

Wayfinding Rethinking Case Study

Connecting Students with Services to Support Success
Using JM Associates' Process Streamlining Methodology

Current Challenge

- Students have difficulty determining a need, discovering information about services, and selecting and navigating to relevant services

Future Vision

- Flexible, scalable solutions to help students to determine they have a need, then learn about and connect with resources

Solutions

- Team solutions included new and improved communication approaches, tools, and philosophies for student and staff, and a set of principles to guide future activities

Why JMA?

- JMA partners with schools to improve and transform processes
- Our proven Process Streamlining methodology is tailored for higher ed
- We engage and facilitate leadership and staff in creative, timeboxed activities
- Activities leverage staff knowledge, introduce new ways of thinking, and yield creative solutions with immediate buy in

Introduction

As part of an overall strategy to support student success, a major North American university identified a student's ability to easily Wayfind to student services as a key success enabler. Wayfinding is the process by which students:

- **Become Aware** of the need for something from the institution
- **Discover Information** about – or are informed of – services that may address their needs
- **Navigate** to the service

Awareness, discovery, and navigation manifest in many ways. Students may be self-directed, rely on others, respond to formal institutional communication, or be prompted by an event or their place in the student lifecycle.

Students use myriad approaches to Wayfind, including online resources, formal and informal communications, referrals, and direct institutional contact.

Current Challenge

If a student is unaware or unable to easily connect with services, they may not realize their personal and educational goals because of missed opportunities and uninformed decisions.

Wayfinding challenges included:

- Lack of systematic, coordinated strategy for student interaction and communication
- Passive approach where students identify needs, search and select options, and pursue services
- Large volumes of complex, unorganized, jargon-filled information
- Conflicting or wrong information
- Multiple, time consuming virtual and physical stops to get answers
- Limited self-assessment and self-service tools, and traditional office hours for in-person interaction
- Non-student-centered interaction coupled with processes oriented to institutional objectives

Future Vision

Wayfinding end results described desired future state:

- Create sustainable, scalable, and flexible approaches to support student Wayfinding
- Help students proactively become aware of a need and identify its root cause, then easily find and connect with relevant services
- Provide consistent, coordinated, accurate, timely, personalized, and jargon-free information
- Offer intuitive processes available when, where, and how students want them
- Facilitate coordinated and transparent referrals and handoffs that ensure continuity of care
- Provide clear, actionable, personalized roadmaps that help students navigate services, and understand options and impacts of choices
- Change student mindset from “seeking help is only for remedial purposes” to “seeking help is a key to success”
- Build student trust and demonstrate the institution cares

Rethinking Approach

To ensure students were aware of and able to connect with services, the school undertook a Process Streamlining project. Sponsors crafted end results describing the desired future state to guide the review. A dedicated team of staff, facilitated by JMA:

- Inventoried and evaluated current Wayfinding processes and identified gaps
- Completed research and brainstormed ideas to improve and transform Wayfinding
- Redesigned and created new Wayfinding processes to enable the end results
- Create a prioritized, sequenced plan to implement the new processes

Solutions

The team made a substantial number of wide-ranging recommendations that involved process transformation and improvement, training, technology, and organizational and culture change.

Recommendations focused on a variety of new and improved Wayfinding approaches, tools, and philosophies for student and staff, including:

- Continually-evolving **Knowledge Base**
- Interactive voice and texting **Chatbot**
- Services-searchable **Smart Map**
- On-demand **Personalized Services Roadmaps**
- **Periodic Check Up and Tuning Tool**
- In-line **SIS Transaction Advising**
- **Integrated Student Services App**
- One-stop **Staff Dashboard**
- Onboarding and ongoing staff Wayfinding **Training**
- **Cross-Departmental Wiki**
- Peak-period **Pop-Up Student Services Centers**
- Generalist and Specialist **Student Services Hub**

The team also developed a set of **Wayfinding Principles** to guide implementation and future activities.

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Contact us to learn more about this and other Process Streamlining successes focused on student services, finance, HR, alumni, and more higher ed processes.