

Determining When A Process Should Be Automated

*An InfoReady Self-Evaluation for Research Institutions
and Higher Education Administrators*



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How can higher ed administrators tell when a process should be automated?

Take our 5-minute workflow quiz to help answer the question...

Automating workflow processes in higher ed has become more common in the last decade, but at most colleges and universities manual processes remain the norm.

Would your program or department benefit from workflow automation? Each institution and situation is unique and this quiz will help you gain insight on whether exploring automated processes might be beneficial.

Question 1: How big is your current investment in a single workflow or process?

You may not think your current process involves investment because it doesn't appear as a budget line item. But what about the staff time committed to manually executing all the steps in a single process – for example, sending out invitations to faculty to submit a research or grant application, soliciting faculty reviewers for those applications, inputting data, distributing the applications and reviews to deans, vice presidents, and other reviewers, communicating award notices, fixing errors, and ensuring resources and next steps are made available?

Next, use the same lens to examine all the processes your unit is charged with executing. Don't forget to make note of the errors and glitches that occur during data entry, mistyped or direct-to-spam email, unopened and unread email, lost or absent attachments, repeated urgings to be aware of deadlines, and re-sending email blasts with the same information to help ensure response. They're part of your current investment, too.

If you can gauge how many hours of staff time are committed to such activities – and then ask if there may be more productive (and, from their perspective, more interesting) work for them to do – you've started to put a number on your current investment. In many cases, the cost of automating workflows, such as the research office example above, can be significantly less than your current costs in time and productivity, and greater savings occur with each additional cycle and process managed. It's also not uncommon that the cost savings will more than cover an investment in appropriate software – even including implementation and training.

Question 2: Does your program or department have multiple workflows that share a common format or structure?

The workflow example above is specific to a higher ed research office but shares a structure common to many college and university programs. That is:

- A solicitation is disseminated (call for research grant applications) to a constituency (research faculty),
- Who are encouraged to respond (applications and attachments),
- Responses in turn must be processed (reviewed by other faculty and administrators),
- Followed by a final decision (notice of award or no award), and
- Then transferred to an ongoing maintenance phase (budget office).

So if your institution offers summer camps for K-12 students, summer classes and programs for students at other colleges and universities, enrichment classes for adults, or any of hundreds of other programs, the workflow structure is probably similar. You solicit a constituency (via posters, email, web messaging, and letters to K-12 teachers and parents of local K-12 students, for example). Those interested will then respond with data, which has to be processed by staff members, reviewed to ensure correctness and payment receipt, then followed by a final decision (“your student has been enrolled in our summer STEM program, first session”).

The more similar workflows you and your colleagues can identify, the greater the likelihood that a workflow automation platform, like InfoReady Review, can be integrated into multiple programs – not only saving time and effort, but reducing errors and achieving dramatically greater engagement and improved outcomes.

Question 3: Are you pressed to achieve greater engagement and response for your program(s)?

If you use email, posters, direct mail, or interior web pages to engage your constituents – whether faculty, staff, students, alumni, parents, or external audiences such as community members and prospective students – you know awareness and engagement response rates can be abysmally low. Faculty and staff typically receive more email than they can reasonably attend to, and students and external audiences may never even notice your message among the hundreds and thousands of competing communications.

InfoReady’s Engagement Hub allows you to create a cloud-based Netflix-like graphics page of tiles, carousels, and “storefronts,” each of which can be clicked on to provide additional information, forms, payment options, and links.

How is it used? Some universities adopted the Engagement Hub to showcase, on a single webpage, all the opportunities available to faculty, graduate students, undergrads, and even K-12 STEM students. Others find the Engagement Hub is a perfect solution for presenting the full menu of

resources and activities available to audiences such as current students, alumni, or parents.

InfoReady's Engagement Hub integrates with InfoReady Review and also works perfectly out of the box on its own as a simple, easily implementable means of quickly presenting the full richness of your offerings on a single webpage that conforms to your institutional brand and style guidelines.

Question 4: Do you need more comprehensive and accurate metrics?

Today, everyone from presidents and trustees to accrediting agencies and legislators demands metrics, but manual workflows and processes make gathering data and data analysis challenging. Often, the inputs (solicitations and messaging) and outputs (grant awards, enrollments, volunteering offers, program attendance) aren't connected in manual processes, so there's no easily captured data on yield versus effort. Then each program's manual record keeping may have a different spreadsheet or information format that makes aggregating data challenging. Finally, manual workflow processes can rarely capture and present qualitative data – user comments, for example.

An automated workflow software platform, like InfoReady Review, seamlessly integrates metrics in every step, making reporting and analysis an always-available output.

Is it time to learn more about InfoReady Review?

More than 150 higher education institutions – from R1 institutions like Stanford and the University of Michigan to primarily undergraduate institutions like Indiana University of Pennsylvania – have gained dramatic benefits from automating their workflow processes with InfoReady. Chances are, your program, department, and institution could benefit, as well.

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