

Doctums



Higher Education Consulting

Exploring the Map for Institutional Improvement and Student Success



Agenda

Introduction

Journey Mapping as a Concept and Methodology

Client Success

Moving Forward

Questions and Discussion

Introduction



What is Journey Mapping?



Journey Mapping vs. Business Process Modeling

Journey Mapping is...

The process of forming a visual representation of a constituent's needs and perceptions throughout their interactions and relationship with an organization's processes.

The goal of Journey Mapping is to fully understand those needs and perceptions from the constituent's point of view.

Business Process Modeling is...

The act of illustrating an organization's business processes often using a software tool that facilitates the use of a workflow engine to automate all or part of the process.

The goal of BPM is to increase efficiency, performance, and agility in the day-to-day operations.



Pivot the Focus from **Process** to **People**



Problem solving often views the technology ecosystem simply as a **collection of solutions and IT principles**



Constituent Journey Mapping (CJM) provides a deeper understanding of the ecosystem based on the series of **impactful moments a constituent experiences** rather than then a series of tasks.



This pivot enables all constituents to think about how services and technology solutions might best support the institution's mission, vision, and values.



Ideas for Journey Mapping in Higher Education

- The typical vision of a constituent's journey is a single, expectedly seamless trajectory, with multiple constituent inputs
- As we know, it can include administrative, technological roadblocks and traffic jams
- Constituents are perhaps focused on their own experiences without the ability to see the impact on the student experience or have insight into how it might be improved
- Journey Mapping creates a larger view of the constituent experience and generates empathy



Journey Mapping Methodology



Doctums Methodology and Approach

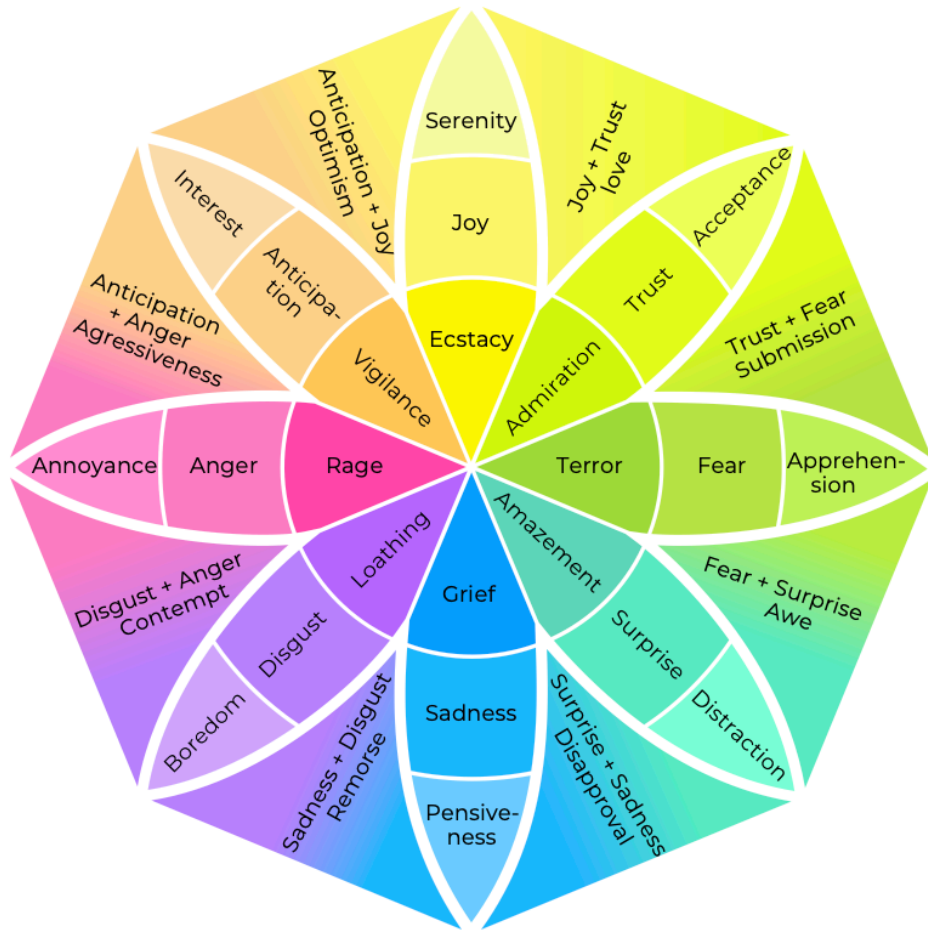
- Identify Key Personas
- Identify Stages and Touchpoints
- Conduct Interviews with Constituents
- Capture Experiences, Mindsets and Emotions
- Perform Analysis and Identify Opportunities

























