infoReady Scale™

Getting Started Toolkit

Table of Contents

Welcome to InfoReady Scale

InfoReady Scale is designed to help higher education institutions drive and manage awareness of your organization's internal and external opportunities, increase and provide insight into interactions, and significantly boost continuous engagement. For Scale Workflow users, the platform also provides powerful and easily used tools for metrics, analysis, and program administration.

InfoReady Scale is a highly robust and comprehensive platform that allows you to graphically showcase virtually all of the programs, events, and resources your campus offers – from the broadest institutional level to individual schools, colleges, programs, and even departments.

Scale's use of *tiles* to graphically represent those opportunities at increasingly more detailed levels (including down to *apply, enroll*, and *pay* options) means users can quickly and easily identify and access the information most important to them – without the need for confusing drop-down boxes, continuous scrolling, searching multiple webpages, or dead ends.

When users and site visitors can immediately experience the entirety of your opportunities – whether from a campus-wide perspective or that of a single unit, program, event, or resource – they more immediately engage with your institution and are significantly more likely to take action on that engagement.

Because InfoReady Scale has been developed to improve both the administrator and user experience, it's also simple to install and implement, intuitive to use for managers and site visitors, secure and low maintenance due to its Cloud storage, and the most cost effective way to draw attention, both on-campus and externally – to the depth and richness of your institutional offerings.

From design and development to implementation, maintenance, and user experience perspectives, we're confident InfoReady's Scale will exceed your expectations. But to get the most out of Scale, we've asked institutional administrators to share their best practices with you. Their "tips from the experts" below will help maximize your Scale success.

> *Start by Crawling…*
> *Chances are, after initial familiarization with Scale, you'll see applications beyond your specific need – ranging from relevance to similar programs in sister units up to those which could impact major functions, such as admissions or advancement, up to ones which could benefit the institution as a whole.*

But while it's important to keep future possibilities in mind (they could impact how you design or configure your tiles, carousels, and landing pages), starting small makes sense for most users.

That's because limited and incremental change is easiest for most people to understand and adopt. Starting small also offers both administrators and users "proof of concept" that will boost their confidence in Scale … plus make later applications and usage more acceptable.

Once You're Walking …

- *Streamline management opportunities*
    - *Ask what opportunities aren't in the Marketplace but should be*
    - *Ask who isn't yet engaged but should be*

- *Enhance the organization of your opportunities*
    - *Reorganize Carousels*
    - *Collaborate with InfoReady for advanced search implementation*
    - *Implement your first Landing Pages*

Then Start Running …

- *Check your performance indicators*
    - *Do constituents know that successful promotion begins with Marketplace inclusion of their opportunity?*
    - *Do constituents know that Marketplace is the first and best place to explore available opportunities?*
    - *Using web analytics, are constituents finding what they need?*
    - *Does keyword search lead to the relevant opportunities?*
    - *Are new Landing Pages needed?*
    - *Is it time to add more complex processes? Create new processes? Add InfoReady Workflow?*

The InfoReady team is pleased to provide the following guide to the world of Scale and the engagement and workflow capabilities it offers.

About This Toolkit

This toolkit is designed to help you structure your InfoReady Scale implementation with the support of your InfoReady Customer Success Team. In the process, we'll be developing your planning process, documenting key decision-making, assisting with implementation, and helping you chart longer-term strategy.

Topics covered include:

- Key terms
- Where to start
- Defining your vision
- Defining your goals
- Building your team
- Identifying and mapping key processes
- Developing your "Crawl, Walk, Run" strategy
    - Defining your success criteria/Which goals will you pursue in each step.
    - Measuring success
- Configuring the platform

Key Terms - The Anatomy of Scale

Throughout our documentation, and within Scale itself, there are a variety of terms with which you may not yet be familiar. Take some time to understand these terms, as they're the building blocks of the platform and will help drive your success.

Opportunity - A point of engagement with your organization. Opportunities may be events, resources, programs, job postings, research opportunities, funding opportunities, blog/news posts, products, etc. They are visually represented in the Scale Marketplace as *Tiles*.

Marketplace - A robust, searchable, and interactive catalog of opportunities within your organization. The Marketplace is the default view for users of the platform. As with any of the features within the top navigation of the platform, "Marketplace" may be renamed to suit your needs.

Tile - A visual representation of an opportunity within your organization. Tiles are showcased to your users within the Marketplace.

Learn More Page - A webpage that provides visually rich promotion of an opportunity. The feature includes a drag and drop interface to create and customize text, video, images, and more. A button on the Tile directs visitors to the page. The Learn More page also has a unique web address that can be shared for promotion on other websites, in email campaigns, social media, etc. Tiles can be created with or without or without a Learn More Page.

