



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?



Flashback to Last Year...



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

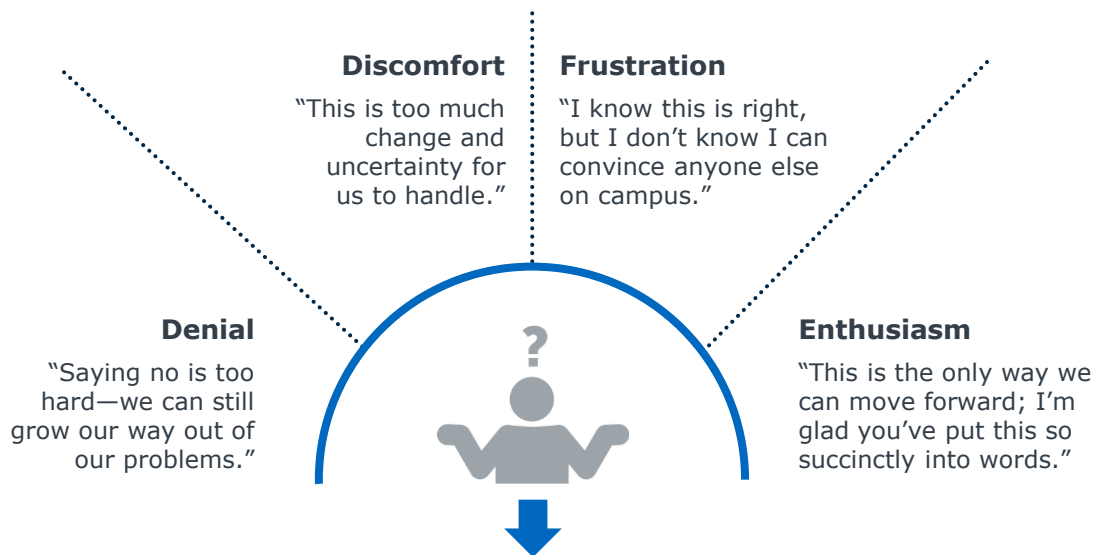
Less with Less

- 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



'Less with Less' Language Strikes a Nerve

Range of Reactions from University Leaders



Even Positive Reactions Raised Same Follow-Up Question:

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

We're Still Making Big, Public Claims...



...But Privately Questioning Our Ability to Change

External Proclamations

"We strive to deliver high-quality service and reasonable workloads while limiting the impact on staff."



Internal Realisations

"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."



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

***How are you talking about (or not talking about) transformation
in order to bring others on the journey with you?***

Three Main Considerations for Transformation



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 KPIs¹ 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**