Collect and Interpret **Data**

- Institutions collect a wealth of student-related data: enrollment, financial aid, and credit accumulation information.
- Correlating CJM data to your existing data provides critical insights.
- Qualitative assessment from CJM and correlate this to decline in recruitment and retention rates. CJM assessments provide insight.
- For example: CJM aids enrollment staff in context, data-driven conversations regarding enrollment funnel conversion from recruitment to registration.







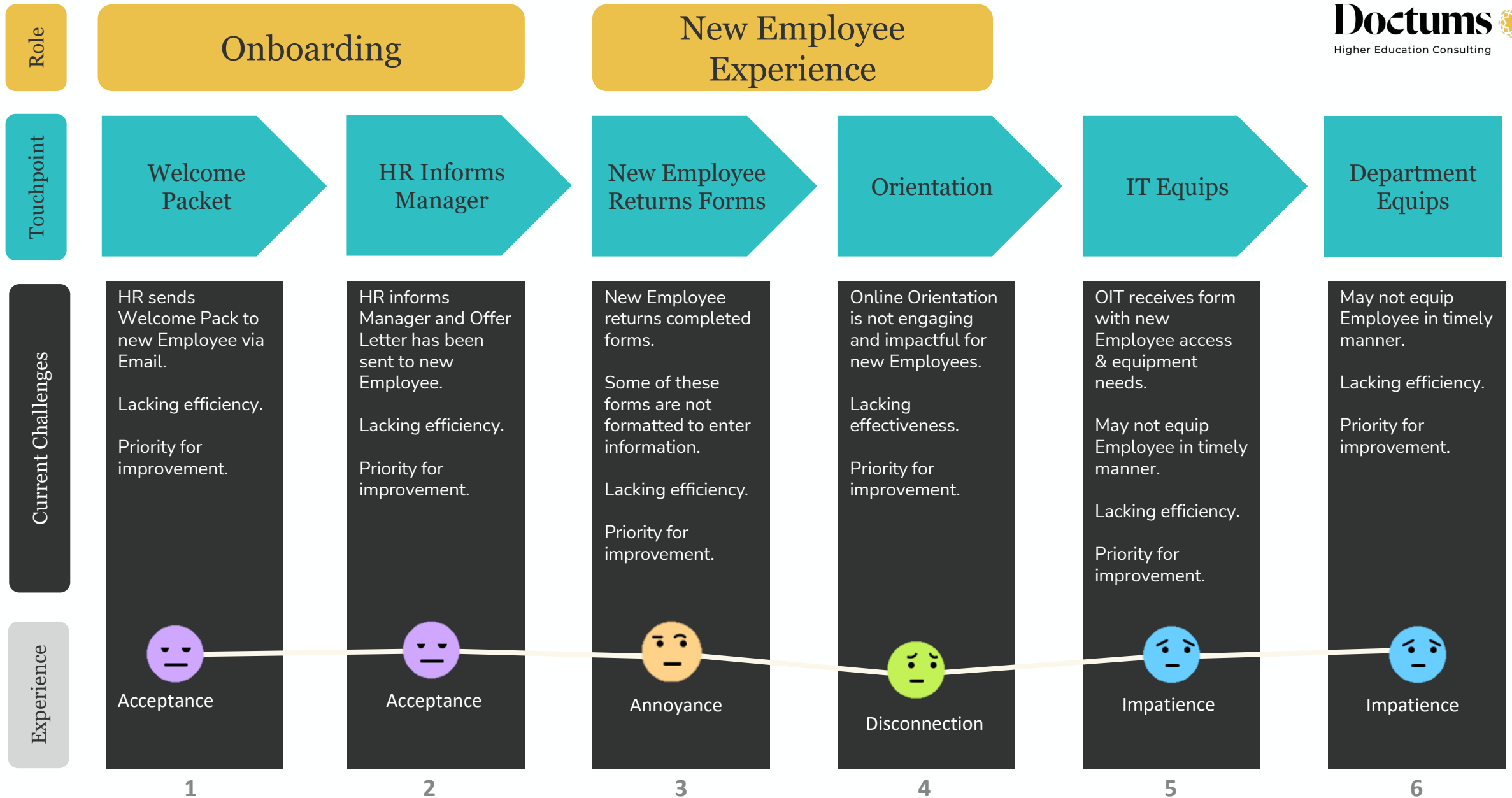
Plutchik's Wheel of Emotions



					
ecstasy	joy	serenity	grief	sadness	pensive
					
admiration	trust	acceptance	loathing	disgust	boredom
					
terror	fear	apprehension	rage	anger	annoyance
					
amazement	surprise	distraction	vigilance	anticipation	interest

Journey Map Touchpoints and Experiences

Touchpoint	Channel / Technology / Communication Method	HR Staff Experience	Manager Experience	Applicant / Employee Experience	Process Effectiveness (Rate 1-5)	Process Efficiency (Rate 1-5)	Target for Improvement	
1	HR sends Welcome Packet to Employee	Email				3	1	High
2	HR informs the HM that the Welcome Packet including the Offer Letter has been sent to the New Hire	Email				3	1	High
3	Forms Returned by candidate to HR	Email				2	1	High
4	Orientation 2.5 hour session each month	Virtual				-1	-1	High
5	OIT receives OIT Equipment Form with information on the new hire's access & equipment needs	Form				1	1	High
6	Department Equipment	Technology Approval Form				1	1	High



Journey Map Touchpoints: Student Experiences

	A	B	C	D	E	F	G	H	I	J
