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DIAGNOSTIC
SEPTEMBER 2014

ACADEMIC IMPRESSIONS

IMPROVING CUSTOMER SERVICE IN HIGHER EDUCATION: SECOND EDITION

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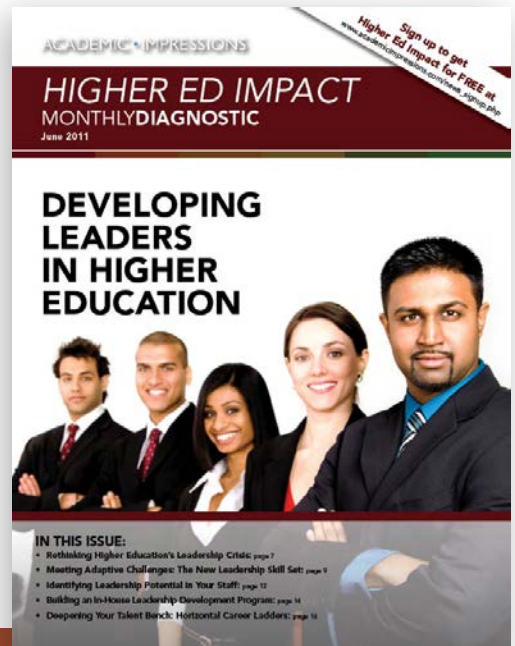

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Our work addresses a range of issues related to student recruitment and retention, faculty support and development, alumni engagement and development, and increasing organizational productivity.

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A LETTER FROM AMIT MRIG
PRESIDENT, ACADEMIC IMPRESSIONS

There is a growing recognition in higher education that improving customer service is a critical step to ensuring students' momentum toward a degree and to improving student persistence.

Yet, surveying professionals at 79 post-secondary institutions, we found that over half would grade their school with a "C" or lower letter grade for customer service. Customer service expectations from both students and parents continue to increase, and it is increasingly critical to meet that demand with a strong commitment to developing a culture of service.

Meeting the demand for improved service does not have to entail sacrificing the rigor of your institution's policies and procedures because the core standards of effective service have little to do with promoting "customer satisfaction." Instead, what matters most is responsiveness, efficiency, clear communication, and conflict management.

We asked past and current presidents, vice presidents, and department heads in student services and enrollment management to speak to the major barriers to improving customer service — including the "silo" structure of support services, inefficient policies and procedures, and staff training needs — and how these barriers can best be addressed. We hope their advice will be useful to you.

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Improving Customer Service in Higher Education

DIAGNOSING THE BARRIERS TO IMPROVING CUSTOMER SERVICE

In November 2012, Academic Impressions surveyed professionals from 79 institutions of higher education, asking them to grade their institution's level of customer service and to comment on the challenges faced in improving it. The responses were revealing.

A "C" IN CUSTOMER SERVICE

29 of our respondents rated their institution with a "B" letter grade for level of service offered, and 31 would assign a "C" grade (together accounting for three-quarters of the total responses). Only six would assign an "A." Among those who assigned a failing grade and those who assigned a "C," a litany of common complaints emerges:

- "Too many offices on our campus treat students as an imposition on their work activities. Telephones are unanswered, hours are not conducive to student needs, many staff have the attitude that students should be grateful for anything that they are given."
- "Cranky clerical folks, arrogant faculty, harried receptionists, clueless student workers — you name it, we've got 'em! it's embarrassing to anyone who cares about the institution and the students."
- "While some departments excel, others are infused with a 'don't bother me' attitude."

Many of the respondents emphasized that front-line staff are focused on completion of tasks rather than achievement of (student-centered) outcomes, and lack the time and the perspective to provide better service to students. When asked to describe how they see exemplary customer service, overwhelmingly, the respondents focused on **responsiveness**.

And while some respondents cited the need for a "friendly" attitude, among many there is a growing awareness that providing effective service to students has less to do with targeting "customer satisfaction" through an improved demeanor and more to do with eliminating wait times, shortening lines, and ensuring that students receive the help they want and need in removing obstacles to their progress toward a degree — whether they are facing obstacles to registering for classes, receiving their financial aid, or seeking academic support services that will help them succeed in a difficult term.

IDENTIFYING THE CHALLENGES

When asked about the challenges faced in improving customer service, respondents listed these three as the most daunting:

- "We need a cultural shift; our faculty/staff don't see customer service as necessary."
- "We don't provide effective customer service training."
- "We aren't sure how to audit our current service and identify bottlenecks/gaps."