The University of Helsinki's Service Redesign



Institutional Profile: University of Helsinki

 Helsinki, FI

 Public Research

 814M OPEX

 31K Students

 8.8K Staff



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

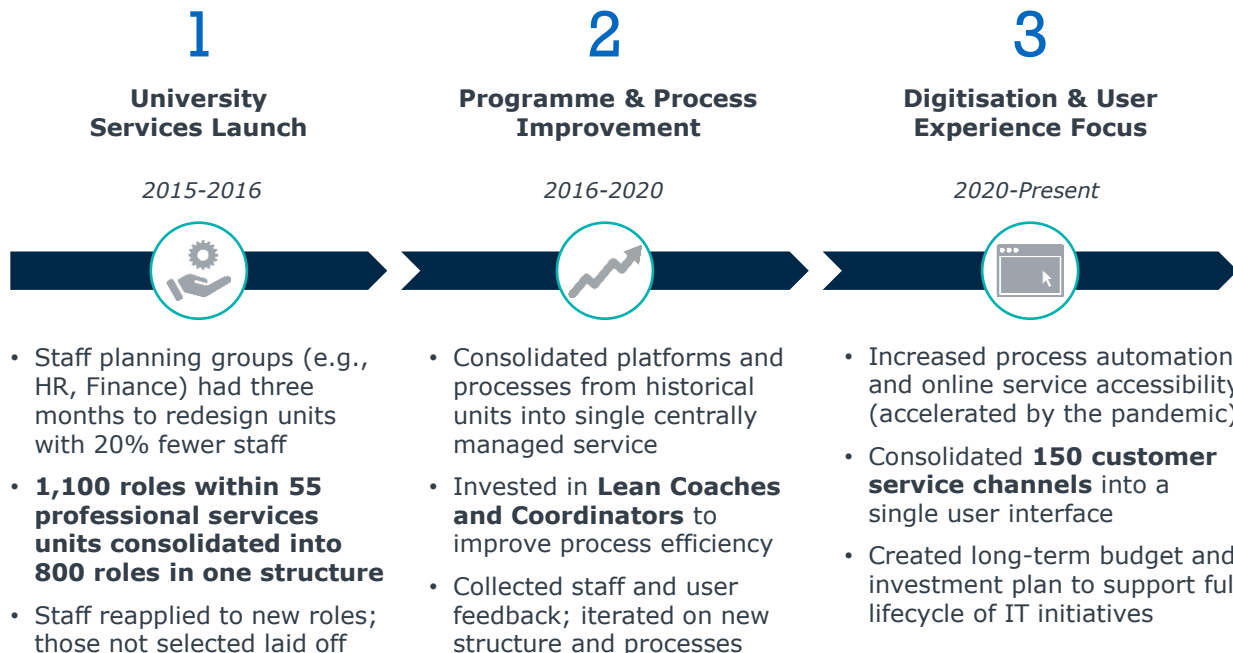
History of Transformation Initiatives

- 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



A Closer Look at University Services

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

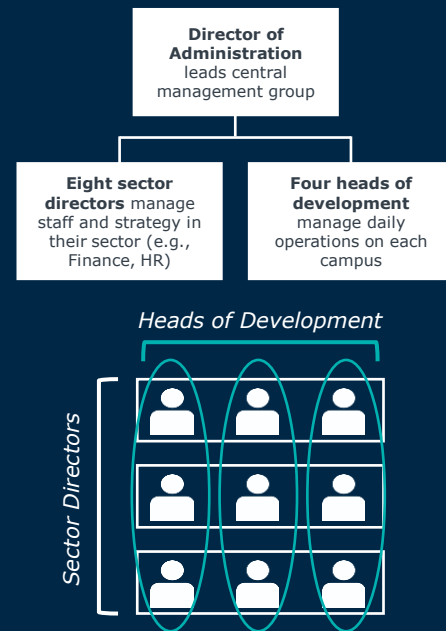
Centrally Governed, Physically Decentralised

- 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



Keeping the Faith



13

How Helsinki Maintained Progress and Morale Despite Drastic Change

UNWAVERING LEADERSHIP MANDATE



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

SUPPORT AND TRAINING FOR MID-LEVEL SUPERVISORS



- 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

CONTINUOUS STAFF ENGAGEMENT AND FEEDBACK



- 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

Results of Transformation Efforts

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 funding¹ since 2015

€47M

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

1) Adjusted for inflation.

University of Auckland's Functional Redesign



Institutional Profile: University of Auckland

 Auckland, NZ

 Public Research

 701M OPEX

 35K Students

 6.3K Staff



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

Auckland's Incremental Change Process



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

Auckland's Function Lead Model



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:

- ▶ **Shapes 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

Leadership and Planning Paved the Way



Leadership Support

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

Organisational Effectiveness Squad

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

Benchmarking

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

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.

Results of Transformation Efforts

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

University of Sheffield
Rob Sykes, COO



Evolution of Sheffield's approach to organisational change

- It's about people, processes, and sometimes systems ~ a mixed approach not ever digital-led transformation: business-led digitally enabled where required
- Genuine academic / PS partnership (recognising accountability) ~ has been most effective in driving Student-centred Education
- PS realignment across key services ~ no 'ideology' but build support aligned with accountability culminating in PS Framework across Schools and consistent teams at faculty level
- I have banned the word 'Transformation' and the phrase 'Target Operating Model'

