

Creating a University-wide CX Strategy



NCI



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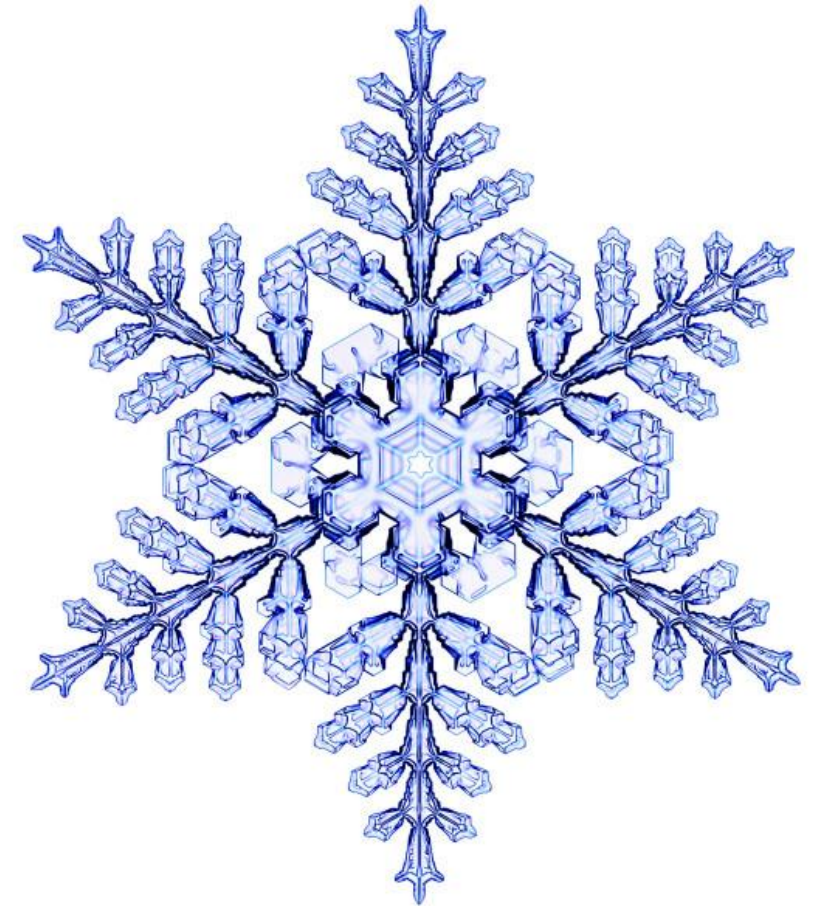
OUR DISCUSSION

- Our Goal
- Change Management
- Our Approach
- From – To
- Key Challenges
- Next Steps