TP	Stage	Touchpoint	Channel (Technology)	Part-Time Traditional Student	Part-Time Traditional Student	Full-Time Traditional Student	Full-Time Traditional Student	Full-Time Traditional Student	Full-Time Non-Traditional Student	Full-Time Online Student
1	Application	Inquiry	Email, cards, in-person	☹️	☹️	☹️	😊	☹️	😊	😊
2	Application	Inquiry Website	Website	☹️	😊	☹️	😊	☹️	😊	☹️
3	Application	Temporary Admission Account	Website	😊	😊	😊	😊	☹️	😊	😊
4	Application	Update Student Account (Returning)	Website	☹️	☹️	☹️	☹️	☹️	☹️	☹️
5	Admission	Application Submission	Ellucian Recruit	☹️	☹️	😊	😊	☹️	😊	😊
6	Admission	Application Received Confirmation	Email	☹️	☹️	😊	😊	😊	😊	☹️
7	Admission	Application "Processed" Confirmation (ID#)	Email	☹️	☹️	😊	😊	😊	😊	☹️
8	Admission	Application Materials (F1)	Ellucian Recruit	☹️	☹️	☹️	☹️	😊	😊	☹️
9	Admission	Admission Step: New Student Orientation	Website	☹️	☹️	☹️	😊	☹️	😊	☹️
10	Enrollment	Admission Step: Starting on Campus	Phone, Email, Virtual, Walk-In/Appnt	☹️	☹️	☹️	☹️	☹️	☹️	☹️
11	Enrollment	Admission Step: Placement	In-Person, Website	☹️	☹️	☹️	😊	☹️	☹️	☹️
12	Enrollment	Admission Step: Course Planning	Phone, Email, Virtual, Walk-In/Appnt	☹️	😊	☹️	☹️	☹️	😊	☹️
13	Admission	Application "Congrats Admitted"	Email	☹️	☹️	☹️	☹️	☹️	😊	☹️
14	Enrollment	Student Tech Support (MFA)	Email	☹️	☹️	😊	😊	😊	😊	☹️
15	Enrollment	Course Selection/Schedule Building	Student Planning	☹️	☹️	☹️	☹️	☹️	☹️	☹️
16	Enrollment	Registration	Student Planning	☹️	☹️	☹️	☹️	☹️	☹️	☹️
17	Enrollment	Payment	In-Person, Self-Service, Phone (Nelnet)	☹️	😊	😊	😊	😊	☹️	😊
18	Enrollment	Drop/Add or Withdrawal	In-Person, Self-Service, Phone	☹️	😊	😊	😊	😊	😊	☹️



