



## **MISSION STATEMENT**

Provide convenient and personalized assistance to connect and empower students to succeed at Wichita State University.

## **VISION STATEMENT**

OneStop: One place for information, all the time.

## **AUDIENCE**

Primary Audience—Current and Prospective Students

Secondary Audience—WSU Community

## **SCOPE**

Guide students and provide information

Quality assurance monitoring

Act as intermediary between students and functional areas

## **GOALS**

Goal 1 Improve internal communication

Goal 2 Improve external communication

Goal 3 Gather, analyze, and use data to make informed decisions for improvement/change

Goal 4 Develop a continual training program

Goal 5 Ensure SmartView/Blackboard Customer Relationship Management accuracy

Goal 6 Ensure knowledgebase content is accurate

Goal 7 Improve Interactive Voice Response based on data collected

Goal 8 Provide plan for better utilization of self-help portal





WICHITA STATE  
UNIVERSITY

CENTER FOR COMMUNITY SUPPORT  
AND RESEARCH

OFFICE LOCATION | 358 N. Main,  
Wichita KS 67202

PHONE | 316.978.3843

TOLL FREE IN KS | 800.445.0116

FAX | 316.978.3593

WEBSITE | <http://www.wichita.edu/ccsr>

TWITTER | <http://www.twitter.com/wsuccsr>

*Strengthening Organizations, Strengthening Communities*

# OneStop Strategic Planning Report

**March 27, 2015**

\*Updated October 16, 2015

The OneStop at Wichita State University requested assistance from the Wichita State University Center for Community Support & Research (CCSR) in strategic planning for their organization. Due to being developed only last year, the OneStop had no previous strategic plan, so a one-year plan was designed through this facilitated process.

The strategic planning process was coordinated by a Design Team comprised of CCSR facilitators Joyce McEwen Crane and Scott Wituk, OneStop Executive Director Janet Brandes, and Rick Muma, Associate Vice President for Academic Affairs.

The strategic planning process began with a working meeting of stakeholders on March 4<sup>th</sup> and concluded on March 26<sup>th</sup> with a working meeting with the OneStop staff and Rick Muma.

## **Stakeholder Meeting**

On March 4<sup>th</sup>, a group of staff and stakeholders were invited to a working session to gather data necessary to formulate a strategic plan for the OneStop office. In attendance were: Rick Muma, Janet Brandes, OneStop Specialist Lisa Hansen, OneStop Specialist Lori Evans, Outreach Admissions Coordinator Krissy Archambeau, Director of Student & AR Fiscal Operations Robyn Bongartz, Assistant Director of Student Service and Outreach Julie Scott, Academic Advisor Janelle Darr, Associate Registrar Michelle Barger, Director of Systems Development Brett Morrill, Executive Director of Online Learning Mark Porcaro, Director of the Office of Student Success Kim Sandlin, Assistant Director of Adult Learning Lisa Hilt and Director of Media Resources Center John Jones.

After the stakeholders were welcomed and the purposes of the day reviewed, the group was invited to participate in a series of activities where their input was recorded. For all activities, the area of their discussion and idea focus was described. Throughout the day, the group worked in pairs or small groups to generate their responses.

Following a short break, the work shifted to focusing on crafting a vision and mission statement. Ideas were generated for each statement separately and discussed. Participants were encouraged to formulate cohesive statements from those ideas as time allowed. The staff of

OneStop will take these ideas forward to craft the official vision and mission statements in their next facilitated meeting.

Finally, participants were asked to give consideration to all of the ideas collected prior to the break and to begin to name strategic directions that already exist and strategic directions that should be pursued in the next year. They were then asked to vote for their top ideas for the staff to consider as they choose their strategic priority areas for the next year. The OneStop staff considered those ideas as they formed their action steps for the coming year.

### **Staff Meeting:**

On March 24<sup>th</sup>, the staff of OneStop and Rick Muma met with CCSR facilitators to work intensively on crafting the vision and mission statement and to begin the outline of a strategic plan for the next year.

### ***Vision Statement***

Participants were redirected to the proposed wording from the stakeholder group for the vision statement and asked to play with the ideas/concepts in order to come up with a broad-based, long-term, inspirational and easy-to-communicate vision statement. The words that seemed important to participants were: *connect, empower, student focused support, quick answers, personalized help, convenience, and centralized information.*

The statement that participants decided to consider word-smithing for a vision statement is “*OneStop: one place, all questions, all the time.*”

### ***Mission Statement***

Participants were redirected to the proposed wording from the stakeholder group for the mission statement and asked to play with the ideas/concepts in order to come up with a mission statement that clearly states what is going to be done, why, and by whom.

Two key ideas emerged to be considered, with the second statement being more strongly considered by participants.