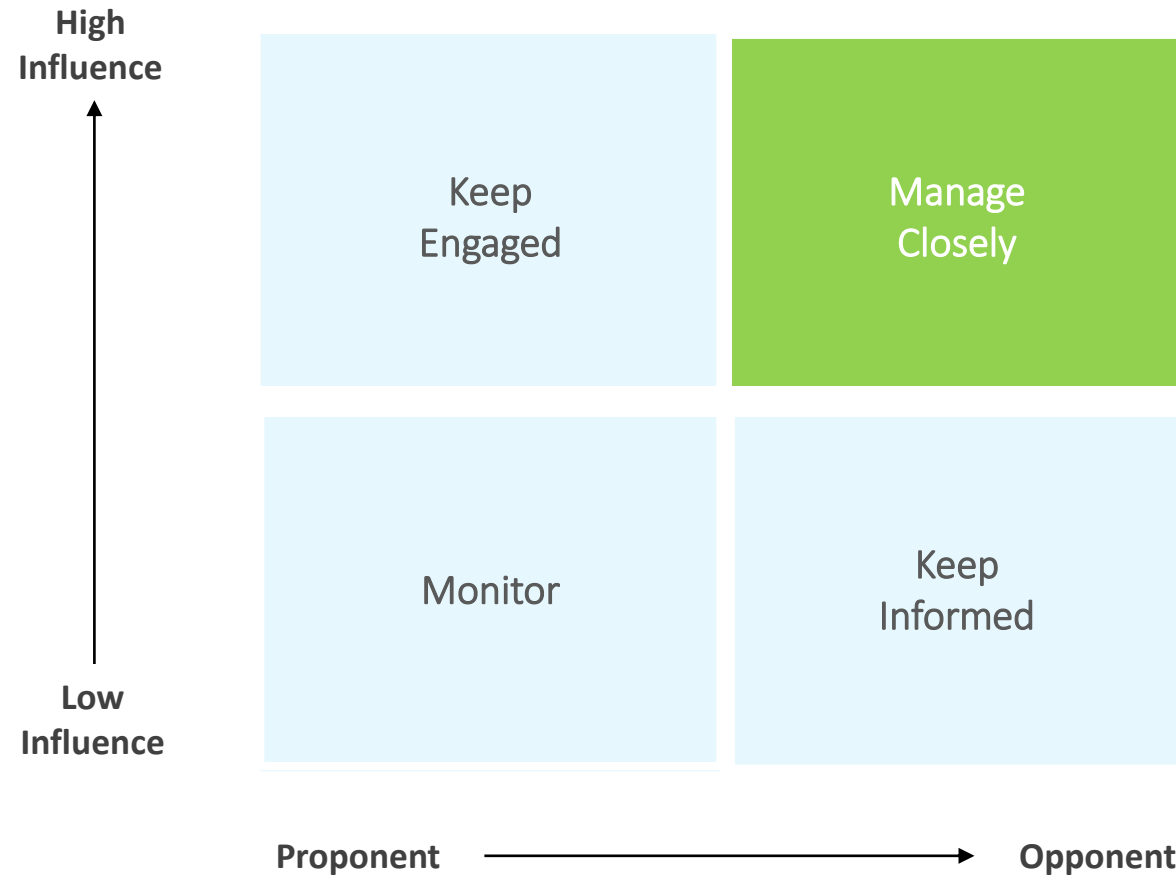
A COMMON CHALLENGE

The University of Michigan was faced with a common “large organization” challenge:

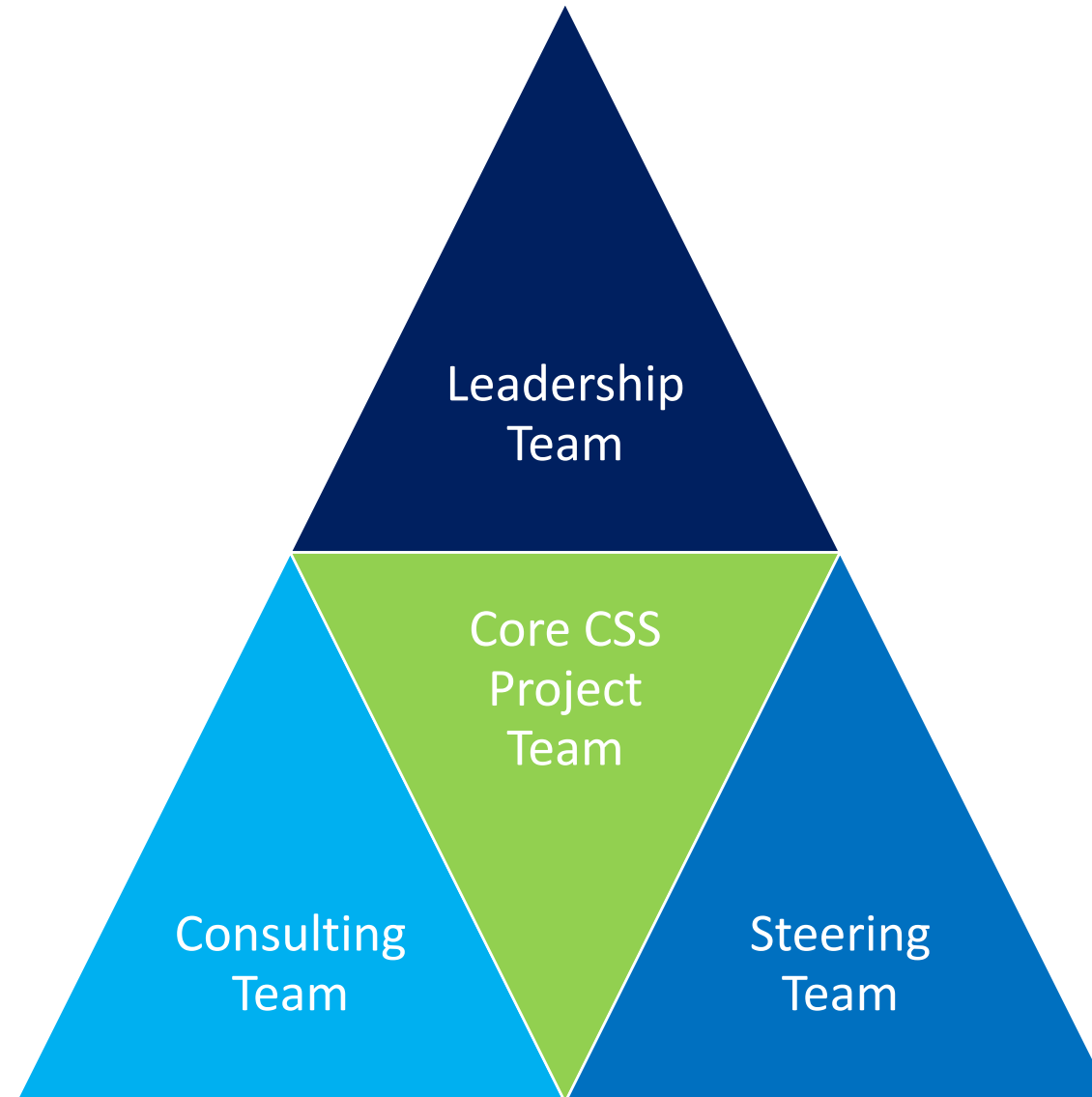
- A new “**Say Yes**” strategic focus on customers.
- Pressure to be more regularly accountable for effective, efficient, quality services
- 65+ **snowflakes** (diverse central service providers, with diverse customers and diverse services).
- Growing dissatisfaction by managers with the existing CS measurement approach.
- Fear of change to a new program/approach.



CHANGE MANAGEMENT



PROJECT GOVERNANCE



OUR APPROACH TO THE PROJECT

What could we
BE?

