An Administrator’s First 90 Days and Beyond: Creating a Winning Strategy to Drive Change at a New Workplace

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We help busy engineers stay sharp, bright and ahead of the herd since 1975.
My First 90… 120… 270 Days

Vision: (adapted from Michael Watkins’ “The First 90 Days”)
- Get up to speed and set a course for the organization by
  - Discovery
    - Past, Present, & Future
  - Strategy
  - Secure Early Wins
  - Achieve Alignment
  - Build the Team
  - Manage Success

Vs.

Reality:
- Discovery
  - Past & Present
  - Future???
- Strategy (started)
Insights

Discovery revealed organizational gaps

- Broken Processes
- Unproductive Team Dynamics
- Silos
- Reluctance to Change
- Budget realities
  - Different Processes
  - Different Expectations
  - Different Market Position
- Customer / Stakeholder Perceptions

Needed an unbiased way to measure internal and external organizational gaps to facilitate strategic planning & organizational renewal
Baldrige Criteria / Core Values

• Visionary Leadership
• Customer-Driven Excellence
• Organizational & Personal Learning
• Valuing Workforce Members and Partners
• Agility

• Focus on the Future
• Managing for Innovation
• Management by Fact
• Societal Responsibility
• Focus on Results and Creating Value
• Systems Perspective
Baldrige Criteria / Assessment Criteria
Evaluation (SmartPlan360™)

(Formalized internal and external data collection and analysis)

• Organization / Management
• Products / Services
• Sales / Marketing
• Market / Model
• Competition
• Customers
SmartPlan360™ / Overview

- Strategic Assessment for Professional Continuing Education and Corporate Colleges
- Understand the specific “Perceptions” of Your Organization and Market
- Provides you with the business market intelligence you need to make strategic decisions leading to continuous improvement and growth
Here’s How it Works

Measure BOTH your **Internal** Organization’s and your **External** Audience’s views.

- Online surveys are conducted
  - Organization’s Staff
  - Customers/Stakeholders
- Post-survey individual executive interviews
- These research methods probe both strategic and organizational issues

Your total market  ➔  Assess your market
The Heatmap

Measure your true market position and strength:

✓ 6 Foundations
✓ 24 Areas of Analysis
✓ 10 Objective Criteria
✓ Compare your Inside View to your Markets!
✓ Determine what to add, delete, improve, and change
✓ Confidence comes from market knowledge
Strategic Recommendations

Your organization’s “Composite Score” is based on the results of the total analysis:

- Each foundation has its own score
- Specific strategic recommendations are provided for each foundation
- You learn what your organization is doing best and how to improve

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<tr>
<th>Foundation</th>
<th>Score</th>
<th>Recommendations</th>
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| Organization | 58%   | - Determine areas of constraint for financial management that are impeding the company's overall management performance.  
- Restructure the management team into three centers of influence including management of executive, financial, and marketing.  
- Create an integrated management team approach vs. independent executive approach.  
- Transition all financial modeling to new CFO. |
| Products/Services | 72% | - Broaden installed base of core distributors throughout North and South America.  
- Systematize product and services.  
- Develop product portfolio to move customers from services to products.  
- Identify key product-service tracks to build customer base in major markets.  
- Begin to build online training platforms to support product management. |
| Sales/Marketing | 72% | - Transition from Sales to Profit forecasting/tracking focus.  
- Create Top 100 target list; put online to track progress; create sales strategy.  
- Develop integrated marketing program that drives from core idea and strategy to relevant company from training only to a total solutions provider.  
- Move from instructor only training to blended training solutions (in-person, online). |
| MarketModel | 54% | - Determine the size and profit the company requires to pay for the investment at the larger scale.  
- Define value proposition to uniquely meet customer needs of the growing company.  
- Financial Management: Lumi Services to Financial Goals and create ROI product-market modeling scenario including Marketing/ROI tracking. |
| Competition | 96% | - Identify top competitors and their value propositions and services they provide.  
- Create effective sales strategy to overcome larger scale competitors.  
- Create Public to Corporate Partnerships (P2P) to deliver unique certifications that meet trade and industry standards the competition does not offer. |
| Customers | 80% | - Develop system to better forecast and track customer engagements and share information throughout company using an online CRM program.  
- Identify known key players of top 10 association board of directors for referrals.  
- Develop proactive referral network program for sales team to drive.  
- Determine Lifetime Value (LTV) modeling of target customers to determine appropriate investment leverage to attract and retain existing customer base. |
Implementation Timetable

- Priorities are established based on the results of the Heat Map:
  - Priorities are ranked
  - Strategic initiatives are designed
  - Workgroup tasks are assigned
  - Timeline and budgets are created
Benchmarking

Guiding your organization: Moving from **Best Efforts** to **Best Practices**

1) **Growth Maturity** is your organization’s goals and services aligned and integrated

2) **Growth Stage** where is the organization based on corporate metrics including annual revenue, employees, and the assessments