A brief history and lessons learned: DVC-led

2017-18 - DVC-led PS reviews

- Inspired by the approach in University of Melbourne, led by an FDO, first on research, then other areas
- High levels of academic engagement in review stage (research = 100 meetings with individuals or groups)
- Single most important positive: complex / dramatic change sometimes necessary
- Issues included: fundamentally remedying weak management; required 'sophisticated leadership' not least cf. academic engagement, inadequately resourced (no PMO, review stage too HR dependent, 'on top of day job')
- None were wholly 'fixed' but two (research and education) had laid helpful foundations, employability dealt with by stealth, student recruitment fundamentally flawed and had to be completely done again

Lessons learned

- Build capacity and make sure the right people lead

A brief history and lessons learned: Digitally-enabled transformation

2016-20 - Student Lifecycle Programme (SLP)

- Conceived and branded as digitally enabled transformation
- Made right call on maturity and capability of 'the business' to transform itself (IT services and Registry / other functions) - build outside the business and hand back
- Built change capacity and expertise

BUT...

- Rightly aligned key roles with organisational responsibilities but people not always sufficiently experienced
- Underestimated culture and ability to manage third parties
- Failed in overall ambition (for good reasons) but with elements of delivery

Lessons Learned

- SLP had begun to (genuinely) move to adopt not adapt (called Tribal's bluff...)
- Incremental steps along an agreed path not big bang genuinely led by 'the business'
- We were honest about our weaknesses / immaturity but not honest enough
- Didn't fully appreciate the significant limitations and challenges of legacy systems

2021-Present day: The 'right' people lead

- Significant PS change since 2021/22 all of which has improved delivery
 - 'centralised' pre-award Research Support and merger of units - to create Research, Partnerships and Innovation, Faculty-based hubs
 - Centralised student recruitment and marketing and now merging with Comms - to create Marketing, Admissions, Recruitment and Communications, Faculty-based hubs
 - Established unified Student and Academic Services under Deputy COO (Student)
 - Established second Deputy COO role (Faculty Operations)
- Various supported by a change team, but 'sponsored' / led by Head of Service both in review stage and formal restructure stage (where necessary) - implementing lessons learned
- 'Maturing approach' to tech enabled improvements ~ TESF aligned with vision / delivery pillars, now 'thinned down' with three boards co-led by senior academic and PS aligning priorities with IT delivery - Education, Research and Innovation, One University

Academic Structural change and PS opportunities

- Since January 2023 have embarked on a project to bring c. 44 academic departments into 21 Schools - project well supported by change team, HR and IT.
 - Addressed governance at Faculty and school level cf. accountability for regulatory risk and now more consistent
 - All Schools have School Manager, all SMs report to Faculty Director of Ops, all FDOs report to Deputy COO (Faculty Ops)
- Restructured and increased consistency / capacity across Faculty PS leadership first (Deputy FDO roles)
- Seized opportunity of latter to win support in UEB for a) centralising budgets/ line reporting and b) development of a PS Framework for Schools based on principles around accountability and responsibility (both via Deputy COO Faculty Ops)
- All Schools of three teams (Ops, Education, Student experience) but allowed for limited specialist: consistent grades, JDs, 'right sized', also established Faculty-based Doctoral Schools, Employability hubs and P2P, c. 15% saving (c. £6 million), achieved in 18 months

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

Lesson 1: Establish an Urgent and Consistent Transformation Mandate



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



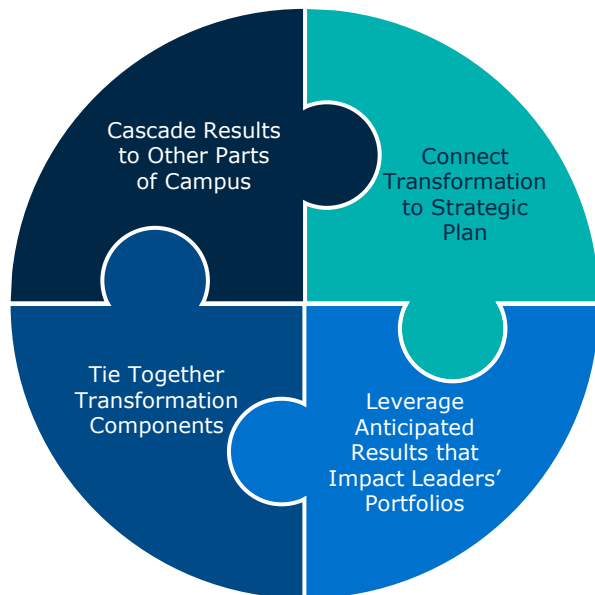
Anticipate Leadership Turnover

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

How to Generate Buy-in for a Mandate?