Let's look at each of these a little closer.

A CULTURAL SHIFT

"The longer we leave a student waiting in line," Rick Weems, past assistant vice president for enrollment at Southern Oregon University, remarks, "and the more runaround the student has to do, the less time that student can spend working toward their academic goals. If we leave hurdles in place that prevent a student from enrolling in a critical course so that they have to wait another year for that course, then they take longer to graduate. This is why the administrative functions of the academic enterprise have to be service-oriented. We have to define what we mean by service to students, and make it a priority to ensure that service is exemplary."

For Weems, service is about responsiveness. He wants students to spend as little time in a support service office as necessary, and get back to studying, with whatever administrative or process-related tasks or obstacles they were facing resolved.

> We need to stop thinking about service to the student as an interruption to our work. Service to the student is why we're there. Your #1 priority is taking care of the student. Drill that in.
>
> **Rick Weems**

Weems adds, "How often have you heard front-line staff tell a student, 'If you had just turned this in on time, you wouldn't have this problem'? It doesn't matter whether the issue is the student's fault; if the student does not receive their financial aid on time, what matters isn't the question of fault but the fact that the student does not have the aid needed, and that's a problem. The correct response to the student's issue is: 'Let me take care of that for you… OK, now it's taken care of. Now, if you do this next time, it won't be a problem; let me walk you through it.' Resolve the problem, then educate the student."

Similarly, for Susan Leigh, of Susan Leigh Consulting and past associate vice president of enrollment management and marketing for DePaul University, the critical question driving effective service is

"How do we improve retention, one student at a time?" and a critical step toward answering it is setting the expectation of first-contact resolution, the commitment that in as many cases as possible, the student's inquiry or obstacle will be addressed during their first contact. If the staff member who answers the phone, receives the student's email, or speaks to the student at the head of the line is unable to resolve the issue, they should be able to refer the student immediately to the correct person who can.

ADDRESSING STRUCTURAL BARRIERS

Often, the barriers are structural, not just philosophical.

Structural barriers occur whenever the process for a student to get from Point A to Point D sends them to offices that report to different division heads. When the offices along the way don't communicate or know each other's processes well — or when the individual department heads are themselves confused or in disagreement over the process the student needs to follow — this creates "runaround" for the student. Runaround is not only students' biggest service-related complaint; it is a serious service issue that detracts from students' time and attention to their studies.

"Students couldn't care less about reporting structures," notes Cindy Barnes, West Texas A&M University's director of advising and retention. "Students don't care where the dollar comes from. They just want help succeeding in their classes."

In this edition, we will look at several one-stop solutions to removing structural barriers, and the final article in this edition will address ways to audit your academic policies and procedures to identify those bottlenecks that create significant problems but may not be immediately apparent.

TRAINING AND TIME

While all of these initiatives — from addressing structural barriers to auditing inefficient policies and procedures — can have a positive impact on service offered to students, it is clear that the primary challenge is one of training. "Service" usually is not core to the conversation during hiring, orientation, and training of front-line staff.

Leigh suggests a multi-pronged approach to training customer service:

- During onboarding, it is critical that new staff meet the right people and get walked through the processes from the student's perspective. They need to know who to refer students to and what steps students will need to complete, and they need to understand this beyond the narrow scope of their daily tasks.
- Provide cross-training, whether you are moving to a one-stop shop or not.
- Provide "just in time" training on a regular basis.

For example, Leigh sets aside an hour every other Thursday morning for this purpose. It has to be an hour in which the office is closed and staff can devote their full attention to the training, and you can use it to address training issues or to provide updates on the processes or regulations that affect their work. "Invest in this because it is important," Leigh emphasizes, "even for your part-timers and hourlies. You can't just send out a memo and expect everyone to know how that change impacts their work or how it affects the way they will need to respond to student inquiries."

Similarly, Weems advocates dedicating consistent, weekly time to ensure that service-oriented training is an ongoing rather than a “one-off” effort. One way to do this: Open at 10 am instead of 8 am one day of each week. This ensures that on that day you have two hours without student traffic. This can be a hard sell, but you have to make the case that the better trained your staff are, the better able your office will be to handle volume and the fewer complaints there will be.

IN THIS ISSUE

For the other articles in this edition, we have asked enrollment managers, leaders in student services, and heads of academic support initiatives for their advice on addressing these barriers successfully — from training needs to structural barriers to revisiting outdated and inefficient policies and procedures in each of those areas of the institution.