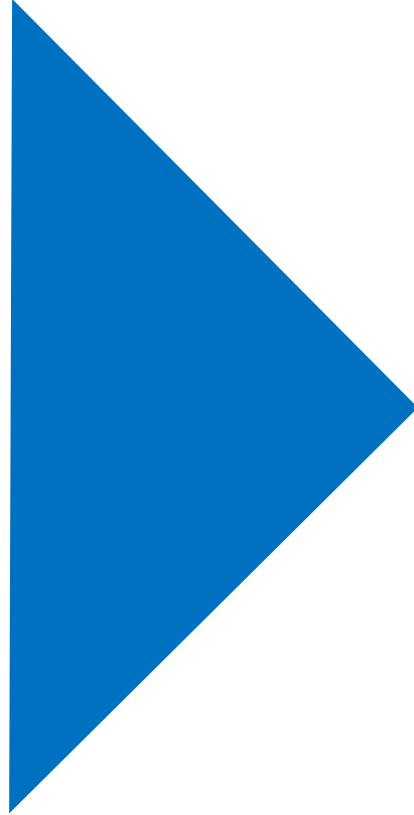
Where have we
BEEN?

What should we
BE?

How do we get
THERE?



WHERE HAVE WE BEEN?



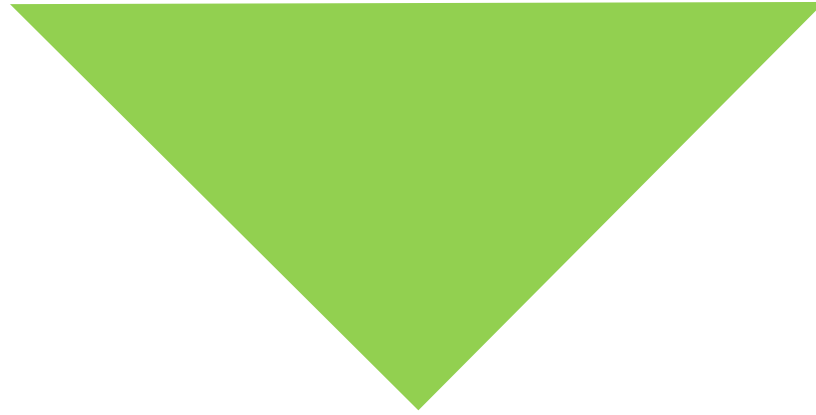
WHAT

- Evaluate the connections between customer experiences and “Striving to say Yes”.
- **Clarify the purpose** of the customer satisfaction program with senior team.
- Assess the current CS survey landscape **by units** and identify potential opportunities for improvement and coordination.

HOW

- Weekly project team input and guidance
- One-on-one interviews with leaders
- Focus groups with stakeholders
- Separate interviews with university Technology Providers
- Mapped CSS processes, assessed historical results, and database populating online CSS reporting tool

WHAT COULD WE BE?



WHAT

- **Benchmarking** CS survey options (items, methods, tools, metrics).
- Improving the level of understanding and sophistication in regards to **the types of customer** interactions/relationships engaged in.

HOW

- Design and distribute **pre-survey** to collect and quantify feedback on the CSS from all participants
- Synthesized findings from the interviews, focus groups and pre-survey
- Developed preliminary **design guidelines** for future CSS program

WHAT SHOULD IT BE?

HOW

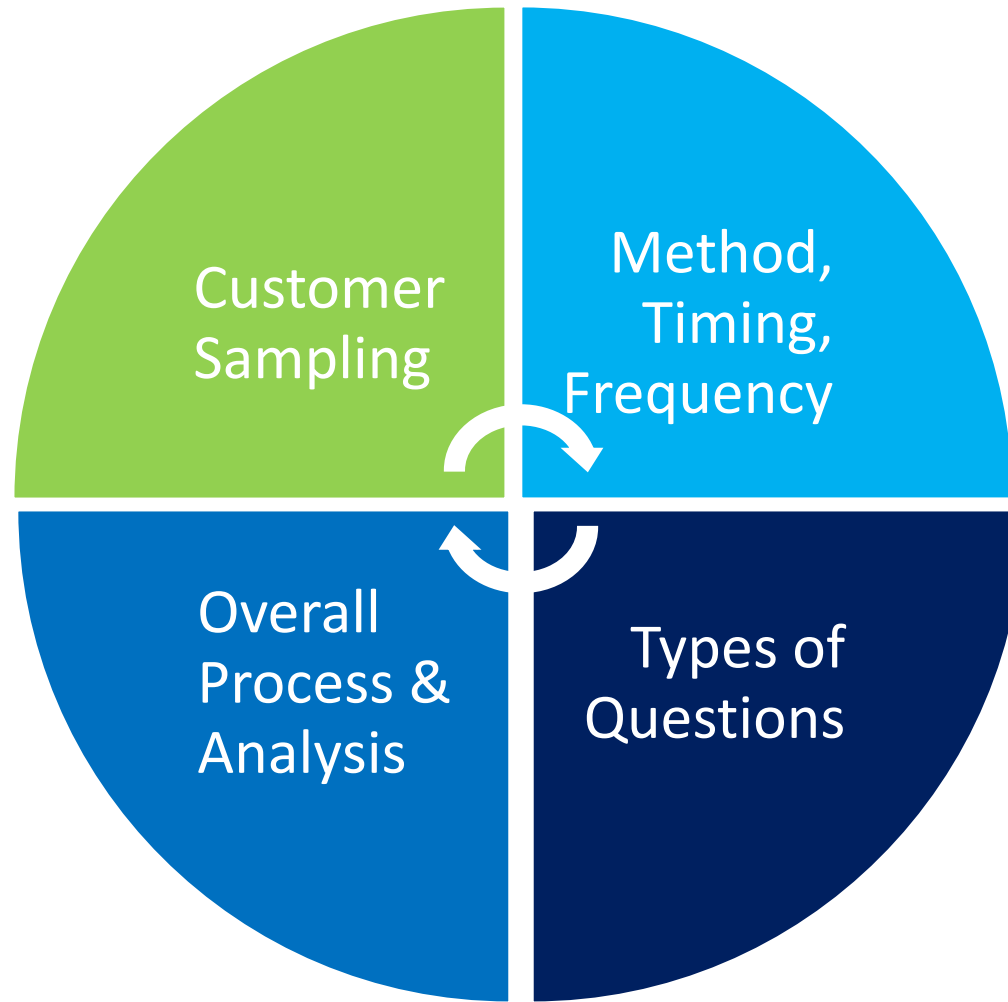
- Engage leadership with suggestions for improvements and unmet needs.
- Identify **best practices** with regards to customer engagement.
- Develop and/or recommend a Web-based data collection and **reporting tool**.
- Investigate best practices with regards to ongoing customer assessment initiatives

