This Changes Everything

- Technology-induced change has the power to alter the fabric of an institution
- Can cause a fundamental shift in the way we interact with our students
- IT finds itself under an intense spotlight
  - anything less than total success is unacceptable
Case in Point

- UW Student Planning (integrated planning & advising services)
- Finding the right blend of people, process, & technology to fundamentally change the relationship between students & university
- We will illustrate how a false start turned into digital empowerment
In a Nutshell

- Create a digital world for digital natives
  - equip students to become hands-on managers of their academic career

- Technology-driven degree audit project that became a digital transformation

- Morphed user disinterest into user engagement

- Impact has been felt throughout UW

No one is exempt!
A Transformative Project...

- Brings together all the elements of a modern IT project
  - technology generational changeover
  - required pan-university collaboration
  - relentless, targeted communication
  - unwavering focus on outcomes
Not Always a Clean Start

- Getting off on the wrong foot
  1) positioned it as an IT-driven technology implementation
  2) left users alone with external specialists
  3) IT thought we could do it without full client engagement
We Goofed

- No burning platform from clients’ perspective
  - too busy with other issues
- Too big, too complicated
- No one driving!
- Too scary
  - multiple compounding changes
  - looked like everything was changing
What Are We Really Doing?
Digital Transformation

Recognize how much is changing!

- Entirely new look & feel for existing online registration process
  - change management challenges

- New online degree planning suite of tools
  - core to university’s mission
  - high priority, high visibility, high impact
Digital Transformation

- **New technology platform**
  - architecture advancement
  - emphasis on new UX

- **Replaced primarily paper-based processes**
  - business process renewal
  - change mgmt. challenges
  - buy-in

- ‘Automating’ not so easy
  - different interpretations
  - data integrity challenges
Bringing Value

• It’s about the client & how they define value
• Technology alone is rarely the answer
• Take it one step at a time
  1. define the value proposition
  2. understand the role of technology
  3. build it into the business processes
  4. figure out how to get there
People + Process + Technology = Value

- Each element plays a critical role
  - the interplay of these elements defines the value proposition
- Each element’s contribution to overall success is different for every project
- Success happens when you strike the right balance
- Deliver value to the organization in terms that matter to them!
People + Process + Technology

Strategy
(methodology)

Technology

Process

People
Collaboration builds understanding, which promotes engagement.
Collaboration Requires

- Commitment
- Understanding
- Openness
- Engagement
Collaboration

● **Key component for buy-in**
  - promotes *collective* ownership of issues and solutions
  - brings together key influencers, informal leaders

● **Required**
  - openness to ideas
  - participation
  - visualization techniques
  - listen!

  *Hear, listen, understand ...*
The Student Planning way...

- Institution-wide collaboration with core cross-functional team
  - start with a baseline
  - listen
  - gain functional expertise
  - facilitate
  - move on
- Use focus groups
- Visualize – paint the picture in a way people understand
- Pilot to confirm assumptions
- Remain nimble, open to change
- Facilitative Leadership
The Nature of Leadership
Facilitative Leadership

- Leaders facilitate ‘Deep collaboration’
  - people-centered, co-creative leadership
  - shared power, vision, and decision-making
  - quality and results driven
  - manage the flow and interaction of decisions

- Optimizes staff expertise, information

- Adapt and change as process evolves
  
  *Inspires*

  *Invites participation*

  *Builds Commitment*
Still Need a Leader
Driving Change

How do you drive change without anyone knowing you are behind the wheel?

- put a wheel in front of them & press the gas
- understand the relationship among people, process and the technology
- collaborate: gain buy-in, trust, mutual respect
- facilitative leadership
- understandable, realistic project management
- straw man approach to focus discussion
Making Change Happen

- At the core are people who will be affected
  - students
  - faculty
  - staff
  - techies

- Understand their perspectives
  - what constitutes value

Unique to each constituency!
Resistance to Change

- Is natural… expect it!
- Threatens success
- Slows adoption
- Affects productivity, quality, relationships

How to overcome?
Understand Why

- Understand the true nature of resistance
  - odds are, it's not about the technology
- Understand their definition of value, cost
- Not everyone looks at the change the same way as you
- Ask! Don’t assume!
The Winning Playbook
The Easy Part ... Technology

- New underlying technology platform
  - robust, advanced
  - positions UW to offer more online services in more ways

- Engaged 3rd party support to assist

- Used standard IT best practices
  - Analysis – modeling, pilots, use-cases, testing
  - Configuration, branding, documentation
  - Testing – unit, system, UAT, load, performance
  - Assessments – performance, storage, risk, security

*Easy-to-use, Intuitive*

*Engages students on their terms*
Our Pilot Approach

- Usually speeds up the process
  - not with such a complex transformational project
  - too big, too complex, too long

