EAB

Can Organisational Transformation Save Us?

Warm-Up Exercise

Consider a transformation/change effort currently or soon-to-be underway at your institution. Take a minute to write out your 'elevator pitch'. Some topics to consider:

- What is being transformed? Why is it necessary? What are the intended outcomes?

- What progress has been made?

- What challenges are you encountering?

Turn to a colleague and share your pitch. What questions immediately come to mind for each other?

| 2000s | 2010s | 2020s | 2030s... |

More with More

- 'If we build it, they will come' mentality fuels growth-minded boom of programmes, facilities, and research expenditures

- Emphasis on high-impact amenities and experiences requires more tech and staff to deliver

- Share-the-wealth budget decisions promote stability in times of growth
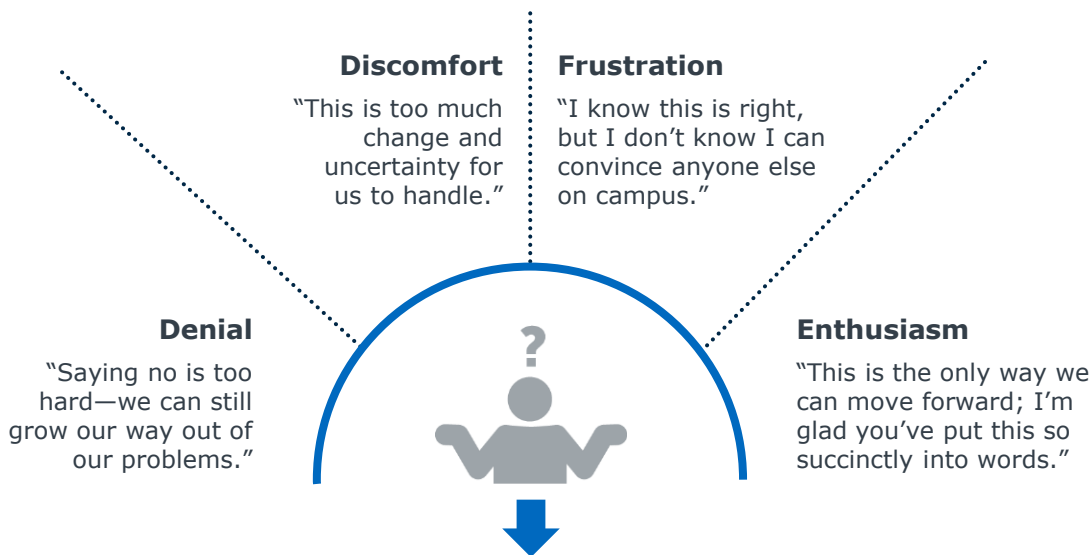
More with Less

- Emphasis on 'efficiency' to keep output constant despite declining resources

- Difficult prioritisation and trade-offs deferred when metrics show incremental improvement

- Growing workloads lead to staff burnout, as there's always more to do

Less with Less

- Intentionally decreasing 'productivity' in favour of sustainable operations

- Budget decisions must reflect market realities of enrolment, funding

- Saying 'no' is rewarded

- Ruthless prioritisation

- Potentially better staff experience; work is scaled to reasonable level

Range of Reactions from University Leaders

Discomfort

"This is too much change and uncertainty for us to handle."

Frustration

"I know this is right, but I don't know I can convince anyone else on campus."

Denial

"Saying no is too hard—we can still grow our way out of our problems."

Enthusiasm

"This is the only way we can move forward; I'm glad you've put this so succinctly into words."

Even Positive Reactions Raised Same Follow-Up Question:

What does 'less with less' actually look like in higher education?

Source: EAB interviews and analysis.

...But Privately Questioning Our Ability to Change

External Proclamations	Internal Realisations
"We strive to deliver high-quality service and reasonable workloads while limiting the impact on staff."	*"We operate in an environment where either staff are stretched too thin or just aren't able to do the necessary work at all."*
"Our institution is committed to embracing a digital-first, cloud-first, AI-optimised organisation."	*"Our technological aspirations seem truly out of reach when half our units still have paper-based processes."*
"Our staff are taking innovative, cross-disciplinary approaches to provide career-aligned instruction."	*"Every department does its own thing and in its own way, creating so much duplication and waste."*
"Our 2035 Strategic Plan lays the groundwork for a leaner, stronger institution."	*"If we don't change dramatically, we'll face some truly tough decisions in a few years."*

Source: EAB interviews and analysis.

Two Approaches to Pursue Large-Scale Changes

Allocate Additional Resources

- Hire, deploy more staff
- Apportion more money
- "More with more"

*Sometimes necessary
(e.g., AI), but hard to activate*

Create More Capacity in Existing Resources

- Improve function performance
- Reduce service provision costs
- Elevate professional services delivery

*Reallocation – leveraging
organisational transformation*

What Is Organisational Transformation?

Impactful, permanent adjustment

Roles, responsibilities, reporting, and activities all in scope

Organisational transformation is a large-scale, lasting change to an institution or its component pieces that reshapes structures and processes to improve efficiency and/or effectiveness.

Reduces costs, improves quality, or aligns with strategy

What's missing from this definition, if you were using it to bring others on the journey with you?

How are you talking about (or not talking about) transformation?

Source: EAB interviews and analysis.

How to Change?

Well-understood list of levers to pull:

- Standardisation
- Centralisation
- Digitisation
- Elimination
- Automation
- Shared Services

How to Implement?

Many degrees of freedom to adapt a transformation to institutional context:

- Who should lead?
- What's the right sequence of improvements?
- How comfortable is the campus with change?
- Do we need to incent participation?
- How do we communicate and collect feedback?
- What's the right approach to transformation given our culture?

What Defines Success?

Finite set of KPIs[1] signal transformation success:

- Reduce costs
- Improve customer satisfaction, experience
- Improve service delivery
- Improve speed of service
- Reduce errors

1) Key performance indicators.