Client Success



Recent Success, Part 1

Enhancing Student Admissions



Institution facts

- Community College
- 15,000 students



Business challenges

- Decline in student enrollment
- Awareness of obstacles for student admission processes



Service outcomes

- Improved student admission and orientation processes
- Enhanced incoming student and staff experience
- Eliminated roadblocks for student registration



Recent Success, Part 2

Human Resource Management System



Institution facts

- Comprehensive State University
- 5,000 students



Business challenges

- Ineffective and cumbersome staff recruiting and selection processes
- Losing best candidates in the hiring process
- Lack of HRMS system



Service outcomes

- Improved employee selection and hiring processes
- Enhanced candidate and staff experience
- Reduced roadblocks which previously contributed to losing top candidates



Recent Success, Part 3

Procurement Process



Institution facts

- Private University
- 7,000 students



Business challenges

- Lengthy processes for requisitioning, purchasing, and receiving
- Heroic efforts required by administrators and the staff constituents



Service outcomes

- Improved efficiency of procurement processes
- Enhanced staff and constituent experience



Moving Forward

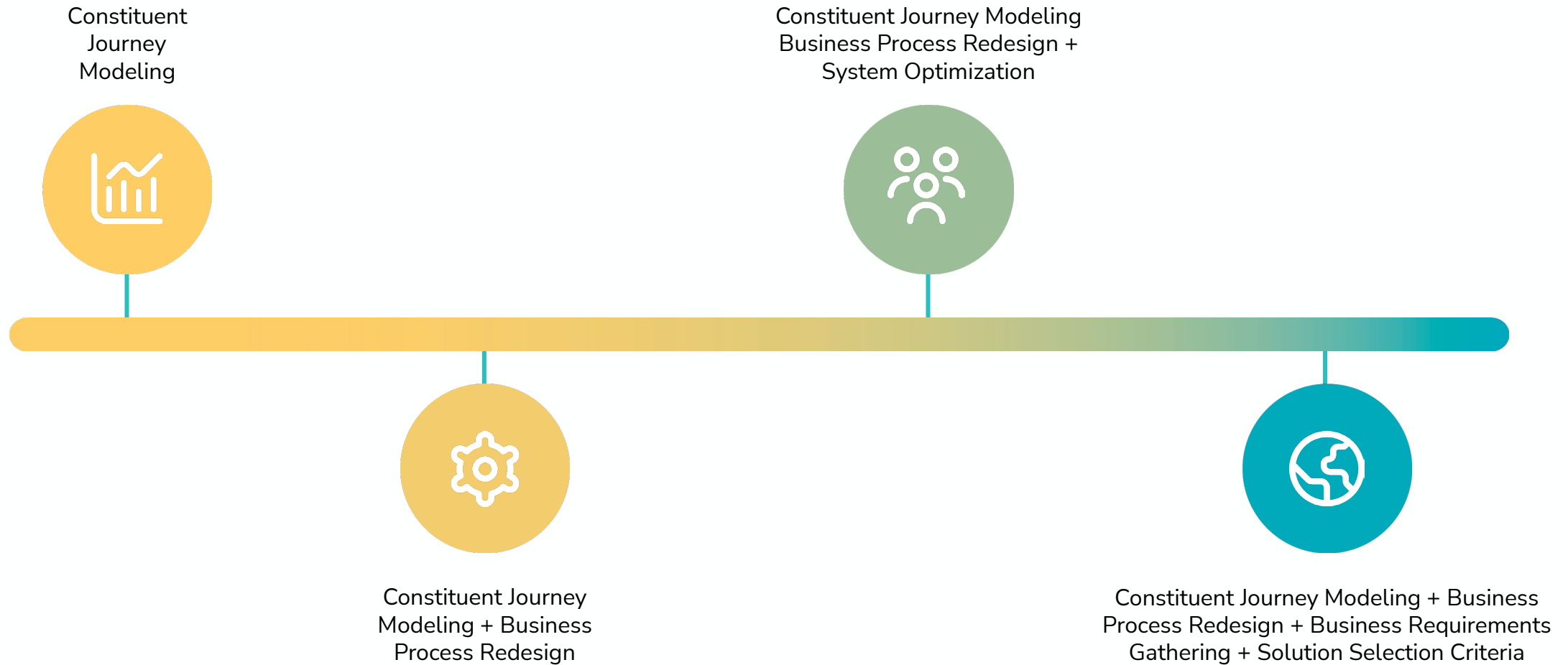



Institutional Improvement and **Student Success**

- The primary goal of Constituent Journey Mapping is to improve the experience of students, faculty, or staff – any constituent of value to the institution – internal or external
- Enhanced experiences lead to improvements in significant outcomes:
 - Student persistence and completion
 - Employee performance and retention
 - Streamlined, efficient, and effective processes
 - Improved constituent satisfaction



Journey Mapping as a Foundation





Our mission is to help higher education institutions of all sizes and types improve their business processes, outcomes, and most importantly, the success and experience of the students they serve.



The Doctums Difference

Technology Agnostic

Doctums focuses on helping you make the most of what is already in place. We derive as much value as possible from our clients' existing platforms, regardless of who their vendor(s) may be.

