EAB

4 Actionable Strategies to Build Buy-In for Your Data Projects

October 11, 2023

Give the Chat a Try!

What's one thing you're looking forward to when this webinar is over? (work or personal!)

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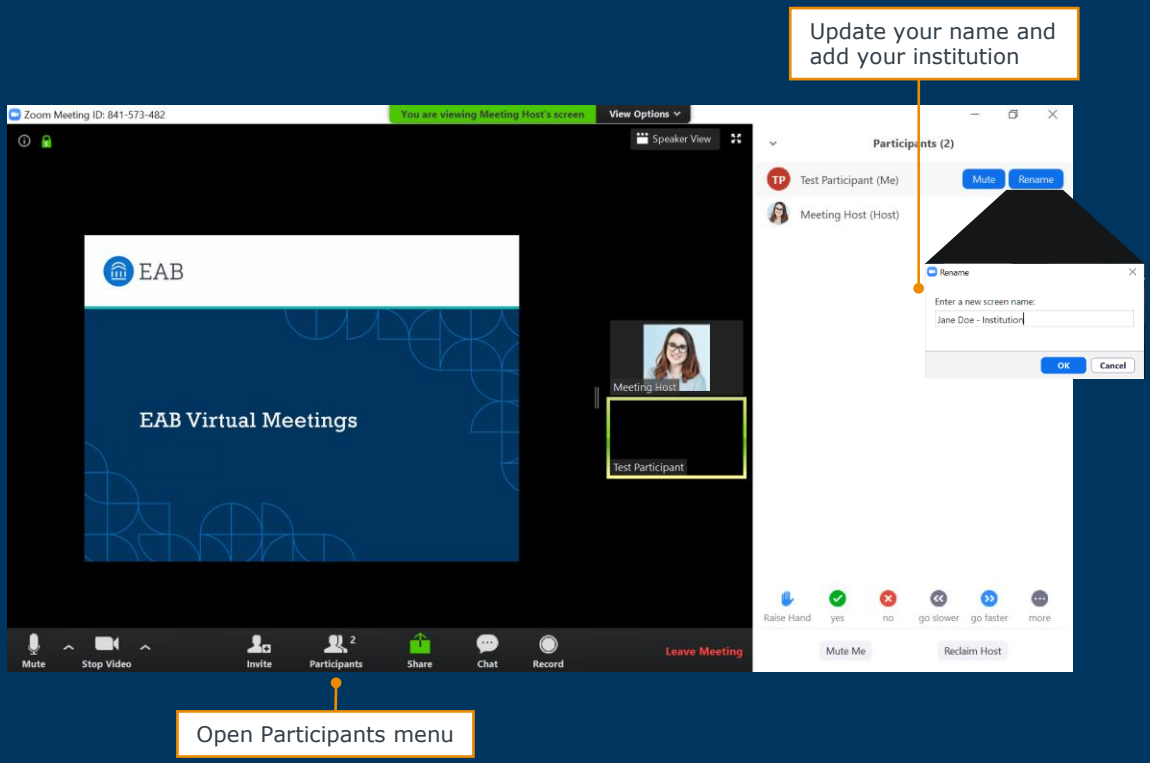
Update Your Name



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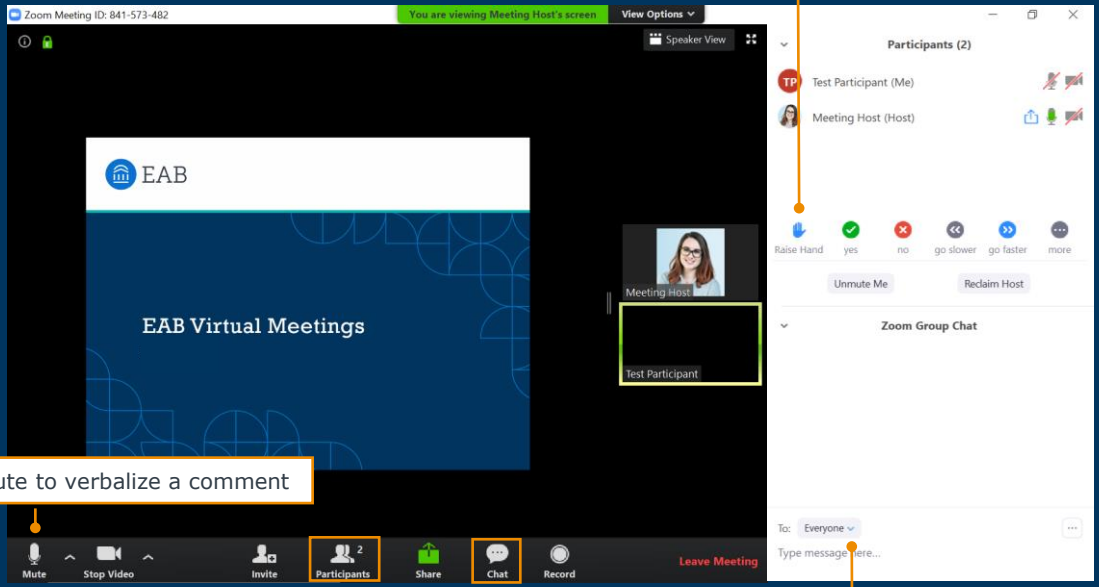
Mic, Chat, and Nonverbal Feedback