Online One Stop: Improving Efficiency and Quality of Service

November 3, 2014 :: Online

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ACADEMIC IMPRESSIONS

IMPROVING YOUR ENROLLMENT SERVICES

Colleges are working hard to bring in additional students, and there is such a cost to bringing in each student, that you don't want to lose them through an enrollment and registration process that is confusing or simply takes too long.

Or as Kevin Pollock, the president of St. Clair County Community College, remarks pointedly, "Any time your students have to walk across campus unnecessarily from one office to another in trying to resolve an issue is an opportunity for them to walk to their car and leave."

WHERE ARE THE BOTTLENECKS?

Kevin Pollock suggests that a key task of your student success task force or retention committee is walking through each step of the student's experience on your campus, from admission on, to take an in-depth look at where students run into bottlenecks, delays in service, or where there might be missed opportunities to better support their academic success. Pollock recommends trying an array of data collection methods from surveys to focus groups to "mystery shopper" exercises (in which a member of the task force walks through a process in person to get a first-hand perspective of its efficiency).

"How does a student register for classes?" Pollock asks. "Is the process productive or not, and if not, how can you fix it? When is financial aid released, and how do students get their information? What about your bookstore — are all the items there on time, and have students received their financial aid in time to buy them before classes start?" Often, Pollock suggests, walking through the processes and procedures of the student experience will reveal where a policy or a process proves a hindrance, rather than a help, to students.

One exercise that we recommend is to bring your department heads and key managers together and lay a rope out over the floor, using it to simulate the path a student takes from admission to sitting in the classroom. Points along the rope can represent particular steps (whether physical interactions or virtual ones), from visiting the admissions office to meeting with a counselor. Often when you carry out this exercise with professionals on your campus, you find that there is disagreement among the officials in the room on the sequence of steps. Surfacing these disagreements together can help you identify where in the process students may be left confused or misdirected.

Another tactic: Interview a student who recently navigated the process. Interview a first-generation student. Where did they find delays?

FINDING THE TIME TO IMPROVE SERVICE

Rick Weems, past assistant vice president for enrollment at Southern Oregon University, who transitioned his institution's enrollment service to a one-stop model, remarks that often managers hesitate to pursue improvements in service because they don't believe they have the time. Yet actually, Weems notes, improved services equal significant savings in staff time in the long-term because improved service decreases lines and call volume.

The key is to ask not "How can I provide service in a way that is friendlier to the student?" but "How can I offer service in such a way that I minimize the demand on the student's time and make visits to my office fewer?"

Here's an example. Suppose your registrar sees very long lines during peak times such as the first few days of each term. One manager might respond in a service-oriented way by asking for volunteers to walk up and down those lines throughout the day, handing out forms and helping students to fill them out by the time the students reach the front of the line. This, however, is not the best solution available; it takes either staff time or time to train volunteers, and you still won't have decreased that line or the frustration your students and staff will feel. And as your staff are busy tending the lines, incoming calls and emails will also get backed up.

Here is Weems' solution. Have one or two managers devote their time during those peak days to answering email inquiries quickly. Suppose your managers respond to student emails within the hour, while your front-line staff handle the line of students. As students get their questions answered quickly, fewer of them will need to come to that line. "A year later," Weems remarks, "you have a shorter line that doesn't go out the door."

Or put as many answers as possible on the web, and direct students to them. "Often, students just need to check status," Weems comments. "If you give them a way to do that through a secure connection, you get a smaller line."

> It all boils down to turnaround time. The faster you turnaround the service, the less traffic you'll have.
>
> **Rick Weems**

Here's another example. If you know that your front-line staff will need to interrupt your experts on particular issues frequently during peak times, put those experts on an interrupt schedule. Rotate through on-call admissions or financial aid staff members. When they are up, they have a block on their schedule and are available to be interrupted by front-line staff with questions during that shift. In this way, interruptions are planned, and your key staff can plan productivity and time management around those shifts.

A USEFUL TOOL

One resource that Susan Leigh has provided her enrollment staff at DePaul University is a three-column chart that tracks, over the course of an academic year, common worries or stress points for students:

- Column A tracks key points on the academic calendar, such as registration, midterm exams, and final exams.
- Column B tracks transactional points, such as the FAFSA due date, the deadline for the housing contract, etc.
- Column C tracks common student life stress points, based on student development research, such as a wave of homesickness six weeks into the first term.

