

IMPROVING CUSTOMER SERVICE WITH A ONE-STOP ENROLLMENT MODEL

June 27-29, 2011
Chicago, IL



“This one-stop planning conference was extremely valuable in helping us anticipate the questions we need to answer, establish a plan for answering them, hear from experienced and knowledgeable experts, and visit an exemplar.”

– *Chris Manasari, Dean of Student Services,
Leeward Community College*

“I really enjoyed our conversations about a one-stop because they also involved talking about student success and first-rate customer service. Bravo!”

– *Barry Taylor, Director of Undergraduate Admissions,
Florida International University*

“Great conference and excellent speakers. Lots of ideas to take back.”

– *Karen Clearwater, Associate Vice President of Financial Planning,
University of Lethbridge*

ACADEMIC • IMPRESSIONS

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OVERVIEW

Institutions that have successfully adopted one-stop models have reported increases in student satisfaction and retention. If you are considering a one-stop model on your campus, you must first carefully consider the academic, registration, and financial service transactions that will need to be blended, as well as your institutional space and resource limitations.

Join us in Chicago to explore the various challenges and solutions to building a successful one-stop model to improve student service and support. We will examine the five main components of the planning and implementation process:

- Process redesign
- Physical space considerations
- HR issues – change management and training
- The advantages and applications of technology and virtual applications

LEARNING OUTCOME

Improve student service on your campus using a one-stop service model.

WHO SHOULD ATTEND

Institutional leaders and practitioners who are considering adopting a one-stop model or are in the process redesign phase of their one-stop implementation will benefit from this event. Institutional teams from enrollment, financial services and financial aid, academic advising, and the registrar's office are encouraged to attend.

AGENDA

MONDAY, JUNE 27, 2011

- 8:00 – 9:00 a.m. **Registration and Continental Breakfast**
- 9:00 – 9:15 a.m. **Opening Comments and Faculty Introductions**
- 9:15 – 10:30 a.m. **Why Choose a One-Stop Model?**
During this introductory session, faculty will share three differing perspectives on why they decided to implement a one-stop center at their institutions. They will introduce the models they chose and discuss some of the assumptions (both true and false) they made before they began their planning processes. During this session, attendees will be introduced to a draft one-stop planning template and will begin to work on their institutional plan.
- 10:30 – 10:45 a.m. **Break**
- 10:45 a.m. – 12:30 p.m. **Getting Started: Envisioning Change**
In order to plan a one-stop center, you will first need to consider process changes to both your operation and your personnel. During this session, faculty will help you understand and facilitate business process redesign. They will also help you understand your current student contact data (walk-ins, appointments, phone calls, etc.) so that you can modify processes and job descriptions for improved customer service.
- 12:30–1:45 p.m. **Lunch**

Improve student
service and
satisfaction
with a one-stop
enrollment
center.

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MONDAY, JUNE 27, 2011 (CONTINUED)

- 1:45–3:15 p.m. **Using Technology to Improve Customer Service**
Technology can help you both in building a platform for successful customer service and in assessing the results of your one-stop implementation. During this session, you will review various ways to use technology to meet your service goals. In addition, you will also learn how to bring more of your services online using technology.
- 3:15–3:30 p.m. **Break**
- 3:30 – 5:00 p.m. **Human Resources, Part I**
Resistance to change can damage or derail a one-stop implementation. Employees and supervisors are often apprehensive about their changing roles and potential move to new physical space. During this session, you will learn techniques for change management and how to manage key messages to staff for maximum support and buy-in.
- 5:00 – 6:00 p.m. **Networking Reception**
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TUESDAY, JUNE 28, 2011