Use icons to communicate answers and signals to presenter



Unmute to verbalize a comment

Open Participants and Chat

Select whether you want to chat with everyone or a specific person

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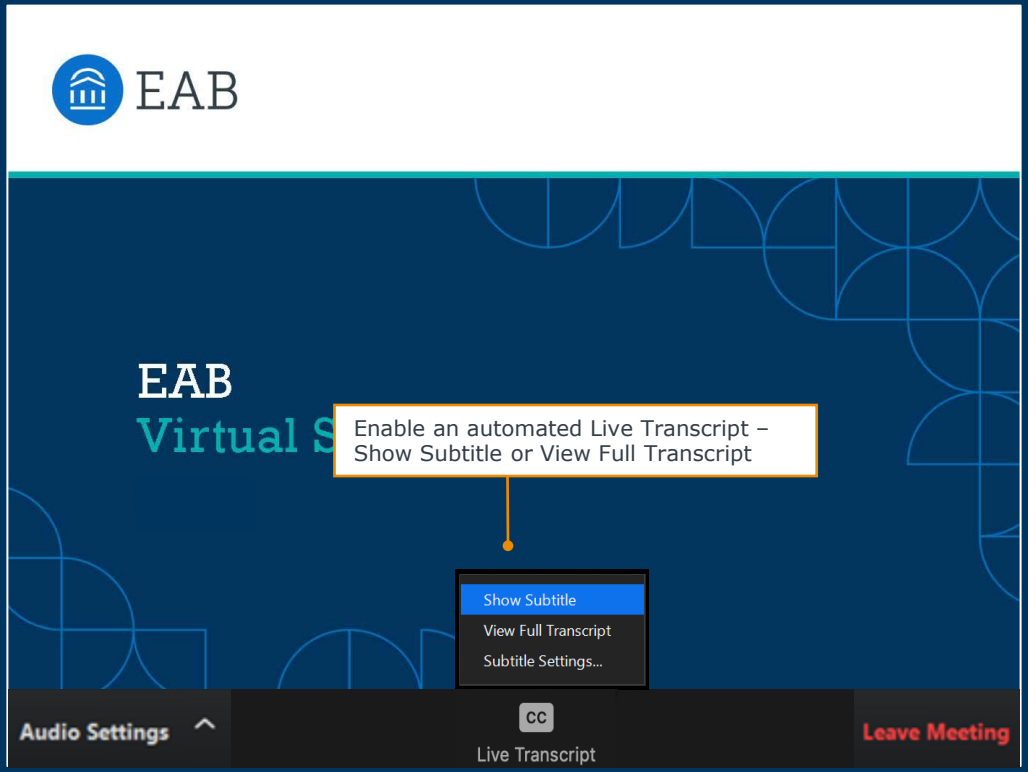
Turn on Captions



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Today's Presenters

James Cousins

Strategic Leader, Data and Analytics

Lily Brennan

Strategic Leader, Data and Analytics

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A Survey of Experiences

Four Actionable Strategies

1. Creating Unlikely Strategic Partnerships
2. Alignment Across Applications
3. Addressing Genuine Gaps
4. Inclusivity in Analytics

Discussion and Questions

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Quick Poll

1. Indicate the degree to which you agree with this statement:

   I have a set of strategies to promote and elevate my data projects on campus.

   A. Strongly agree

   B. Somewhat agree

   C. Neither agree nor disagree

   D. Strongly disagree

2. **How would you describe your institution's engagement with your data projects?**

   A. I have both executive and peer investment

   B. I have a couple of consistent allies

   C. I need to advocate loudly to draw support for my initiatives

   D. Stonewalling has left me burnt out

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Presentation Structure

1. **We'll provide a strategic framework for you to apply in follow up**
2. **We'll characterize the core issue**
3. **We'll provide a concrete example of the solution in action**

Actionable Takeaways

Our primary goal is for you to leave with an awareness and a set of strategies that you can use when you go back to campus with a desire to promote and elevate your work.

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A Tour of Best Practices

- **Creating Unlikely Strategic Partnerships**
- **Alignment Across Applications**
- **Addressing Genuine Gaps**
- **Inclusivity in Analytics**

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Best Practice #1:
Consider Strategic Partnerships at Your Institution

Use the first page of the worksheet to structure your follow-up work!

When applying this practice, focus on *one* of your analytical targets (enrollment, retention, etc.)

#1

When typically analyzing this outcome, are there any "**constants**"?

- Departments that are always part of the process?
- People who are always involved in sign-off?

#2

Are there any departments or people who could be involved but are not?

#3

Are there any departments or people with a vested interest in this outcome *who are not currently involved*?