This tool helps guide front-line staff as they respond to student inquiries by encouraging greater awareness of an inquiry's context.

In the Shoes of the Customer: Autumn Quarter

Month	Academic Stresses	Personal Stresses	Transactional Stresses
Oct	• Should meet with an advisor to plan next two quarters • First major tests, papers or projects • Must decide to drop a course if not doing well • Often begins to cut classes if things are not going well.	• New students realize that college is not as perfect as their expectations. Old problems continue/new ones are added • Grief develops if students have inadequate social skills to find a group of be selected by one • Sexual conflicts begin to show as a result of first time confrontation with different sexual orientations.	• Registration for Winter Quarter (plus, December session) • Discuss FA for study abroad for Winter, Spring • Info/events for Prospective Admits (UGRD & GRD)

SOLVING THE STRUCTURAL ISSUES: THE ONE-STOP APPROACH

Housing enrollment services teams within one reporting structure and one physical location on campus can be a key strategy to start the conversations and the collaborative work needed to improve service to students.

A one-stop center creates a single point of contact, allowing students to approach one front desk and get their questions answered, whether those questions are best directed to financial aid, student records, admissions, cashiering, one card services, or other critical functions.

Weems notes that a one-stop approach may not be necessary for *all* institutions, but that it would be beneficial for many.

"This depends on the culture of the institution," Weems notes, "and how prepared the staff are to work across lines. You can accomplish a lot without a physical, one-stop structure if the staff are willing to work across silos and can eliminate student runaround without it. But at many institutions, staff are neither accustomed nor ready to achieve this."

TRAINING YOUR ENROLLMENT SERVICES STAFF IN CUSTOMER SERVICE

Weems notes that while transitioning to a one-stop model for enrollment services can serve to break down "physical" silos successfully, simply merging offices or placing them all under one vice president is not, in and of itself, enough to improve service to the student.

> You won't get the desired result unless you deal with the emotional and mental silos. You have to get everyone on the same page—that this is now one unit, not three units. That's hard; it takes everyone's commitment.
>
> **Rick Weems**

"To make service work in the modern educational enterprise," Weems adds, "you have to become committed to cross-training."

Weems offers this example to illustrate the point: "Up to 50% of incoming student inquiries are likely to be questions related to financial aid. If those all have to be answered by front-line financial aid staff, then response time is going to crawl toward a standstill. The more that front-line staff across enrollment services can understand and answer basic financial aid questions, the better equipped you will be to handle volume."

Also, consider developing a core list of commonly asked questions across enrollment services. There might be 30, or 50, or 70 such questions. "Each person who answers the phones or sees students at the front counters needs to know the answers to these questions," Weems advises. "This will ensure that students can receive answers to these common questions without the need to take up a specialist's time unnecessarily." Also, ensure that these FAQs are available (and easy to find) online.

IMPROVING YOUR ACADEMIC SUPPORT SERVICES

Improving customer service isn't only an opportunity in enrollment management. Academic support services often face similar structural, procedural, and training barriers to improving service to students.

Cindy Barnes, director of advising and retention at West Texas A&M University, developed a one-stop student success center for the institution. We reached out to her recently to learn more about how she addressed structural barriers, inefficient policies and procedures, and staff training needs to ensure that West Texas A&M could deliver efficient and effective support to students as they pursue their academic studies.

Here is some of Barnes' advice.

ADDRESSING STRUCTURAL AND PROCEDURAL BARRIERS

At many institutions, varied and decentralized academic support services report not only to different department heads but to different vice presidents. Barnes recalls that prior to the advent of the student success center at West Texas A&M University, support functions reported variously to the vice president of student services, the vice president of enrollment management, and an associate provost. To address this structural issue, it's critical to bring together department heads from across these divisions to talk through the challenges students face — whether these department heads meet in the form of a student success and retention committee or as a one-stop academic success center.

Once you have department heads meeting regularly — across divisions — look for obstacles to connecting students efficiently with academic support services. Often, the barriers you will find are actually policies and procedures that look right at first glance but, in practice, create confusion, frustration, and delay for students. Here are two examples.

EXAMPLE A

Previously at West Texas A&M, a student's primary point of contact with academic support was the faculty advisor. This led to several oversights:

- "At risk" freshmen, such as academically underprepared students and students with learning disabilities, were connected first with professionals who were prepared to help chart a course toward their degree but who were ill-equipped to direct them to the various support services they might need.
- Dual credit and transfer students who entered at the junior level were directed to their faculty advisor minus any orientation; often, a faculty advisor noted their junior-level credit and assumed they knew the campus and knew all the procedures relevant to declaring a major, adding and dropping courses, etc.