3) **Knowledge and Strategic Position** how does your organization compare to your competition based upon core knowledge
   1) Innovator
   2) Leader
   3) Viable Competitor
CLEE’s Results

We Discovered 3 Areas for Growth:

1) **Roles and Organization Alignment** need to be reassessed within the multi-departments of CLEE

2) **Program Management** needs to change to more frequently engage with customers to develop programs customized to specific industry needs through:
   - New program development
   - Existing program evaluation
   - Program portfolio management

3) **Business Development and Marketing** needs a **unified** sales program to significantly increase both academic and non-credit training programs
We take leading engineers and make them engineering leaders.
My First 90 450 days…
The Administrator’s New Life…

Soma Chakrabarti, Ph.D.
Director, Continuing Studies
Professional And Continuing Studies
Division of Professional and Continuing Studies
Functional Units

Website: http://www.pcs.udel.edu
The PCS Budget Model-ADAC

- Responsibility-based budget model of UD
- Academically decentralized, administratively centralized PCS
- Allocated cost – support for academic support services
- Self supporting noncredit programs
Observations in 90 Days

• Extremely operation centric
• Innovation is not fostered (noncredit)
• Not many existing college partnerships
• Systematic talent development is missing
• Paper-based separate processes (as opposed to digital, one platform) in academic support services
• Well defined tactical plan but measurement metrics not so well defined
Identification of Issues

• Need to motivate staff, identify optimal structure
• Need to have a strategy for future
• Need to innovate new programs
• Need to change the way we work; get a comprehensive MIS!
• Need to bring CHANGE
  – BUT can I change the culture or should I learn the culture and then change the way we work?
Key Questions to Answer

• Why do we do what do we do? (finding the meaning?)
• How can we align ourselves with the University’s new strategic plan? (justifying our existence?)
• How can we measure ourselves? Metrics? (accountability?)
CS (APP) Present Organizational Chart (Still flat, but leaner)
Finding the Guiding Light
At the Core

- Delaware first
- Diversity
- Partnerships
- Engagement
- Impact

Our Mission

Making positive impacts in the non-traditional learners’ lives through services and programs
Where are we?

A Self-Assessment Model for Quality Management and Organisational Development for Continuing and Professional Education

Other models considered:
• Malcolm Baldrige Model
• Balanced Scorecard
IACCE Quality Program for Continuing Education: Self Assessment and Benchmarking Tool for CE Administration

Reference: http://www.iacee.org/quality_program.php
IACCEE Quality Program/EFQM Model

Five enablers, four results; we measure ourselves against these criteria.
Each criterion has sub-criteria. We assess ourselves, score based on the levels. Then plan for improvement, set next level.

**SUB-CRITERION 3a: HUMAN RESOURCE MANAGEMENT**
The organisation has processes to recruit and manage its human resources.

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<thead>
<tr>
<th>Definition of Levels</th>
<th>LEVEL 1</th>
<th>LEVEL 2</th>
<th>LEVEL 3</th>
<th>LEVEL 4</th>
<th>LEVEL 5</th>
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<td>Quality depends solely on the individual (no processes)</td>
<td>Process awakening (basic processes)</td>
<td>Vision through processes, professionalisation and a guarantee of quality (intermediate processes)</td>
<td>Systematic assessment and improvement of processes (sophisticated processes)</td>
<td>Aiming for external excellence (excellent processes)</td>
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The institution recruits staff for the organisation. The organisation’s management does not participate in the definition of criteria for personnel recruitment and management. Strategies are not coordinated with staff recruitment.

The request for staff includes a definition of the profile required for positions other than management. The institution does not allow staff to take part in the selection process. People are mainly seen as an expense.

The organisation’s management defines the profiles and the selection process of all technical, administrative and management staff. There is documentation which outlines the staff policy of the organisation. There is a definition of task profiles related to the strategy of the organisation.

The organisation has defined tasks for each employee. Management’s processes include necessary competencies required for the tasks and their development. Staff policy is considered within the context of the strategic plan. The staff policy is agreed upon by the management and work teams and reviewed regularly.

The organisation defines competency profiles for the future. It has a diverse, multidisciplinary, innovative, and international combination of human resources. Innovativeness is a shared value of the organisation. People are seen as an investment. There is consensus among the staff, management, and the governing board on human resource management policy. The staffing policy is used as a benchmark, and becomes a national and international point of reference.