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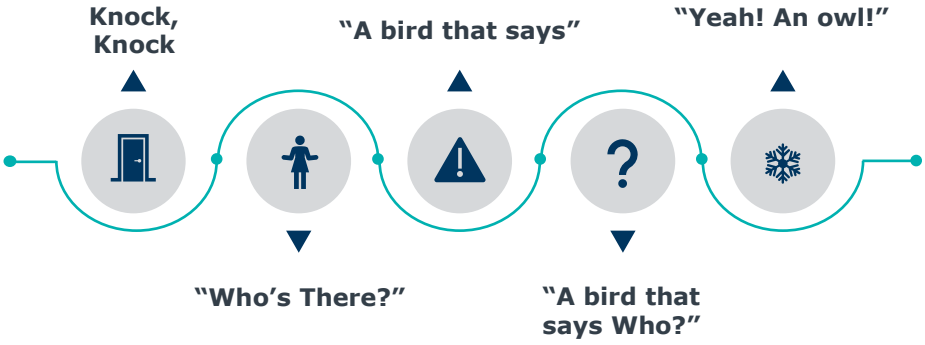
Don't Be Afraid to Try Something New

Characterizing the Obstacle



The Strengths and the Weaknesses of "Familiar" Approaches and Strategies

- Strengths
  - Individuals and departments are aware of *how* to contribute when the framework is familiar to them
  - Mechanisms may be in place that help you move from one step to the next more quickly
- Weaknesses
  - There is a limit to how much you can innovate while remaining inside the framework
  - When folks can assume how a project will go, they may have predispositions that inhibit their cooperation

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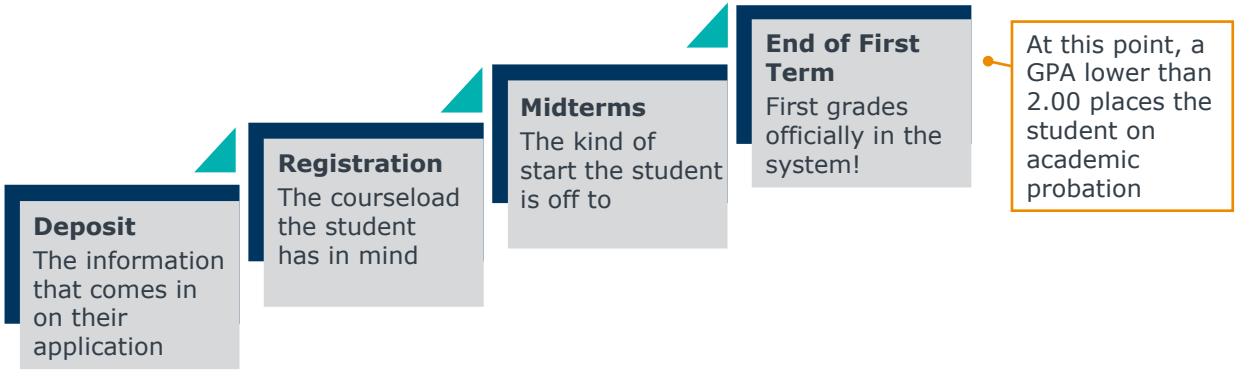
Source: EAB interviews and analysis.

Phase 1: Generating Valuable Insight for Student Success

Small, Residential, Public 4-Year University

Data Checkpoints: The Early-Stage Student Lifecycle



Student Success Obstacle	Clever Modeling Solution
• Students ending up on academic probation were dropping out at higher rates	• Instead of using it as a factor in the predictive model, use it as the *target* of the predictive model!

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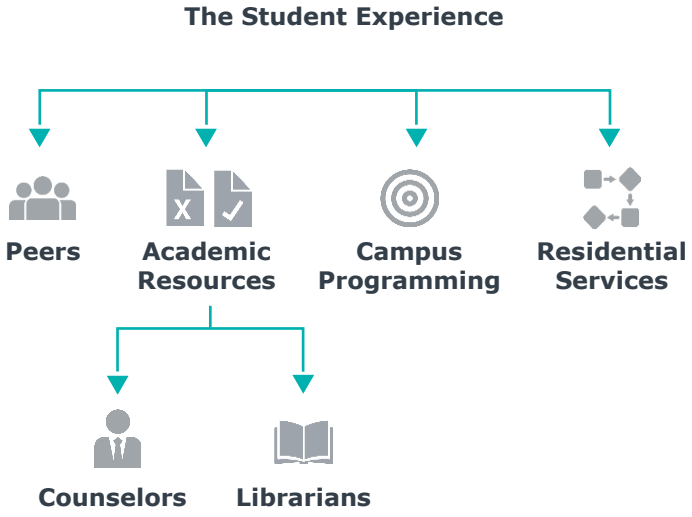
Source: EAB interviews and analysis.

