

Creating Efficiency in the Application Administrator Role

Transformation Lab

Meet Your Presenter



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1

Thinking Through Capacity Busters

2

Showcasing Examples of Efficiency Gains

3

Prioritizing Your Process Improvements

4

Wrap-Up and Next Steps

Show of hands...who has faced the following issues in the last year?

New users to train

New care units, offices, or groups to onboard

A new feature or a new workflow to implement

Been overwhelmed by the volume of user questions

Had fewer people resources to do the work of application administrator

Wondered how other institutions address these challenges



Show of hands...who has made process improvements for any of those challenges in the last year?

No, but I have big dreams!

Minimal; I am not sure I can say a full "yes."

Yes! And life is better!



Application Administrator Role's Demands Expand over Time

Expansion has Positive Institutional Impacts but Demands Rethinking How We Provide Support

Proliferating Users and Units

New Features and Functionality

Same or Fewer People Resources

Need to Find Efficiencies for Sustainable Support

"Business as usual" when it comes to end-user training, answering questions, diagnosing issues, creating documentation, feature rollout, and onboarding creates overwhelming demands on time.

Diagnosing the Problem

- **Capacity Busters** – Time-intensive, inefficient processes that take outsized time and resources
- Outcomes no longer match output
- Often start as a process that used to work well but hasn't evolved to meet new needs



Finding the Solution

- Capacity busters linger because it takes time to redesign an inefficient process
- Meanwhile they continue to waste valuable time
- **There are no quick fixes**, but investing in the *right* process improvements yields long-term resource savings

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Common Capacity Busters for Application Administrators

- 1** Fielding End-User Questions and Issues
- 2** Streamlining Documentation Management
- 3** Scaling End-User Live Training
- 4** Simplifying Platform Configuration Process



Fielding End-User Questions and Issues

Centralizing Support Systems for All Incoming Inquiries for Transparency, Efficiency, Insights

Challenge

- Endless user questions across multiple channels and topics
- Overwhelming for admins, frustrating for end-users

Solutions

- **Centralized ticketing system** for end-user questions and support
- Consider leveraging existing support systems to create single helpdesk platform
- *Sample Technologies: Freshservice, ServiceNow, Team Dynamix*

Results

- Reduced time and frustration for app admins while improving end-user satisfaction
- Better insights into most common questions allow **standardized request forms**

Partner Showcase



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Fielding End-User Questions and Issues



Centralizing Support Systems for All Incoming Inquiries for Transparency, Efficiency, Insights

Request Support



Support Request

Access Request

Frequently Asked Questions

- *Need Staff Training*
- *Advice*
- *Problem solving*
- *Information*
- *Have questions*
- *Need access*

Streamlining Documentation Management

Live Training Can Often Be Supported Through Streamlined, Clear, Tailored Self-Service Resources

Challenge

- Live trainings are effective but demand a lot of hands-on time from admins
- Quality documentation is useful but custom documentation time-intensive to create

Solutions

- **Online training platforms, guide-creation tools, and cloud-based document management** allow admins to quickly create training content that end-users understand
- *Sample Technologies: Scribe, Wiki/Confluence, Articulate 360*

Results


- Greater end-user utilization of materials, improved satisfaction and learning outcomes
- App admin time savings from **reduced live training requests**, follow-up questions
- Decrease in support ticket submissions

Partner Showcase



Streamlining Documentation Management

Live Training Can Often Be Supported Through Streamlined, Clear, Tailored Self-Service Resources

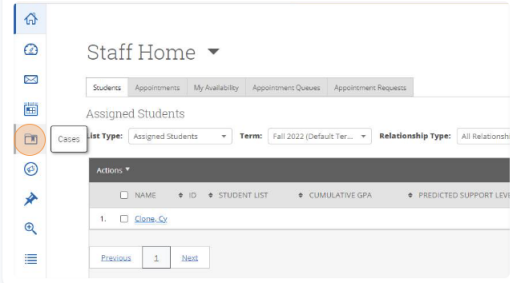


How to View and Manage Your Assigned Cases in Navigate

When you are assigned a case in Navigate please take time to review it, comment on it, add additional staff, take ownership, or close it. Your engagement with the case will help the campus community provide the necessary tailored support. Review these steps to learn how to manage a case.


