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| Post-Offer Conversion |  | **ACADEMIC***(Faculty Academic Administration)* |
| The RATIONALE What prompted you to participate in the PPR workshop? |
| **Purpose** | The process review we undertook was for post-offer conversion activity, that is the number of students given an offer who took up the place. The process we were using in our faculty was identified by a couple of the senior program administrators as being quite varied across the different departments. We were aware that students were getting overloaded with all kinds of information and there was little consistency. We needed to look at what conversion activity was already taking place in the faculty and if we could making improvements to it. We felt it a participative process review was a really valuable thing as a way of involving people across the faculty and central support.  |
| **Stakes** | The faculty had already created a working group to audit post-offer conversion activity and identify ‘quick wins’ for our postgraduate courses, looking at current good practice faculty-wide as well as opportunities to improve conversion. Following the audit a post-offer conversion activity map was created to identify the activities carried out. It was identified that some Departments and Schools completed little conversion activity which may be affecting the applicant experience which could then result in the Faculty not meeting its targets. The faculty need to push our numbers, particularly in certain areas. We were keen to look at what more can we do to convert people who applied to study with us.It was agreed that a more comprehensive activity map was required to include University-wide communications with applicants, e.g. surveys. In addition, the working group suggested that a flow chart of applicant communications, and what conversion activity could take place during the applicant cycle, would be useful to academic colleagues and the programme administration teams who were completing conversion activities. |
| **Objectives** | * To produce a timeline of all Faculty and University wide conversion activities and to identify new opportunities.
* To develop a series of flowcharts (for both home and international applicants) mapping post-offer conversion communications with applicants.
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| The PROBLEM What was the issue, challenge, opportunity the review focused on? |
| **Context** | 'Conversion' is what we term when a student makes an enquiry with us, what we then do as follow-up to that enquiry to try and convert them into either applicant or if they are an applicant to convert them into actually accepting an offer with us. For example, we might send them further information as a means to persuade them to come to the university.  |
| **Need** | Because we have a large faculty, a key need to map what activities we are doing, identify best practice, share ideas and give recommendations moving forward. For example, mostly we use email, but one group use and social media really heavily. Related to this was a need actually to draw process maps to see how often and in what ways we were contacting applicants, because what we were quite concerned about overloading and the timing of the activities.  |
| **Participants** | Teams/roles involved in the process: * Post-Offer Conversion group members, including: strategy department heads, faculty admin, subject coordinators, faculty marketing
* Wider University team members: admissions, business and planning, student union, accommodation, marketing, international office
* Students
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| The SOLUTION What did participating in the process review achieve for you? |
| **Key understandings** | Prior to the workshop, the marketing team gathered in all the different kinds of letters that people send and other resources/materials. A key outcome from the process review was the idea/ decision to create a 'menu' on how we communicate came out of the discussions. This would promote different methods, outline pros and cons and enable flexibility and choice, since people tailor their communications depending on the kind of cohort, depending on the subject and whether they are postgraduate or undergraduate students: different types of people, different types of information. As a result of the postgraduate mapping, the working group suggested a minimum of five interactions with applicants would be most appropriate so we decided on best practice in that sense. Due to the different locations where the team are based across the University, we actually very rarely see each on a work level, so these process reviews are really good for creating a consistent process. From the PPR, even though it can take a whole day, we saw how we could apply the approach to many different processes to enable us to share best practice more readily and regularly.  |
| **Intended outcomes** | * The main goal in terms of criteria for success was to achieve clarity across everyone's point of view. We know that different departments are different and want to send out different things, so it was a matter of creating a process that was a standardised as possible without being rigid. We want to establish areas of best practice, which can be disseminated to all teams.
* Having consistency across all the different processes was also important, because a lot of the time in one department we’ll be doing something totally different from another department. A useful output would therefore be a timeline of all current conversion activities and identifying gaps within the process.
* The aim is to have a greater understanding of what conversion activities are happening within the Faculty and how these fit with University wide communications and activity. This will avoid duplication and cross communications with applicants.
* A conversion matrix will be developed for the Faculty to benchmark the success of conversion activities and potentially inform recruitment activities.