Evaluate Opportunities to Amplify Transformation Mandate



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.



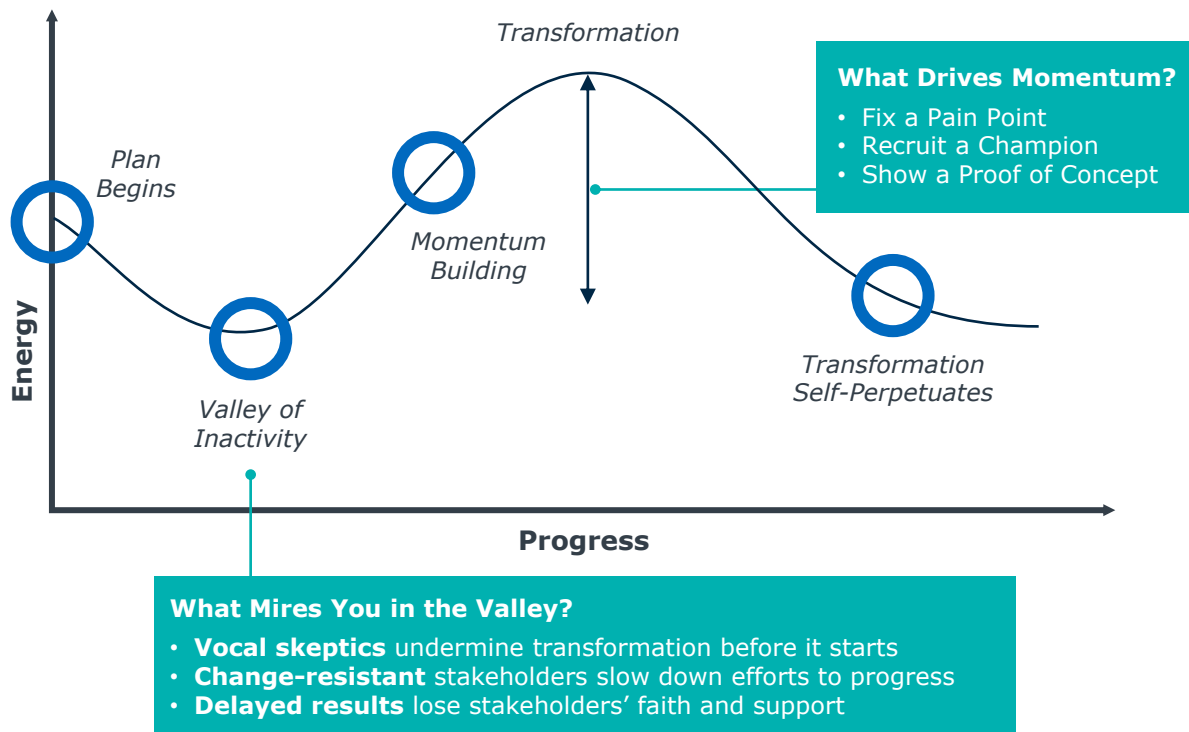
Cascade Results to Other Parts of Campus

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

Lesson 2: Leverage Momentum to Propel Projects Past Stall Points



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



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

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)