"Learn More" Button - The Tile menu allows users to click a "Learn More" link, a button, to view an opportunity's Learn More Page, if enabled. If desired, the label of the link displayed to users can be modified. If a webpage about the opportunity already exists outside of Scale, the Learn More button can be configured to link to that webpage simply by entering the webpage address.

"Apply" Button - Similar to the Learn More button, the Tile menu allows users to click an "Apply" link to begin an application (e.g., complete a form, RSVP, register, etc.) to a specific opportunity. The label of the link can be changed. If the opportunity is configured to include a workflow, the link will automatically connect to that workflow; if the application is managed by an external application, the link can be configured to link to that application by entering the web address for that application.

Carousel - Carousels are groupings of opportunities in the Marketplace organized around a particular theme (e.g., topic, event, audience, etc.) that can be presented to users and scrolled through via a horizontal interface. This allows users to gain information quickly about similar opportunities and take action. There are platform-level Carousels (e.g., “Recently Added,” “Favorites,” and “All”) as well as Custom Carousels you may create to include Tiles of your choosing.

Landing Pages – Landing Pages provide another form of organization of opportunities within Scale. While all opportunities are showcased in the Marketplace, you may wish to create and curate a dedicated location where users may explore opportunities associated with specific groups (schools, colleges, departments, offices, etc.), events (e.g., conferences), or audiences (e.g., prospective students, current students, faculty, staff, community partners, etc.). Each Landing Page has a unique web address that can be included on existing websites and in existing communications with which your constituencies are already familiar. Landing Pages allow you to leverage existing infrastructure and points of engagement to drive awareness of the broader landscape of opportunities within your organization that are showcased in the Marketplace. You may also consider offering Landing Pages to specific groups within your organization to help drive their participation in your implementation of Scale.

Workflow - A collection of steps that together define a process or part of a process. Multiple workflows may be connected (“daisy-chained”), allowing information gathered from one part of a process to be accessible within another part of a process (for review, other processes, etc.).

Search - In the Marketplace and within Landing Pages, users may refine opportunities of interest via keyword search.

Advanced Search - Within the Marketplace, in conjunction with the keyword search, you may choose to develop search facets that allow users to refine opportunities via any number of categories and subcategories. This feature is typically explored during the crawl-phase, developed with InfoReady during the walk-phase, and then refined overtime with the insight of user analytics.

Top Navigation

About - If enabled, the About section of the platform appears to all users, those with and without accounts. Using the same interface as the Learn More Pages, you can use this section to inform users about your organization and your Marketplace. “About” may be renamed.

Dashboard - Any opportunity may be associated with Workflow tasks a user is requested to complete (e.g., register, RSVP, complete an application, complete a payment, etc.). Users see assigned tasks in their Dashboard in the top navigation menu. “Dashboard” may be renamed.

Manage - The Manage section of the platform allows administrators to create new Tiles and Workflows, as well as view and edit existing Tiles, Workflows, and Users. “Manage” may be renamed.

Admin - The Admin section of the platform allows administrators to configure the look and feel of the platform, including colors and branding. This is also the location where Custom Carousels may be configured. “Admin” may be renamed.

My Account - “My Account” includes a user’s profile information. Users may change passwords here, as well as view any applications or reviews they have completed. “My Account” may be renamed.

Workflow Step - One of many activities in common processes. Workflow steps are easily configured and connected to one another to meet the needs of a clients’ process. Current step types include:

- Form Step - An administrator customizes a form to present to users for collecting certain information. Users complete and submit the information. Information can then drive other steps of a process.
- References Step - A user is asked to identify individuals who can provide references for the user. The user provides their names and email addresses. Individuals are contacted via email and receive a link to complete a reference form that has been configured by the administrator of the process.
- Payment Step - A payment form solicits payment information from a user and completes a payment transaction.
- Approval Step - An administrator configures the parameters of an approval or review, including identifying what information from an application a reviewer can see.
- Wait Step - This step halts further workflow steps until a specified date.
- Flow Condition - The Flow Condition can be used to terminate a workflow based on a single form response.
- Content Page – Similar to a Learn More Page, a Content Page allows an administrator to display information to a user for review. The step is often used to confirm that a user has been presented with certain information, much like an acknowledgement.
- Programming Step - This feature provides a convenient interface for sorting applications into any number of groups.

Where to Start - Crawl. Walk. Run.