① **Organisational Transformation Successes: Transformation Case Studies with Novel Ideas and Impressive Results**

② Five Lessons on How to Achieve Successful Transformation: Adapting Change Management Advice to Higher Education's Context

③ Administrative Effectiveness Index: Establish a Data Basis to Identify, Prioritise, and Evaluate a Transformation's Progress

Institutional Profile: University of Helsinki

Helsinki, FI

Public Research

€ 814M OPEX

31K Students

8.8K Staff

UNIVERSITY OF HELSINKI

Helsinki Funding Cuts Prompt Shared Services Transition

Timeline: from 2015 to present day

Approach: Rapid transition to a shared services organisation followed by continuous improvement

Goals:
- Reduce administrative costs
- Improve service efficiency and satisfaction rates

Methodology: Shared services transition, iterative process improvement, and digitisation

Campus Conditions Preceding Transformation

Cultural Receptiveness to Change

- 15% (€106 million) cut to University budget in 2015 left little doubt that operations must change
- Four campuses, four cultures, four orgs

Organisational Effectiveness

- Staff dissatisfied with career pathing opportunities and flexibility to move between units
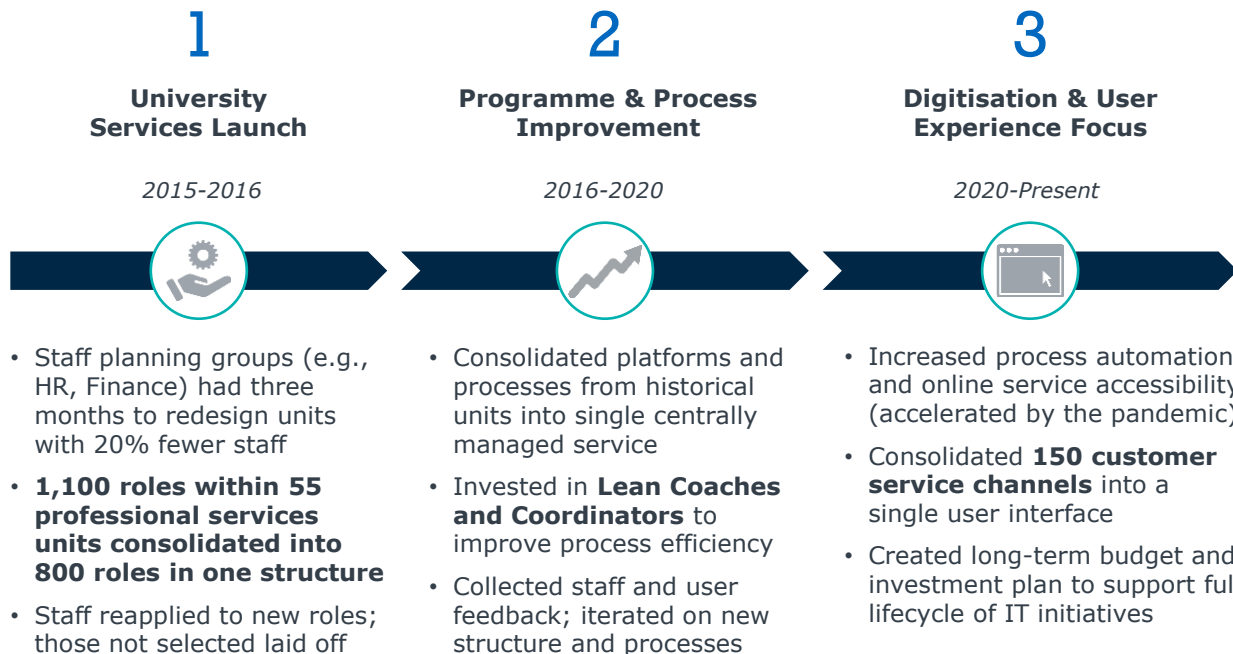- Roles spanned multiple functions, few specialists

History of Transformation Initiatives

- Started pursuing cost-containment initiatives once independent legal status achieved in 2010
- Academic unit consolidation underway since 1991

From Rapid Launch to Sustained Impact

Helsinki's Three-Stage Process To Transform Professional Services

1
University Services Launch

2015-2016

- Staff planning groups (e.g., HR, Finance) had three months to redesign units with 20% fewer staff
- **1,100 roles within 55 professional services units consolidated into 800 roles in one structure**
- Staff reapplied to new roles; those not selected laid off

2
Programme & Process Improvement

2016-2020

- Consolidated platforms and processes from historical units into single centrally managed service
- Invested in **Lean Coaches and Coordinators** to improve process efficiency
- Collected staff and user feedback; iterated on new structure and processes

3
Digitisation & User Experience Focus

2020-Present

- Increased process automation and online service accessibility (accelerated by the pandemic)
- Consolidated **150 customer service channels** into a single user interface
- Created long-term budget and investment plan to support full lifecycle of IT initiatives

Key Attributes of Helsinki's Model

Specialists, not Generalists

- Previously, employees split time across multiple service areas; now, employees are specialists in a specific terrain
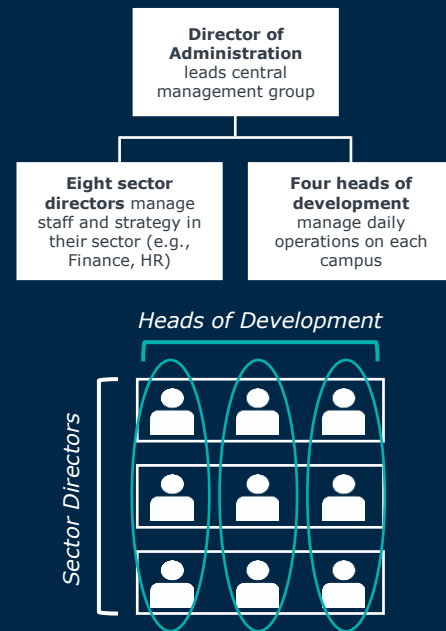- Many staff roles filled externally to ensure qualified candidates

Centrally Governed, Physically Decentralised ●

- Campus and service leaders reside in central management group
- Staff physically distributed across four campuses and one institute to retain unit presence

Channel for Top-Down Process Improvement

- Centralised governance paved way for Director of Administration to implement:
  - Employee upskilling
  - Lean process development
  - Technology platform consolidation

University Services' Matrixed Management Structure

Director of Administration leads central management group

Eight sector directors manage staff and strategy in their sector (e.g., Finance, HR)

Four heads of development manage daily operations on each campus

Heads of Development

Sector Directors

Keeping the Faith

How Helsinki Maintained Progress and Morale Despite Drastic Change

UNWAVERING LEADERSHIP MANDATE	SUPPORT AND TRAINING FOR MID-LEVEL SUPERVISORS	CONTINUOUS STAFF ENGAGEMENT AND FEEDBACK

- Cabinet and Board made it clear that **University Services was non-negotiable**
- Leadership pushed rapid transition to shared services in two months

- Supervisors **trained on how to have redundancy conversations** with staff
- During shared services transition, leadership hosted regular three-hour meetings for supervisors to voice concerns
- Process improvements delayed until after headcount reduction to reduce workload

- Head of Admin hosts **annual one-on-ones with deans to solicit feedback**
- Twice a year, Head of Administration reports on University Services' progress to deans and directorate heads
- Supervisors encouraged to solicit employee feedback daily and adjust workflows as needed
- Regular feedback and employee wellbeing surveys

Shared Services Transition Improves Satisfaction and Financial Sustainability

Organisational Structure

27%

Reduction in administrative staff (1,100 to 800)

55

Independent administrative units brought into singular University Services

Staff and Customer Satisfaction

19%

Improvement in customer satisfaction between 2017 and 2023

5%

Increase in employee satisfaction after process improvements

Financial Sustainability

€1M

Budget surplus in 2024 despite 18% reduction in federal funding[1] since 2015

€47M

Of initial €50M cut absorbed in first year of University Services

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1) Adjusted for inflation.