- Instead used pilots to confirm assumptions
  - **functionality**
    - student benefits
    - advisor benefits
    - department benefits
    - ease of use
  - **technology**
    - configuration, architecture
    - load
Our Pilot Approach …

● Confirming assumptions
  ▪ project
    • timelines
    • training strategy (based on needs)
    • communications strategy (based on needs)

● Is it what we think? If not…
  ▪ change the messaging
  ▪ manage expectations
  ▪ alter the project
Our Pilot Approach

● Transformational Analysis
  ▪ required change
  ▪ projected impact (risk)
  ▪ readiness assessment
  ▪ recommended change mgmt. tactics
    • communications strategy
    • training strategy

● Examples
  ▪ advisors now working online
  ▪ engaging departments in future course planning
Communications Strategy

- Create a formal strategy/plan
  - who, what, when, where, how
  - targeted, key messaging

- Confirm approach/assumptions

- Numerous feedback mechanisms
  - word of mouth
  - pilot
  - surveys
Communications Strategy

- Use diverse communications methods
  - campus communiques
    - e-mail, posters, pamphlets
  - student campus radio, newspaper
  - web site, blogs, FAQs, online videos
  - digital signage
  - social media
    - Twitter, Facebook, Instagram
  - information sessions, formal presentations, meetings
Student Planning – the Players

The Who List

Students

Advisors

Student Services
- Student Central
- Awards
- Registrar
- Admissions
- Scheduling

Academic Departments

Students' Union

Executive Team
Training Strategy

● What do we think?
  ▪ ask!
  ▪ build out a plan to support
  ▪ who, what, when, where, how
  ▪ targeted, key messaging

● Confirm approach / assumptions

● Hit many different angles
  ▪ in person, hands on
  ▪ demos / information sessions
  ▪ online FAQ, training materials
  ▪ professional online videos
Our ‘Take’ on Videos …

- Collaborative, professional production
  - storyboards
  - 9 student videos
    ... created by Theatre & Film students
  - 6 advisor videos
    ... created by an Academic advisor
  - UW media services production crew
Key success factors …

● Do, show, let them go … it’s their system

● Sit the client in the driver’s seat
  ▪ academic departments:  *pilot their programs*
  ▪ student records staff / advisors:  *validate*
  ▪ advisors sitting with students:  *pilot the front-end*
  ▪ students:  *create online training videos for students*
  ▪ advisors:  *create online training videos for advisors*
  ▪ admin staff:  *run demos and information sessions*
Secret of Our Success

- Institution-wide collaboration
  - all other success factors built around this
- Pilot approach proved invaluable
- Unwavering focus on outcomes
- Facilitative leadership
- Relentless, multi-faceted, targeted communications
- Conscious, targeted training strategy
- Project management role
  - keep things on track
  - flag issues before they become crises
Lessons Learned
A Model for Success …

- **Place emphasis on people**
  - facilitative leadership – collaboration
  - skill / talent required for handling change across an organization
  - communicate – shared knowledge enables higher efficiency

- **Place emphasis on process**
  - create efficiency in managing change & interaction across many teams of people
  - sound processes foster trust across IT & business
  - consider processes the technology will impact
A Model for Success

● Place emphasis on project structure
  ▪ align business and IT
  ▪ work collaboratively
  ▪ keep things on track
  ▪ foster communication, enable high efficiency & ease of project decision making

● Bring in help if you need it!
Summary

- Building competence in all of these aspects allows IT project leaders to:
  - create a common vision for value, and deliver it!
  - build buy-in (and trust)
  - engage the community in a way that promotes ownership and follow through
  - enable innovative and adaptive solutions
  - realize value promise
  - instills ‘success’ in community

- Project Success!
Remember...

● The answers are different for every project!
  ▪ nature of collaboration may change
    • focus group – decision-making process
    • pilot group
  ▪ communications strategy will change
  ▪ training strategy will change

● It all depends on:
  ▪ the technology change itself
  ▪ the impact on the business
  ▪ organization culture
“**Student Planning** was a very high priority that we believed would bring immeasurable value to students, faculty, & particularly to Student Services. I was delighted that key groups worked so co-operatively and to such excellent effect. This project exemplified the value of teamwork to the benefit of all.”

*Provost and Vice-President, Academic*

“**Our IT department** moves projects along but allows the business side to set the agenda according to its needs. I couldn’t have asked for a better collaborative process.”

*Registrar*
“Best thing ever. Now I can see my whole progress and plan my degree. It's super exciting.”

“Simple .... easy to use ... love it”

“This student planning tool is awesome. I love how I could check out another degree program to see my progress and more options.”
Bravo!

“The project was run efficiently with attention to detail and ongoing communication among IT and the business teams. Student Planning allows students to take control of their degree planning, and allows advisors to spend more time advising.”

Executive Director, Wellness and Student Life
One more thing…