- 8:30 – 9:00 a.m. **Continental Breakfast (included in registration)**
- 9:00–10:30 a.m. **Human Resources, Part 2: Training**
Too often, an advising session focuses solely on the details of course selection and registration. In this session, our faculty will showcase how to encourage students to use advising sessions as a time to dream about their futures. Then, faculty will highlight how they have used assessment and data to document their efforts and successes.
- 10:30–10:45 a.m. **Break**
- 10:45 a.m. – 12:15 p.m. **Physical Space Considerations**
What space do you have available? Are you building a new structure or remodeling existing space? How many service areas will you be combining? Will any services be moved online? In this session, faculty will help you answer questions you have about physical space redesign and logistics. After the presentation, you will work on your own unique space redesign project.
- 12:15 – 1:45 p.m. **Lunch and Table-Top Discussions**
- 1:45–2:15 p.m. **Trip to DePaul University for Site Visit**
- 2:15 – 5:00 p.m. **Site Visit: Tour the One-Stop Shop (DePaul Central) at DePaul University**
Join us for the tour of the one-stop center at DePaul University to see firsthand the implementation of some of the ideas about space and process redesign you reviewed earlier in the conference. DePaul Central was created in 2006 and blends student accounts, financial aid, and student records into one cross-functional operation. The unique operation services over 8,000 students each month in person and also handles high volumes of calls, emails, and online chats with students, providing a two-tiered approach to customer service.
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WEDNESDAY, JUNE 29, 2011

- 8:00–9:00 a.m. **Continental Breakfast and “Open Mic” Session with Faculty**
Ask any questions you have before you get started on your draft plan.
- 9:00 – 10:15 a.m. **Crafting Your Plan**
This session will help you jump-start the planning process. Faculty will help attendees weave the information learned during the first part of the conference into a practical plan.
- 10:15 – 10:30 a.m. **Break**

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WEDNESDAY, JUNE 29, 2011 (CONTINUED)

10:30 a.m. – 12:15 p.m. **Assessing Quality and Return on Investment**

Once you have decided to implement a one-stop center, you need to develop valid measures to assess success and determine the return on investment to institutional leaders. It's likely you'll be asked to measure both quantitative and qualitative outcomes during the life cycle of your new operation to demonstrate both fiscal and customer service outcomes. During this session, you will learn techniques for assessing progress and using key performance indicators around expenditures, staff time, facility use, and student satisfaction.

12:15 – 1:15 p.m. **Lunch for Post-Conference Workshop Attendees**

1:15 – 4:00 p.m. **Optional Post-Conference Workshop: Customer Service Essentials for Enrollment Staff**

During the hectic registration and payment cycles, conversations with students and parents can sometimes escalate and get out of hand. You can minimize conflict in your one-stop shop with specific techniques for managing lines, foot traffic, and telephone calls, and through proven conversational approaches to de-escalating emotional responses. This workshop will help attendees learn both process redesign and communication techniques to improve customer relations. Faculty will use case studies and role plays to teach core concepts that can be used at your institution.

INSTRUCTORS



Dennis Day, Vice President of Student Services, Johnson Community College

With more than 30 years of higher education experience and having visited more than 50 campuses in the U.S. and Europe, Dennis has developed an in-depth knowledge of divergent enrollment systems. While at Johnson Community College, he has worked to create service delivery systems designed to maximize the method of delivery, provide information directly to students, and use the latest technology. Throughout his time at JCC, Dennis has provided leadership for a new student development model, implementation of Web-based products, and construction of the new student center containing the "Success Center," a model one-stop center visited by more than 70 colleges and universities.



Susan Leigh, Associate Vice President, DePaul University

Susan Leigh joined DePaul University in 1992. With more than 30 years in higher education, Susan oversees Student Records, which is responsible for all academic enrollment records, placement testing, registration, grading, graduation, transcripts, diplomas, immunization, and advising reports such as the course history and degree progress reports. She is also responsible for DePaul Central, the university's new integrated student services concept that offers a one-stop location for student records, financial aid, and student account services.



Larry Lesick, Associate Vice President for Enrollment Management, Widener University

Since beginning his career in higher education administration in 1982, Larry has served in a variety of roles, including director of admissions, dean of admissions and financial aid, and vice president for enrollment management and strategic planning. He has written articles and made presentations on a variety of topics in financial aid, admissions, business process redesign, and customer service in higher education.