A more effective procedure? Direct all entering students (including transfer students) to a central advising office, brief them on the resources available to them during their first term, and then connect them with the appropriate faculty member. Barnes emphasizes: "Make sure all entering students are connected first with staff who can help them navigate campus services."

This also ensures that when the student visits their advisor, they can focus on problem-solving and planning toward their academic and career goals, rather than using that time to answer questions about policies and procedures that the faculty advisor may not be best-equipped to answer.

EXAMPLE B

Here's another example. At one time, West Texas A&M University had three separate funding sources for student tutoring — which was then handled within three separate offices at separate locations across campus. Additionally, because one of the funding sources was a TRIO grant, the institution was interested in serving eligible students with the tutoring services provided by grant dollars prior to directing students to those services that were funded by the student service fee.

This led to a policy in which students seeking tutoring services were directed to apply for the TRIO-funded service first. If a student did not qualify for the grant-funded service, then the student would be redirected to the other services.

Barnes notes that this policy appeared to make sense financially. But in practice, this policy meant directing students on an 8,000-student campus to a service funded by a federal grant that could support only 250 students. "Many students would hear a 'No' when they first asked for help," Barnes recalls. "They were unlikely then to walk all the way across the campus to a second tutoring service—possibly, they must have thought, to hear a second 'No.'"

> The biggest challenge is getting the student over the threshold to ask for help. It is hard to admit they need help. You don't want unnecessary barriers in the way when they do ask for help.
>
> **Cindy Barnes, West Texas A&M University**

Barnes' one-stop approach to the problem in this scenario:

- House the tutoring services in one facility.
- Have students visit the front desk at that facility and complete an application that will determine if they are eligible for services provided for by the TRIO grant.
- If they are eligible, direct the student through Door A to that tutoring service; if they are not eligible, direct the student through Door B to the other service.

This solution ensures that the student isn't turned down when they ask for academic support. They are simply directed to the appropriate service within one success center.

IDEAS FOR A ONE-STOP APPROACH

West Texas A&M University chose to house all of its academic support services under one reporting structure and in one physical center on the first floor of a major classroom building, a location that makes it easy for students to stop by on their way to or from classes and ask for help. Services housed there include personal counseling, career counseling, placement and career services, study abroad, scholarships/grants, orientation, advising, transfer student services, student employment services, the writing lab, tutoring, testing, and student disability services.

Suppose that you take a similar one-stop approach. What can you do to maximize its effectiveness?

Here are a few of Barnes' suggestions:

- Consider establishing a shared "governing body" for these linked offices and meeting to establish bylaws that will provide guidance in resolving conflicts within the success center. The point is to emphasize that when a problem arises, it isn't just a student affairs problem or an enrollment services problem — it's a success center problem. If the department heads can sit together and resolve conflicts on a monthly or quarterly basis — rather than refer conflicts up the chain of command to their respective vice presidents — they will be better able to prevent the success center from dividing into silos.
- Consider a shared front desk and "glass walls" throughout the central area and front-line offices — e.g., transparent partitions that facilitate functioning together as a single center.
- House a liaison with financial aid within the center.
- Add part-time faculty advising fellows who are paid by stipend and can work closely with students within the success center. (At West Texas A&M, two of these positions are filled by retired deans who each work ten hours a week to provide advising services for students).
- Provide ongoing training across academic support service offices.

TRAINING ACROSS OFFICES

In part because of the sheer number of staff across many diverse academic support functions, Barnes advocates offering a highly structured approach to training in customer service. At West Texas A&M University, Barnes championed investment in a new full-time position, a student success coordinator whose responsibilities include providing ongoing training for front-line staff and student workers, coordinating shared resources across the various offices, and assessment of the student success center's effectiveness.

This new FTE was conceived as a solution to the problem of time. "We're all busy," Barnes notes — and training is something that needed to be designed and implemented effectively, not just as an afterthought on an already crammed schedule. The new coordinator's salary is funded out of the savings from shared overhead costs (shared staff, equipment, and some shared rooms). It is an elegant solution to a potentially thorny problem: In making the commitment that multiple offices will share equipment, some staff, and some physical space, scheduling and coordinating can quickly become complex; using the savings to fund a coordinator eliminates that difficulty.