Leif Olsen | 25 steps | 3 minutes

- 1 Login to Navigate and click on the Cases icon



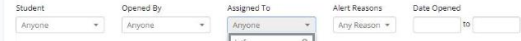
- 2 You can also view open cases in the "My Assigned Students Activity Feed" on your Navigate dashboard.
- 2 Click the assigned to drop down then type your name OR click the "My students only" checkbox on the right side of the grey bar

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STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED
Open		Progress Report: Attendance Concerns	10/19/2022	Amanda Patefish-Schrag	10/19/2022

- 3 Click on your name - this will allow you to filter the list of cases to only those you have been assigned to



STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED
Open		Progress Report: Attendance Concerns	10/19/2022	Amanda Patefish-Schrag	10/19/2022

Scaling End-User Training

Investing in Ongoing End-User Learning, Training at Scale

Challenge

- End-users reluctant to attend live trainings past initial implementation training
- Ongoing hands-on training tends to be reactive to emerging challenges

Solutions

- Open-ended weekly **office hours**, embedded feature spotlights into **existing meetings**
- Online **survey forms** to assess understanding before and after training
- *Sample Technologies: Qualtrics, Google Forms*

Results

- Recurring, open-ended time centralizes user questions and builds community
- End-users saw **improved understanding and adoption** of new features

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GERMANNA
COMMUNITY COLLEGE

FRESNO STATE

Scaling End-User Training

Investing in Ongoing End-User Learning, Training at Scale

Notable features include:

- [Basic Student Records Info](#) and [Appointments Summaries](#)
- [Appointment Campaigns](#)
- Record class attendance, events, workshops, visits, etc.
- [Schedule advising, tutoring, and career appointments](#)
- Tracking of specific groups (freshman, special groups, etc.)
- [Saved Lists, Saved Searches, and Scheduled Reports](#)

[Request a Bulldog Connect Training >](#)

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Discovery. Diversity. Distinction.

Drag and drop items into one of the three groups. Within each group you can rank them by your interests.

I am interested in learning about...

Items	Extremely interested
Advanced Search & Student Lists	
Appointment Campaigns	
Appointment Center: Front Desk	
Appointments: Summaries ; Calendar Sync ; Scheduling	Moderately interested
Availability and PAI	
Case Management	
Coordinated Referrals: Submitting Referrals	
Messaging Campaigns	Not interested
Kiosk : Recording attendance/visit	
Professor Role : Attendance, Progress Reports, Referrals	
Reports : Pulling reports	

Simplifying Platform Configuration Processes

Proliferation of Users and Units Without Expansion of App Admin Time to Onboard, Support

Challenge

- Growing users, units, and features make configuration demands more complex
- Custom care unit onboarding processes not replicable or scalable

Solutions

- **Standardizing care unit onboarding** through application process, onboarding template
- **Redesigning** complex alert, case, or appointment scheduling configurations for scale
- Leveraging **Navigate360 Guidebook** to document standardization of processes