Phase 2: Identifying Where the Insight Translates to Action

Librarian Mentor *Opportunities*

- **Familiar and Flexible Resources:** Academic resources are a blend, considering the main pillars of student experiences
- **Recasting a Current, Not New, Service:** Librarians are always available to help students with study and research skills
  - Created a list of students to proactively offer a librarian mentor to
  - Unique way to leverage not only the scores but the library's services as well



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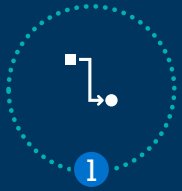
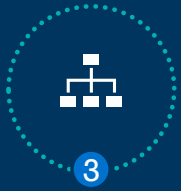
Source: EAB interviews and analysis.

Summary:
Creating Unlikely Strategic Partnerships



Sometimes familiar problems have **unquestioned**, routine paths to solution

Reassessing your efforts with lateral thinking can unearth novel possibilities



When introducing novel solutions, **"add" at first, don't "replace"—** and measure and celebrate wins!

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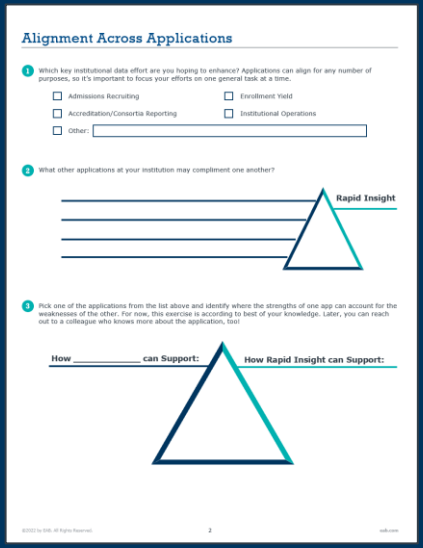
Best Practice #2:
Alignment Across Applications



Alignment Across Applications

1 Which key institutional data effort are you hoping to enhance? Applications can align for any number of purposes, so it's important to focus your efforts on one general task at a time.

- ☐ Admissions Recruiting
- ☐ Enrollment Yield
- ☐ Accreditation/Consortia Reporting
- ☐ Institutional Operations
- ☐ Other: _____

2 What other applications at your institution may compliment one another?

Rapid Insight

3 Pick one of the applications from the list above and identify where the strengths of one app can account for the weaknesses of the other. For now, this exercise is according to best of your knowledge. Later, you can reach out to a colleague who knows more about the application, too!

How _____ can Support:

How Rapid Insight can Support:

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After the session, use the worksheet to help you consider alignment between Edify/Rapid Insight and other applications at your institution.

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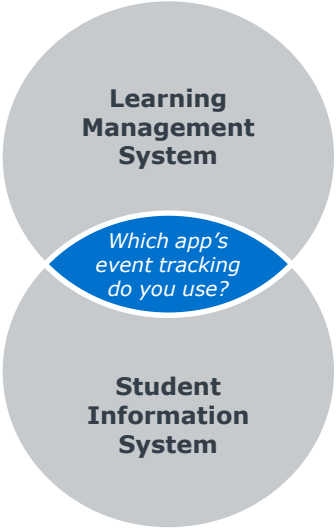
Best Practices for Using Many Applications

Characterizing the Obstacle



Too many tools in the toolbox

How do you know when to use which tool for what?

- Generally, no institution uses every single feature of any given application
  - It can be overwhelming
  - Multiple applications may provide the same information
  - Easiest to "go with what you know"

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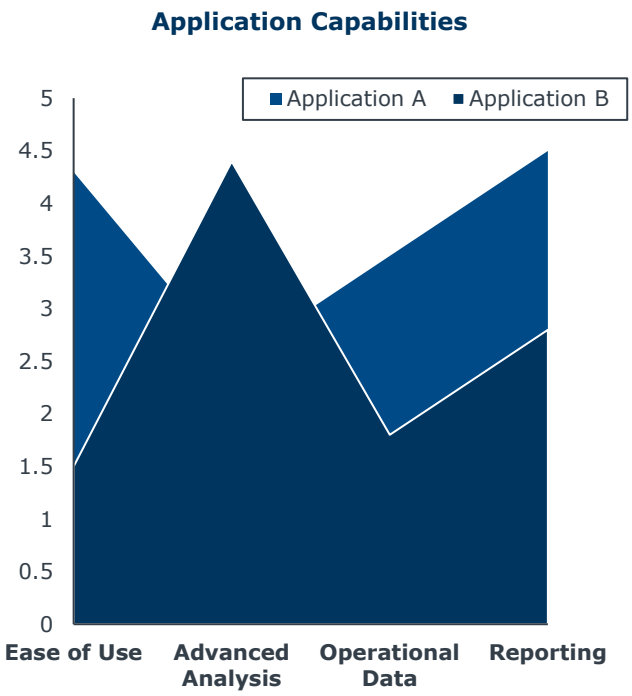
Source: EAB interviews and analysis.