Institutional Profile: University of Auckland

- Auckland, NZ
- Public Research
- $701M OPEX
- 35K Students
- 6.3K Staff

THE UNIVERSITY OF
AUCKLAND
Te Whare Wānanga o Tāmaki Makaurau
N E W   Z E A L A N D

University of Auckland Aligns Functions with Strategy

Timeline: 10+ years

Approach: Continuous, incremental transformation culminating in function lead model

Goals:
- Reduce transactional activity
- Save on administrative costs to reinvest in academic quality

Methodology: Function Lead Model to drive efficiency through strategic planning and standardization

Campus Conditions Preceding Transformation

Cultural Receptiveness to Change

- Academic leaders and administrative staff aware of inefficiencies, but limited interest in change
- Recession, tuition caps prompt urgency

Organizational Effectiveness

- Transactional activity efficiency **benchmarked in lower quartile** of comparators
- Non-transactional efficiency was average compared to benchmarks

History of Transformation Initiatives

- Incremental, scattered standardization of roles and organisational structures over previous decade

2011	2015	2018	2020
Centralised & Standardised HR **(People First!)**	Research Administration Review	Position Management Sprint	Library Organisational Review

2013-2014	2016	2019	2021-2023
Faculty Administration Review	IT Organisational Review	Shared Transaction Centre	**Transition to Function Lead Model**

Standardised Faculty Administration

- Changed **reporting lines** to clarify career paths
- **Communities of Practice** maintain new structure across faculties

Position Management Sprint

- Taxonomy of core activities to **identify similar roles**
- Created **common job descriptions** and titles across university

Established Shared Transaction Centre

- High volume, transactional **activities centralised**
- **Specialist roles** created to deliver transactional services

Overview of the Function Lead Model

Function Leads are responsible for the operational capability of a professional function **across the whole University** (rather than organisational unit. Their job is to deliver strategic outcomes, improve service, set a vision for the future of the function, and manage the size, shape, and composition of staff.

What the Function Lead Does:

▶ **Controls Budget, Hiring, & Activities**
Function Leads ensure that their Function's activity, budget, and roles **align with the University's Function Design Principles**

▶ **Implements Annual Function Plans**

Function Leads create plans in which they identify opportunities for improved efficiency and **define FTE targets for their function**

▶ **Oversees Function, Not Staff**
Function leads are responsible for the long-term operational capability of their professional function, **not individual management** of staff in their function

Examples of Function Design Principles:

Transactional activity should be centralised and standardised

Delivery teams should only address one activity type

Organisational structures should have wide spans of control

Position descriptions should be created from standardised building blocks

Source: University of Auckland, Auckland, NZ; EAB interviews and analysis.

Leadership Support

VC served as public face of transformation process; Cabinet aligned in support.

Benchmarking

Throughout the process, Auckland used NousCubane's Uniforum benchmarks to guide strategic direction

Organisational Effectiveness Squad

A small (12 FTE), agile team drove efforts; now a permanent group for monitoring progress, implementing change

Data-Triggered Improvement

Customer satisfaction data used to continuously improve professional service delivery.

How Benchmarking Guided the Transformation Process

Pre-Work:

Benchmarks showing low organizational efficiency were an impetus for transformation.

The Design Process:

Higher education reference models were used as a guide to create the design principles.

During Function Planning:

The time each worker spends on each function is measured and aggregated across the work force. Total time spent on each function is checked against benchmarks.

Efficiency Gains in Two Areas Secure Financial Sustainability

Organisational Structure

90%

Reduction in unique job descriptions (**410 to 45**)

22%

Increase in the number of vacancies filled internally (5% to 27%)

Processes

20%

Reduction in transactional activities for administrative functions

#1

Most efficient purchase- to- pay process compared to peers

Financial Sustainability

Auckland is the **only NZ university not running a budget deficit.**

6%

Budget reduction absorbed in 2024 via restructures and attrition

ROADMAP

1 Organisational Transformation Successes: Transformation Case Studies with Novel Ideas and Impressive Results

2 Five Lessons on How to Achieve Successful Transformation: Adapting Change Management Advice to Higher Education's Context

3 Administrative Effectiveness Index: Establish a Data Basis to Identify, Prioritise, and Evaluate a Transformation's Progress

Three Reasons Leadership-Backed Mandates Promote Success

Set a Direction

Provides clear signal of **priority** the transformation should take amidst initiative proliferation

Weather Discontent and Resistance

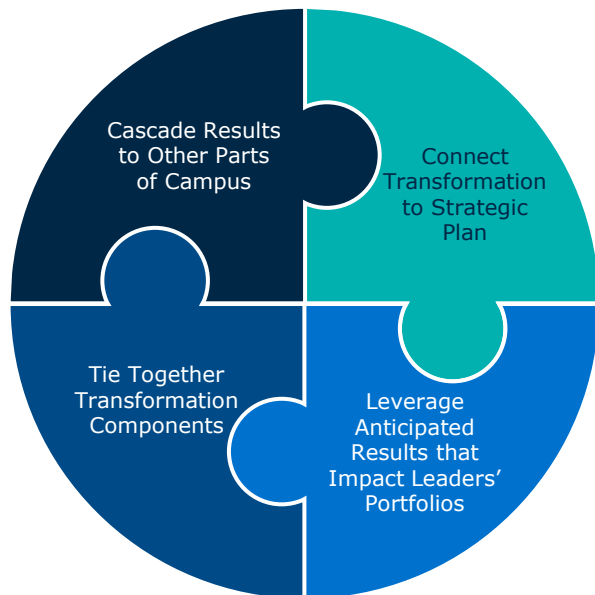Offers cover and endorsement to implementation teams in the face of pushback

Anticipate Leadership Turnover

Creates persistent senior leadership support that supersedes departure of any individual person

Source: EAB interviews and analysis.

