

From: Cathy Wilhelm
Date: September 11, 2012
To: Project Management Group
Re: Process Improvement Hobsons' Retain Message Review

Basic Assumptions:

- The Hobson's Retain communication tool is not being utilized to its maximum effectiveness. The intended purpose of many of the messages is not readily apparent. Many messages are not being opened, read or acted upon by the intended audiences.
- There is no formalized system for continuing to train faculty and staff to utilize the system. As a result, Hobson's Retain is not being utilized consistently across the campus.

Synopsis of Proposed Changes:

- At the time the Hobson's Retain messages were originally crafted, student use of mobile devices to access e-mail was not as prevalent. In the current climate, the messages need to be rethought for length, content and appearance. Graphics which were developed to be viewed on a traditional computer screen should be removed or – in the case of logos – moved to the bottom of the message to be sure that students immediately see the most relevant portions of the message.
- Many current messages do not get quickly to the most relevant points. A brief but detailed Hobson's Retain style guide will be developed to help guide users of the product in crafting their messages. Subject lines and opening sentences are of particular concern. Messages should be shorter; use bullet points when possible; have a specific call to action; provide an accessible point of contact for follow-up.
- Some users of the system do not adequately utilize the filtering capabilities of the product. It is the opinion of the work group that irrelevant messages reduce the likelihood that all messages will be widely read, reducing the effectiveness of the system. Part of the style guide contents will address the capabilities of the system. In addition to the segmenting and targeting capabilities, users of the software should also use the system's statistical tools to evaluate the effectiveness of their past messages and improve future results.
- Academic alerts should communicate a greater sense of urgency. Unread academic alerts and alerts that have not been acted upon should automatically trigger a follow-up message. Other mediums of communication should be considered for the most urgent Hobson's messages that have not garnered a response.

- Current users of the system should be able to access information about how they should be utilizing Hobson's Retain. Colleges, schools and departments across the campus should have access to training and help in utilizing the system to accomplish relevant goals. A formalized central point of contact should be established for educating users, encouraging best practices, reviewing use and effectiveness, and continuing to train new users of the system.

Additional Recommendations:

- Appoint a Hobson Administrator from the Student Affairs Division to manage the system, processes and provide training.
- Some longer messages that include large quantities of crucial information could be converted to shorter e-mail messages that direct recipients to a PDF attachment or web page containing longer, more specific information.
- Because statistics show that students are not reading e-mails in great numbers, the people communicating through the Hobson's system should consider that using more than one communication vehicle will increase the effectiveness of their messages.
- Create an ongoing Hobson Message review team to maintain check and balances in order to meet the standards of best practices set by this team. Timelines: Fall messages reviewed January, Spring messages reviewed May and Summer messages reviewed mid-August. Team members should consist of Hobsons Administrator, experience users. Term will be a two year appointment, with new members attending the August meeting. For the beginning of this review team a certain number of members will have to serve three years in order to secure a set rotation.
- Develop a request for access form for Hobsons with approval signature Dean/Director/Designee level.
- Hobson administrator receives report of employees leaving the University in order to remove their Hobsons' access.
- Develop training materials to be used for approved campus users. Users will not receive access until they have attended training.
- Review and improve the Hobsons templates that are being currently used to meet the standards/best practices developed by the team.
- Create webpage for central location for Hobsons information for campus users; FAQs, guidelines and list of authorized users.
- Add Hobsons to university A-Z list.
- We understand that Hobson's Retain pulls data from Banner but does not export data to Banner. We also understand that eCourseware pulls data from Banner but does not export data to Banner. With the expansion of our online courses, there may be a reason to pull information from eCourseware for Early Intervention. ECourseware tracks the log-ins and time online of students. This may be vital information to find at-risk students. It may be necessary to consider this more fully in order to determine if the information contained in eCourseware needs to be populated in Hobson's Retain. There may also be reason to encourage faculty to use eCourseware for their on-ground courses in order to track certain student engagement when attendance is not taken in larger classes.

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