This position also designs and manages a periodic staff retreat that promotes shared ownership of the student success center and the service it offers students — driven by shared goals that are directly tied to student success. Each retreat gives staff time away from the office and away from the grind of daily activities to talk through the "big" questions: Who are we? Why are we here? What kind of assistance do we truly want to offer students, and how do we do that? Getting staff problem-solving together across silos is critical.

Even lacking this type of central coordinator position, that staff retreat — followed up with regular and consistent customer service training that is shared across offices — can make all the difference.

IDENTIFYING ACADEMIC POLICIES AND PROCEDURES THAT IMPEDE STUDENT SUCCESS

Our interview with Dennis Pruitt, vice president for student affairs at the University of South Carolina, suggested the need to direct attention to something that is often overlooked: the need to review and audit institutional policies and procedures that delay students in progressing toward their degree.

Historically, many have assumed that if students get over their homesickness, if they have a good affinity group, if they feel good on campus, they'll persist. But the two factors that truly help students persist are academic progress toward a degree (having a goal and gaining momentum toward it) and maintaining maximum eligibility for the maximum amount of financial aid (to ensure non-interruption in their courses).

Dennis Pruitt, U of South Carolina

In light of Pruitt's comment, one thing academic and administrative leaders will want to look for at their institution is the presence of "road bumps" in their processes and procedures that delay a student's progress toward a degree. To find those "bottleneck" points in your procedures that stall students in their progress toward a degree:

- Review student complaints as opportunities to identify and correct outdated policies or procedures, recognizing that recurring complaints may point toward a systemic issue.
- Survey students to help prioritize where you need to focus.
- Audit your academic policies for some of the most common inefficiencies.

REVIEWING STUDENT COMPLAINTS

> Most frequently, student complaints emerge around the speed of getting a critical task done. Periodically review complaints, and when you find bottlenecks, take them apart. Often, behind that bottleneck, there is an outdated policy or an outdated procedure. Get the right people around the table, ask them directly: How can we improve this service for the student?
>
> **Susan Leigh, Susan Leigh Consulting**

For example, DePaul University, which enrolls a large percentage of students who work full-time, found that one significant stall was requiring students to visit an on-campus office as part of a critical process. Working students are often unable to take a half day away from work to visit offices on campus during business hours. "Students would tell us that they can't wait a week for a particular process to be run on their account," Leigh recalls. "For example, an employer may offer to pay for the class if the student can get registered and billed by a particular date, but the student may need to secure permission to register for a class that is closed, and then have their account reflect the right balance due for the employer. Yet, the student may not be able to take the time off work needed to visit several offices on campus to complete the procedure."

Working students continue to enroll to retool their careers, but these students are also facing increased constraints on their time. Moving processes online can remove many of the most common bottlenecks.

> Look for the root cause. Maybe your front-line staff are having to answer more calls, and in trying to provide better service, you are working to make those calls faster and move more quickly. But how to speed up the calls may be the wrong question. The right question is: Why do we have more calls?
>
> **Lawrence Lesick, Vice President of Enrollment Management, Ohio Northern U**

SURVEYING STUDENTS: IDENTIFYING THE MOST CRITICAL "TROUBLE SPOTS"

Colleges are more frequently surveying their students about the quality of their services, but Leigh and Lesick note that too often the surveys do not return information that can empower enrollment staff to pinpoint the underlying service issues or identify the ideal solutions to them.

Here's one method DePaul University uses to identify and prioritize trouble spots. Students are asked to rate (on a 1-5 Likert scale, with 1 being the lowest rating and 5 the highest) both the importance of a service to their ability to register for, attend, and succeed in their classes, and how well the institution is providing that service to them. The survey is designed to identify the most important gaps in service and assists in prioritizing efforts to improve services.

For example, when asked about parking, let's suppose that students at a particular commuter campus answer:

- Importance of parking - 5
- Level of service - 2

In this first case, parking is a valued service, but one that needs investment. In another scenario, though, students at an urban institution with significant access to public transportation may answer:

- Importance of parking - 2
- How well are we providing parking - 1

In this second case, improving parking services may not be the first priority, even though the service is lacking — because it isn't one of the services that makes a significant impact on students' speed in getting to their classes, their stress level, or their ability to build momentum toward their degree.

