Surviving SIS Conversions & Upgrades

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Housekeeping

- **About Me**
- **About UTRGV**
- Disclaimers
- Who's in the room?
- Why is this an important topic?

Housekeeping

- About Me
- About UTRGV
- **Disclaimers**
  - **The presenter and this presentation are not perfect :-O**
  - **This presentation and its ideas are not all inclusive**
- **Who's in the room?**
- Why is this an important topic?

Housekeeping

- About Me

- About UTRGV

- Disclaimers

- Who's in the room?

- **Why is this an important topic?**
  - **Your SIS is the backbone of campus operations and the lifeline of students.**
  - **Supplemental software; data transmission; data extraction; data exchange.**
  - **We get buried in the technical.**
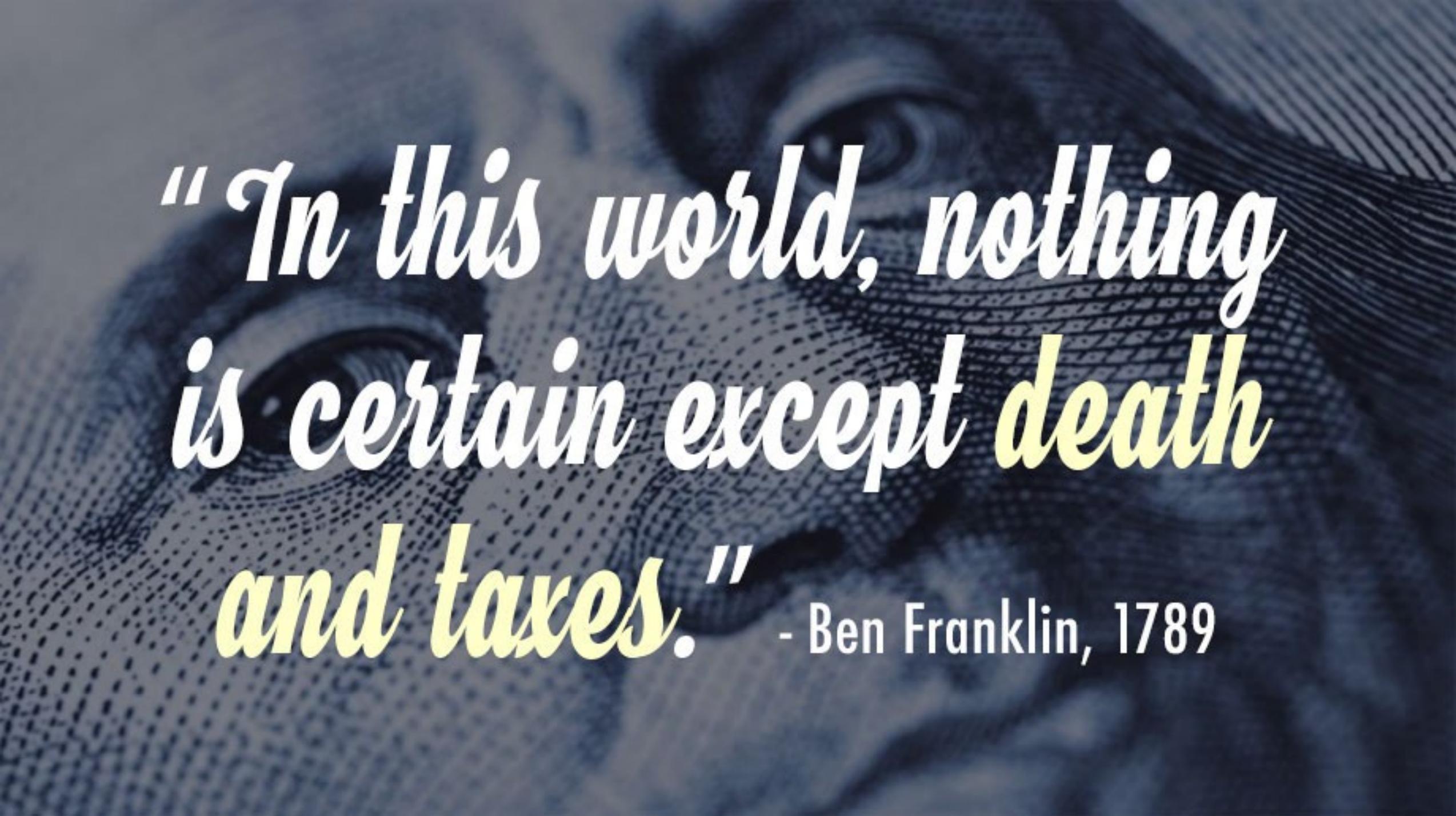
" In this world, nothing is certain except death and taxes."

