VOYAGE ADVISORY

TRANSFORMATION THAT GOES BEYOND TOOLS

How Voyage Advisory Helped
One Education Services Provider
Transform its Knowledge Management
Practices

College students have more options than ever before, and given the recent surge in remote learning, a student with the right qualifications can choose from nearly any academic institution in the world.

Our client, an education services provider, helps learners navigate that dizzying array of options. Their recruitment services team guides prospective students through every step of the process, from finding a school to preparing students for their first day of studies.

After years of company growth and various acquisitions, though, their processes had become less streamlined. They weren't able to execute as quickly or nimbly for their clients, and they were in danger of losing ground to competitors. They reached out to Voyage Advisory to help them identify issues and improvements so they could get back on track.

HELPING STUDENTS FIND THEIR LEARNING PATH

The process of choosing a college and degree plan is full of difficult questions. What do you want to study? Do you plan to take classes full-time or part-time? Would you like the ability to attend online? Are you a parent navigating childcare responsibilities while you study? The list goes on.

Our client employs around 400 enrollment advisors, or EAs, whose job is to take the answers to those questions and match prospective students with the right partner program. Behind the EA team are several other groups that play supporting roles, including the process improvement and excellence (PIE) team and its knowledge management subset. These teams are there to ensure that the company's tools and processes allow the EAs to do their jobs effectively.

PRACTICE AREA	PROJECT DURATION	CLIENT
SERVICE OPERATIONS	12 WEEKS	EDUCATION

Ultimately, our client's existing knowledge management database and processes were making it difficult for EAs to sift through information while on the phone with a prospective student.

DISJOINTED PROCESSES AND INSUFFICIENT TOOLS

As is often the case with established companies, our education services client had grown and changed over years in the business. They'd acquired many companies with methods and systems of their own, and these disparate processes were often thrown together with a focus on short-term continuity over seamless, holistic integration.

As a result, there was little consistency in how processes worked throughout the organization. One team of EAs serving one set of schools might have a completely different process than another team serving a different set of schools. The knowledge management system that housed all of the information EAs needed was disjointed and clunky to navigate, so EAs were creating their own cheat sheets in an effort to facilitate interactions with students.

As a result, when we stepped into the project, there was a disconnect between the customer-facing EAs and the other teams in the organization. Teams were sometimes working in silos, and when it came time to help a prospect, the execution had the potential to be frustrating and inefficient.

"The folks that are actually using the information and sharing it with learners don't necessarily feel like they know what's going on," said Donna Studdiford, Voyage Advisory senior consultant. "They feel like the information they need to do their jobs is hard to find, and it's not always reliable or up-to-date."

FROM A CLUNKER TO A CADILLAC

At the start of the project, we expanded on efforts the client was already implementing to bring these issues to light. Through focus groups and surveys, we were able to see how insufficient tools and disjointed processes were making it difficult for the company to deliver for its customers. Our client doesn't get paid until a student starts school, so inefficient processes pose a serious problem.

> "It is hard for organizations to change things, big things. It's very, very difficult. But when it's managed well, it goes so much more smoothly." — Donna Studdiford, Voyage Advisory senior consultant

To help them home in on a solution, we worked to determine the critical capabilities they needed so they could have a framework for comparing the various options available. After narrowing the field down to several promising candidates, our client decided on one of the leading knowledge management systems on the market.

Not only would this new system allow them to centralize their knowledge database, but it would also make it much easier for the EAs to communicate their needs to the PIE team, knowledge management group, and other support teams. With their new KM system, we were confident our client was on the right track.

SUPPORTING CHANGE WITH DEEPER TRANSFORMATION

A tool alone isn't enough to transform an organization's existing processes, which is why we made a point to offer additional change management support.

As Harry Marsteller, one of our directors, explains, "You could put the best information in the tool and make it easily accessible, but if people don't know it's there or how to use it — they're not going to."

It's this part of the process more so than choosing the right tools that often presents the biggest hurdle for organizations. The good news for our clients? Change management is one of the specialties of Voyage Advisory.

Change management requires a company to truly adapt to a new tool — not just at the point it was implemented, but at every level of the organization.

> "The change management process is largely about pulling everyone together to create a scenario where they're all working toward a desired change."

For our client, that means all internal processes will have to be reshaped to serve the ultimate goal of helping EAs better serve student needs and close the deal. As we work with them to fully implement their new knowledge management system, our goal is to help them ensure every change serves that end.

> "It was nice to be able to enhance the work that a small but diligent team is doing. They're improving the quality of working life for the folks who are on the front lines helping learners."

LET VOYAGE ADVISORY DRIVE HOLISTIC CHANGE FOR YOU

Big changes are never easy, but our client learned that the right tools and change management support could help them stay competitive and better deliver for their academic partners and students.

At Voyage Advisory, this is how we treat every client. We take a holistic approach — we listen, learn, and tailor solutions to fit your needs and drive results. **Reach out today to learn how we can help you tackle the next big change in your organization.**

Tech Spec	Solution		Function				
	Salesforce	Shelf	Recruitment Services	Student Services	Marketing	Partnership Team	Operations
Front line user change submission	Requires Customization	Out of the Box	Required	Required	N/A	Required	Required
Highlight/Communicate Changes	Not Offered	Out of the Box	Required	Required	Required	Required	Required
Ability to share content	Not Offered	Out of the Box	Required	Required	Required	Nice to Have	Required
Ability to tag w/metadata	Out of the Box	Out of the Box	Required	Required	Required	Required	Required
Content Approval by Item	Out of the Box	Out of the Box	Required	Required	Required	Required	Required
Integration with SalesForce	Out of the Box	Out of the Box	Required	Required	Required	Indifferent	Nice to Have
User/ Admin Experience							
Intuitive User Interface	Moderately Intuitive	Highly Intuitive	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Customizable view based on team	Unknown/ Unclear	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Filtered Search Function	Requires Customization	Out of the Box	Required	Required	Nice to Have	Nice to Have	Required
Ability to flag or bookmark content		Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Ability to link content in a series	Requires Customization	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Track Changes/Prior Versions	Not Offered	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Q&A Section	Requires Customization	Searchable Q&A	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Branding and Customization Available			Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Template Available	Requires Customization		Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Use Metrics to the User Specific Level (QA)	Not Offered	Out of the Box	Required	Nice to Have	Nice to Have	Nice to Have	Required
Public-Facing Self-Service Options	Out of the Box	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Change Management Support	Not Offered	Dedicated Team	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Required
Support for New Users	Not Offered	Training for new users	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Content Review and Approval							
Multi-tier Content Approval	Out of the Box	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Required	Required
Migration and Integrations							
Anticipated IT Involvement in migration process			Nice to Have	Nice to Have	Nice to Have	Nice to Have	N/A
Data Migration Support	Not Offered	Yes, No Additional Cost	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Integration with Teams	Not Offered	Requires Customization	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
Browser Integration	Not Offered	Out of the Box	Nice to Have	Nice to Have	Nice to Have	Nice to Have	Nice to Have
SSO Integration	Out of the Box	Out of the Box	Required	Required	Required	Required	Required
Tied to primary needs identified in discovery							

KM Tool Selection Assessment