WHAT

- Synthesize feedback from steering committee and project team to refine CSS program design.
- Develop **detailed design requirements**.
- Recommend best practices with regard to ongoing customer improvement structures or processes.



DESIGN AREAS: ADDRESSING 4 CHALLENGES



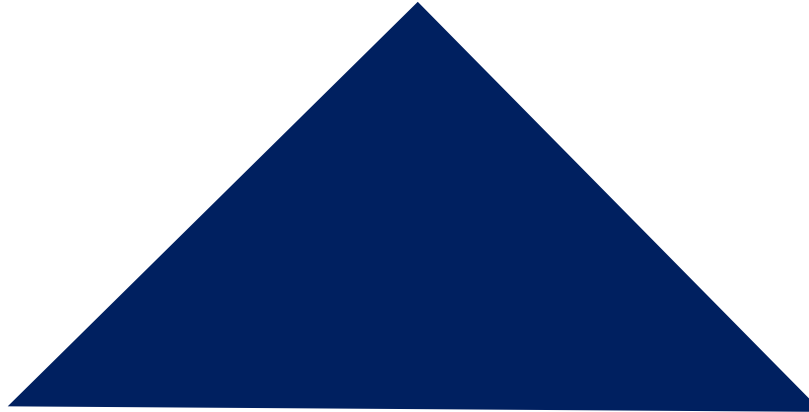
HOW DO WE GET THERE?

WHAT

- Develop high level survey, survey administration and specific implementation plan.
- Develop **an annual process and long-term plan** for coordination and organizational administration.
- Provide **coaching and guidance to the CSS Team** to ensure a successful transition and implementation of the recommendations.

HOW

- Develop implementation and communication plans:
 - Integration of the design requirements into the 2017 CSS program
 - Timeline, key milestones, and communication plan



OUR OUTCOMES

From (2005-2015)

Single, biannual common survey deployment supplemented by individual service area surveys

Multiple, individually chosen platforms

Unclear respondent burden

Ad hoc differentiation of B&F customer types

Fragmented administration across survey areas

Variety of question types and scaling (in service area surveys)