– Ben Franklin, 1789
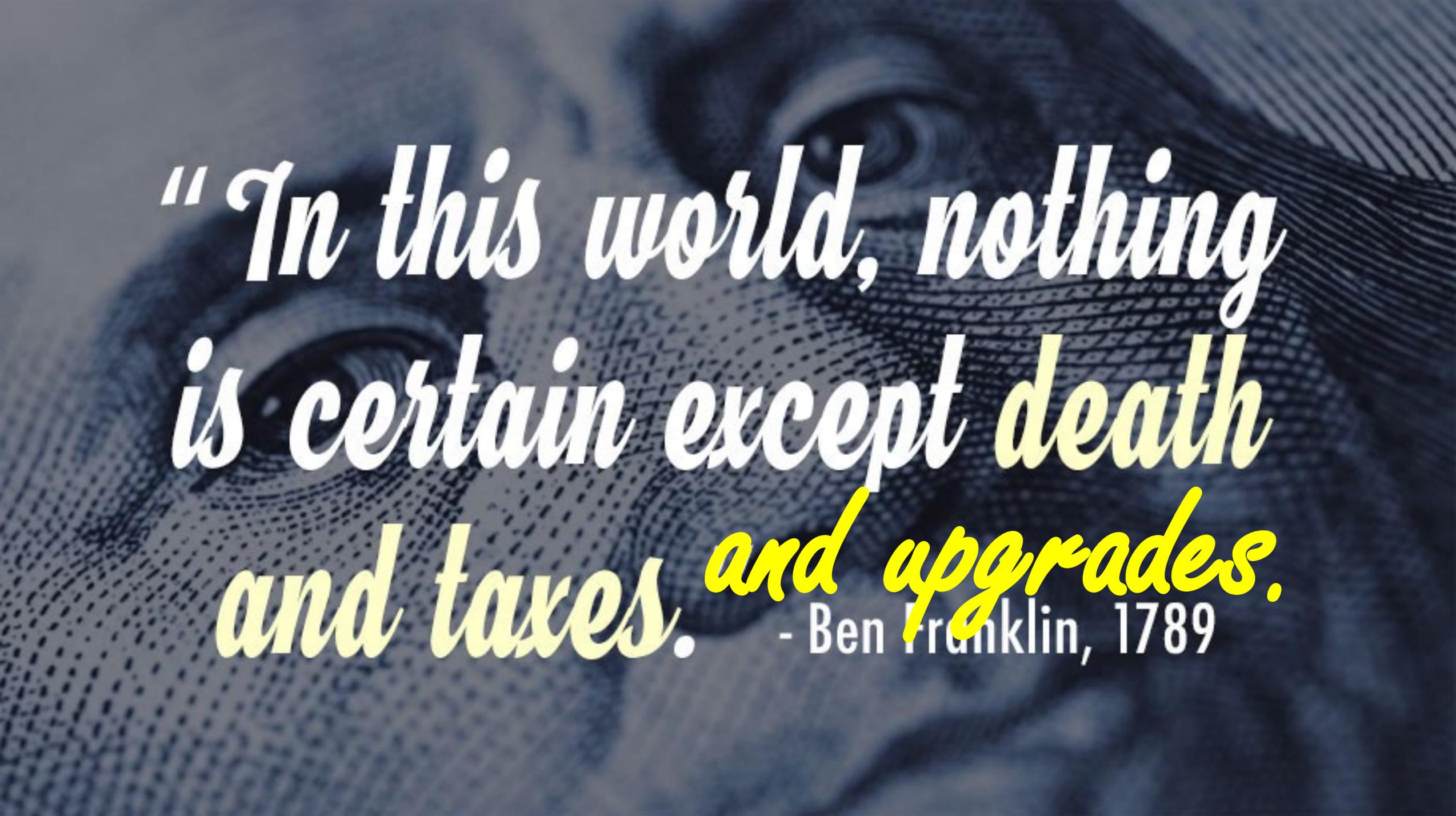
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Roadmap