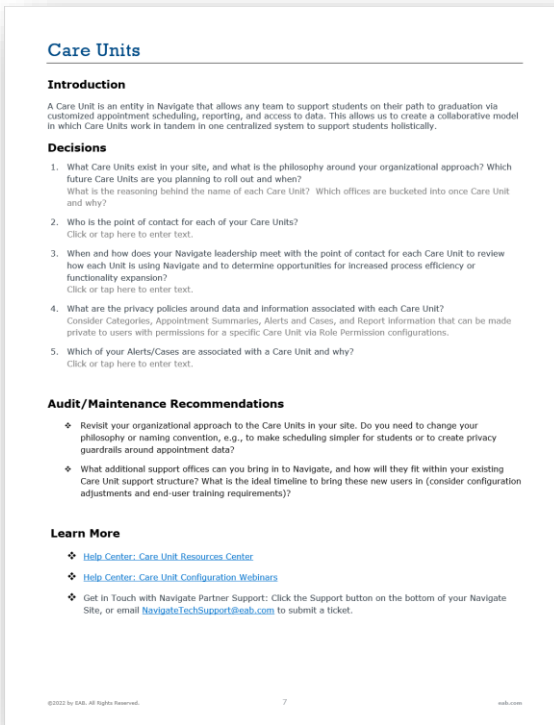
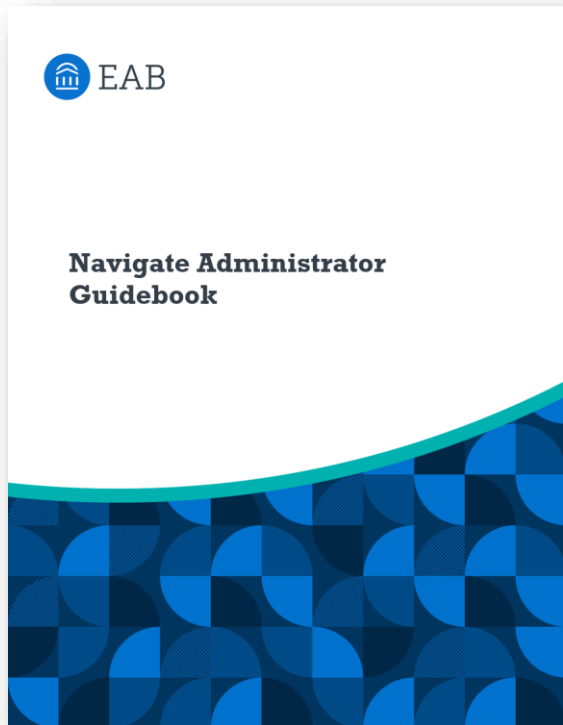
Results

- Replicable processes allow for expansion of impact without expansion of support time
- **Improved consistency** of experience for students

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Simplifying and Documenting Configurations in Guidebook



Navigate360 Guidebook

Dynamic document used to track the rationale behind foundational Navigate360 decisions. Creates a recorded history of configurations to codify the process of maintaining and expanding Navigate360.

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So Many Ideas, So Little Time

Identify Which Process Improvements Are Worth the Investment

Making a Change

Why is it so hard to bust our capacity busters?

- **Time** – I don't have the time to set up or maintain a process change
- **Buy-In** – Even if I had the time, I don't have the time to convince stakeholders that this is a worthwhile change
- **Risk of Failure** – If I did commit more time and resources short-term, will it pay off in the long term? What if it's not worth it?
- **Complexity** – The changes that would be the most worthwhile are the most daunting to implement

How can we commit to doing something?

- Using a **Prioritization Framework** helps us weigh complex pros and benefits with cons and trade-offs




Common Prioritization Frameworks

- Pros vs. Cons list
- Effort vs. Impact matrix
- Value vs. Complexity matrix
- Eisenhower Matrix (Urgent vs. Important)
- SWOT Matrix
- RICE Scoring
- **Cost-Benefit Scoring**

Turn to Your Workbook

Brainstorm your "Capacity Busters" and complete your Cost-Benefit Analysis for implementing a Process Improvement



Creating Efficiency Worksheet – 10 minutes



Creating Efficiency

Use the scale 0-3 to score your capacity busters and process improvement ideas. Consider a score of 0 = none/not at all, 1 = low cost/impact, 2 medium cost/impact, 3 high cost/impact.

- 1 Capacity Buster**
Describe your issue:

Can this be changed? _____
If yes, describe your ideal state:

Process Improvement Ideas
- 2 Process Improvement Cost**
Process Improvement under consideration _____ **Notes:**

	0	1	2	3
	N/A	Low	Med	High
What is the cost of a new system license or salary for individuals implementing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What amount of time is required by all teams to set up this process improvement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How long will it take to roll out the new process to other stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How much time will it take to maintain the new process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Score:
- 3 Process Improvement Benefit**
Scores once process improvement is in place. **Notes:**

	0	1	2	3
	N/A	Low	Med	High
How much time does the new process save for App Admins?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How many users benefit from this new process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How much of an impact does this new process have on the users of the system?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How much of an impact does this have for the students served?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Score:

Cost Benefit Calculations

<input type="text"/>	-	<input type="text"/>	=	<input type="text"/>
Benefit Score		Cost Score		Efficiency Total Score

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Brainstorm a “Capacity Buster” – something that takes up a lot of your time.

