Pathify Playbook

The Secret Ingredients to a Successful Student Portal Launch

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Congratulations.

You've decided on a new student portal solution! But choosing a new solution is only the first step. Now it's time to get it implemented, launched and drive engagement. Unfortunately, a portal project can stall at any of those phases. Fortunately, we have some secret ingredients to help you keep things moving forward to portal success!

What You'll Learn

- What's needed for a successful launch
- Who should be involved
- Examples and inspiration from real-world launches

Who's Involved

- IT
- Marketing & Communications
- "Customer" stakeholders (students, faculty, staff, alumni ... anyone who will be using the portal)
- Your vendor-side implementation team*

**This playbook assumes you've selected a portal provider, but most of these tips still apply if you're building a solution in-house.*

PHASE 1:
SETTING THE STAGE

Before you dive into the nitty gritty, everyone involved should be on the same page regarding timelines and initial outcomes.

Engage “Customer Stakeholders”

Hopefully stakeholders from multiple departments were involved in the portal evaluation and selection process, so you should already have an idea of what they want and how they’d like to use the portal. But if they weren’t, get them involved now to make sure your plans align with real end user needs and expectations. (If they don’t, the portal will sit unused.)

When developing launch goals and setting up key personalization aspects, roles and features it’s important to keep end users in mind — or better yet, run your assumptions and plans by them. At the end of the day, they’re the ones who will be using the portal the most, so their opinions matter more than most!

Understand Your Launch Goal

This is a big project, so define your initial launch goal. You can launch quickly or you can launch with all content in place, but launching quickly with all content can be incredibly stressful. Discuss the most important outcomes and decide how to get there. Maybe you want to roll out the portal to a small group or for a specific use case first then build from there. Or if you have time, it may be more important to get everything fully in place before launching. It really depends on your institutional priorities.

It's incredibly important for all stakeholders to be involved in this discussion so that no one is surprised or disappointed when the initial launch doesn't meet their expectations.

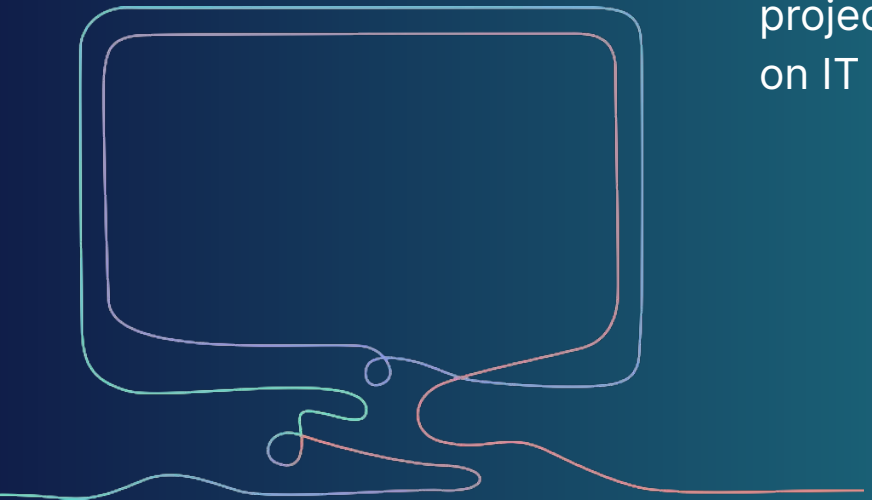
Have a Detailed Timeline

Working with all key stakeholders — especially your vendor implementation team — put together a detailed implementation timeline. This should include milestones, key deadlines and the important players for each phase. If you're looking to launch for a specific event (like new student orientation or the start of a semester) keep this deadline in mind when building the timeline.

The goal of the timeline is to make it clear to everyone who is doing what, when and what interdependencies may exist. Without it, the project is at risk of slipping or dragging on. Use this document as your roadmap and status checker during regular project check-in meetings.

PHASE 2:
IT'S ROLE

While all stakeholders should be aware of the project status, these next set of steps fall largely on IT and the vendor implementation team.



Gather Integration Tech Specs

This is where the rubber meets the road so to speak. You have a chosen solution, now you need to actually build it. Start by documenting exactly what you'll need then start gathering the required information. If you're working with a portal provider, your implementation team can give you the exact tech specs you'll need to get everything integrated and in place.

- What data to expect to be pulled into the portal?
- What systems are you integrating with? (SIS, LMS, etc.)
- What information do you (or the vendor implementation team) need to get those integrations set up?
- Do you need any user information to come over in SAML? Or will all the information come over through a flat file?