Evaluate Opportunities to Amplify Transformation Mandate

Cascade Results to Other Parts of Campus

Connect Transformation to Strategic Plan

Tie Together Transformation Components

Leverage Anticipated Results that Impact Leaders' Portfolios

What has – or has not – been effective for your campus in terms of establishing a change mandate?

Connect Transformation to Strategic Plan

Outline the transformation's importance for and impact on campus priorities outlined in strategic plan.

Amplify Results that Impact Other Leaders' Portfolios

Identify KPIs directly relevant to other executives, even if indirectly relevant to transformation scope.

Bundle Together Transformation Components

Connect disparate projects together in simultaneous or sequence manners to force efforts to "live or die" together.
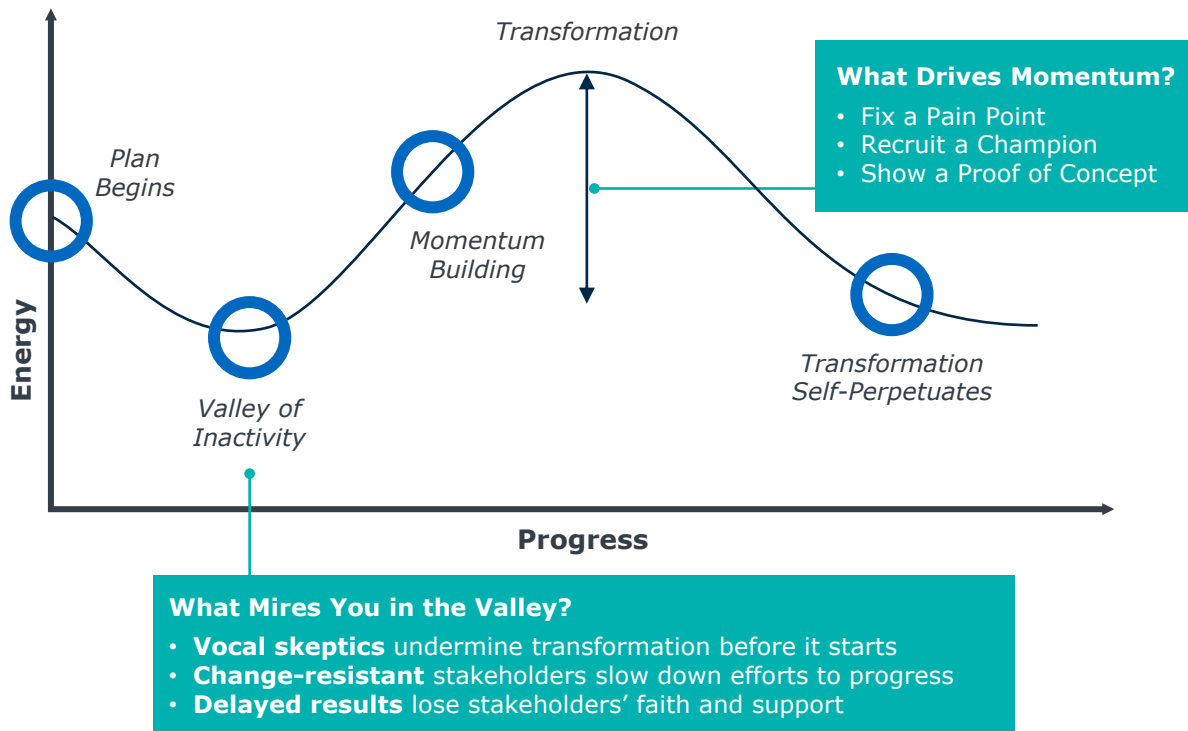
Cascade Results to Other Parts of Campus

Funnel cost savings, freed-up staff time, other outcomes to mission-critical (or skeptical) parts of the institution.

Borrowing From Chemistry: Momentum, Energy Needed to Spark a Reaction

Transformation

What Drives Momentum?
- Fix a Pain Point
- Recruit a Champion
- Show a Proof of Concept

Plan Begins

Momentum Building

Valley of Inactivity

Transformation Self-Perpetuates

Energy

Progress

What Mires You in the Valley?
- **Vocal skeptics** undermine transformation before it starts
- **Change-resistant** stakeholders slow down efforts to progress
- **Delayed results** lose stakeholders' faith and support

Proven Strategies to *Generate* Momentum

Strategy	Problem	Implementation
Fix a Pain Point	Staff resistant to efforts aimed at optimising roles and workflows, afraid of automating themselves out of jobs	COO prioritises fixing process pain points (e.g., reducing bank reconciliation time from two days to one hour), inspiring broad role restructuring across departments.
Recruit a Champion	Deans sceptical of Shared Business Services Centre.	Service centre directors partner and build trust with influential units, regularly incorporating feedback; partners then evangelise others.
Show a Proof of Concept	Staff hesitant to adopt automation, believing it would disrupt workflows.	Machine learning automates parts of central accounts receivable process; success drove increase in application of data analytics and ERP[2] automation for less complicated activities in student affairs, advancement.

1) Machine learning.
2) Enterprise resource planning.

Proven Strategies to *Preserve* Momentum

Foundational Levers to Protect Progress

People	*Skills*	*Process*
Establish Position Control Policy	**Make Professional Development a Pillar**	**Ensure Review of Every Process**

People

Establish Position Control Policy

- Every vacant position goes through committee review before being filled
- FTEs reduced by 40%, hiring back only 24 of 65 open roles; remaining positions net new hires

Access EAB's Report on Position Control

Skills

Make Professional Development a Pillar

- Launched 12-week course for shared services staff on service culture (90% uptake)
- Formalised career paths and instituted competency-based training
- Cross-trained staff to make service centre more adaptable and resilient

Access EAB's Professional Development Playbook

Process

Ensure Review of Every Process

- Workshops held in six key areas to identify process pain points, build improvement plans
- Workshops included service area staff, service users, project sponsor, project manager, independent convener

Access EAB's Process Improvement Primer

How have you generated or preserved momentum for change? (Discuss at tables)

1) Business Service Center.

Source: Keele University, Keele, UK; Ohio University, Athens, OH; University of Tennessee Health Science Center, Memphis, TN; EAB interviews and analysis.

Solicit Input, Encourage Agency – But Beware the Paradox of Participation

Levels of Involvement

Examples

Ownership
Full control over a fundamental aspect of change

- Design new process
- Establish responsibilities and reporting lines for business partner (BP)
- Determine what percentage of small classes to consolidate

Danger Zone?

