Implementing New Business Processes: Strategies for Success

Determining needs, managing change, and communicating effectively

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For many institutions, implementing new processes, platforms or solutions in the business office, bursar's office or financial aid departments can seem intimidating and overwhelming. Along with ensuring that any new process or solution improves efficiency and meets the needs of both students and staff, there are a multitude of other factors to consider, such as security, compliance, logistics, and project timing and prioritization. In this web seminar, a leader from Temple University discussed how their bursar's office overcame these common obstacles and successfully implemented a new student refund solution that has improved efficiency and service for students and staff. Presenters also outlined some real-world strategies and best practices for implementing new business processes, platforms or solutions efficiently and successfully at any institution.

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Matt Spethman: Our first key strategy is determining needs. When you determine needs, you assess what should be improved in a business process, product or solution. How does this impact multiple offices within your institution? How influential are different teams across the institution? How important are the needs of students and families? You also consider all viable solutions and options. What does the process look like? Which stakeholders and how many teams are involved? What absolutely must be considered a priority when looking to outside partners?

Conrad Muth: One of Temple's first goals in our implementation process was to improve efficiency and to provide a better service experience to our students and parents. One of the first things that we identified a need for was a refund solution that would be fully integrated with all of our current student account functions. We didn't want students to pop into multiple websites. An additional need was an easy-to-use intuitive interface for our students and staff.

Matt Spethman: With Nelnet Campus Commerce, we like to take a team approach to determining needs. We start with the "project scope process" where we sit down with the client and determine all the things they need in a product.

Once the need is determined, we work through the how. How can you ensure necessary resources are available across the institution? How can you determine a realistic versus idealistic timeline? How can you best prioritize the project among your institutions other major initiatives?

Conrad Muth: Given the magnitude and the priority of this project, along with the fact that other university initiatives were occurring at the same time, we requested an earlier engagement from Nelnet. In order sure we work alongside our partner to know how this project may impact and change their processes.

Some of our best practices related to this implementation:

1. Make sure you have a full grasp of your current business process, including documentation, going all the way down to ground level. Make sure you know how the process functions from start to finish.
2. Fully immerse yourself in the new product. Read the user guides, have product review calls and receive demonstrations of the system. Once you get an account into that system, start navigating early in the process. You need to know the product cover to cover.
3. Identify the gaps between your old process and the new product. There will be certain things that the current process does that the new process may not do, and you're going to want to identify those to determine their need.
4. Create a full, all-encompassing, high-detailed project plan. List out every task that needs to be completed, along with the responsible party and a target date. With a project of this magnitude, there are so many moving parts that it's easy to just forget stuff.

Matt Spethman: We want to make sure that we understand the client side of the change. We want to make sure we work alongside our partner to know how this project may impact and change their processes. Doing that helps us learn more about the teams we work with, allowing us to develop our product and project plan. Once we have that information, we can then move on to communicating the implementation process.

We have six steps we go through within the project plan:

1. Kickoff Call
2. Planning
3. Configuration
4. Integration Testing
5. Acceptance Testing
6. Go Live

Effective communication is also important. How do you rally teams across your institution to get them excited about change? How do you successfully and efficiently collaborate with your third-party partner's many different teams? We utilize our customer relationship managers to communicate early and often. That is why they're on our team. They work with individuals like Conrad, through our partners, to know when they are interested in a specific product or an enhancement within our platform. Then, weekly communication is done on our side. We have the weekly project status calls with the partner. Internally, we have weekly meetings to go over each project manager's book of business that they're working on, including their projects. Finally, we value true partnership in a potential third-party partner. How important is trust, accessibility, transparency, reliability and responsibility to your team? Know how to build a strong relationship with your partner. What expectations need to be met for you to continue working in tandem with your partner of choice?

Conrad Muth: You should always be working with a partner. With Temple and Nelnet, it's not "vendor" or "client"—it's "partner." That's the way it should be. A vendor is going to provide an out-of-the-box product and say, "Here's what we have, go implement it." A true partner will do some outside-the-box thinking with you to help you develop solutions.