Finding Synergies Between Rapid Insight and Edify

Small, Public 4-Year Institution



Finding Synergies

Additional Platforms Introduced in Parallel

- More isn't always better but sometimes can create opportunity to use one app to round out another's functionality
- Staff pursued "synergies" between applications

Edify (Data Warehouse) and Rapid Insight (ETL)

Using both tools together allowed for an accurate and customized Enrollment report to be built and implemented quickly

Impact

- Rapid Insight allowed users to make use of their Edify data quickly
- Using Edify data ensured the Enrollment report was trusted and accurate

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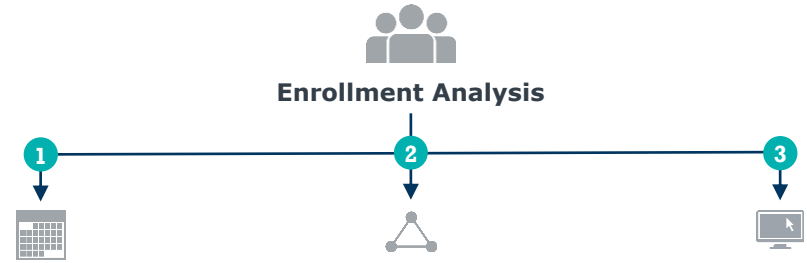
Source: EAB interviews and analysis.

Surveying Your Application Landscape

STEP 1
Take inventory

Bird's-Eye View of Your Target—
"Which Apps Have *Anything* to Do with This?"



Data Sources

- Student information system
- Data warehouse

Data Analysis

- Statistical package
- ETL tool
- Functionality native to another app/portal

Data Reporting

- Dashboarding software
- Functionality native to another app/portal

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Source: EAB interviews and analysis.

Creating a Plan

STEP 2

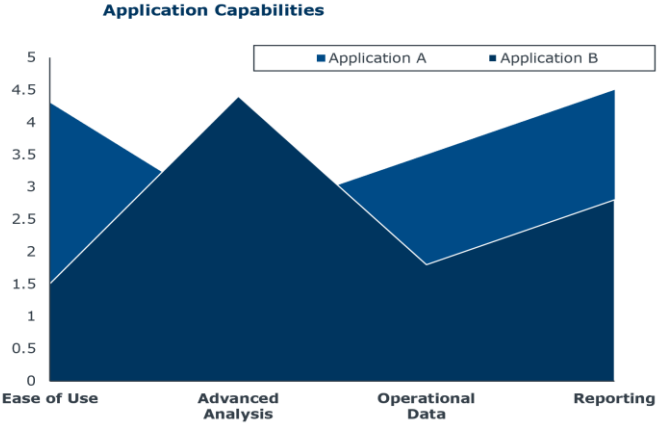
Assess Strengths and Weaknesses

Edify (Data Warehouse)

- Single source of truth
- Accurate and vetted data
- Data definitions

Rapid Insight (ETL)

- User friendly data access
- Web-based data sharing



This is a hypothetical example. Choose your criteria specifically based on the apps you are comparing.

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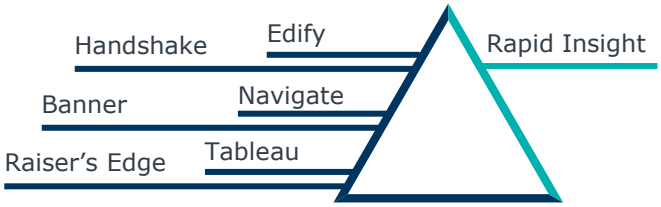
Source: EAB interviews and analysis.

Envisioning App Partnerships

STEP 3

Brainstorm Integrations



You Do Not Need to Be an Expert on Everything

Keep an open (optimistic) mind when brainstorming possible integrations

- Start with an app you know well so you can articulate its value
- Meet with experts on the other platforms where you suspect there could be a valuable partnership

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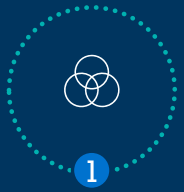
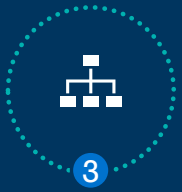
Source: EAB interviews and analysis.

Summary: Alignment Across Applications



Deciphering how tools will **serve your needs** can be difficult when many options are available

Evaluating the way applications **work together** can uncover opportunities for **process improvement**



Finding synergies between apps **can fill gaps** and **strengthen outcomes**

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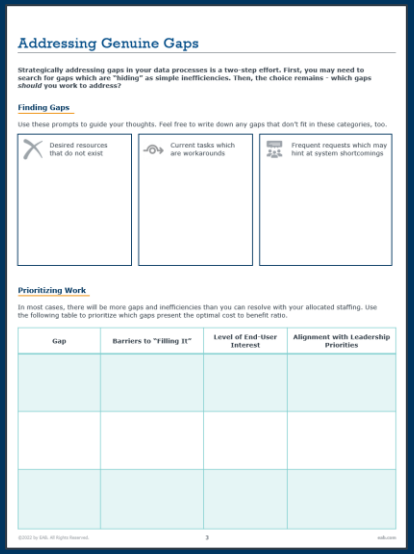
Worksheet:
Addressing Genuine Gaps



Addressing Genuine Gaps

Strategically addressing gaps in your data processes is a two-step effort. First, you may need to search for gaps which are "hiding" as simple inefficiencies. Then, the choice remains - which gaps *should* you work to address?