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IMPACT REPORT; first step
http://bit.ly/1PsEbQW

Credit
- 8,502 served

Online Courses
Credit courses offered in a flexible, web-based format
- 6,194 served

Continuing Education Nondegree
Credit courses for part-time, nondegree seeking students
- 2,308 served

Osher Lifelong Learning
- 3,690 served

Noncredit
- 2,740 served

Professional Development Courses
Offering a variety of ways to build credentials and move careers ahead
- 1,248 served

Conferences
Helping professionals further their education in their specific fields
- 590 served

High School Programs
Giving qualified high school students opportunities to get a jump on their college education
- 132 served
Next step: finding the challenges and opportunities

The Challenges and Opportunities
Challenges

- Global competition
- Delivery needs to be quick and convenient for the learners
- A formal degree is no longer the only answer
- Smart technology infrastructure needed for programs and services, and for smooth operation
- Trained/skilled administrators are often hard to get at all levels
Opportunities

• To provide outstanding administrative support services to the University partners
• To make affordable, accessible, quality professional development education using advanced technology to learners throughout the world
• To make societal contribution to Delaware and beyond (positive impact that can be felt….)
Four imperatives

- PEOPLE
- PARTNERSHIPS
- PROCESSES
- PLACES

PROGRAMS and SERVICES
Impactful Educational Opportunities

Learners
Communities and Organizations
University
STRATEGIC GOAL 1 – PROGRAMS AND SERVICES
INNOVATE OUTSTANDING PROGRAMS AND SERVICES THAT POSITIVELY CHANGE THE LIVES OF LEARNERS, COMMUNITIES AND ORGANIZATIONS WHILE SUPPORTING THE UNIVERSITY’S MISSION

- Number of innovative programs
- Technology driven services
- Measuring programs impact
- Measuring services impact
STRATEGIC GOAL 2 - PEOPLE
DEVELOP A TALENT MANAGEMENT SYSTEM FOR DIVISION EMPLOYEES THAT WILL FOSTER DEVELOPMENT AND RETENTION OF PASSIONATE, SKILLED PEOPLE

• Increased staff commitments and participation
• Transparency in communication
PEOPLE
Soma’s Dream for CS (APP):
Collaborative and simplified structure
No silos
Networked

ACCESS
Nontraditional Students Advising and registration

Digital Learning Management including State Authorization

Noncredit Professional Development Program Management

Noncredit registration, reporting, research and information
STRATEGIC GOAL 3 - PROCESSES
DEVELOP AGILE, TECHNOLOGY-BASED, SEAMLESS PROCESSES AND SYSTEMS THAT PROVIDE STRONG SUPPORT FOR PROGRAMMATIC AND SERVICE DELIVERY

• Increased data-driven decision making
• Increased staff time for building newer programs and providing quality services due to less time spent on routine, repetitive, manual tasks
Now

- Advising database
- Corporate engagement CRM spreadsheet
- Noncredit CRM database
- Noncredit Registration CENC
- Separate Spreadsheets for Budgets
- Online administration database
- Separate Spreadsheets for Reporting
- Separate Spreadsheets for Reporting
- Marketing reports
- Marketing analysis
PROCESSSES
Where we want to be:

- ONE SYSTEM
- Integrated
- Easy reporting
- Data driven decision making
STRATEGIC GOAL 4 - PARTNERSHIPS
DEVELOP SYMBIOTIC PARTNERSHIPS WITHIN AND OUTSIDE THE UNIVERSITY TO HELP PROVIDE EXCELLENT SERVICES AND DEVELOP NEW INITIATIVES

• Increased number of corporate and UD partnerships
• Increased number of programs and services resulting from such partnerships
STRATEGIC GOAL 5 - PLACES
EXPLORE AND SECURE PHYSICAL SPACES TO ENSURE CAMPUS VISIBILITY AND TO CONSOLIDATE MULTIPLE SPACES IN NEWARK, ENHANCE EFFECTIVENESS OF EXISTING SPACES

• Increased space utilization
• Increased collaborative services and programs
• Increased staff time due to consolidation of spaces
Where We Are Now

• Innovative program development fund awarded
• Position descriptions of all 40+ staff completed
• Needs assessment done for MIS
• Partnerships with four colleges
• Places – temporary arrangements made but no permanent space allocated; we’ll be in the Master Plan
450 days... 
and later ... 
I’m still learning!

Thank You!
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RECOMMENDATIONS

OUR LESSONS LEARNED
STAFF

Spend considerable time in your first few months getting to know your inherited team.

Don’t make direct reports feel like they are being “grilled” or re-interviewing for their jobs in the process.

Avoid actions that may feel controlling or micromanaging to staff.

Keep in mind, your inherited direct reports are already established in the workplace culture.

Be cautious when considering taking away responsibility, autonomy and authority from staff. Find out first what they are used to owning.

Listen more than talk.

Establish mutual respect and openness
ORGANIZATION

Diagnose the internal political workplace landscape before you leap. You need to know the elephants in the room and where the bodies are buried so you don’t unwittingly step on a land mine.

Who has power? Where do loyalties lie and why? Who has credibility and why?

How are communication channels open or closed?
What do people care about most?
How do decisions get made?
How much decision making power do you really have?
How do resources get allocated?
Do NOT demonize the past.
Look forward with hope.
Understand BOTH the internal and external perceptions of your organization
RESOURCES


IACCE Quality Program -
[http://www.iacee.org/iacee_quality_program.php](http://www.iacee.org/iacee_quality_program.php)


Four ways leaders fail in their first 30 days -

When you're the new boss: how to manage the transition -