I.   Why Upgrade?

II. Tools:
  - Timelines
  - Resources: People, Skills, Groups; Colleagues and Counterparts
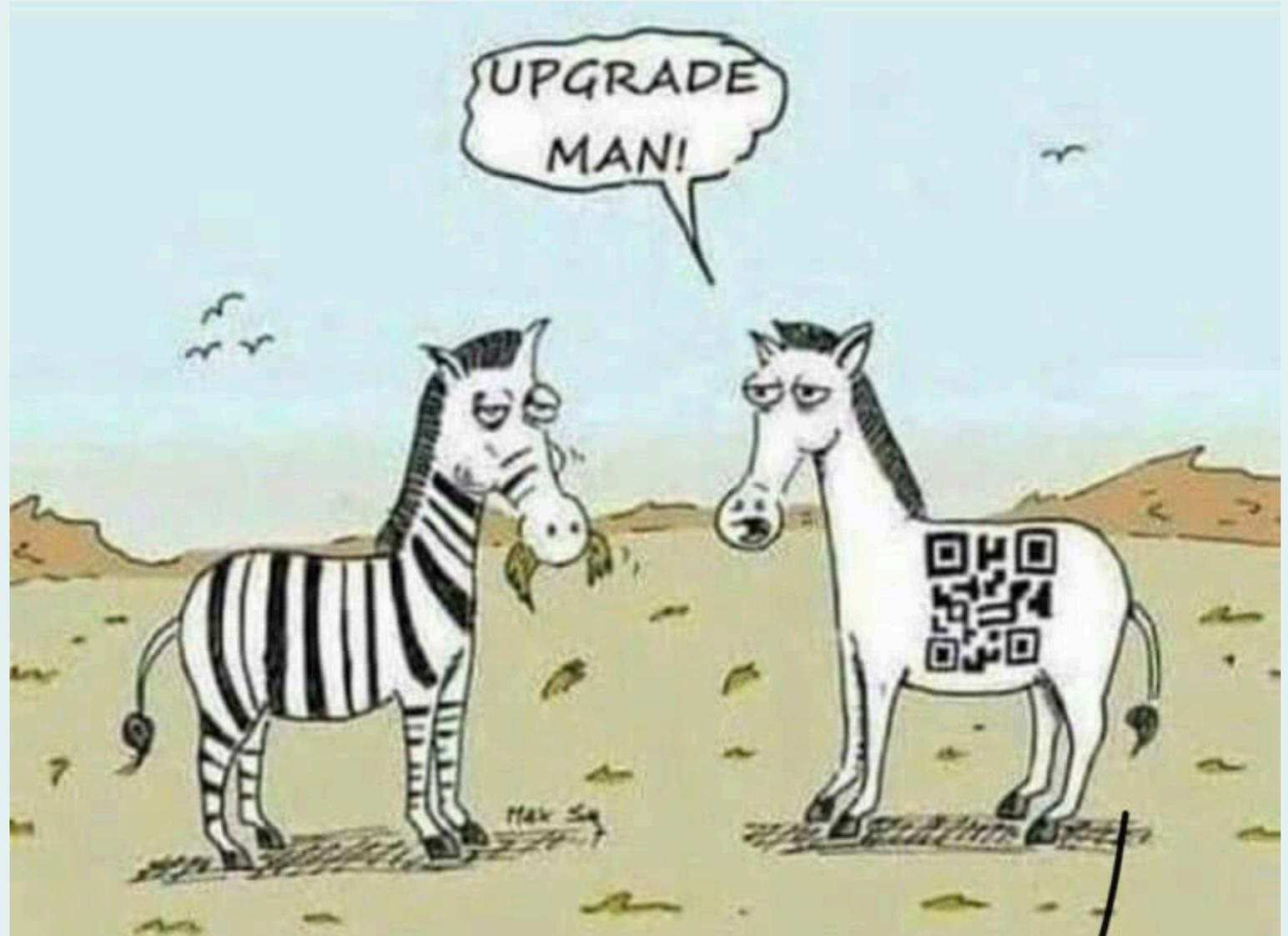
III. In Retrospect:
  - Good Ideas
  - BAD Ideas
  - Other Thoughts

IV. Show & Tell

I. Why Upgrade?

- Because I said so!
- But seriously…

…Why Upgrade? (cont'd.)