Agency
Authority to determine how a narrow component of change impacts them

- Collaborate to draft proposed new process
- Interview and hire BP within hiring criteria
- Create criteria to identify small classes to merge

Input
Valued voice in considering changes

- Provide feedback on broken process
- Make recommendations for BP hiring criteria
- Suggest small classes to combine

Threading the Needle

Find Sweet Spots Between Empowering Colleagues and Yielding Control

Successful Compromise

Deans offered 50% reimbursement to move admin assistants centrally… on condition they not duplicate those roles

Every sub-scale department required to combine with another… but empowered to pitch their preferred partner

Largest unit exempted from using unpopular, centralised ticketing process to ease their transition into using Business Service Center

HR roles rewritten to perform specialised functions; staff allowed to suggest their best-fit roles in the new model

⚠ 'Ownership' Danger Zone Scenario

Offering reimbursements for centralised positions without setting conditions

Allowing academic departments to decide how they would consolidate independently

Permitting units to maintain all their existing processes when migrating to shared services

Giving staff freedom to select roles without ensuring they have the right skills; roles are serving business needs

Two Approaches to Resolving Ownership Disputes

Bain & Company's RAPID® Framework: Primarily for Complex, Important Decisions

```
Input                                          Agree

Input        →    Recommend    →    Decide    →    Perform

Input
```
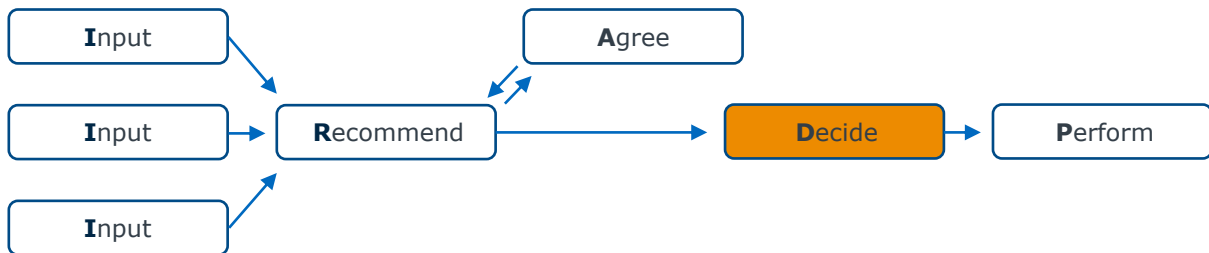
The RACI Matrix: Primarily for Assigning Roles in **Project Management** for Regular Decisions

Responsible: *Creates the deliverable*

Accountable: *Delegates and reviews*

Consulted: *Provides feedback*

Informed: *Is given status updates*

Project Tasks	Provost	Committee Chair	Faculty Senate
Create Committee Charge	R	C	I
Select Committee Members	A	R	C
Collect Relevant Data	I	A	--

Sources: Bain & Company, RAPID® Decision Making; Forbes, "What is a RACI Chart?".

Expanding Consultative Process and Asserting a "D" are Key to Success

**In most settings, the "R" drives
80% of the work in each framework**

Recommend

Agree

Perform

Input

Decide

80%

Of the effort
occurs here

Responsible

Accountable

Consulted

Informed

Sources: Bain & Company, RAPID® Decision Making; Forbes, "What is a RACI Chart?".

Expanding Consultative Process and Asserting a "D" are Key to Success

HE Culture Requires Significant and Overt Consultation

Recommend

Agree

Perform

Input

Decide

80%
Of the effort occurs here

Responsible

Accountable

Consulted

Informed

Six Questions to Consider for Building a Consultation Strategy

1 Who do I need to engage first, second, and third, before broader conversations?

2 Do I have a preferred solution, or am I looking for "blank slate" ideas?

3 What data needs to be shared to provide context for the decision?

4 Who are the likely detractors, what drives them, and how will I engage them?

5 What are the time constraints for constituent feedback?

6 Do I need to update each constituent as the process unfolds?

What to Do for a Sector that Plans to Plan

Realistic Transformation Plan

Idea ⚡ Input   Design ⚡ Implementation   Go-Live ⚡ Evaluation   End-State

| Executive sponsor departs | Misaligned expectations frustrates units | Early adopter identifies unanticipated outcomes | Project funding shortage |
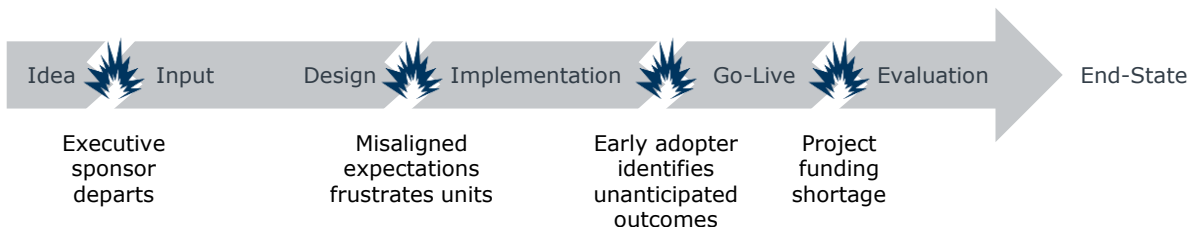
Iterative Transformation Plan to Absorb Inevitable 'Shocks'

Idea → Input → Design → Implementation → Go-Live → Evaluation

Review, Reassess, Recalibrate (Again)

Continuous Transformation
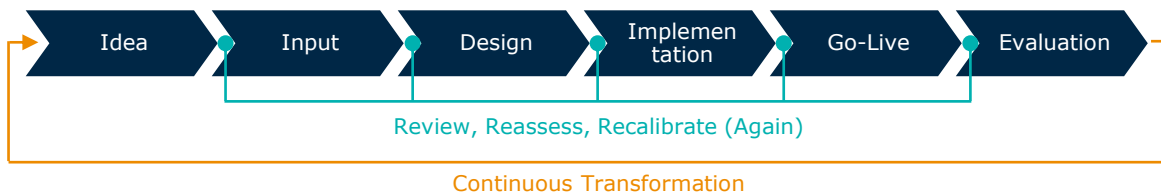
Multiple Phases of Planning Guide 'One Keele' Transformation

Keele
UNIVERSITY

2019 — 2021 — 2023

Phase 1
*Setting Vision
and Scope*

Phase 2
*Revisiting and
Fine-Tuning*

Phase 3
*Charting Next Steps…
Without the Branding*

- Internal and external **benchmarks**
- Announced One Keele vision in Financial Sustainability Plan; published One Keele Implementation Plan
- Conducted **Design Workshops** to scope out specific initiatives and create Design Group implementation plans

- Reviewed One Keele progress, **recalibrating scope and timeline of existing initiatives** given COVID-19 (delaying some and accelerating others)
- **Narrowed future focus** around people redesign and **identified areas to revisit** (e.g., remapping Procurement processes, driving professional development in shared services)

- **Reinitiated campus benchmarking** and consultation
- Published new goals in Our Future Delivery Plan and currently working on implementation plans
- **Dropped One Keele branding**, as it created more headaches than benefits
- **Pivoted plan to focus on process and technology** initiatives to support existing people changes

Breakdowns in Communication Across Transformation Project Timeline Stem from Both Too Little and Too Much Information

Failure to Launch

Academic units not consulted in shared services migration design. Despite quality improvement, staff opposition forces reversal.