Next, ask follow-up questions that invite a high degree of specificity. For example:

- Ask students when they have felt they received poor service or a "runaround."
- Give students a list of options to select from, to pinpoint the "runaround" — Did they stand in line too long or have to wait too long to have their call picked up? Were they routed to another office? Were the staff unable to answer their questions?
- Ask them what the one thing was that slowed them down the most.

Sometimes students don't know where the inefficiency is or how you could provide them with superior service. If Steve Jobs had been conducting focus groups several decades ago, likely none of his potential customers would have volunteered: "I would like to have a portable recorder that I can put in my pocket, with headphone buds in my ears." That didn't exist yet. You have to know how to ask the right questions.

Lawrence Lesick, Ohio Northern U

EXAMPLES OF WHAT TO LOOK FOR

Here are two examples of policies and procedures that can slow student progress:

GRADE RECALCULATION

How does your institution calculate GPA in cases where a student retakes a course? "A student can have a bad course or a bad semester," notes Dennis Pruitt. "When they retake courses, what happens on their transcript?"

Pruitt cautions that averaging the two grades "almost penalizes" the student for retaking the course. A better option is to keep the first grade on the transcript (so that it remains a part of the academic record) but use only the second grade in calculating the student's cumulative GPA. This incentivizes students to improve their academic performance and rewards them for it.

ADVISING PROCEDURES

It needs to be very clear to students what courses count toward their major and what courses do not. Their degree audit needs to happen quarter by quarter or semester by semester.

Lucie Lapovsky, President, Lapovsky Consulting

"Students can so easily be misadvised," warns Lucie Lapovsky, president of Lapovsky Consulting and past president of Mercy College. Getting false information to students is a risk both because academic advisers often have a high load and because catalogs and requirements are updated frequently. This can make it difficult for either students or advisers to keep track.

Lapovsky suggests letting students do their own degree audits regularly. "Make the degree audit available online." An online audit can keep both students and advisers up to date. Many registrars already use effective online programs, often for a degree audit in the spring of the junior year.

Lapovsky recommends having these programs shared out with academic departments and with students. Give the program an easy Web-based end user interface. The ability to produce a degree audit quickly will empower students to make smarter choices — and to take ownership of their course plan.

Other key policies and procedures to check include:

- Major/minor declaration — how complex is the process?
- The financial aid process — survey your students to learn where there are bumps in the road.

SAMPLE POLICY AUDIT

Pre-enrollment

Admissions:	☐ Clear procedures & responses	☐ Procedures available in multiple places & formats	☐ Available & knowledgeable staff	☐ Connections across the campus community
Financial Aid:	☐ Student centered	☐ Timeliness – packaging, disbursement, & notification about SAP	☐ Available & knowledgeable staff	
Registration:	☐ Withdrawal policies (add/drop, course, & term)	☐ Academic progress barriers (e.g., seats available)	☐ Holds: Who can place a hold? Who can remove one? What are the thresholds for holds?	
Transfer Policies:	☐ Credit evaluation for incoming students	☐ Credit evaluation for your own students taking courses elsewhere		
Recruit Back & Continued Connections:	☐ Non-registered students: Outreach?	☐ Stop-outs: Outreach?	☐ Students with 90+ hours: Outreach?	☐ Post-graduation follow-up?

Graduation

AI Contributors

Amit Mrig
PRESIDENT, ACADEMIC IMPRESSIONS

Amit co-founded Academic Impressions in 2002 to provide a variety of educational products and services that help higher education administrators tackle key, strategic challenges. Since 2002, AI has designed and directed hundreds of conferences and has served representatives from over 3,500 higher education institutions. Besides designing and leading events for cabinet-level officers focused on strategic planning, budgeting, and leadership development, Amit leads Academic Impressions' ongoing research into the five- and 10-year challenges facing higher education and plays a lead role in outlining each issue of Higher Ed Impact: Monthly Diagnostic to highlight how college and university leaders can take an institution-wide approach to answering those challenges.

Daniel Fusch
DIRECTOR OF RESEARCH AND PUBLICATIONS, ACADEMIC IMPRESSIONS

At Academic Impressions, Daniel provides strategic direction and content for AI's electronic publication Higher Ed Impact, including market research and interviews with leading subject matter experts on critical issues. Since the publication's launch in 2009, Daniel has written more than 350 articles on strategic issues ranging from student recruitment and retention to development and capital planning. Daniel previously served as a conference director for Academic Impressions, developing training programs focused on issues related to campus sustainability, capital planning, and facilities management. Prior to joining Academic Impressions, Daniel served as adjunct faculty for the University of Denver. Daniel holds a Ph.D. in English.