- Upgrades to a student information system and the functions related to it are not uncommon.

- Upgrades are often done to evolve with technology and achieve improved aesthetics and navigation.

- If an institution does not upgrade, there is inevitable loss of support from the vendor.

II. Tools: Timelines

Quick Story: My Aunt Dolores (we assume poor punctuality!)

Assume delays!

Use status meetings to hold each other jointly accountable but *not to waste each other's time*

See the timeline, breathe the timeline, BE the timeline

Create a calendar in MS Outlook that you can overlay with yours (will demo)

II. Tools & Prep: Resources

- **People/Skills**
  - Who's pitching, and who's out in left field?
  - It had to be you?   Nope; not true. Empower others to have important roles, too!

- **Coordinate Groups and Choose Contributors Strategically**
  - Heavy users (not addicts) → those that heavy utilize your SIS and/or certain functionality
  - Veteran nay-sayers → those that resist change and tend to be pessimistic
  - Tough audiences → those that always give your office a hard time; that means they usually are very involved and pay attention to detail

- **Colleagues and Counterparts in HE: Check with them! Get feedback!**
  - OACRAO, for example; Registrar buddies (or others)
  - *Other SIS/system/software clients!!!*
  - And, yes, the vendor and/or consultants

II. Tools & Prep: Getting Ready

- A Good Offense is the Best Defense
- Consider Conflicting Priorities – but be realistic
  - It is **never** a perfect time to implement. Just avoid major overlapping implementations (such as, *for example*, SIS change plus a CRM change and catalog software)
- Your BAs, Programmers, Developers
  - Know your *existing* modifications
    - Purpose?
    - Obsolete?
    - Alternatives!
    - Make no assumptions – include stakeholders if purpose/need are not fully known and understood
- Anticipate Disappointment

III. In Retrospect:
An Upgrade in Review – BAD Ideas

- **Status Meetings** (they can get tiring and frustrating if folks don't pull weight)
- **Optimism**: Assume the worst; Celebrate the opposite
- **Faculty Users v. Student Users v. Staff Users**
  - Same needs? Same challenges?
  - It's not all about the size of the population.
  - What changes can they expect?
    - Example: "College Scheduler"

III. An Upgrade in Review – Good Ideas

- **Status Meetings** (they are frustrating, but helpful)
- **COMMUNICATE – to EVERYONE about the changes, in advance!**
  - Senior leadership; Faculty; Students; IT
    - Email
    - BB (LMS) Messages
    - Portal announcements
    - Social Media
    - TV Screens
  - Campus Community/Partners
    - Make the rounds: FS; Faculty; One Stop Shop; Academic Advising; Councils.
    - Be ready to respond; be sympathetic.
      - Consider blocking calendars to be readily available to address concerns, demo, screen-share
    - Be mindful of your words! Productive/constructive language. Positive.

Explain why this is being done. Be approachable.

III. An Upgrade in Review – Good Ideas (cont'd.)

- **User Guides Galore** (showcase of UTRGV's web-accessible resources forthcoming)
  - Written
  - Video
- **Zoom, Zoom**
  - Presentations were similar, but tailored, because... **One size does not fit all.**
  - Live!
  - Record 'Em
- **Find Your Zen**
  - Be Available: Calls, Emails, IM
  - Follow Through!
  - Delegate!

III. An Upgrade in Review – More Thoughts

- Luxury List
  - Second and third tier priorities
  - Enhancements
  - *YOU CANNOT FIT IT ALL IN*
- Plan to never let it go.
  - Follow-ups
  - Tier 2 and 3
  - Recurring meetings
  - Repurposed meetings
- Don't worry about what you can't control, but **be cognizant of what you can influence**.

IV. Show & Tell

- User Guides
- Calendar Overlays
- Dialogue