Outcomes-Based

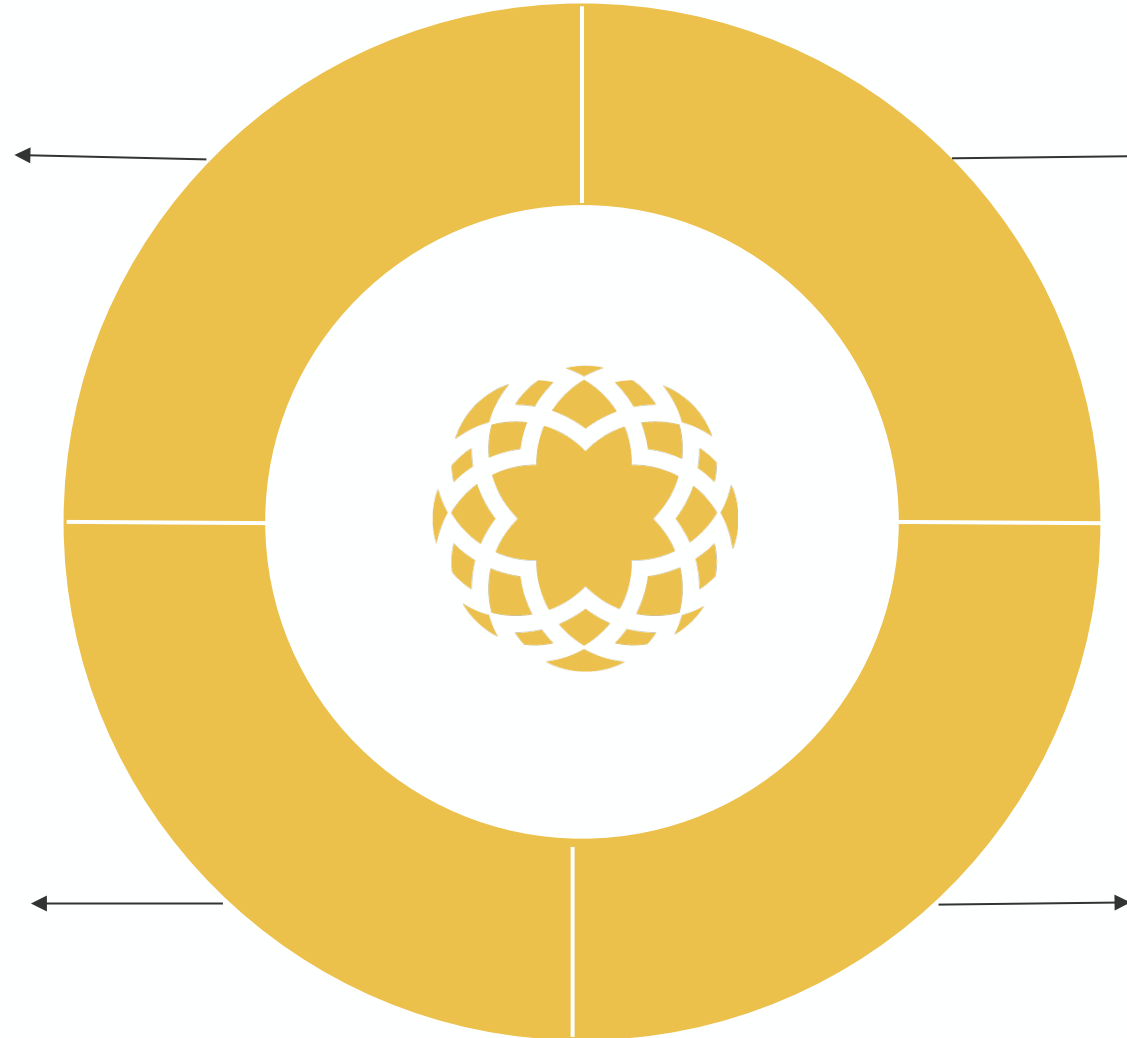
Beginning with the constituent experience and aligning outcomes with institutional strategy, we go beyond theory and recommendations – we partner to deliver outcomes.