Marla P. Whipple
SENIOR CONFERENCE DIRECTOR

Marla oversees and directs AI's programs and services for student affairs professionals. Her main areas of research are outcomes-based assessment, retention, leadership in student affairs, and topics related to career service offices. Previously, she worked in career services and college counseling at a variety of campuses. Marla earned an MA in clinical psychology from The University of Texas El Paso and a BA in psychology from Miami University (Ohio). Marla's favorite parts of the conference director role are building relationships with practitioners and learning about the amazing work they are doing.

Contributors

Lucie Lapovsky
PRINCIPAL, LAPOVSKY CONSULTING; PAST PRESIDENT, MERCY COLLEGE
Lucie is an economist who consults, writes, and speaks widely on issues related to higher education leadership, governance, finance, strategy, and enrollment management. Much of her recent work has been with boards of trustees on issues of leadership and effectiveness. Lucie previously served as president of Mercy College, a diverse, multi-campus college of 10,000 undergraduate and graduate students with New York City, Westchester, and online campuses. She serves on a number of boards and advisory committees, including the boards of HERS, the American Public University System, Western New England College, Packer Collegiate Institute, the Tuition Exchange, the National Council for Research on Women, and the White House Project. Lucie is the editor of one book and the author of more than 100 chapters and articles.

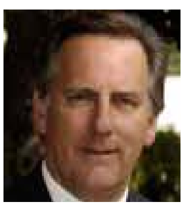
Susan Leigh
PRESIDENT,SUSAN LEIGH CONSULTING LLC
Combining successful careers in both professional theatre and higher education spanning over thirty-four years, professor Susan Leigh recently retired as associate vice president for enrollment management and marketing after twenty-two years at DePaul University in Chicago to consult full time in higher education. While at DePaul, Susan made significant contributions to the advancement of student service standards by leveraging technologies along with "big data" resident within the PeopleSoft student information system to accomplish customer-centric business process redesign. Susan led the creation of DePaul Central in 2006, an award-winning one-stop cooperative model with two onsite campus locations.

Drawing on her expertise in the university classroom, Susan developed ReEnvision Customer Service: Certification Training for Higher Education Professionals with beginner, advanced, and "train the trainer" levels. The new training curriculum that debuted In October in Denver with Academic Impressions for both national and international trainees can also be tailored and branded as campus specific upon request. A frequent speaker at conferences nationally, Susan's ideas have been published in many journals; her most recent article appeared in the AACRAO SEM Quarterly, July

Lawrence (Larry) Lesick
VICE PRESIDENT FOR ENROLLMENT MANAGEMENT, OHIO NORTHERN UNIVERSITY
Since beginning his career in higher education administration in 1982, Larry has served in a variety of roles on a variety of campuses, 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.

Kevin Pollock
PRESIDENT, ST. CLAIR COUNTY COMMUNITY COLLEGE

Drawing on experience as a high school and junior high school teacher; university admissions, enrollment, and recruitment director; and community college student services vice president, Kevin is an advocate for college access and student service quality initiatives. Under his leadership, St. Clair formed high school partnerships for early college and middle college programs; joined Achieving the Dream: Community Colleges Count, a national organization that helps community colleges identify strategies to improve student success, close achievement gaps, and increase retention, persistence, and completion rates; and was awarded a five-year TRiO Student Support Services grant from the U.S. Department of Education to help disadvantaged students succeed in higher education. Kevin has presented more than 70 sessions at conferences and colleges and written more than a dozen articles and book chapters on topics such as at-risk students, continuous quality improvement, mentoring, retention, strategic planning, and student success. He holds a doctorate in higher, adult, and lifelong education from Michigan State University.



Dennis Pruitt
VICE PRESIDENT FOR STUDENT AFFAIRS, VICE PROVOST AND DEAN OF STUDENTS, UNIVERSITY OF SOUTH CAROLINA

Dennis has led the University of South Carolina's Division of Student Affairs and Academic Support since 1983. He earned his doctorate in education from Carolina, his master's degree in counseling/student personnel services from West Georgia College and his bachelor's degree in history and political science from Armstrong Atlantic State University. Dennis has received numerous national, regional, state, and university awards; he most recently received the Scott Goodnight Award for Outstanding Service as a Dean at the NASPA Student Affairs Administrators in Higher Education annual meeting. This is his fourth award from NASPA.

Rick Weems
PAST 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. He 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.