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| **Light bulb moments** | The process review was all fairly straight forward. However, we realised we all had in our heads that we overload applicants and it turned out that actually that we don't. Everybody was quite shocked, because you go into it thinking something and actually that's not the case.Having done the initial process maps, we realised that there was loads of different emails getting sent to applicants both from the university and from the department's, so theyThere was someone from our international office at the workshop, who was really useful because she explained what they send this out to international students. A really good thing that came to light was their booklet that they send out to international students. It was detailed resource that has a really easy guide on what’s expected of applicants, where to go and all kind of stuff. However, we could see that the information wasn’t just contradictory to what we sent to all students, it was different as well; so they were getting a variety of really odd communications. The biggest discoveries were just about realising how much duplication there exists across all the departments, but also the variety of different formats. For example, one department sends letters out, one would invite applicants along to a special event day, and other things like that. One moment I remember was when we had the process mapped out at the time and we counted the number of email communications that applicants were sent - about 12 emails, they would see from the University: 6 from central admissions and 6 from the department all saying very similar things.  |
| **PPR techniques** | The team had rather merged roles in the review process, rather than a clear process leader as project manager. One person wrote the Terms of Reference initially and later the final report, another create the map/chart. The first part of mapping is the best part about these process reviews, because it highlights what is happening at the moment creates the focus for asking questions of why we do things a certain way. Whereas before someone might never dare say let's change this, let's change that, you have the freedom to change the process because you become much more aware of how it will impact another department and understand the wider effects. |
| **Actions / next steps** | Now we have agreed a new process and the different touch points, we are going to re-circulate the action plan for moving forward to the next academic year. In terms of getting that information to everybody for them to use as a tool, we created a Google drive so everybody had access to the best practice examples of the letters, emails, booklet, as well as recommendations for communications.  |
| The RESULT What are the tangible outcomes & impact? |
| **Immediate changes** | On a day-to-day basis, people working on the ground with the detail are best placed to assess how the new resources are changing their practices. I’d say 80% of the whole process was relatively fixed, but we have now really catered for flexibility so that the approaches were applicable. There was actually no point in making a 'one- size-fits-all' process, because every department runs things differently and they will require different approaches. We all agreed we would standardise as much as possible, quite mindful of going through a few of the different pinch points, so there were various parts were there were exceptions. |
| **Improvements made** | Our faculty working group discusses activities on a bimonthly basis. However, conversion activity is an on-going big project across the University, being reviewed annually just in time for the next academic year. In terms of figures for improvements made from this PPR, therefore, it's early days in terms of the cycle. For example, comparing how many people we converted this year compared to last, we haven’t got those numbers yet. However, from our faculty bimonthly meetings, I can definitely say the conversion activities have been stepped up.From this, we hope that the majority of programmes that the conversion activity affects will improve. What we notice is transfer of practice; when something is working in one area, how it can be improved across-the-board. For example, in one area people were telephoning applicants to engage and convert them, which is not something we do in every area. Others were using Twitter quite effectively, so we would then look to transfer that to another area. |
| **Evidence of benefits** | There were benefits from the PPR in terms of efficiency gains. For example, there was a lot of duplication in the number of emails applicants received from us. At the end of the workshop, once we'd agreed the new process, we counted again and we had halved the amount. Because we knew central admissions were doing certain things, we were able to stop doing the same and dovetail better with conversion activity they were doing. This reduces staff time and lessens workloads in the faculty. From a personal point of view, knowing that I don’t have to send out as many emails has definitely freed up a lot of my time.For example, in one department being able to clarify the process, means we can use the process map as a reference tool. When we get an enquiry, we can inform them that they should receive an email soon from the central University that will answer your questions. It’s meant understanding where they are in the communications process before you take time to send anything out, whether it's something scheduled or a random email trying to push people if offers are low; not that we’ve done that, just for example. It is good to look at that process and see where that fits it in the applicants timeline.In terms of measuring outcomes, there is a survey by the admissions department to assess student enrolment. In that sense, monitoring outcomes from the changes is out of our hands effectively as the surveys are done on a university level. However, we are evaluating how it is received by our faculty staff members. Eventually we would like to see our own systems so that our faculty interactions can actually be monitored and we can be proactive rather than reactive.Metrics we use are mainly in terms of applicant numbers, i.e. how many people are applying compared to last year and the number and time of our interactions with prospective students. This way, we can take action to enhance the conversion activity by additional 'menu' of opportunities identified in the process review. |
| **Unintended & unexpected** | One of the biggest realisations was that the numbers of applicant communications was actually quite appropriate as that was something we really wanted to make sure of. The process review revealed that actually we may be doing the best we can do with conversion across the board, which was excellent to see. We found ways how we could share information in the ways we communicate with applicant, and produce a communications menu of ideas and tools to wrap around the basic standard process. The idea of introducing a customer relationship management database came out of discussions of what we need to know, as we felt this would make interactions with applicants much easier to monitor and manage.The Lucid chart software turned out to be a really great tool and very straightforward to use. It's being used it for a few other things now as well. It's provides something visual and makes such a big difference; it can be a much better way of explaining something rather than just having a list. |