Cart Before the Horse

Details of transition to central travel portal shared with units before implementation finalised. Confusion forces dedicated team to provide 1:1 support.

Overcommunication

Exhaustive information provided to all stakeholders during restructuring. Staff misconceptions over changes not relevant to their units leads to upheaval.

Not Everything Is Worth Sharing

"People only want transparency when they're going to hear something that makes them happy."

Chief Operating Officer

Source: EAB interviews and analysis.

Stakeholder Group	How Often to Communicate?	What Tone to Frame the Message?	What Results to Primarily Share?
Change Evangelists		**Focused** • Relatively informal • Nuanced and tactical • References plan	• Completion of milestones • Individual and team achievements • Positive campus feedback
Directly Impacted Staff		**Supportive** • Open to input • Continuity of care • Recognises uncertainty	• Improvements in job quality • Accolades from students/staff/staff benefiting from changes
"Customers" and General Stakeholders		**Targeted** • Focused on results • Highlighting disruptions • Continuity of service	• Improvements in service delivery • Customer satisfaction
Senior Leaders and Board		**Elevated** • Position within broader strategy • Connection to Cabinet/Board priorities	• Relevant KPIs • Impact on strategic plan • Cost savings

How have you hyper-personalised stakeholder communication? Who is missing?

Source: EAB interviews and analysis.

At Your Tables:

Based on your collective experiences, what's another 'lesson' that would be worth adding to the five identified today.
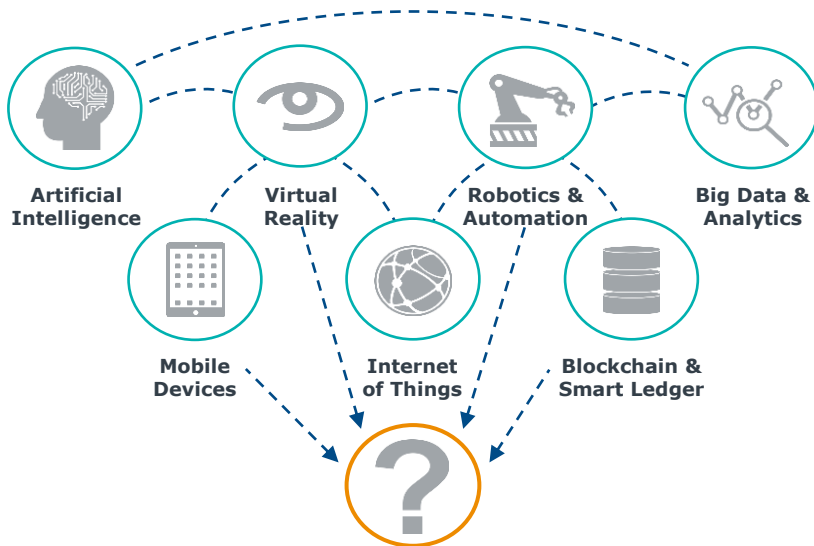
What are your recommendations – and lessons learned – for implementing that lesson?

Expansive Web of New Technology Solutions Piques Interest

Artificial
Intelligence

Virtual
Reality

Robotics &
Automation

Big Data &
Analytics

Mobile
Devices

Internet
of Things

Blockchain &
Smart Ledger

Two Goals for Technology Investments

Unlock New Administrative
Efficiency Opportunities

Create a More Customer-
Centric Campus Experience

Emerging Technologies Drive Greater Cost Savings

Technology	Description	Case Studies	Impact
People Counters	Thermal sensors that count people as they cross specific lines or enter spaces in the sensor's field of view	**University of Alberta** installed 300 people counters in classrooms to reduce custodial costs and collect data on facility utilization patterns	**2.5-year average payback period** due to reduced custodial and HVAC costs in underutilized classrooms
Internet of Things (IoT) Sensors	Sensors built in or attached to equipment that collect environmental metrics like temperature and wirelessly transmit real-time data to decision-makers	**University of Iowa** installed Fault Detection and Diagnostic (FDD) sensors on equipment in 49 of their buildings to continually assess systems data and alert a team to malfunctions	FDD sensors enabled Iowa to realize **$780K in energy savings** in the first year in a single lab building
Robotic Process Automation (RPA)	Software solution that is customized to perform repetitive, computer-based tasks by interacting with the user interface of existing technology within an organization	**University of Melbourne** automated 22 rule-based and high-volume tasks in enrollment management and procurement, including manual data entry and attachment uploads	**Saves 10K labor hours** annually across 22 processes

Universities Placing AI Bets to Cut Costs

AI Staff Productivity Boons Across Departments

Modest Bets to Augment

Admissions

Maryville University used Sia to automate transcript review, affording 14 admissions counselors **50% more time to build deeper relationships with students** through online and social media campaigns

Procurement

University of Florida uses AI tools to review contracts and ensure regulatory compliance in a matter of **minutes instead of hours**

Big Bets to Replace Staff

Registrar

By automating **transfer credit evaluation**, Maple University[1] projects a **90% reduction in staff** required for this task

Enrollment Marketing

Maple University[1] projects that they will be able to **cut marketing costs by 40-50%** once they start using AI to help in their marketing campaigns

1) Anonymized institution.

Source: Maryville University, Town and Country, MO; University of Florida, Gainesville, FL; EAB interviews and analysis.