Finding Gaps

Use these prompts to guide your thoughts. Feel free to write down any gaps that don't fit in these categories, too.

Desired resources that do not exist	Current tasks which are workarounds	Frequent requests which may hint at system shortcomings

Prioritizing Work

In most cases, there will be more gaps and inefficiencies than you can resolve with your allocated staffing. Use the following table to prioritize which gaps present the optimal cost to benefit ratio.

Gap	Barriers to "Filling It"	Level of End-User Interest	Alignment with Leadership Priorities

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After the session, use the third page of the worksheet to search for and address gaps in your data processes.

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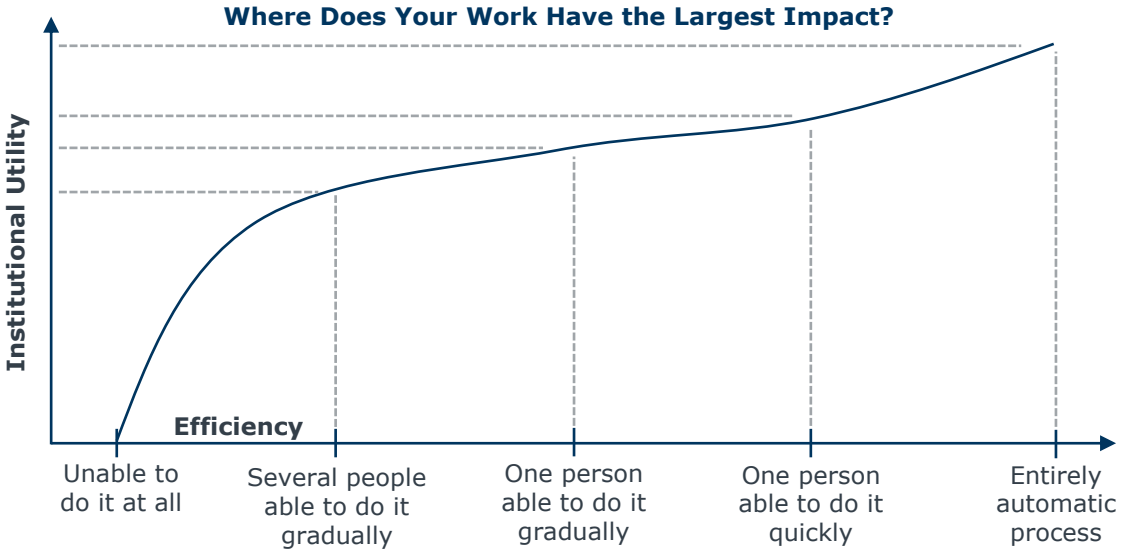
Stakeholders Can Spot Diminishing Returns

Characterizing the Obstacle



- **Improvements in Efficiency Do Not Need to Occur Incrementally:** Most RI users are able to go from "unable to do it at all" to "one person able to do it quickly" in one phase.
- **Focus on the Highest Level of Efficiency:** If you spend too much time (at first) trying to work on a marginal increase in efficiency, your work may be easier to disregard.

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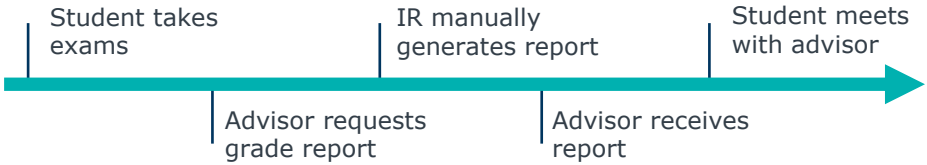
Source: EAB interviews and analysis.

Spotting the Symptoms of an Operational Gap

Private, 4-Year and Graduate University

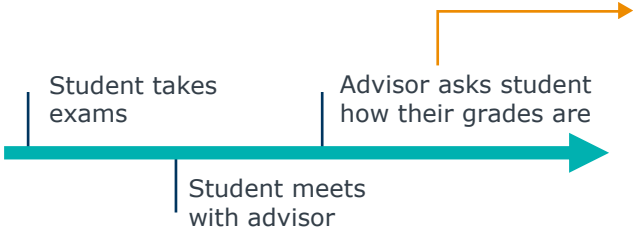
Ideal Scenario

When There Is Time



Actual Scenario

When It's Busy



"Advisor asks student..."