Understand How Integration Data is Shared

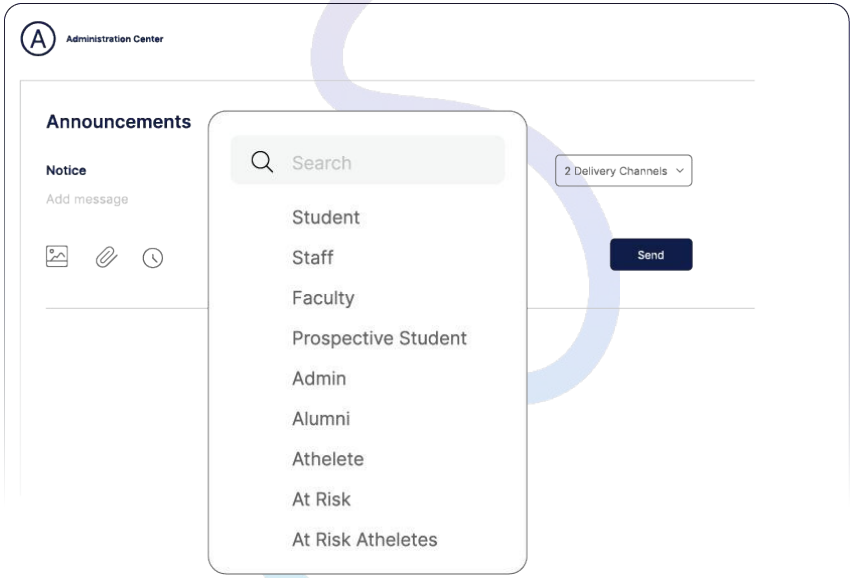
While this is technically part of gathering integration tech specs it's often overlooked, so it's worth mentioning separately. You'll be pulling a lot of important information into the portal and that information may come in many different formats depending on the system, software or provider of origin. Knowing whether data will be integrated via end points, SSH tunnels, flat files, etc. will make the integration process run smoother.

This is particularly important because some software vendors limit what data you can export from their systems. You don't want to be 80% of the way through implementation only to learn that you can't pull important data into the portal. In some cases your portal vendor will have already experienced this request and may have a workaround, so clear communication around expectations is vital.

Set Up Portal Personalization

The key to any successful portal is a highly personalized experience that shows each user only what they need. (There's no reason a freshman should see information about ordering a graduation cap and gown.) You should begin defining user roles early in the process. Start broad (class, major, campus) then get more granular (e.g. "London study abroad students" or "athletic scholarship students") based on your institutional need. A portal with the ability to add users to multiple roles is vital. No one fits into a neat box and you shouldn't treat them like they do.

Don't forget to account for roles beyond just students. The most successful portals engage everyone involved with the university including faculty, staff, administrators and even alumni and prospective students. Each user role should have access to specific features, integrations and information based on what they specifically need to see or would find valuable.



Define Your Ownership & Admin Plan

Ideally, a modern portal or campus engagement platform should make it easier on IT, not harder. The key to this is letting go of a little control … in a controlled manner. Give certain users or user groups permission like the ability to:

Create and edit pages within the platform

Create or update events

Send announcements, alerts and other in-platform communications

Review and approve new groups, pages, comments, etc.

This allows IT teams to shift some of the heavy lifting and daily maintenance and gives high level users an deeper sense of ownership and buy-in.

Even amongst IT, designate an owner(s) for the portal who will be responsible for regular maintenance, permissioning, updates and other necessary tasks you don’t want to move outside the department.

TRANSITION PHASE: IT + MARKETING & COMMUNICATIONS

While multiple departments should be involved throughout the process, there are a few areas where the teams really need to collaborate to ensure a successful launch.

Re-Engage “Customer Stakeholders”

Once the platform is ready (or almost ready), return to your key stakeholders and have a few early adopters from each user group start using it. While it won’t be fully functional, this is a great opportunity for IT to gather some early feedback and make adjustments with minimal disruption.

If you have a compelling new portal, re-engaging stakeholders will also help you build excitement and develop user-advocates. Marketing and communications teams (or whoever is responsible for promoting portal adoption) should also take note of what users particularly like. These are excellent talking points to incorporate into marketing campaigns. Just like with stakeholder involvement at the beginning of the project, knowing what real users actually enjoy is significantly better than assuming what will resonate with them.

Create Content & Populate the Portal

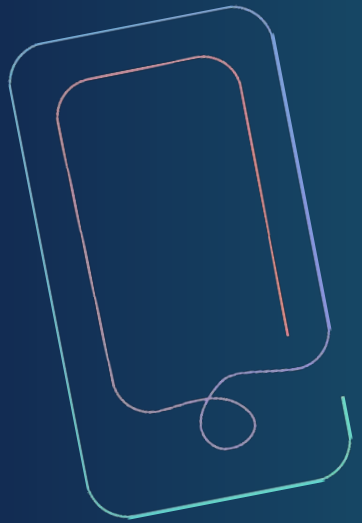
There will be many pieces of the new portal that are pulled via an integration or iframe, but there will also be instances where new content and components need to be created or populated.