Emerging Technologies Address Demand for Real-Time Info

Technology	Definition	Case Study	Impact
Chatbots	AI-powered software that simulates human conversation and processes data to answer users' questions in a specific domain	**UC Santa Cruz** launched a chatbot, Slugbot, to answer questions about student business services, such as how to pay bills, clear account fees, and repay loans	Users engaged Slugbot in **1,869 interactions in the first seven weeks** after launching
Intelligent personal assistants (e.g., Amazon Alexa, Apple Siri)	AI-powered applications that provide personalized assistance with tasks, like setting reminders and managing schedules	**Staffordshire University** launched an AI-powered concierge, Beacon, to provide personalized, on-demand support for students. Students use Beacon to manage tasks ranging from reminding them when assignments are due to helping them find books in the library	Beacon **answered 25,000 questions** in the first 4 months and handles **thousands of conversations daily**
Voice-activated smart speakers (e.g., Amazon Echo Dot)	AI-enabled speech recognition technology interfaces with intelligent personal assistant technology to provide hands-free personalized assistance	**Saint Louis University (SLU)** placed over 2,300 smart speakers in residence hall rooms to answer over 200 institution-specific questions (e.g., "Where can I eat on campus right now?")	Students at SLU used voiced-activated devices in residence halls **100,000 times** in first semester after implementation

UC San Diego's Triton GPT Initiative as a Process Navigation Assistant

UCSD Assistant

Offers support with policy, process, and help documentation by sourcing UCSD documents and web pages

General AI Assistant

Assists with writing and content-generation tasks, idea generation, and document summarization

Job Description Helper

Reviews existing job templates and hiring manager input to develop unique job descriptions

Fund Management Coach

Provides staff with information regarding managing grant budgets, transactions, and guidelines

Source: Attridge, Margaret, "Campus-GPT: How 2 University of California Campuses Are Designing Their Own Specialized AI Tools," Best Colleges, April 24, 2024; Davidson, Nikki, "Meet TritonGPT: AI That Loves Tedious University Tasks", Government Technology, May 24, 2024; Prior, Shannon, "TritonGPT, shaping the future at UC San Diego through student innovation", UC IT Blog, May 30, 2024; UC San Diego, "Triton GPT," UCSD, 2025

AI Requires Rethinking Tasks, Processes, Roles, and Org Structures

1	2	3	4	5
Knowledge Capture	**Data Management**	**Upskilling**	**Cost-Benefit Determination**	**Role Transformation**
Collecting institution-specific proprietary data to train AI	Ensuring high-quality, integrated, and well-governed data for AI tools to use	Dedicating time and training academics, professional services staff, and IT staff to learn how to optimise AI tools	Providing initial up-front investment in AI tools, which can be costly and requires time to realise ROI[1]	Redesigning roles and processes due to AI augmentation of academic and professional services tasks and responsibilities

1) Return on investment.

Source: Peter Cappelli, Prasanna (Sonny) Tambe, and Valery Yakubovich, "Will Large Language Models Really Change How Work Is Done?," MIT Sloan Management Review, March 4, 2024; EAB interviews and analysis.

Discussion

- What wins have you already seen from AI (or other technology) implementations?
- What institutional challenges have you identified in implementing or piloting AI solutions?

	Off-the-Shelf Optimiser	**Iterative Innovator**	**Community Empowerer**
Posture Definition	Prioritise ease of implementation by scaling ready-to-use AI solutions from established vendors	Build AI expertise within the institution by developing and deploying a small number of targeted in-house solutions	Democratise AI development by equipping community members to build their own solutions, with IT scaling the most promising ones
Industry Prevalence			

Source: Arizona State University, Tempe, AZ; Ithaca College, Ithaca, NY; University of South Florida, Tampa, FL; EAB interviews and analysis.

1 Organisational Transformation Successes: Transformation Case Studies with Novel Ideas and Impressive Results

2 Five Lessons on How to Achieve Successful Transformation: Adapting Change Management Advice to Higher Education's Context

3 Administrative Effectiveness Index: Establish a Foundation to Identify, Prioritise, and Evaluate Progress

Historical Challenges to Making Progress

- Difficult to **understand current state** without lengthy, expensive discovery
- **Unclear what "good" looks like** and how to improve performance
- 'Traditional' benchmarking engagements fail to offer true apples-to-apples comparisons
- Outputs are intellectually interesting – but challenging to activate

EAB's Administrative Effectiveness Index

- **Comprehensively and objectively** evaluate 19 critical business capabilities
- **Quickly surface** near-term process improvement opportunities impacting institutional performance
- Create a **prioritised roadmap** to close operational process gaps
- Build **consensus with leadership** to focus time and resources strategically
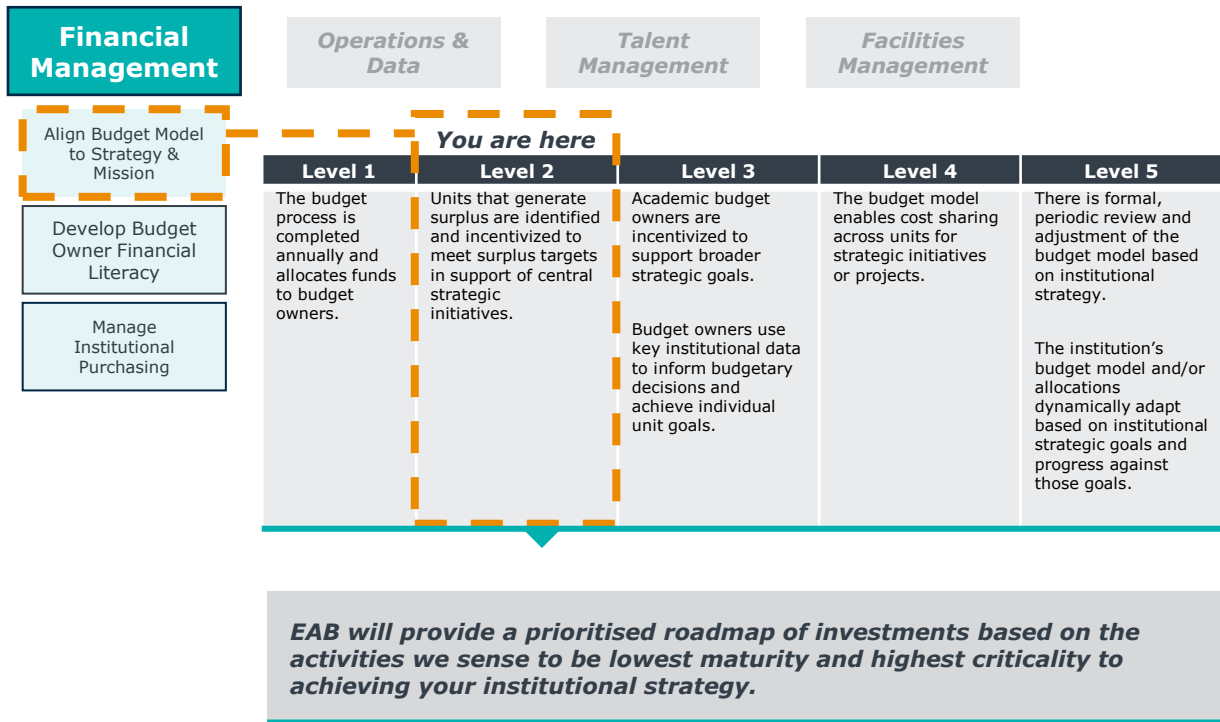
Measures Performance Across 19 Discrete Business Capabilities