- Connect and empower students by providing convenient and personalized support
- *Provide convenient and personalized assistance to connect and empower students to succeed at Wichita State University*

### ***Priority areas***

To introduce the task, participants were given an example of what a strategic plan might look like. With this format in mind, they were encouraged to review the documents on strategic priorities and trends/opportunities/challenges gathered at the (previous) stakeholder meeting and to begin to name priority areas for focus for the next year for OneStop. The group was able to agree on three strategic priority areas on which to focus. These areas included:

- Define the audience, boundaries, and scope [for OneStop]
- Increase utilization and satisfaction
- Knowledgebase and technology enhancements

The group was also able to develop some specific strategies for each of these three priority areas, and in some cases, specific action steps to take. It is anticipated that the staff will work on completing this document by developing specific action steps for each strategy listed. Listed below is an outline of this plan. In the appendix, the outline is translated into a strategic planning document that the team can use to track their work.

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1. Defining audience, boundaries, and scope
  - a. Internal discussion and communication
    - i. Discuss and define audience, boundaries and scope at a staff retreat
    - ii. Utilize staff meetings to discuss updates
    - iii. Develop template for staff meetings (for purposes of improving communication)
    - iv. Explore implications of taking over x.3456
  - b. External communication
    - i. Gather and centralize information from functional areas regarding events, mailings, etc. into one place.
    - ii. Communicate our boundaries, audience & scope to the functional areas, faculty, staff, support services and students
      1. Communicate at quarterly meetings with functional areas
      2. Utilize University communication channels (e.g. WSU today, Senates, Student Government, Housing, Orientation Programs, etc.)
      3. Host a social event for functional areas and ancillary areas to build relationships/impart information
    - iii. More formalized communication with upper administration about OneStop (Rick Muma)
2. Increase utilization and satisfaction
  - a. Analyze and use data to inform needs for improvement/changes
    - i. Conduct student focus groups
    - ii. Conduct faculty and staff focus groups
    - iii. Intentionally synthesize and examine all sources of data at staff meetings
  - b. Partner with new student involvement events and organizations
  - c. Partner with existing student involvement events and organizations (e.g. Student Government Association, Recognized Student Organizations, etc.)
  - d. Host and participate in campus events
3. Knowledgebase and technology enhancements
  - a. Audit user data we are interfacing and look at data we allow Blackboard to have access to for SmartView to make sure it meets our business process needs
  - b. Knowledgebase audit (provide additional screen shots and update information)
  - c. Simplify Interactive Voice Response based on data
  - d. Provide plan for better utilization of Self Help Portal

### **Recommendations**

The following steps are recommended for the OneStop staff:

1. Review the draft plan and adjust language to reflect any progress or decision made since the planning session.
  2. Assign responsible for each task and set target dates for completion of tasks. Incremental steps to accomplish a task may be necessary and reviewed often.
  3. Present the adjusted plan to the original stakeholders for feedback, buy-in, and to identify areas for partnership to get the work done.
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4. Use this plan as a “working document” guided by the strategic priorities. This report is provided in a Microsoft Word document so that the strategic plan portion may be easily modified and updated as needed. To help the strategic plan stay useful, consider using a portion of each staff meeting to update progress on the plan. Track progress by making the updates electronically on the document, deleting items as they are accomplished and adding new objectives and associated actions as they are determined. CCSR is available to can demonstrate this “course correction” approach to strategic planning.
5. Follow-up with CCSR in about 6 months for an additional check-in about how the planning document is working and make adjustments as needed.

WSU CCSR enjoyed working with the OneStop office on its strategic planning process. We observed an organization with many significant stakeholders, all of whom care deeply about the office’s future. We saw strong commitment to honoring the value of the vision and mission of the OneStop.

*Wichita State University's Center for Community Support & Research (CCSR) is dedicated to improving the health of Kansans through leadership development, organizational capacity building, and community collaboration. CCSR's skilled staff works directly with community coalitions, nonprofit organizations, government entities, health and human services organizations, and self-help groups.*

**Want to know more about this report? Contact Joyce McEwen Crane at [joyce.mcewencrane@wichita.edu](mailto:joyce.mcewencrane@wichita.edu).**

# **APPENDIX**

## OneStop Strategic Plan Action Steps

### **Priority Area #1: Define and communicate audience, boundaries, and scope**

#### ***Strategy #1: Internal Communication***

##### **Develop template for staff and strategic meetings for purposes of improving communication**

###### **Action Steps**

Contact Center for Community Support and Research to get template for new staff meeting agenda	Completed
Create template for strategic planning meeting	Completed