Scale helps build awareness of your organization's opportunities, drive engagement with them, and generate insights into the relationships thus created. To these ends, Scale's power lay in its flexibility and extensibility. Unquestionably, there's a great deal of utility right "out-of-the-box", but the more you explore Scale and creatively apply it to additional elements and facets of your institution, the more you unleash its robustness and ultimate value. Of course, as with any new business tool, your implementation of Scale will involve people and processes – the "human factors" issues that can challenge and even compromise success.

Because our objective is *your* ultimate success, we've learned that projects may fail or generate resentment because they try to tackle too much too quickly. To that end, we've learned that InfoReady users are most successful when they adopt an incremental "crawl, walk, run" approach to implementation – that is, viewing technologies as *tools to help support success* rather than simply solutions to problems. While your implementation of Scale will begin with its configuration and creating opportunities within the Marketplace, overarching success will depend on your ability to generate excitement about, support for, and awareness of your project across the institution. Adopting an incremental approach will best support that success, so let's take a look at what your crawl, walk strategy might look like.

Crawl

During the *crawl* phase, focus on immediate changes you can execute fairly quickly and easily. Changes should be within (or closely within) your authority to make. Typically, the emphasis here is on the *discovery* and *organization* of existing opportunities into your Marketplace, followed by the *promotion* of the Marketplace itself and opportunities within it (For Workflow users, we generally don't recommended changing existing complex processes during the crawl phase.). This progression starts to generate the buy-in from others within the organization necessary to reach the *walk* phase – *highly* visible results seem to be a great motivator!). With that buy-in, the end of the crawl phase is the ideal time to engage *core* constituents to get feedback, reevaluate next steps, and prepare to walk.

> Pro Tip: It's tempting to try and plan out *all* opportunities you want to include in the Marketplace, how you want them to be organized, and how you want individuals to be able to find each through Scale's Advanced Search. It's best, though, to avoid that temptation and create quick wins by creating tiles for the most immediate opportunities. Then share the Marketplace with your team and with select constituents. You'll generate excitement as the Marketplace ceases to be an idea and begins to come to life. Offering opportunities for feedback is important, too, as these insights will be invaluable when you begin to organize the Marketplace.

Walk

You're ready to walk when a greater part of your organization is "on board" with the Marketplace – when they see the value and want in, too! Working together with this larger group, you might consider:

- How to streamline the creation and management of opportunities in the Marketplace
- What opportunities are not in the Marketplace but should be
- Who is engaged in the project and who isn't but needs to be
- How to enhance the organization of opportunities within the Marketplace
    - Reorganizing Carousels
    - Working with InfoReady to define and develop facets for Scale's Advanced Search
    - Implementing your first Scale Landing Pages
- Identifying lightweight processes that could be implemented with Scale Workflow (e.g., event registration, RSVPs, sign-ups, simple application and review processes).

At the end of the *walk* phase, you should see that buy-in from the end of the *crawl* phase transforming into greater collaboration in the promotion of opportunities across your organization. More constituents are discovering that that your Marketplace is where they should go to learn about all you have to offer and you're starting to see increased engagement through the cross-promotion of opportunities in the Marketplace. You're beginning to receive insights about the value of the opportunities you offer and who your organization is serving through those opportunities. You have the information you need to pick up the pace.

Run

There are two key performance indicators of success with Scale that you're up and running:

- Individuals within your organization know that the successful promotion of their opportunities begins with promoting them in the Marketplace.
- Constituents know your Marketplace is the first stop in learning about all your organization has to offer.

If you are walking and ready to pick up the pace you might consider the following:

- **Reorganize the Marketplace.** Work with InfoReady to take a look at your analytics. Take a step back to inspect all of the opportunities that have appeared in your Marketplace. For example, you may want to take a look at your Advanced Search facets: Are users finding the opportunities they're seeking? Are the keywords users search for matching up to the opportunities in your Marketplace? Are the right opportunities in the most appropriate Carousels? Are the Carousels ordered well? Is there a need for new Landing Pages? Taking the time to optimize Scale to enhance organization and the discovery of opportunities is critical to success for the obvious reason: If users can't find the opportunities they're seeking, they'll quickly disengage.

- **Analyze Users.** It's important to take a step back from time to time to look at *who is* and *who is not* engaged:
    - *Are there any key constituencies you are not engaging?* Why are they not engaged? How might you engage them?
    - *Are there any unexpected surprises about who is using the platform?* How did they become engaged? Is there an opportunity to advance engagement?