Operations & Data	Talent Management	Financial Management	Estates Management
Maintain & Evaluate Business Processes	Develop and Communicate Employee Value Proposition	Align Budget Model to Strategy & Mission	Manage Long-Term Master Plan
Manage Enterprise Data	Recruit & Onboard Staff	Develop Budget Owner Financial Literacy	Prioritise & Manage Capital Renewal Projects
Design & Manage Administrative Service Models	Support Staff Career & Leadership Development	Manage Institutional Purchasing	Govern and Optimise Space Utilisation
Select & Manage Admin KPIs	Manage Staff Performance		Determine Maintenance Priorities
	Foster Staff Engagement & Well-Being		Manage Infrastructure Efficiency
	Enable Flexible Work Arrangements		
	Manage HR Capacity and Infrastructure		

Financial Management | *Operations & Data* | *Talent Management* | *Facilities Management*

Align Budget Model to Strategy & Mission

Develop Budget Owner Financial Literacy

Manage Institutional Purchasing

You are here

Level 1	Level 2	Level 3	Level 4	Level 5
The budget process is completed annually and allocates funds to budget owners.	Units that generate surplus are identified and incentivized to meet surplus targets in support of central strategic initiatives.	Academic budget owners are incentivized to support broader strategic goals.

Budget owners use key institutional data to inform budgetary decisions and achieve individual unit goals. | The budget model enables cost sharing across units for strategic initiatives or projects. | There is formal, periodic review and adjustment of the budget model based on institutional strategy.

The institution's budget model and/or allocations dynamically adapt based on institutional strategic goals and progress against those goals. |

EAB will provide a prioritised roadmap of investments based on the activities we sense to be lowest maturity and highest criticality to achieving your institutional strategy.

Sample Survey Items

Align Budget Model to Strategy and Mission: *How the institution designs its budget model to allocate funds and incentivize budget owners to support overall institutional strategy.*

Select Yes if the statement is a <u>consistent</u> practice at your institution	Yes	No	Don't know
The institution completes an annual budget process that allocates funds to budget owners.	○	○	○
Institutional leadership identifies revenue-generating budget units that produce surplus funds and quantifies the surplus amount.	○	○	○
Revenue-generating budget unit owners are incentivized to meet a surplus target each year.	○	○	○
There are incentives in place to encourage academic budget owners to support institutional strategic goals.	○	○	○
Budget owners use key institutional data (e.g., enrollment/revenue/costs) to inform unit-level budgetary decisions.	○	○	○

To what extent is *Align Budget Model to Strategy and Mission* a barrier to executing your institution's strategy in the next 12-18 months?

Use slider to record response

Not a barrier   *Moderate barrier*   *The primary barrier*

Measuring Maturity

EAB measures the presence of 5-12 markers of maturity for each capability.

Measuring Criticality

EAB measures the extent to which each activity is a barrier to strategy execution

Align Budget Model to Strategy and Mission: *How the institution designs its budget model to allocate funds and incentivize budget owners to support overall institutional strategy.*

Level 1	Level 2	Level 3	Level 4	Level 5
Ensure the annual budget process allocates funds to budget owners.	Identify which revenue-generating units produce surplus funds and quantify surplus amount	Incentivize academic budget owners to support institutional strategic goals	Ensure budget model enables cross-unit cost sharing to support institutional strategy	Define triggers to evaluate operating budget allocations and ensure alignment with institutional strategy
	Incentivize revenue-generating budget owners to meet yearly surplus targets	Equip budget owners with institutional data to inform unit-level budget decisions		Review budget model at least every two years to align allocation formulas with strategy
				Incentivize administrative budget owners to support institutional strategic goals

Currently Doing	
Start Doing Next	
Future Roadmap	

Source: EAB interviews and analysis.

Informed by Lowest Maturity Ratings, Highest Importance Scores

Dimension	Activity	Measurements		
Financial Management	*Align Budget Model to Strategy and Mission*	**Maturity** ○○○○○ **Importance** ●●○○○ **Priority Rank** 1		
Talent Management	*Manage Staff Performance*	**Maturity** ●○○○○ **Importance** ●●○○○ **Priority Rank** 2		
Facilities Management	*Determine Maintenance Priorities*	**Maturity** ●○○○○ **Importance** ●○○○○ **Priority Rank** 3		

n = x

Source: EAB interviews and analysis.

Bringing AEI to Campus

Rapid Deployment and Delivery of Results Jumpstarts Action

1 Kick-off
EAB meets with your core team to align on goals, timeline, and survey audience

2 Participant selection
Choose who should complete the survey based on recommended parameters

3 Survey launch
EAB distributes survey; completion requires <1 hour (survey stays open for 10 days)

6 Ongoing support
EAB advises on next steps and equips you to further operationalise findings from the survey results

5 Team debrief
EAB facilitates wider debrief session to discuss results and design roadmap for improvement

4 Results preview
Walkthrough of results (3 business days to generate) with core leadership to align on messaging, priorities

EAB

Concluding Thoughts

A Moment to Reflect (and Give Us Homework)

What's your top takeaway from the past two days?

What are the implications for your campus? What will you start/stop/change?

Who will need to be involved?

Just Ask EAB

Our Savviest Partners Turn to EAB to...

1 Provide written **feedback on plans, proposals, and strategies** at any stage

2 Conduct and summarize **stakeholder interviews** on critical campus initiatives

3 Design **senior leadership away-days** to prioritize decision-making

4 **Educate governing bodies** about today's biggest higher education topics

5 Fortify high-stakes presentations and meetings with **talking points and slides**

6 Support rising leaders stepping into new roles with **1:1 coaching and education**

7 Facilitate **pre- and post-mortems** of strategic initiatives

8 Benchmark **organizational structures** in select functional areas

9 Lend a third party, expert voice to **difficult conversations**

10 **Network with global leaders** to address a specific issue

" We have a rule called '**Ask EAB First**.' Before we start any workstream we check to see what EAB has done on the topic and how that expertise can **save us time, prevent us making mistakes, and speed up our progress**. Our leadership thinks of EAB as an extension of our team and as an added set of resources.

Chief Operating Officer