Lesson 3: Maintain Strategic Ownership of the Transformation



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

Levels of Involvement



Ownership

Full control over a fundamental aspect of change

Examples

- 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

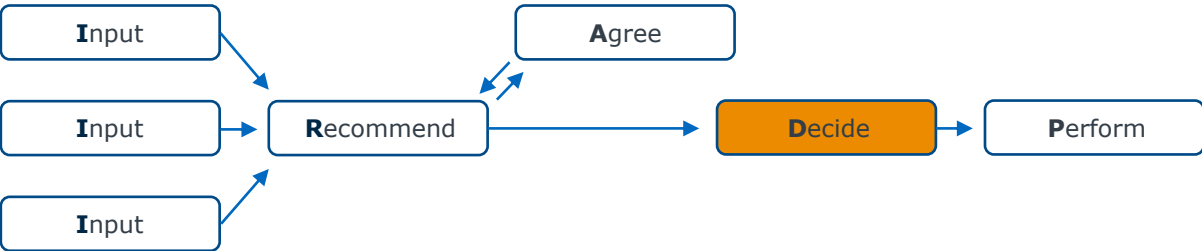
Valued voice in considering changes

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

Clarifying Roles When Complexity Demands It

Two Approaches to Resolving Ownership Disputes

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



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	--



Translating Corporate-Speak to Campus

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

Intput

Decide

80%

Of the effort
occurs here

Responsible

Accountable

Consulted

Informed

Translating Corporate-Speak to Campus



35

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

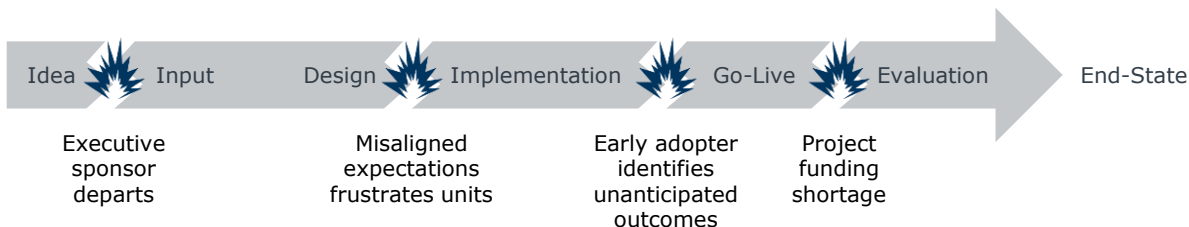
- 1 Who do I need to engage first, second, and third, before broader conversations?
- 2 Do I have a preferred solution, or am I looking for “blank slate” ideas?
- 3 What data needs to be shared to provide context for the decision?
- 4 Who are the likely detractors, what drives them, and how will I engage them?
- 5 What are the time constraints for constituent feedback?
- 6 Do I need to update each constituent as the process unfolds?