  Understanding your audiences is critical to engagement. Scale analytics can help refine your strategy to build more robust engagement. You may also consider engaging those constituencies that are not engaged directly. Using Scale Workflow to develop a survey that can be shared with these constituencies is one way to bring them into the platform and gain insight into their experience.
- **Add more complex processes.** Processes involve people, and the more complex the process, the more people are typically involved. As such, processes become an opportunity for engagement. If you are a Scale Workflow user, identify some critical or more complex processes you may want to replace, support, or enhance with Scale.
- **Create new processes**. Every process requires time and support. Perhaps there are business needs for which you have not had the time or resources to support. Or there may be processes (and the personnel involved in them) that could benefit from greater efficiency.
- **Add Scale Workflow.** If you are not a Workflow user and wish to drive greater engagement in the platform, it may be time to consider adding Workflow to Scale. Again, processes involve people. If people have to use the platform to complete a process--even the simplest of processes--you will drive awareness of the Marketplace and cross-promote other opportunities of which users may be unaware.

Before developing the *crawl, walk* strategy right for you, it's important to first develop your vision for Scale, as well as the tactical goals to realize that vision. In the following pages, you'll find some resources to support your planning.

Define Your Vision

When starting a new project, some organizations agonize over the vision statement to the point where it becomes a stumbling block to getting things off the ground. Seeking to avoid this problem, other organizations forego creating a vision statement altogether, opting instead to focus on the goals of the project. There are risks to this strategy, too:

- The goals need some orientation and context; the vision statement provides this.
- Without a vision statement, the scope of the project can quickly become too large *or* too small to make the intended impact.
- Forgetting the vision when making key decisions during the course of the project can lead to risky, unexpected, or unintended outcomes.

Your vision is simply a point of reference. It's likely not going to be 100% right, as there will be unforeseen circumstances and new information uncovered (a good problem!) along the way. However, referring to your vision statement will keep you in the direction of "right" and will almost certainly keep you from heading in the wrong direction. Consider the following the following prompts to help you get started with defining a 1-3 sentence vision for your implementation of InfoReady Scale:

- By implementing a Marketplace, we seek to…
- We wish to drive engagement by…
- We are striving to create greater access to opportunities to…
- Our Marketplace will...

Begin to craft your vision statement below…

Define Your Goals

Most often, organizations reach out to InfoReady because they are trying to solve a problem. Others reach out to InfoReady because they're seeking to create new opportunities. Regardless of your starting point, identifying the challenges and opportunities you seek to address with Scale – as well as any barriers or constraints – will be paramount to success.

Just as important as defining your goals is prioritizing them. For each goal, we recommend first identifying the phase of implementation you believe is most appropriate – crawl, walk or run – before developing a project timeline. Once you've identified the phase for each goal, you can take a step back and begin estimating a reasonable timeline for each phase. Your goals will define your timeline.

When working with our clients, we like to add one final note about identifying your goals: goals are fluid. There will be unforeseen circumstances that arise and new information discovered during the course of implementation. These will bring to light new challenges and unlock new opportunities that may require re-prioritizing or amending your goals. These may also impact your timeline.

Map Your Key Processes

While your initial implementation in the crawl or walk stages may include only lightweight processes, it's never too early to start mapping the key business processes you're looking to create with Scale Workflow. As complex processes involve many individuals and transactions, it's generally the case that no single individual knows all the "ins and outs" of any process. Often enough, there are steps that happen "behind the scenes" that may not be well understood. Bringing together all the individuals involved in a process to map out the complete process is essential to preparing for Scale process implementation.

Identify Who is Involved

There are any number of roles that individuals play within any process. In addition to identifying who is involved in a process, it's also important to identify the role of each individual. As you consider the individuals involved in your process, you might also consider the following roles.

- Process Owner - This is the individual who is responsible for managing and overseeing the objectives and performance of a process. This individual also has the authority to make changes to the process to achieve process objectives.
- Data Owner - Within a process, this is the individual responsible for determining what information goes in and comes out of the process, how that information is be collected (including format of questions, prompts, and data fields), and why that information is important for achieving the objectives of the process and any subsequent or higher level processes.
- Process Administrator/Manager - This is the individual who is responsible for the day-to-day management of the process, including delegating assignments to process executors (defined below) regarding quality control, timing, etc.
- Executor - Executors are individuals responsible for performing essential activities within certain stages or steps of a process. Typical activities for executors include providing, reviewing or approving information within a stage or step of the process, processing information, or communicating with other executors and stakeholders within the process. Communication roles include verifying to stakeholders and/or other executors that information has been received, reviewed, approved, requires attention, etc. Individuals applying to, registering for, or requesting information through a process are also executors.
- Stakeholder - There are often individuals or organizations outside of an organization who rely on the information gathered within or outcomes of a process for subsequent processes or analysis. These stakeholders should be included in your process mapping to ensure that your process enables or enhances their activities.