Rick Weems, Assistant Vice President for Enrollment Services, Southern Oregon University

A 30-year higher education veteran, Rick has served as a director of financial aid and an enrollment manager at several Pacific Northwest institutions, including Warner Pacific College, the University of Alaska Anchorage, and Southern Oregon University. Drawing upon his experiences as a seasoned administrator, he has presented on retention, financial aid, and developing student-friendly enrollment services at numerous state, regional, and national conferences. Rick also has chaired the National Association of Student Financial Aid Administrators' Training and Best Practices Committee. Rick has been successful in using one-stop concepts to improve service to students, stop student run-around, and increase student satisfaction.

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MEETING LOCATION

The meeting will be held at a board room on the second floor of Morton's Steakhouse on 65 E. Wacker Place, Chicago, IL -- this is 0.75 miles from the Club Quarters hotel, which will only be used for accommodations.

HOTEL RESERVATIONS

Club Quarters, Central Loop
111 West Adams St., Chicago, IL 60603

To reserve your room, call 212-575-0006. Please indicate that you are with group code: DEP626, Academic Impressions, to receive the group rate of \$139 for single or \$154 for double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 26-28, 2011. Reservations must be made by May 26, 2011. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Club Quarters, Central Loop is located at the corner of Adams and Clark Streets beside the famous Rookery Building and in the center of the Central Loop, just minutes from Michigan Avenue. It is a short walk to the Symphony Center, the Art Institute, Board of Trade, the Willis Tower, the Riverfront, and Grant Park. It boasts the popular Elephant & Castle Pub and Restaurant, serving a combination of British classics and North American favorites.



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Attend as a team – remember, if you register as a group, every fourth registrant is free. Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you. **Register online at www.academicimpressions.com**

REGISTRATION FEES

Your registration fee includes: full access to all conference sessions and materials; breakfast, lunch, and access to the networking reception on Monday; breakfast and lunch on Tuesday; breakfast on Wednesday; and refreshments and snacks throughout the conference.

Postmarked on or before June 10, 2011

- Improving Customer Service with a One-Stop Enrollment Model conference _____ \$1095 USD
- Improving Customer Service with a One-Stop Enrollment Model conference plus post-conference workshop _____ \$1395 USD
(For registrations postmarked after June 10, 2011, an additional \$100 fee per registrant applies)
- Check here if you have any dietary or accessibility needs. Please list any needs in the space below and we will do our best to accommodate you.

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) _____

CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Name Preferred for Badge _____
Job Title _____ Institution/Organization _____
Address _____
City _____ State/Province _____ Zip/Postal Code _____ Country _____
Telephone _____ Fax _____ Email _____

For registration confirmations and pre-conference communication. (FOR ADDITIONAL REGISTRANTS, PLEASE COMPLETE ADDITIONAL FORMS.)

Additional Contact Name _____ Additional Contact Phone _____
Additional Contact Title _____ Additional Contact Email _____
Emergency Contact Name _____ Emergency Contact Phone (day) _____
(In case of emergency, we will contact this person on your behalf) (evening) _____

FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

- Sign me up for HEI: Daily Pulse** – impactful news, trends, and practices, sent daily
- Sign me up for HEI: Weekly Scan** – the week's most critical news, with analysis of top stories and trends, sent on Fridays
- Sign me up for HEI: Monthly Diagnostic** – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, Denver, CO 80237.

CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx)

Name on Card _____
Account Number _____
Exp. Date _____
Billing Zip Code/Postal Code _____
Security Code (last 3 digits on the back of Visa and MC or
4 digits on front of AmEx) _____

CHECK/INVOICE

- My check is included and covers _____ registration(s)
Check # _____
- Please invoice me
Purchase Order # _____
(PO# not required to receive invoice)

REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by April 1, 2011. A \$100 processing fee will be assessed. After April 1, 2011 a credit (less \$100 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.