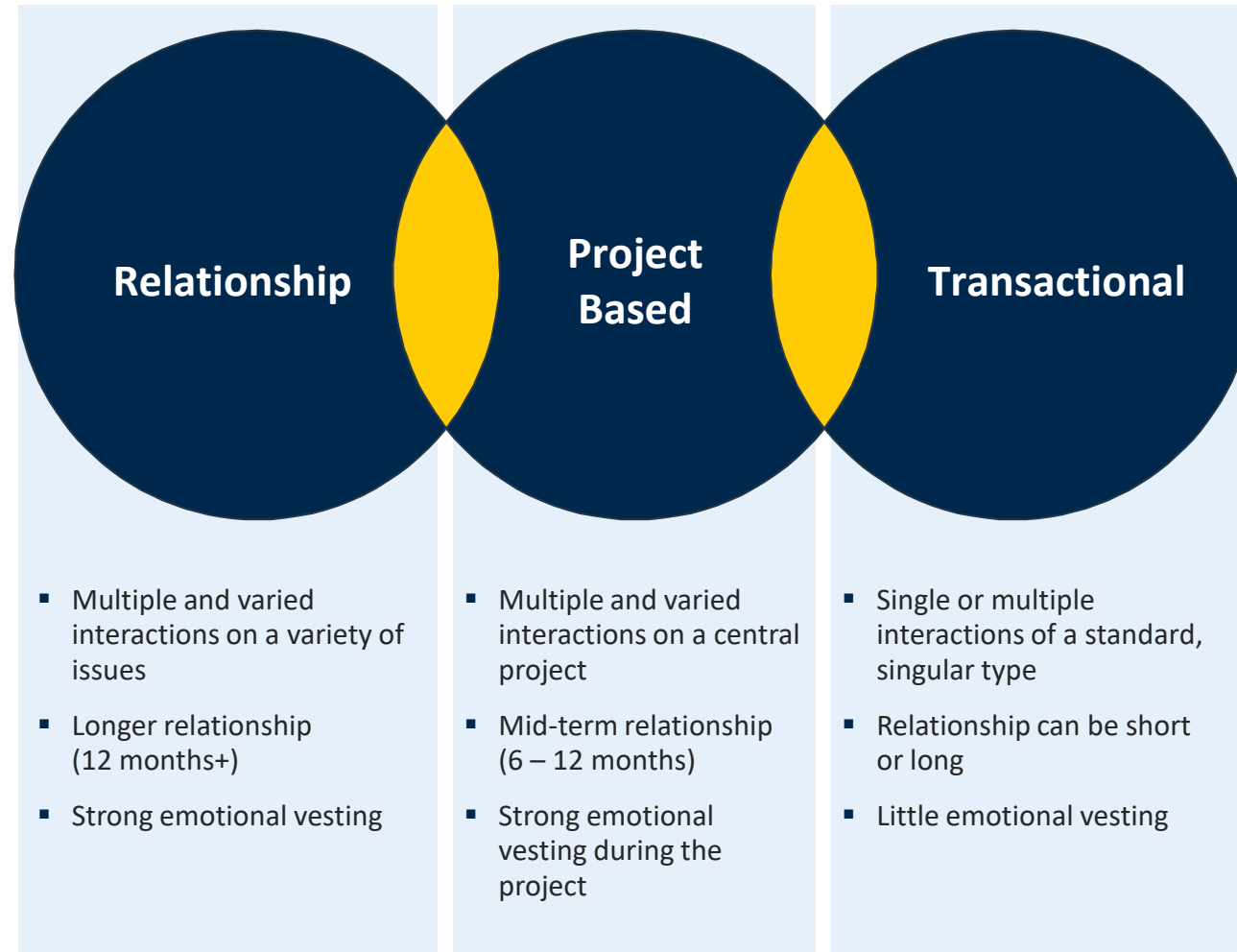
Uni-dimensional report output, limited data mining options

“Relevance gap” (questions, timing, reporting)

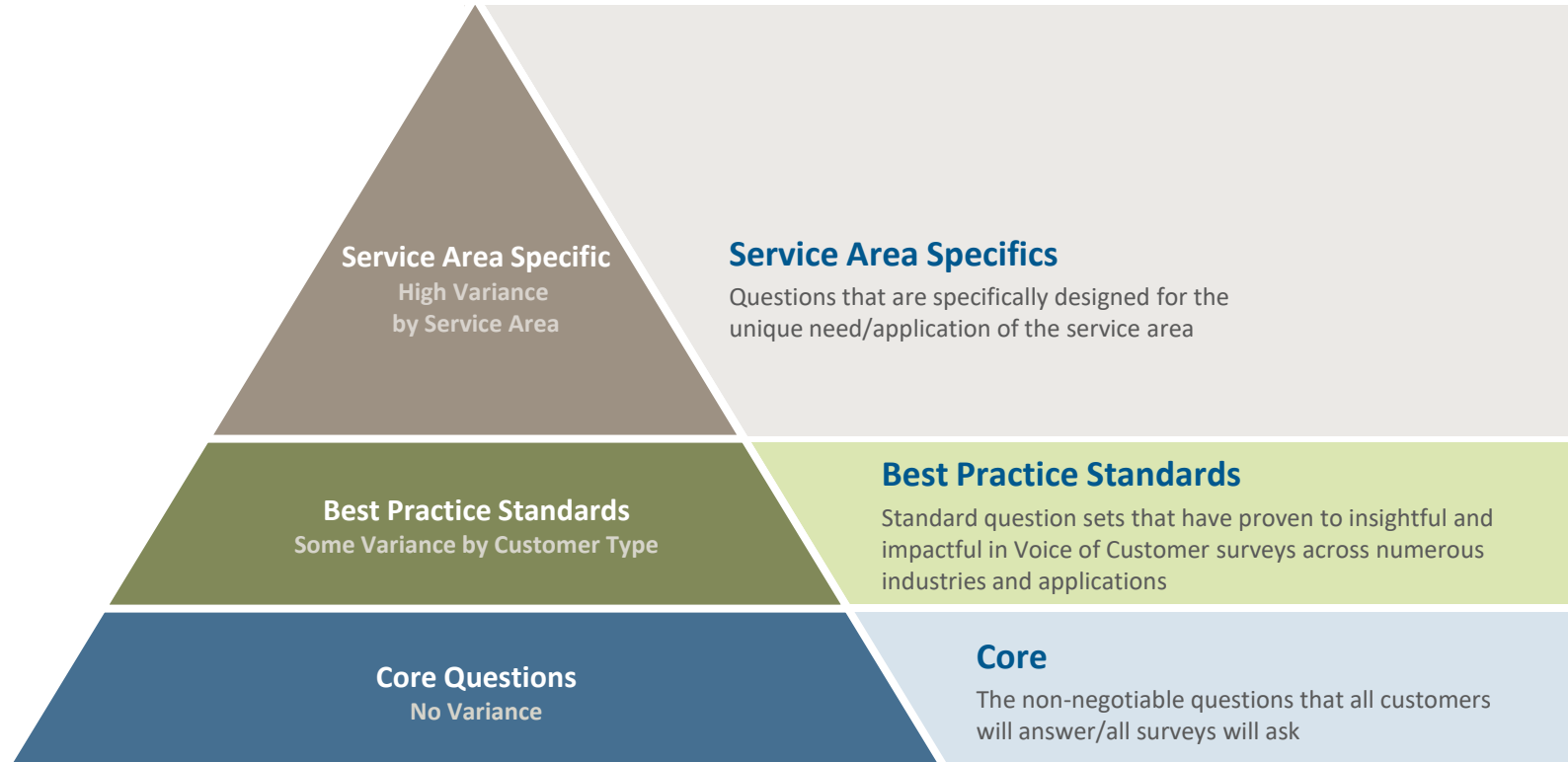
To (2017-ongoing)