Lesson 4: Encourage Principled Ambiguity via Iterative Transformation

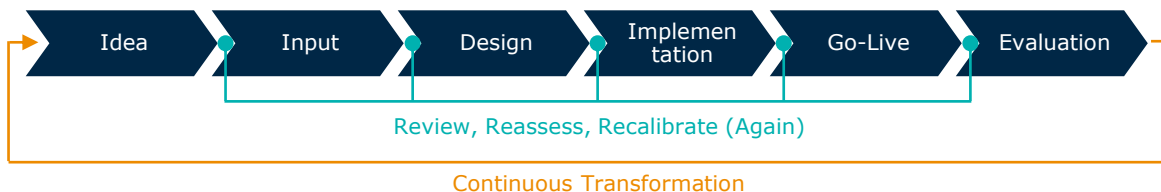


What to Do for a Sector that Plans to Plan

Realistic Transformation Plan



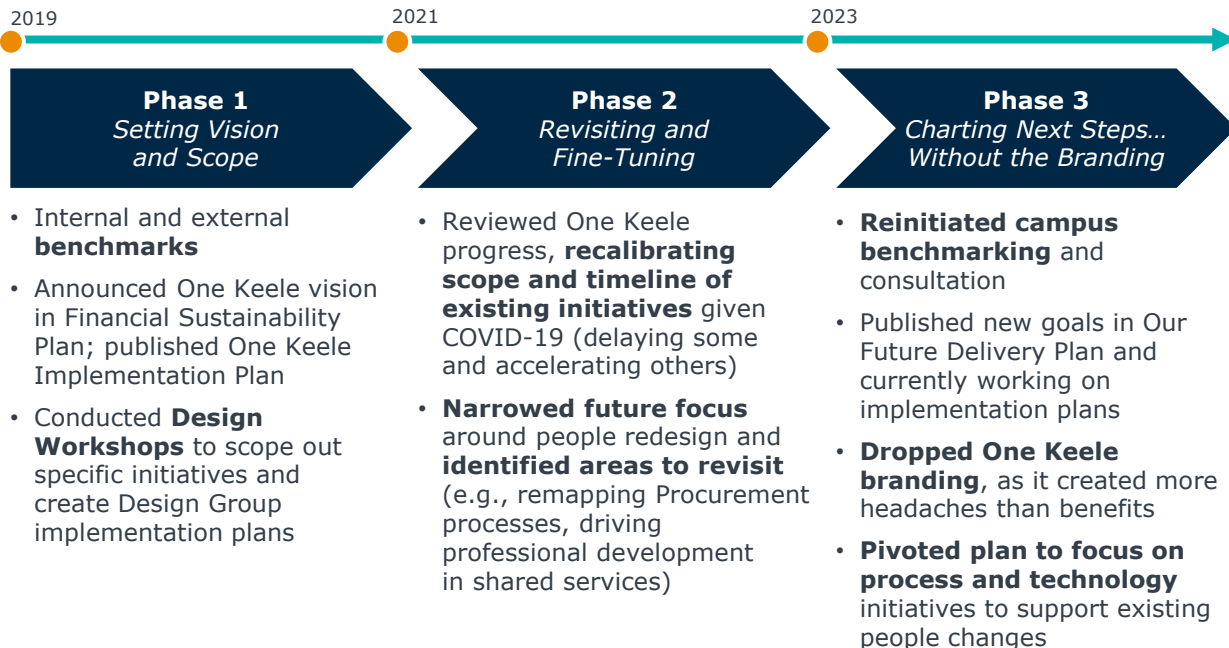
Iterative Transformation Plan to Absorb Inevitable 'Shocks'



Putting Iterative Planning and Review into Practice

37

Multiple Phases of Planning Guide 'One Keele' Transformation



Lesson 5: Match Transformation Messaging to Audience



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

Customise Frequency, Content by Stakeholder



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?

Applying Transformation Lessons

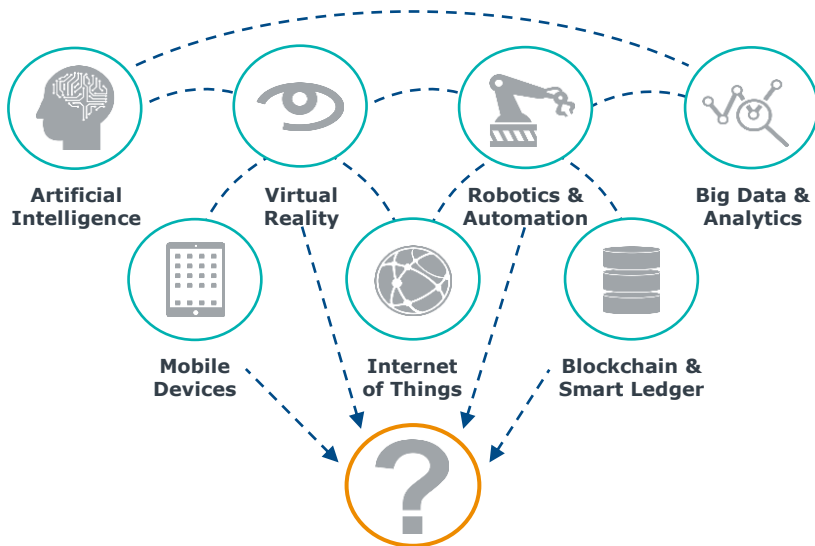
Consider one of the transformation scenarios and discuss the important stakeholder groups, their interests, likely obstacles to progress, and potential strategies to move forwards.