Bespoke and Flexible

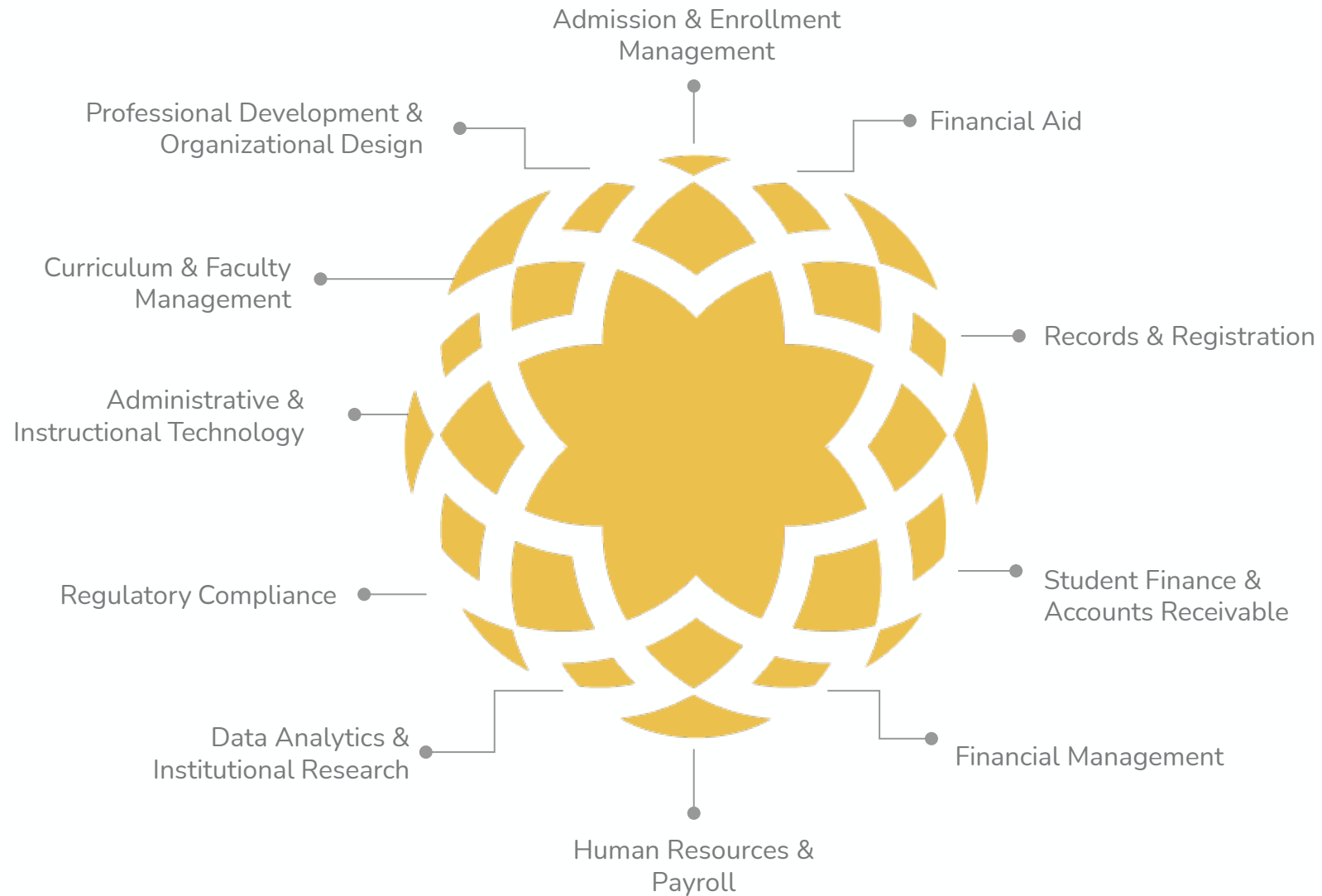
Your institution is unique, so our plan for reaching your goals will be too. Instead of pushing a set of plug-and-play plans on your team, we will work with you to develop a way of working designed for you.

Resource Efficient

Doctums resources work as one team – collaborating across workstreams – focused on your success.



Areas of Practice



Strategic Advisory Services

Portfolio of Offerings

Business and Technical Staff Augmentation or Backfill



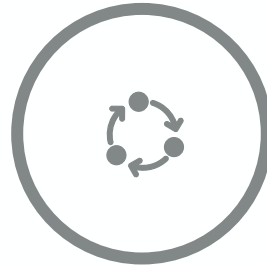
Provide key staff resources to cover customer project responsibilities or as backfill to maintain on-going operations while customer staff focus on project activities.

Technology Portfolio Assessments



Assess the current inventory of technologies/tools on campus to opportunities for rationalization - duplication solutions, cost-saving opportunities, under-implemented solutions, unmet business needs, etc.

Functional or Technical Readiness Assessments



High-level business assessments to surface business process and source system configuration issues or source data migration and integration risks including data quality and data compliance specific to Ellucian solutions

Implementation Planning Activities



Develop an implementation plan detailing tasks and timelines/milestones, budget allocation, resourcing and performance indicators for each strategic initiative.

Adoption, Deployment, and Training Events



Execute implementation plan to drive business process change in the community, optimize technology to support new processes, and train constituents to ensure a positive experience.

Project Management and Change Management



Questions and Discussion



Thank you

Joe Street

Vice President of Institutional Sales

joe.street@doctums.com

+1 (434) 960-6061