Sketch out a **solution** you could implement to change the current state.

Calculate the cost and benefit of implementing and maintaining this change.

Complete one sheet per capacity buster.

Complete 'Creating Efficiency' page(s) 🕒 10 minutes

End-User
Questions


Documentation
Management

End-User
Training

Platform
Configurations

Something
else!

For Discussion at Your Tables

- Do you notice any common themes in your capacity busters?
 - What types of process improvements did you find most interesting?
 - Do any of your efficiency scores surprise you? How so?
 - Do you plan on prioritizing the one with the highest score? Or a different one? Why?
- 

Efficiency Audit – 10 minutes

Efficiency Audit

Capacity Buster _____ Process Efficiency _____

Use this worksheet to write out the details required to implement the process efficiency selected. Distinguish the onetime implementation details vs. the ongoing support required once the process is in place.

Category	Implementation	Ongoing
Who Who needs to be involved in the initial setup of the new process? Who will be involved ongoing?		
What What steps are required for implementation? What steps will be followed for ongoing use of this new process?		
Where What systems will this take place in? Do any require purchase approval? Consider new implementation times based on this.		
When Timeline for implementation Timeline for rollout/switch-over from current process		
Why Define your elevator pitch for all involved to understand the importance/need for this change.		



Select the Capacity Buster with the **highest Efficiency Total Score**.

Complete the “Efficiency Audit” page to **create your process improvement implementation plan**.

Consider both **implementation** and **ongoing maintenance** requirements.

Complete 'Efficiency Audit' page(s)

 **10 minutes**



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Need to Make a Connection?



Katie Chupp
Ohio State University

- Online training modules
- Effective live trainings



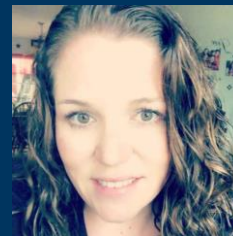
Dr. Adam DeRosa
Broward College

- Expansion of care units and alerts
- Networking with stakeholders



Jessica Julicher
University at Buffalo

- Streamlining onboarding
- New workflows



Alicia Landes-Sweetser
Germanna Community College

- Live Q&A
- Alert streamlining



Monica Solis
California State University, Fresno

- Ticketing system
- Centralized documentation

Remember, the EAB Community (networking.eab.com) is a great place to connect with other Admins 24/7!

Other CONNECTED Sessions

On the Leading Edge: A Conversation with the Excellence in Technology Administration Award Nominees

Monday (1/22) at 2:30 p.m.

App Admin Office Hours

2nd & 4th Wednesday of each month at 2:00 p.m. EST; [Registration Required](#)



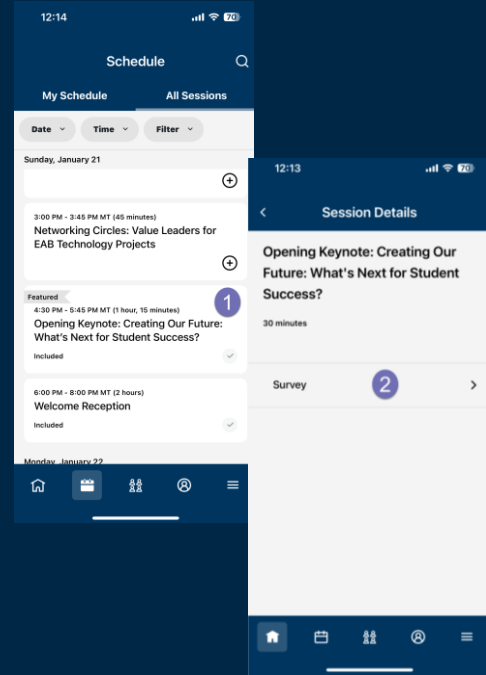
Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience.**

Evaluations are available in the event app by clicking on a session and then clicking **Survey**.

Need help with the app?

Stop by the **information desk!**



CONNECTED24

Join us tonight for a
CONNECTED Celebration!




Join us at **5:00 p.m. in the Aurora Ballroom B-D** to celebrate with your colleagues and peers.

Bites, drinks, and fun provided





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