- This became the call to action
- The LMS in use had limitations which necessitated *either* slowed meeting schedules *or* reliance on student impressions of their grades

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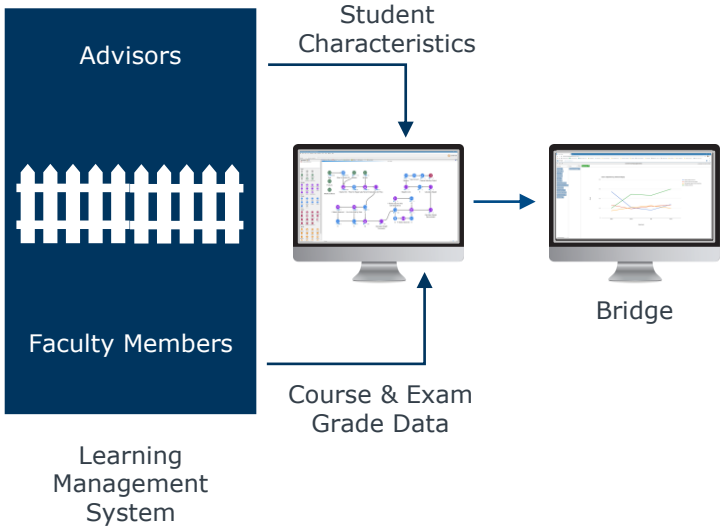
Source: Interviews and analysis.

Diagnosing (and Resolving) the Reporting Roadblock

IR Advisors LMS

The gap stemmed entirely from the LMS. It offered no direct path, which created a perfect opportunity for a high-engagement data project.



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Source: EAB interviews and analysis.

How You Can Use It Too

Two Critical Considerations

1 Finding Gaps

Needs Not Accommodated by Native Systems

- Routinely create a report bridging two systems
- Schedule automated tasks for routine data requests
- Test a hypothetical correlation that's holding up decision-makers
- Provide simple predictive resources for otherwise anecdotal processes

Great Ways to Identify Gaps

- Desired resources that do not exist
- Current tasks that are work-arounds
- Frequent requests that may hint at system shortcomings

2 Prioritizing Work

Optimize Your Impact

- Most institutions will not want for data gaps to be filled
- Focus on the gap's three key characteristics
  - How much time will it take you to fill?
  - Do you need to learn new systems or skills to manage it?
  - How important is it to fill this gap?

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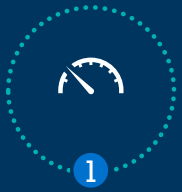
Source: EAB interviews and analysis.

Summary:
Addressing Genuine Gaps



1

Inefficiencies are easier to live with than **outright lack of capability**

2

Identify disconnects and dead ends that obstruct strategic action

3

Start to **provide enabling analytic solutions**, and gradually you can direct the conversation with increased buy-in

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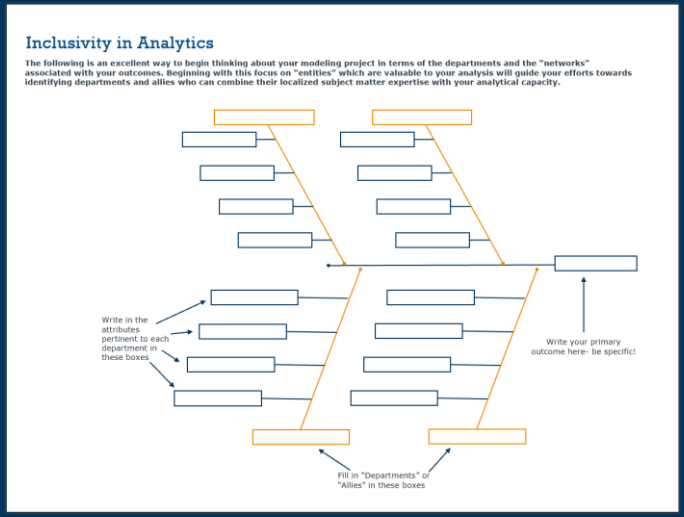
Worksheet:
Inclusivity in Analytics



After the session, use the last page of the worksheet to model your data project.

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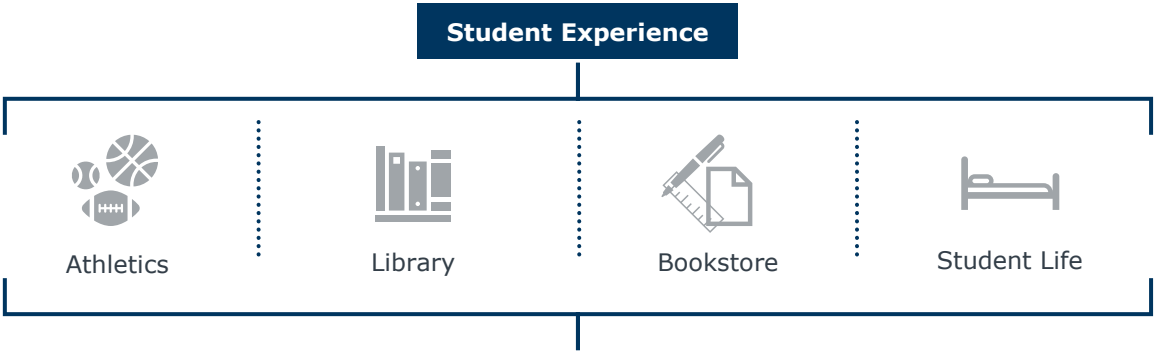
Cross-Departmental Collaboration Is Critical for Success