- Ongoing and event-driven deployment
- Drive to a single (Qualtrics) platform
- Sampling programmed to manage respondent burden against best practice standards
- Definition and differentiation of three distinct B&F customer types (relationship, transaction, project)
- Centralized administration, program management, and subject matter expertise
- Best practices question “menus” and standardized scaling
- Dynamic, user-driven data access through a BI-based tool (Tableau, MS BI)
- Meaningful, actionable insight for leaders, service area managers and service providers

CUSTOMER TYPES



THREE QUESTION TYPES



Core Questions



BEST PRACTICE STANDARDS

Question Sections	Question Type	Description	Customer Type		
			Relationship	Project-Based	Transactional
<div>Core, Non-Negotiable</div> <div>Best-Practice Standards</div> <div>Service Area Specific</div>	Service Excellence Index	An index of the detailed, critical components of excellent service for that site/role/project	✓	✓	✓
	Relationship Manager / Primary Contact	Insight on the performance of the primary point person for the relationship/project's performance	✓	✓	
	Action Alert	Proactive “popping” of the emotional “bubble” associated with a poor experience and appropriate escalation where needed	✓	✓	✓
	Functional Process Series	Questions on the functional “basics” of the transaction aimed at giving tangible, actionable insight			✓
	Last Visit Role Specific	Detailed review of the critical elements of the last visit/transaction			✓

NEXT STEPS



LESSONS LEARNED

- **Equip CS team members** with more training than you might think - about surveys, sampling, CS measures, CS culture
- **Engage university customers** as allies in all aspects of design, planning, implementation; avoid "corporate speak"
- **Script and practice "meeting in a box" manager sessions** with team members, to enable them to get managers on board with the change
- **Go slowly but steadily with implementation**— relying on champions and early adopters. Continuously invoke senior leadership commitment
- **Don't underestimate of the complexity** of continuous ongoing measurement within a closed university customer system
- Maintain the delicate balance between **standardization and the needs for customization** from very diverse units