This should be a multi-department task as different departments have different expertise and can highlight areas that others might accidentally overlook. Student and academic affairs naturally think about different things than IT or the enrollment office and that's fine. The key is to invite all these voices to the table so that the end result is a robust portal that puts critical information and tools at a users' fingertips before they even know they need them.

To make sure this runs smoothly create a tandem project plan that identifies:

- What needs to be manually created in the portal
- Which of these elements are required for initial launch
- Who's responsible for creating, reviewing and approving each element (make sure these users have the correct in-portal permissions!)
- Necessary timelines and deadlines

PHASE 3: MARKETING & COMMUNICATIONS



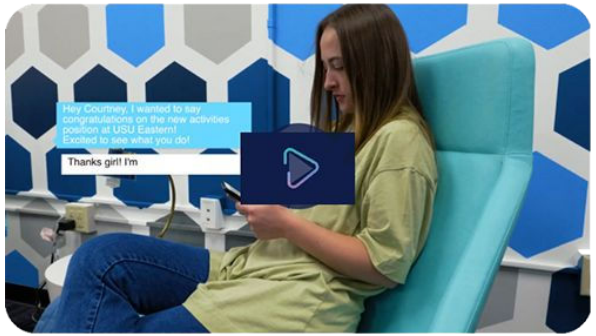
This is where we really start seeing the transition from the technical side of things to the promotional part. Planning for this phase should begin well before the portal is ready to launch and will drift throughout the platform's lifecycle. You need to actively promote the portal with every new class or group of users, so elements of this plan will be evergreen or evolve with time.

Craft a Launch Marketing Campaign

Even the most amazing portal will sit unused if students, faculty, staff and other users don't know about it. This is where a robust marketing campaign comes into play. Craft a comprehensive communication plan that spans multiple touchpoints across different media.

Many institutions who successfully launch new student portals or engagement platforms start drumming up excitement early with emails, tweets, banners around campus and other ways to get the information in front of students. The most successful take it a step further with videos or giveaways.

You can also schedule in-person portal showcases or training sessions, especially as part of new student orientation. Be sure to offer these showcases and trainings as videos as well for students who don't attend in person. Having "how to" videos generally available can help students master the new platform in their own time and avoid frustration and abandonment.



Design an Engagement Plan

Many higher ed teams mistakenly think that a launch plan and an engagement plan are the same thing. While they share similar elements and do overlap, an engagement plan is longer lasting and designed to drive *continued* engagement well beyond the platform's initial launch.

The best way to drive continued engagement is to make the platform a tool that students, faculty, staff and other key personas actually want to use. This means it's helpful to them (important messages, grade information, event calendars, etc.) but it also needs to have an element of fun. If it's all business you're likely to see user attrition no matter how useful the portal is.

To keep students continually engaged, institutions have found success with things like weekly trivia nights, scavenger hunts, movie or books clubs and in-portal social groups. You can also create an ambassador program to help further encourage adoption and engagement. Giving students access to a virtual ID card via the portal to make sure their ID never gets left behind is another way to make it an invaluable tool.

No matter what approach you take, making sure the portal is appealing and stays top of mind is key to sustained engagement.

TOP TAKEAWAYS

Introducing a new student portal or engagement platform is a big undertaking, but when planned and executed properly it can have a hugely positive impact on student life, engagement and success. These secret ingredients to a successful portal launch may seem overwhelming, but they really boil down into a few overarching takeaways.

It’s a multi-departmental effort

One department alone cannot launch a successful portal. It takes input and active help from multiple departments to understand the full breadth of needs then build and promote the final product.

Involving stakeholders is key

From ensuring portal features align with real user needs to making sure all the necessary (and helpful) information is included in the platform, you’ll need to engage stakeholders outside of the people working directly on portal implementation. Don’t be shy about asking for input. The more people feel like they have a say in the platform, the more good will and ownership you build toward the new solution. Plus, there’s no way that one person or department can realistically understand what every user and department needs. The experts are there, so lean on them.

Have a defined vision & an understanding of desired integrations

Know what you want it to do, then make sure the portal solution you're working with can meet those requirements. Divide your feature and functionality lists into "must haves" and "nice to haves." If scope creep occurs, make sure it's truly a "must have" before inserting it into the project.

Remember, some integrations may never work as you envision because the data source limits exports or data sharing. This has nothing to do with the platform you select and will still be an issue even if you build an in-house solution. You simply cannot integrate data you can't export from the source system.

"If you build it, they will come" does NOT apply here — you need to market it!

This isn't baseball. You'll need to put effort into advertising and promoting the new platform if you want people to use it. Create comprehensive marketing plans that tease the new portal before launch, has a big advertising push during launch and includes on-going marketing to support continued adoption and engagement. Until the solution becomes fully ingrained as an indispensable part of the collegiate experience, you need to market it.

Thank You.

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