Which lessons on the previous page would be most important to activate, and how?

Emerging Tech Stokes Optimism... and Fear

41

Expansive Web of New Technology Solutions Piques Interest



Two Goals for Technology Investments



Unlock New Administrative
Efficiency Opportunities



Create a More Customer-
Centric Campus Experience

Goal 1: Unlock Operational Efficiency Opportunities

42

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

Source: Automation Anywhere, "[University of Melbourne Saves 10,000 Hours Annually with Automation Anywhere](#)" *Automation Anywhere*; M Johnston, "[Melbourne Uni turns to automation to meet mounting student expectations](#)," *iTnews*, May 27, 2019; "[Robotic process automation \(RPA\) for colleges and universities](#)," *Ernst & Young*, December 11, 2019; University of Alberta, Edmonton, AB; University of Iowa, Iowa City, IA; University of Melbourne, Melbourne, AU; EAB interviews and analysis.

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 University¹ projects a **90% reduction in staff** required for this task

Enrollment Marketing

Maple University¹ 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.

Goal 2: Enhancing Customer-Centricity

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

UCSD's AI Consortium



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



Job Description Helper

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



General AI Assistant

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



Fund Management Coach

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

Note of Caution: It's Not as Easy as Pressing a Button

46

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

1

Knowledge Capture



Collecting institution-specific proprietary data to train AI

2

Data Management



Ensuring high-quality, integrated, and well-governed data for AI tools to use

3

Upskilling



Dedicating time and training academics, professional services staff, and IT staff to learn how to optimise AI tools

4

Cost-Benefit Determination



Providing initial upfront investment in AI tools, which can be costly and requires time to realise ROI¹

5

Role Transformation



Redesigning roles and processes due to AI augmentation of academic and professional services tasks and responsibilities

1) Return on investment.

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?