HAVE YOU EVER USED QUALTRICS

WHAT DO YOU USE QUALTRICS FOR

80%

OF CEOs
BELIEVE THEY
DELIVER A
SUPERIOR
EXPERIENCE

8%

OF THEIR
CUSTOMERS
AGREE

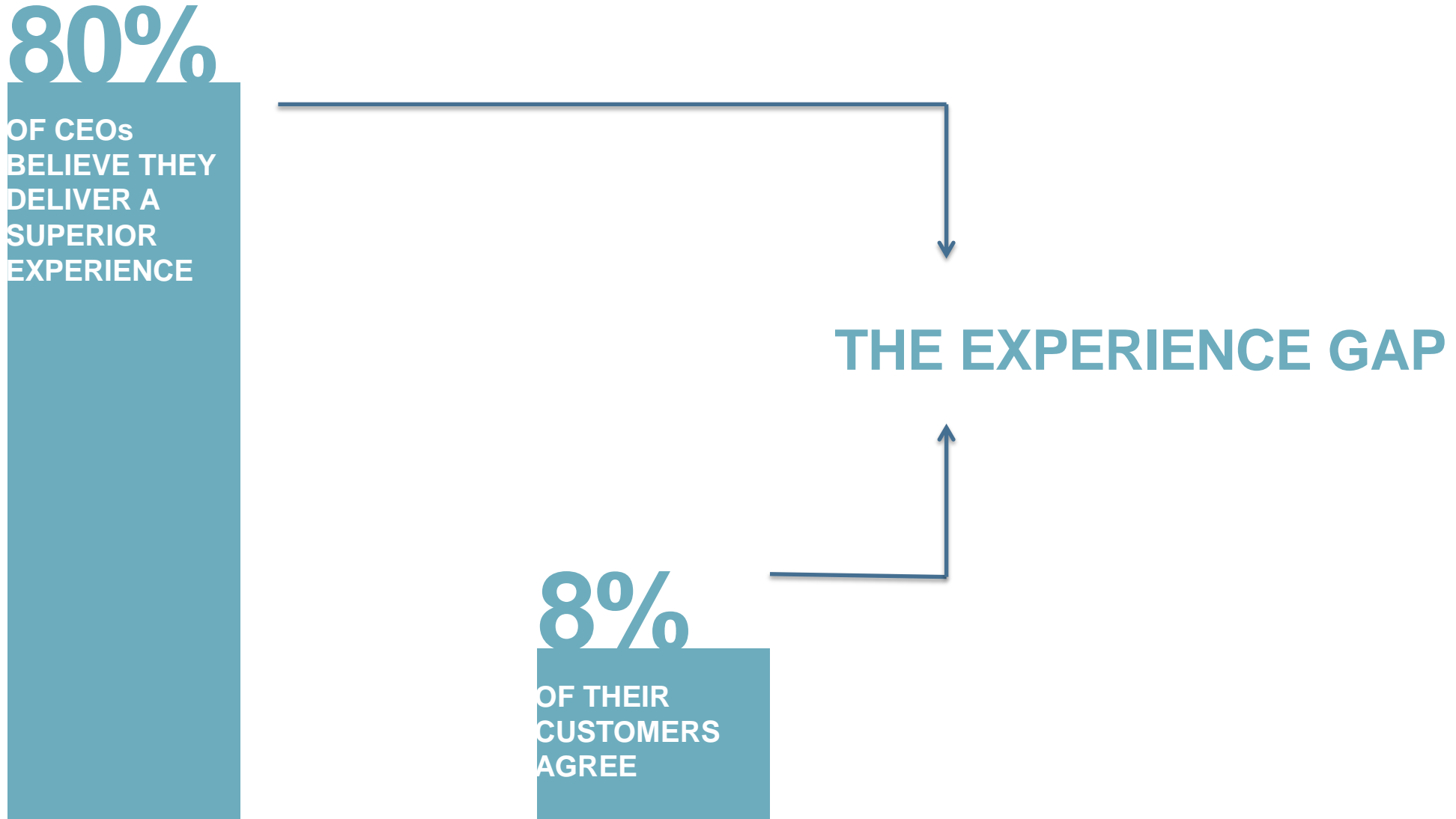
80%

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THE EXPERIENCE GAP

8%

OF THEIR
CUSTOMERS
AGREE



96% of Chief Academic Officers believe they are preparing their students with the skills they need to be successful, but only 11% of employers agree.

Gallup



Employee Engagement

Student Satisfaction

Course Evaluations

Instructor Evaluation

Alumni Experience

Campus Experience

Sales

Production

Finance

SKUs

HRIS

O
DATA

Filtering by:

Course Type: All

Professor: All

Course: All

Session: All

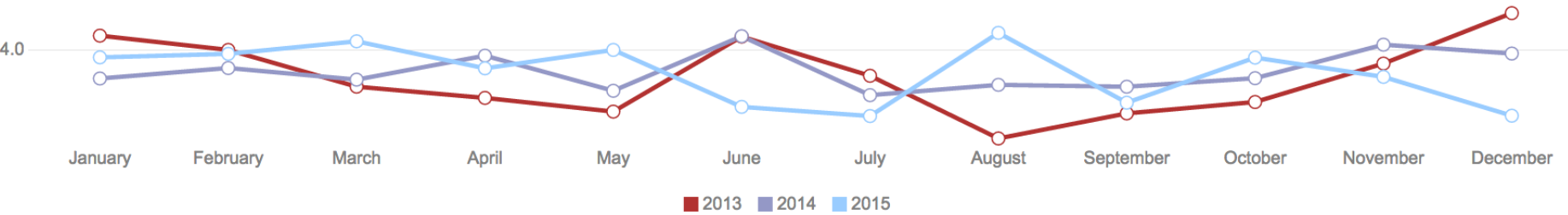
Session Date: All Time

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Overall Rating Year over Year



Overall Rating (Last Month)

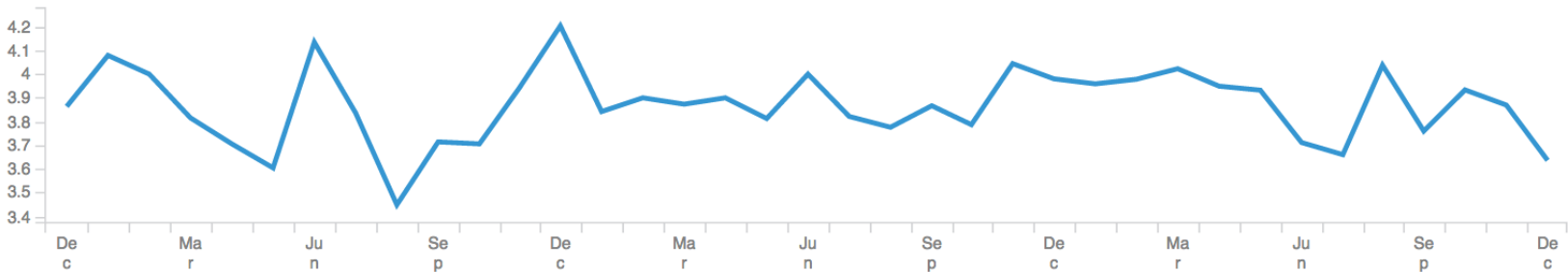
1



0 Average (Overall) 5

Overall Rating Trend Over Time

1



Overall Rating (This Month)

