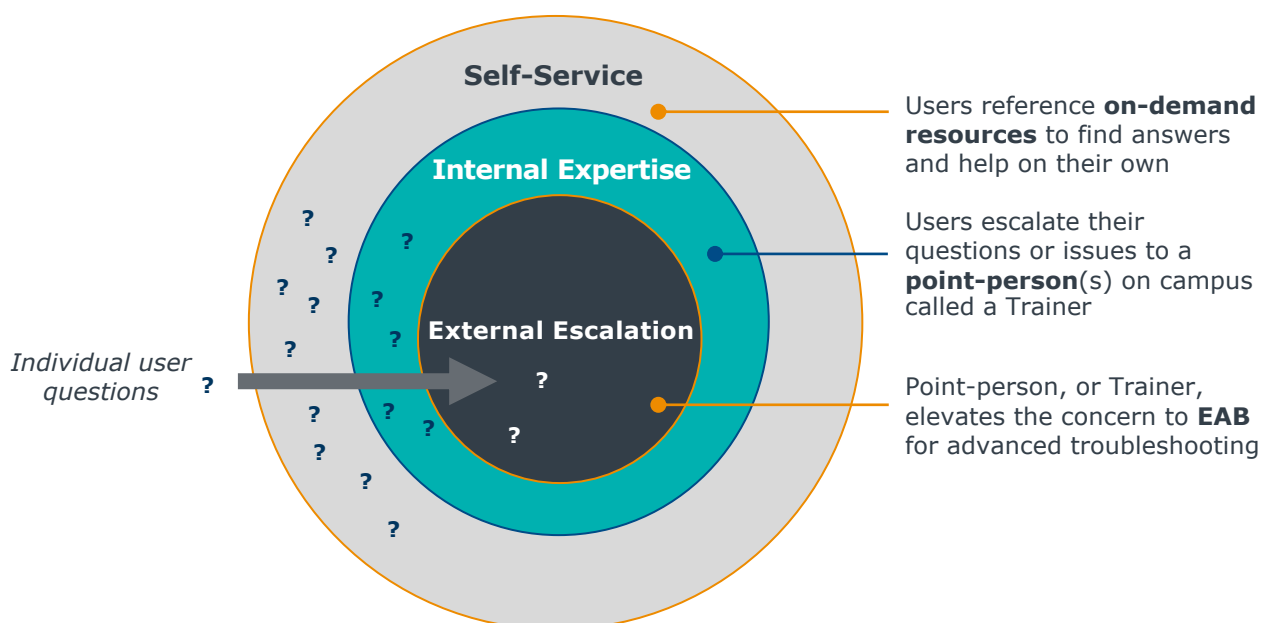SEPTEMBER 23
OCTOBER 1
OCTOBER 7

Session 4 | Thursday, October 7

Group Topic: Creating a Support Infrastructure

Use this worksheet to start planning the launch of your institution's support infrastructure as it relates to your annual unit health check-up process. After today's session, connect with your colleagues to discuss ideas, collect their feedback, and make a concrete plan to take action. Follow up with your Strategic Leader for support.

Three-Tiered Support Infrastructure

Transformation via People + Process + Technology is achievable through a holistic support infrastructure for your users. The support infrastructure consists of three tiers: Self-service, internal expertise, and external escalation This infrastructure not only creates scale, but it also empowers users to take ownership and seek answers on their own before escalating the issue either internally or externally.

Self-Service — Users reference **on-demand resources** to find answers and help on their own

Internal Expertise — Users escalate their questions or issues to a **point-person**(s) on campus called a Trainer

External Escalation — Point-person, or Trainer, elevates the concern to **EAB** for advanced troubleshooting

Individual user questions

1 What are your goals for launching a support infrastructure as it relates to your annual unit health check-up process? Consider the ideas of building scale, data trust, data empowerment, and more.

eab.com

Self-Service Resources

2 What self-service resources will you provide to your users? Check the boxes below.

To see an example of an APS Quick Start Guide, open the document titled APS Quick Start Guide template.

☐ APS Quick Start Guide   ☐ Tutorial Videos

☐ FAQ Document   ☐ Recorded Trainings

Other:

3 What is the process for creating a microsite to house the self-services resources? Consider a site that is easy for users to access and behind your institution's login.

Internal Expertise

4 Who will serve as your institution's internal expert/Trainer regarding annual health check-ups? This individual or individuals will lead trainings, answer user questions, and troubleshoot issues. Recommended areas to look: Institutional Research/Institutional Effectiveness, Faculty Data Analyst, Budget Analyst, Tech Trainer, Associate Provost/Dean/Chair who is passionate about using data and teaching others about data

Check the applicable box and enter your response in the appropriate box below.

☐ **An individual or multiple individuals in the Academic Affairs Office**
  - Key considerations: Data literate, able to teach others about data, understands institutional complexities, understands underlying goals for APS use, understands data methodology
  - **Names:**

☐ **An individual whose expertise is outside of Academic Affairs, such as in technology training, who can partner with individuals from the Academic Affairs Office**
  - Key considerations: Data literate, able to teach others about data, understands data methodology
  - **Names:**

5 Once the individual(s) are confirmed to serve in the internal expert/Trainer role, have them complete the second column in the following table to outline their training plan in order to build platform expertise and get comfortable training colleagues.

Event/Resource	Date	Desired Outcome
Introduction email/meeting with Trainer(s) and APS Strategic Leader		Introduce key messaging points for APS as it pertains to your institution
Deep 1:1 review of the metrics chosen for the selected planning process		Understand APS metrics selected for your planning process template
User training outline		Create training plan to engage and train your users
Teach-back/practice training session		Ensure Trainer is comfortable
Study time		Deepen APS knowledge and comfort in the platform
Live user training session(s) with APS Strategic Leader dialed in as support		Teach users how to use APS for your relevant planning process
Follow-up emails about process/deadlines		Ensure users understand requirements, deadlines, and expectations
Office hours and other ad hoc training opportunities		Answer user questions

Communication and Next Steps

6 How will you communicate expectations to users? Consider: access to resources, use of resources, scenarios in which they should reference self-service resources vs. your internal expert/trainer, and more.

7 What are your immediate next steps to launch your support infrastructure?