Analytics at University of California, San Diego

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1. How did your department begin its analytics journey?

Our journey began with the goal of addressing inefficiencies in customer service in Student Financial Solutions (SFS), which serves as the main point of contact for more than 30,000 students for any questions about billing or student accounts. Students contacted us in person, via phone, and by email, and we were not using a customer relationship management (CRM) solution to centralize interactions. We had no real-time data visibility on who was contacting us, about what, or the volume of inquiries. If we wanted to see any data, someone had to go through all of our emails and voicemails. This meant–

- We had incomplete data – phone calls and in-person visits were not logged

- Maintaining this data required significant effort, and it still did not provide real-time information

- Limited data elements were available to isolate issues, making translating the information into action difficult

In Winter 2018, SFS launched a CRM solution. For this first phase of our analytics journey, we focused on gaining foundational knowledge. We didn't initially define metrics to track or set goals for improvement; we spent time transitioning our email inboxes to be tracked and using the CRM's out-of-the-box dashboards to begin understanding our data.

2. How has using analytics impacted your department?

According to the *2019 NACUBO Study of Analytics*, 81 percent of business officers cited end users' inability to translate data into action as a barrier to leveraging analytics. Similarly, we had to address the question: How do we get team members to take action beyond just looking at the dashboards?

To help answer this, we moved away from using out-of-the-box dashboards. We created a dashboard suite of CRM data where the audience, analytics, and actions were clearly outlined for each tier in the organization.

Tier 1—Monitoring: Built for leadership, this executive dashboard includes analytics on three critical success factors: timeliness, accuracy, and client/student satisfaction. This enables leaders to confirm program strategies are meeting intended outcomes or refocus priorities.

Tier 2a—Strategizing: This dashboard provides leadership and senior managers with metrics on case volume, top accounts and clients, and top issues over time. Data are used to devise strategies to reduce case volume and ensure resources are available to support client needs.

Tier 2b—Executing: Built for supervisors, this dashboard provides insight into whether team members are meeting client demands and includes metrics such as total incoming cases and total cases closed. Supervisors determine if work and priorities need to be reallocated.

Tier 3—Immediate Action: Frontline agents view metrics on items such as how quickly staff are responding to clients, the number of reopened cases, and client/student feedback on service. Agents obtain a better understanding of what they are doing well and where they can improve.

3. Consider the principle "Invest in what you can. You can't afford not to." What was your approach to make your organization data analytics ready?

Colleges and universities have limited resources, so this is a challenging, but nonetheless vital, principle to uphold. UCSD's SFS director knew that to see improvements, she'd need to invest in her department's ability to leverage analytics. Making a bold move, she sacrificed a vacant position to create a new data analyst position. The team had to take on more work to make up for that lost position; however, in the long term, everyone understood the organization had to change and, in order to do so, needed to be data-informed.

Organizations can't rely on one position to provide data insights. To build up the department's analytical capabilities, we offered Excel training for team members to learn basic functions to mine and sort data. (Not everyone needs to know how to use a fancy visualization tool!) We also hosted a data literacy learn-at-lunch that provided tips on how to read charts and identify trends.

Hiring students is a cost-effective option if your organization is unable to hire permanent staff for analytics positions. For example, one of our students applied machine learning to our billing category to help us identify what new sub-categories we should create and how accurately the cases were being categorized. The student offered a new skillset and we provided a real dataset for them to analyze and apply what they learned in their academics. It was a win-win.

4. What advice do you have for your colleagues at other institutions?

Any organization that plans to make data analytics more prominent should be mindful of how data are presented.

Data transparency – Establish and widely share a clear purpose on why the organization is tracking the data and how they will be used. Having access to the data doesn't mean you should track them, so part of being transparent also being clear about what is not tracked and why.

Provide context – Data alone cannot be the source of truth. When sharing data, always provide context to what the end user is seeing. Did something happen that week to cause the data to spike? Were there unusual outliers?

Data integrity – Before making decisions, confirm the accuracy of the data. Conducting a secondary analysis may be helpful to ensure you are capturing the information you need to help make that decision.

Steps to Begin Your Analytics Journey

- **Hire a data analyst.** Then, commit to providing resources and tools for your analyst to be effective at what they do. This could be investing in a data visualization tool or hiring student employees to support the analyst.

- **Establish foundational data skills.** Educate team members on basic Excel skills and data literacy so they can get used to creating and understanding different views of data. You want to increase the analytical capabilities across your team and not solely rely on your analyst.

- **Get data in front of people.** Make it easy for team members to see the data by embedding the information in weekly data analytics emails. Don't rely on them to look up the data themselves.

- **Communicate responsibilities.** Define who's responsible for strategy, operations, and client support. Develop data dashboards so that staff are only looking at data that they need based on their responsibilities.

- **Be curious and ask questions.** Continue to have conversations about the data in various formats, such as emails and in team meetings. Ask "why" to challenge your team to look at the data in a different way and to encourage them to come up with their own analysis.