Characterizing the Obstacle



A Variety of Perspectives and Expertise Improves Your Efforts

- Each department that impacts an admit or a student's experience has a view into what helps them succeed— factoring them in decreases the likelihood that you're missing out on valuable predictors
- Furthermore, each department has a unique way in which they can act on your results—inclusion primes them to operationalize your work

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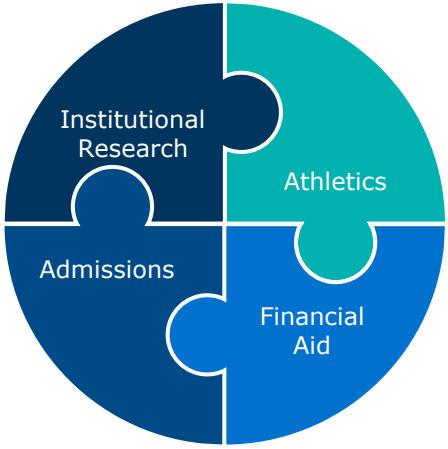
Source: EAB interviews and analysis.

Holistic Analysis Leads to Holistic Benefits

Private, Liberal Arts College

Admit-to-Enroll Modeling



- **Director of Athletics**

  Non-recruits were more likely to enroll because they were less competitively sought-after.

- **Data Dictionary**

  A tool like Edify can help document the important findings established through your inclusive research and furthermore provide a centralized location for other stakeholders to access your findings.

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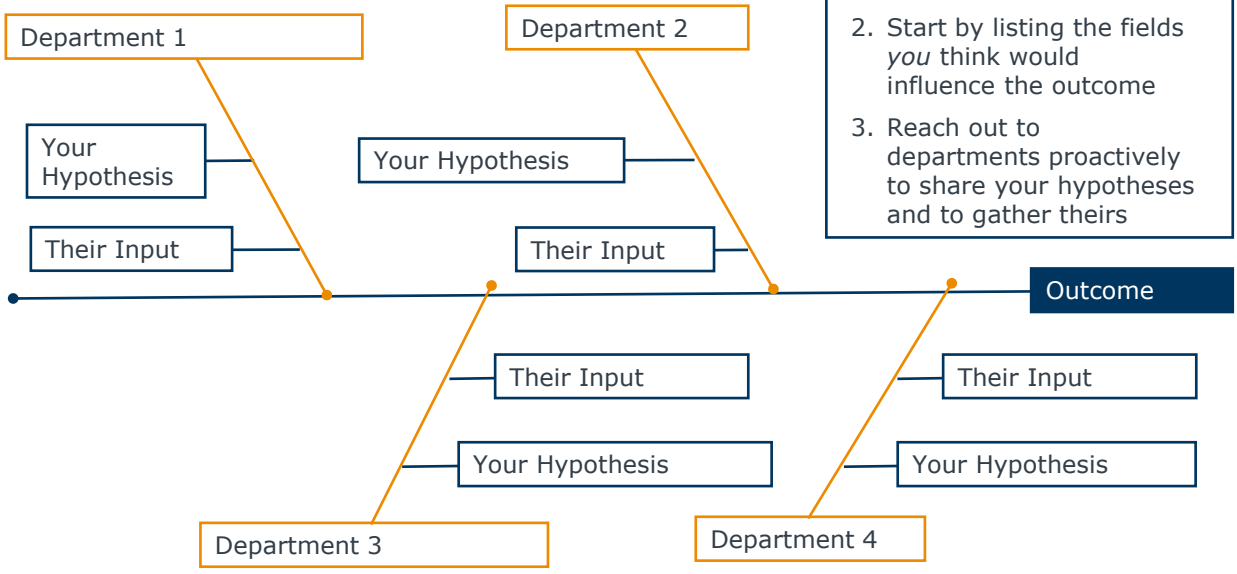
Source: EAB interviews and analysis.

Department-First, Attribute-Second Analysis Prep

Think of Your Data Set like a Network

1. List the departments with a connection to your outcome
2. Start by listing the fields *you* think would influence the outcome
3. Reach out to departments proactively to share your hypotheses and to gather theirs



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Source: EAB interviews and analysis.

Summary: Inclusivity in Analytics

1

Viewing your analysis with respect to **institutional entities** unveils potential partners

2

Meeting with departments **introduces their perspectives** and builds preemptive **support for your results**

3

Documenting your findings in a data dictionary can **improve access to information** for future analyses

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Closing Poll Questions

1. **How was today's session?**

2. **Indicate the degree to which you agree with this statement:**

   After participating in today's session, I have a set of strategies to promote and elevate my data projects on campus.

3. **Which of these strategies do you foresee being most helpful to you in the future?**

4. **Would you like to set up a support session or attend our office hours to further discuss these strategies?**

5. **Additional feedback or questions?**

You will receive a follow-up email that will include a link to today's session materials.

THANK YOU!

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