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

Administrative Effectiveness Index Framework

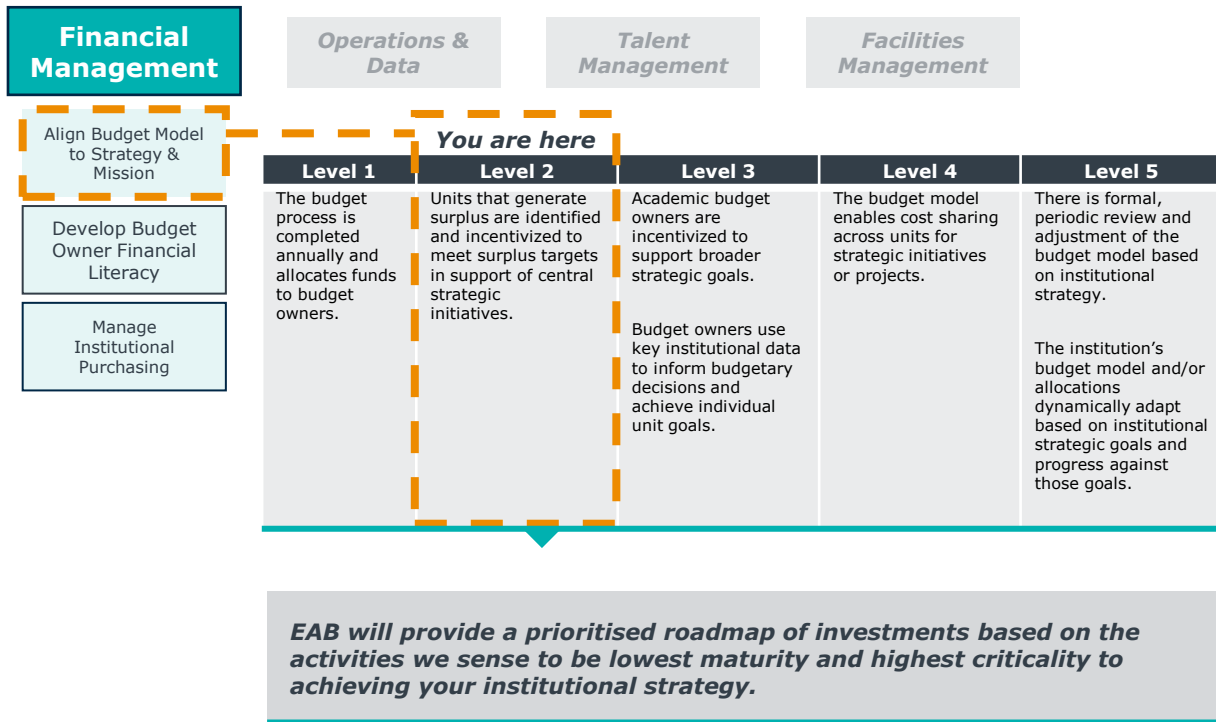


Measures Performance Across 19 Discrete Business Capabilities

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		

Each Capability Scored on a 5-Point Maturity Curve

51



Survey Assesses Maturity and Criticality



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	

Snapshot of Initial Recommendations Report



Informed by Lowest Maturity Ratings, Highest Importance Scores

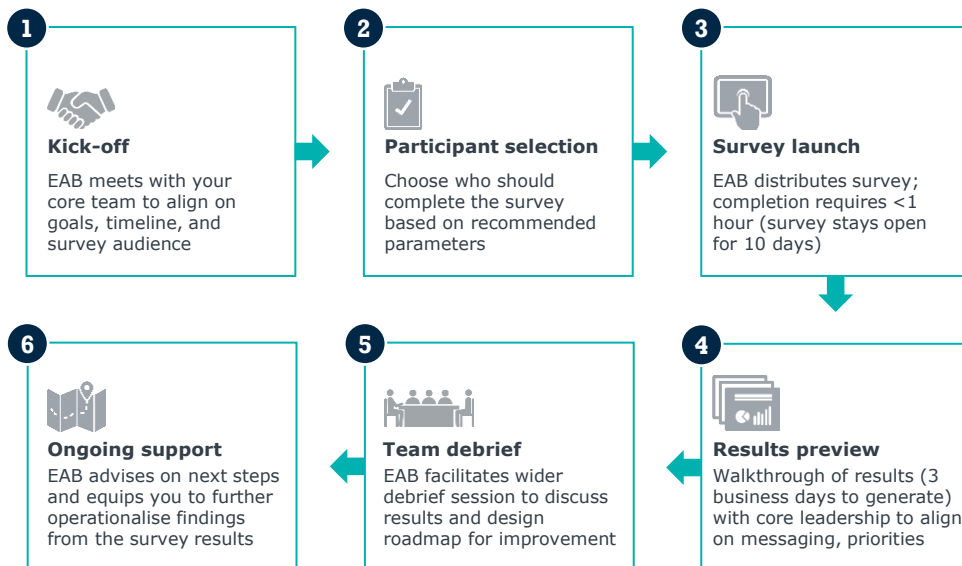
Dimension	Activity	Measurements
Financial Management	Align Budget Model to Strategy and Mission	Maturity ○○○○○
		Importance ●●○○○
		Priority Rank 1
Talent Management	Manage Staff Performance	Maturity ●○○○○
		Importance ●●○○○
		Priority Rank 2
Facilities Management	Determine Maintenance Priorities	Maturity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

n = x

Bringing AEI to Campus



Rapid Deployment and Delivery of Results Jumpstarts Action





Concluding Thoughts and Reflections

BEFORE YOU GO...

A Moment to Reflect (and Give Us Homework)



Annual Roundtable for Senior Leaders
 3-6 November 2025
 Sheffield, UK

Name: _____
 Institution: _____

Overall Reflections and Feedback

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?

Overall Meeting Evaluation	Excellent	Good	Fair	Poor
Please evaluate the meeting in its entirety	☐	☐	☐	☐

Overall Comments:

©2025 by EAB. All Rights Reserved. eab.com

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?

Thank you for joining us for the past two days.

Please leave any feedback forms at your table.

Don't hesitate to let someone from EAB know
how we can be of service.



202-747-1000 | eab.com



@eab



@eab_



@WeAreEAB



@eab.life