1



0 Average (Overall) 5

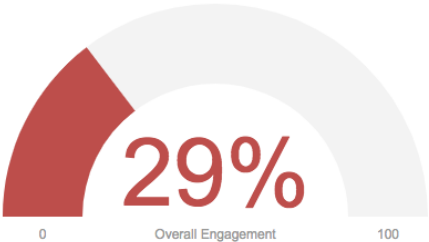
Overall Rating Breakdown



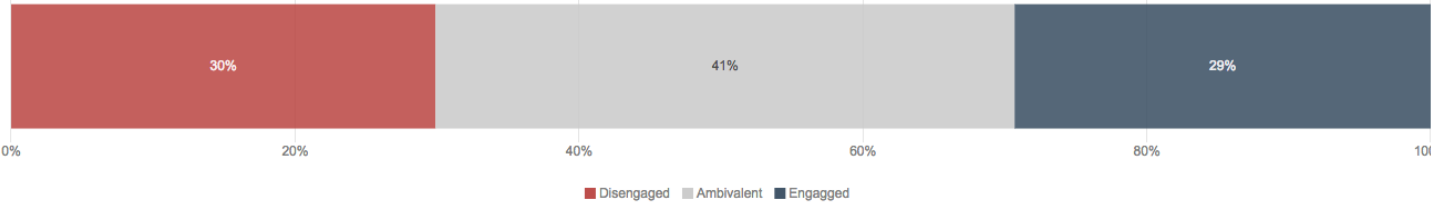
Faculty eNPS

-44.3

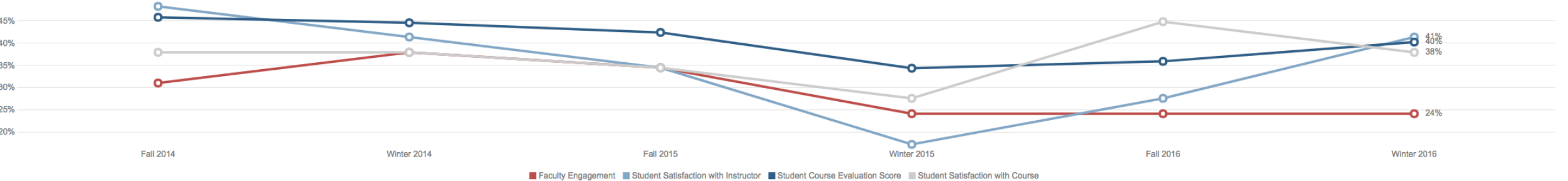
Overall Faculty Engagement



Overall Faculty Engagement Distribution

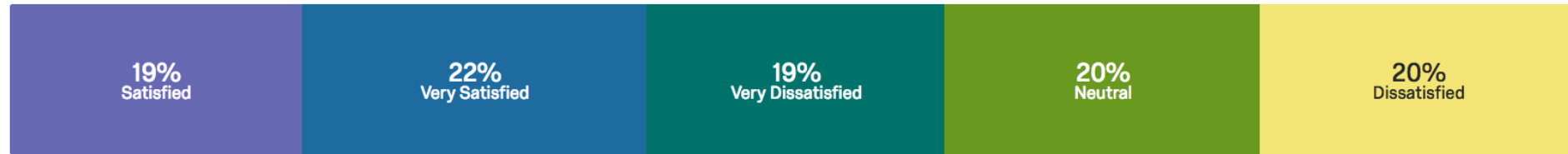


Faculty Engagement Relation to Student Experience





Satisfaction with Facilities



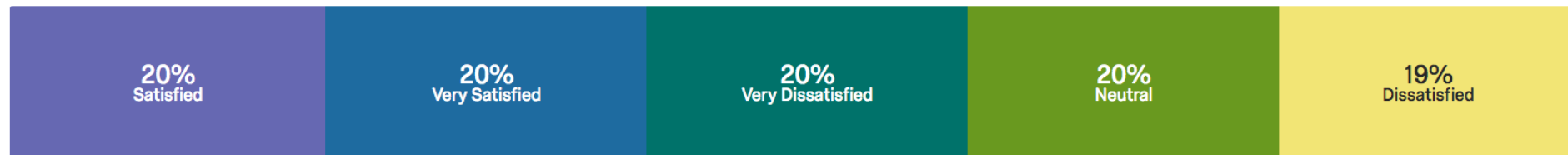
Quality of Facilities



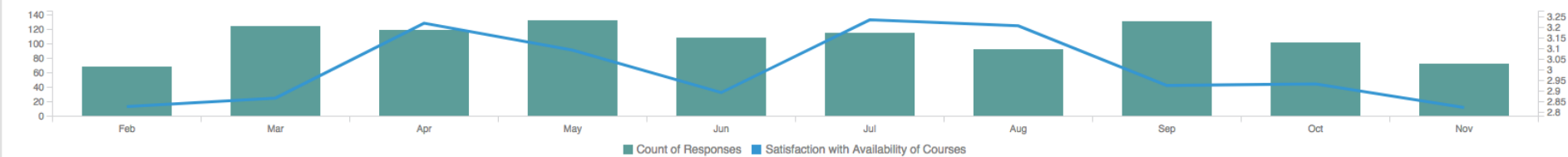
AVG Satisfaction with Quality of Teaching



Satisfaction with Availability of Courses



Satisfaction with Availability of Courses



AVG Satisfaction with Quality of Teaching