##### **Operationalize taking over x.3456**

###### **Action Steps**

Meet with Telecom to view/discuss current operator set-up and process	Completed
Arrange meeting with architect to determine appropriate office set-up for new staffing	Completed
Update Telecom with plan for x.3456	Completed
Confirm budget for staffing and furniture to operate x.3456 within OneStop	Completed
Order necessary modular furniture/equipment	Completed
Determine back-up plan for operator lunch/breaks/vacation/sick leave	Fall 2015
Hire new staff for operator position	Fall 2015
Train new x.3456 staff	Fall 2015
Move x.3456 from Telecom to OneStop	Fall 2015
Provide ongoing training; monitor for quality	Ongoing

##### **Develop and formalize standard operating procedures within OneStop**

###### **Action Steps**

Develop and finalize list of Standard Operating Procedures (SOP) topics for discussion	Completed
Research and decide on SOP manual type/style	Completed
Schedule meetings to discuss topics	Completed
Delegate topics for each staff member to type for manual	Completed

Deadline for SOP topics to be developed	Fall 2015
Hold meeting to discuss OneStop SOP and uses	Fall 2015
Review SOP for updates	Ongoing

## ***Strategy #2: External Communication***

### **Gather and centralize university information regarding events, mailings, etc. into one place**

#### Action Steps

Register for Event Management System (EMS) and review site	Completed
Develop a comprehensive list of frequently requested phone numbers	Completed
Communicate with all university departments requesting they provide OneStop with information about events, orientations, testing, meetings, etc. especially since we will be taking over x.3456	Spring 2016
Develop computerized calendar for information not contained in EMS available for everyone to access	Spring 2016
Identify and request access to listservs, ShockerBlast, etc.	Spring 2016
Continue to assess and communicate need for calendar dates	Ongoing

### **Gather and centralize information from functional areas regarding events, mailings, etc. into one place**

#### Action Steps

Request event calendars from each functional area	Completed
Request inventory transfer for physical calendar	Completed
Request calendar to be mounted in Director's Office	Completed
Enter events to physical calendar & hard copy to have available for agents	Fall 2015
Coordinate ongoing communication with functional areas to stay up-to-date on events	Spring 2016

### **Communicate our boundaries, audience, and scope to functional areas, faculty, staff, support services and students**

#### Action Steps

Develop annual communications plan	Completed
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Review and approve communications plan	Completed
Communicate at quarterly meetings with functional areas	Ongoing
Attend fall and spring new faculty, unclassified professionals and university support staff orientations	Ongoing
Attend Student Government Association meeting in fall	Ongoing
Provide communications through WSU Today	Ongoing
Coordinate in student/faculty outreach and awareness activities	Ongoing
Transition mentors - request shadowing of OneStop	Ongoing
Hold Outbound webinars	Ongoing
Participate in advisor groups (e.g. Advisor Council, Academic Advisor Consortium, The Advising Network)	Ongoing
Monitor communications plan progress and assess outcomes to determine future plan/participation	Ongoing
Determine feedback tool for events evaluation	Completed

**Further develop relationships with functional areas and ancillary areas to impart information**

**Action Steps**

Continue meeting with Student Accounts on a bi-weekly basis	Ongoing
Attend department staff meetings with Student Accounts on a weekly basis when possible.	Ongoing
Enhance relationship with Online, Adult Learning and Military/Veterans through creating Knowledgebase (KB) articles and cross-listing current KB articles	Fall 2015
Work with E-Learning Services (eLS) on KB articles and issues that may arise	Ongoing
Discuss the realignment of functional area liaisons	Completed
Reassign functional area liaison responsibilities	Completed
Host year in review event and invite all functional areas to see where we started, where we are now (data), and where we aspire to be next year	Fall 2015
Coordinate ongoing meetings with functional areas to cultivate communication and partnerships	Spring 2016
Work with Blackboard Student Services to discuss ways to change the formatting	Spring

of information pulling from Banner into SmartView for student accounts so information is easier to read	2016
Run report for August 2015 and provide to Student Accounts to review the number of calls that were transferred to their department from Blackboard	Completed
Go-live for Student Accounts	Spring 2016

**Develop more formalized communication with upper administration about OneStop Action Steps**

Send email to Student Success to get example of Annual Report	Completed
Review report format and what we need to include	Completed
Review data needed for report	Completed
Meet with Mark Porcaro to review data and put together report	Completed
Finalize report data	Completed
Design report	Completed
Present report to Rick Muma	Completed

**Priority Area #2: Increase utilization and satisfaction**

***Strategy #1: Gather, analyze and use data to inform needs for improvement/changes***

**Conduct student, faculty, and staff focus groups**

Action Steps

Determine purpose and timing of focus groups for academic year 2015-16 and develop tentative agreement with consultant	Spring 2016
Develop and confirm scope of work for focus group to include the number, timing and budget for focus groups	Spring 2016
Contract with consultant conduct focus groups	Spring 2016
Work with consultant to develop questions	Spring 2016
Arrange for logistics for focus groups (i.e. location, times, rooms, equipment needed, refreshments, incentives)	Spring 2016