Use the table below to identify a process, who's involved, and the role each individual plays in the process. Use the roles outlined above or describe the roles in ways that make the most sense to you.

Process:	
Who is involved?	**Role(s):**

Map Your Process

There are many ways to map your process – from narratives to "sticky notes," chart paper, software, and others. At InfoReady, find it helpful to use a grid system and a narrative to map our processes (see the example below). While the tools are up to you, what's important are the steps you follow to create your map and the information your map conveys to others.

Follow these guidelines to help you map your process.

1. Determine the beginning and end points of the process.
2. Identify each step between the beginning and the end.
3. From beginning to end, for each step identify:
    - What triggers it
    - What happens within it
    - Who does it
    - How you know it's finished
    - Who needs to know when it begins, ends, or is incomplete, and how they are notified

4. Put the steps in order
5. Review and edit with all involved to ensure accuracy
6. Identify pain points in the process and opportunities for improvement

Remember, map your processes as they exist today, not how you envision them within Scale.

Example

State University operates a program for current 9th through 11th grade students. The goals of the program are to identify and develop talent in science, technology, engineering, and mathematics (STEM) and to generate interest in applying to State. To achieve these goals, students must apply to participate in the program. It is offered twice every summer; each session is two weeks long and housing is provided. Due to space, funding, and staffing constraints, each session can accommodate only 30 students. Students may participate in the program only once.

The Map

<table>
<tr><td colspan="2">Step 1: The application becomes available to students online.</td></tr>
<tr><td>Trigger: January 1 of each year</td><td>Who does it? Marketing Coordinator</td></tr>
<tr><td colspan="2">What happens? The program manager provides the marketing coordinator with the web address for the new application. The marketing coordinator adds the link to the application on the program's website and includes an announcement on the Department's homepage. The announcement is distributed via email to high schools and high school teachers.</td></tr>
<tr><td colspan="2">When is it complete? When the application link is available on the program website. Applications are accepted until the March 31st deadline.</td></tr>
<tr><td colspan="2">Notifications:
1) The marketing coordinator emails the program manager when the link has been added to the program website and provides the website address of the page where the link is hosted.
2) Constituents receive announcement via email.
3) Print flyers are distributed to schools.</td></tr>
</table>

Step 2: Students begin applications.	
Trigger: Students	Who does it? Students
What happens? Students are asked to provide biographic and demographic information about themselves and their parents/guardians. They are asked to write 3 short essays to express their interest in STEM, their college and career goals, and why they are interested in this program in particular. They are asked to provide contact information for two recent teachers who can attest to their interest in and aptitude for math and science. They identify which of the two sessions they prefer and are informed that if they are accepted to the program there is no guarantee that they will be assigned to their preferred session.	
When is it complete? When the application and recommendations are complete.	
Notifications: Teachers identified as recommenders receive an email with a request to complete and submit the recommendation form.	

Step 3: Students complete applications.		Step 4: Teachers complete recommendations.	
Trigger: Students	Who does it? Students	Trigger: Program Manager	Who does it? Teachers
What happens? Students complete biographic and demographic information about themselves and their parents/guardians. They submit their 3 short essays via file upload.		What happens? Until applications are complete, the program manager monitors applications. As soon as students identify teachers as recommenders, the program manager emails the teachers to request their recommendations. Teachers complete a form online to submit their recommendations.	
When is it complete? When the application and recommendations are complete.		When is it complete? When the recommendation is completed and submitted and the program manager has matched the recommendations to a student's application.	
Notifications: Students receive a message on screen when their applications have been submitted successfully; they also receive an email confirming the successful submission.		Notifications: Teachers receive a message on screen when they have submitted their recommendations successfully; they also receive an email confirming the successful submission. PAIN POINT: This is a very time-consuming, manual process. Ideally, teachers would be notified automatically when students provide contact information and applications would be matched up with recommendations automatically when recommendations are submitted.	

Step 1: Completed applications are assembled for review.	
Trigger:	Who does it?
What happens?	
When is it complete?	
Notifications:	

Exercise: Develop Your Crawl, Walk, Run Timeline

Timeline

Exercise: Organize Your Marketplace

Crawl

Walk

Run

You're the authority on the opportunities you have to offer. You know how to find them. And you're implementing the Marketplace because you want others – who don't know how your organization is structured and shouldn't need to know – to be able to discover those opportunities. How might individuals unfamiliar with the opportunities, or the way the opportunities are organized and administered within your organization, find each opportunity?