| **Longer term impact indicators** | Before the PPR, we were probably quite reactive and part of the impact of understanding more clearly what we’re doing is right in terms of interactions is it allows us to move forward with introducing other options available to us.Looking now at customer relationship management (CRM) systems is informing University practice and policy so we monitor what is working well centrally and within faculties, as well as what didn't work. Having better data management and communication means all those stakeholders with an interest or who it’s going to have an effect on can adjust things at their local level. One long term outcome is the *confidence* it created in the platform developed, because it is very rare for all of us to be sitting in a room. You can’t just bounce around an email as it’s really difficult to get the heart of any concerns. A participative workshop has proved much more constructive than meetings, because it actually give you a proper focus, discussion and collective agreements. Since in the PPR, you surface the assumptions and disconnects, duplication and overlaps from mapping a process out fully, decision making is much more grounded and evidence based than team meetings in the past. |
| Lessons learned - what experience has been gained? |
| **Prior experience** | No prior experience, at least nothing structured. We did other process reviews previously and we could have done it better using a participative approach, which seems a better way of clarifying the processing and getting a clear map at the end of the session. |
| **Participative experience** | Being able to go through a participative process review first with external guidance has been brilliant, because sometimes if you do not have much project management experience, it's difficult to know where to start. The terms of reference formalises the activity and gives everyone a much better understanding of what they are coming along to talk about, what are the aims. It also makes you consider who are the parties involved, which is not something everybody naturally does. Likewise, everybody knows how to do a SWOT, but it often is not applied to process review. Overall, our experience is that PPR is a much better approach for mapping out processes that involve people from all across the university. It makes everybody feels included and actually people enjoy it. Mapping the process was unproblematic as we had a good range of people in the workshop. We achieved a general overview from the admissions team who could tell us the timeline of students, the applicant cycle and we have a number of people from the faculty who shared what they do in terms of conversion, so there weren't really any difficulties. However, it was crucial to keep a clear focus, as some activities discussed were pre-offer not post-offer, which would have widened the scope of the project in hand and slowed down change. Because of all enrolment is managed by the admissions department centrally with clear policies each faculty have to follow, more representatives from the admissions department would have been helpful. We needed a more definitive sense of their activities (what and where to put the post-its on our timeline) such that their plans ripple into ours. We'd stick it down and it kept getting shifted around. |
| **Personal skills / application to other processes** | With post-offer conversion, we picked something we felt was well suited for the review in terms of (1) there is an applicant cycle, (2) there is a timeline, which made it easier, so in applying it to other process, it depends what you use the review for. Personally, the workshop was a really good experience, as I've never really facilitated something like that before. The project management background, context and guidance to PPR is useful the first time. We have looked at quite a few now as we’ve done this for three different areas and I’ve actually been involved in a fourth area across the university. We all realise how good a method PPR is for clarifying a process.*"I’ve used it in a lot of other places in my work and see just how straightforward it is, get it right, get it all mapped out and working, it’s a great tool to clarify processes and improvements."* The more process reviews I’m doing, the more I’m learning about how to manage people and what it actually means to be in that facilitating role. For instance, I'd never written a terms of reference, never written an implementation report like this, so for me it's been great, because I am developing the skills and hopefully getting better. There were a lot of people at the first one I facilitated so it was quite difficult to make sure everybody is quite involved, everybody had a say and people weren’t going off on a tangent and going into little groups kind of keeping everybody on task. It's really good as well, because the team feel more involved, that’s always good for me when I feel they’re making really good contribution tosomething and actually the meeting isn't a waste of time.We ran a PPR on student induction, which we found was too large an area and we needed to break it down in another workshop, so we did student induction and enrolment as two separate reviews. What we should have done is have one group working on one part and then swap it over and try to join it together. There are many other processes we would want to do PPR for once we finalize and review these first ones. For example, prizes at graduations is one we need to look at that because, like with post-offer conversion, there is a lot of different practice and the team feel it can get complicated. There are other variations within the faculty like what departments do at examination committees, what we do in terms of students asking for time out.  |
| **Success tips** | * Some processes suit a PPR better than others. Those that are more free range where you have a structured timeline are straightforward, but with some you are starting from nothing and don't have anything to base a map on initially. For example, our post-offer conversion process was completed in a single workshop, while others took a second workshop or further meetings to finalise the new process. A process review on staff induction did not really work well as a PPR, perhaps because the set of people involved were more opinionated and not the right mix in terms of how long they had been at the University. We needed more input from new people who had been here perhaps just a year.
* Some processes are too large and need splitting, whilst staying mindful of the transition between the two. For example, in our case conversion, enrolment and induction dovetail each other in the 'student journey' and you need to be careful about separating them out. Where you draw the line could actually create a problem if the line itself is the area of stickiness.
* Group size is quite key; it’s a balance between getting the full range of perspectives and facts and ideas and actually having a productive process. It was important to keep reminding everyone of the goal, because people tempted to go off on a tangent a bit. This is exacerbated if you invite too many people along or if their role is more before or after the process under review, as much of the time they would just be sitting around doing nothing. When it’s a smaller group you don't get as many perspectives, but you are better able to discuss and go through the process as a whole.
* Reminding people of the outcomes/benefits is an inherent part of what makes this successful. It is great doing PPR at the time, but people can forget quite easily and go back to entrenched habits and behaviours. It can tend to be the same kind of people who will get involved in a process review, engage with the outputs, while others who won’t see the value in it long-term. For example in our case, initially everyone thought the conversion activity menu and best practice documents was a brilliant idea, but actually in reality when people are busy, they may forget that these things are available to them. If a department is struggling with applications, they should be able to look at what came out the workshop and use it to improve their conversions. Reflecting on what has been done/achieved, and just keeping your eye on the ball with it, is partly the team leader's responsibility. Impact is quite hard to evidence, because everything is such a large-scale. You need to break it down into particular areas and timeframes in order to find the right measurements for showing how to improve practice.
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