Conduct focus groups	Spring 2016
In conjunction with consultant, analyze and interpret results to make recommendations for improvements with OneStop	Spring 2016
Provide appropriate feedback/recommendations to Blackboard	Spring 2016

**Conduct online survey of students' perceptions of OneStop**

Action Steps

Meet with Mark Porcaro to discuss options for online survey	Completed
Develop questions for survey	Completed
Send questions to company to design survey	Spring 2016
Send out survey to students	Spring 2016
Compile responses and analyze study data	Spring 2016
Report findings to Rick Muma (possibly functional areas and Blackboard as well)	Spring 2016

**Review and evaluate operational data of OneStop**

Action Steps

Request access for Google Analytics and Pentaho for reporting, as well as access for Mark Porcaro to Blackboard Customer Relationship Management (BbCRM) reports	Completed
Request Student Help Portal information from Blackboard and follow-up	Completed
Define points of Student Help Portal evaluation for data	Completed
Review data provided	Completed
Meet with Mark Porcaro to discuss data	Completed
Present findings to Rick Muma via annual report	Completed
Request Interactive Voice Response (IVR) from Blackboard and evaluate	Completed

***Strategy # 2: Develop a continual training program for OneStop***

**Plan for Blackboard Student Services Agent training**

Action Steps

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Work with Blackboard to start “Bootcamp” to be used in new agent training as well as refresher for current agents	Completed
Set supplemental training calendar to go along with event/communication plans of departments	Completed
Seek input from Blackboard as to what agents find most beneficial in training	Completed
Based on feedback from Blackboard, develop standard format of trainings	Completed

**Plan for WSU staff training**

Action Steps

Develop plan for new staff training for BbCRM and SmartView	Fall 2015
Develop plan for refresher training for BbCRM and SmartView	Fall 2015
Schedule new and refresher trainings for upcoming academic year based on department feedback	Fall 2015

**Plan for OneStop Office staff training**

Action Steps

Customer service training procedures for x.3456 and student assistants	Fall 2015
Create binder for office procedures documents	Fall 2015
Create a common training sessions document for new staff	Fall 2015
Use previous How to Guides for programs (BbCRM, SmartView, Client Support, etc.) to make a more user friendly version	Fall 2015

**Priority Area #3: Improve tools and resources**

***Strategy #1: Ensure SmartView/BbCRM accuracy***

**Audit and review user data we allow Blackboard to access for SmartView to make sure it meets our business process needs**

Action Steps

Review each tab in SmartView for accuracy	Spring 2016
Review data being pulled to ensure correct tables	Spring 2016
Discuss possible additions or deletions to streamline SmartView	Spring 2016

Discuss current practice for uploading user data (frequency, timing)	Spring 2016
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### **Update drop-down options in tickets for agents**

#### Action Steps

Review current drop-down options and decide on possible updates	Completed
Send recommended updates to functional areas for approval	Completed
Send recommended updates to Blackboard	Fall 2015
Develop training documents for new drop-down options	Fall 2015
Communicate changes to functional areas and Blackboard agents	Fall 2015

### ***Strategy # 2: Ensure KB content is accurate***

#### **Perform audits with functional and ancillary areas**

#### Action Steps

Schedule meetings with Blackboard and functional areas to review KB audit for Records & Registration	Completed
Schedule meetings with Blackboard and Student Accounts to review KB	Fall 2015
Work with Blackboard on new formatting of KB articles - descriptive (key) words vs. several questions	Completed
Work with Online Learning to develop comprehensive KB articles	Completed
Work with Adult Learning to develop comprehensive KB articles	Completed
Work with Blackboard Student Services to find a way to have a printer-friendly version of KB articles	Spring 2016
Review all KB articles and add links within long articles so that agents can easily jump to the information needed to assist the caller, and add "Back to Top" after each area	Fall 2015

### ***Strategy # 3: Improve IVR based on data***

#### **Coordinate with Blackboard Student Services for improvements**

#### Action Steps

Hold IVR review/analysis meeting with Blackboard	Completed
Review IVR call flow to identify areas of improvement, both for immediate change	Spring

and for Student Accounts “Go Live”	2016
Explore Engineering advising needs for IVR	Completed
Work with Blackboard to implement changes in IVR scripting	Spring 2016
Update IVR call flow to include Student Accounts	Spring 2016

### ***Strategy # 4: Provide plan for better utilization of Student Help Portal***

#### **Coordinate with Blackboard Student Services for improvements**

##### Action Steps

Conduct Student Help Portal review/analysis meeting with Blackboard	Completed
Review data in Google Analytics on Student Help Portal usage	Fall 2015
Identify areas for improvement in Student Help Portal, e.g., keyword searches, separating eLS articles to improve search results	Fall 2015
Implement changes to Student Help Portal as necessary	Spring 2016

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