

# Maximizing the Efficiency of Your Academic Workflow

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## The Case for Technology



# MAXIMIZING THE EFFICIENCY OF YOUR ACADEMIC WORKFLOW: THE CASE FOR TECHNOLOGY

## *How can software help maximize workflow efficiency on your campus?*

Workflows are part and parcel of any large organization. In order for a decision to be made in accordance with your institutional policy, it has to pass through any number of steps, hands, and sanity checks. Workflows around shared governance decisions, especially promotion and tenure, require even more diligence when it comes to getting all the right voices heard.

But workflows can also be a major drag on efficiency and source of error. A poorly planned or executed workflow can cause major problems for both the people who spend their precious time on committee decisions, and the institution's bottom line. How, then, is it possible to maintain the right balance of process and efficiency?

Major higher education research firms recommend that institutions seek technology to help streamline workflows around academic decisions and faculty workflows. Currently there are technologies on the market that help tackle the distinct needs of academic institutions seeking refinement of their workflow processes (without losing any of the necessary rigor or customization required by higher education); when seeking this type of software, keep in mind the following ways institutions can leverage technology to make their campus's workflows as efficient as possible, without disrupting academic requirements or engagement.

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## 1 Technology should make your workflow visible.

One of the most common points of inefficiency in an institution's workflow is simple lack of documentation. Are you—or those at your institution—aware of every step in the process of a promotion or tenure decision? What about the difference in those processes across your institution, in various colleges and schools? Finding technology to help you clearly see every step of your process is the starting point for creating a more efficient system. Do some colleges have a better system for moving a decision forward than others? Start to find where your workflow is working well and then seek to adjust where you can. Simply visualizing your workflow will help you catch processes that are out-dated or inefficient.

In your initial quest to document your process, don't forget all of the associated

details that make up the sum total of your workflow. Seek tools that help you visualize not only the steps of a decision, but also the documents, information, committees, and people associated with each step. Are there standard document types that are required across campus? What about institutional questions that need to be answered by every candidate? Any points of insecurity where privacy might become a concern? Do all decisions need to go through a single standing committee near the beginning or the end? It's a daunting task, but luckily there are tools that help bring all this information into a central location from which you can organize your process.

***Recommendation:*** Look for a software platform that helps you visualize your workflows at the institutional, college, and departmental level in order to create consistency and eliminate slack; consider the inclusion of all documents, permissions, committees, and personnel information in a workflow as a mandatory requirement in your software selection.

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## 2 Technology should help eliminate the busy work.

Once you document the steps of your process, you can start to see obvious places to clean house. Often, institutions have a workflow that's overcomplicated because there are whole steps of the process dedicated to administrative logistics (if there a step at your institution that's wholly dedicated to someone printing, copying, collating, or re-titling packets of documents, then it's time to think about how technology can help).

One common logistical sinkhole is printing and document distribution: does the solution you have found allow online review of the sort of large documents typically included in a hiring or tenure decision? If administrative functions like requesting and distribution materials are rolled into each step of a workflow through automation,

then the process for an academic decision can often be reduced by multiple steps.

Seek technology that helps you eliminate purely logistical steps by eliminating major functions like email communication. If the software does not include a method to replace email for the most basic of workflow tasks—alerting committees to new materials, updating applicants about the stage of a search, requesting external evaluations on behalf of a tenure candidate—then you're not truly gaining efficiency through technology.

***Recommendation:*** Make sure your software choice covers the basics of academic workflow logistics, such as document collection and distribution, online review, and communication between committees, administrators, and candidate/applicants.

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## 3 Technology should standardize workflows.

Many higher education institutions require that every decision follow the same general workflow, even if it stops off at different departments and colleges along the way. Rather than hope individual schools and departments follow centralized rules, think about investing in a solution that allows you to create a centralized template for any number of workflow “types” on your campus (for example, a cross-institutional “Promotion to Associate Professor”). These templates should not only define the path of a decision, but also the documents and permissions associated with each step. Share these templates across your institution in order to make sure the basic process remains the same.

Sometimes, colleges or schools within a larger institution will have an entirely autonomous process for how they handle decisions—often with the exception of a final step that occurs on the institutional

level in the Provost’s office. In these cases, look for software that allows you to create distinct templates for each college or school (for example, “Promotion to Associate Professor in the School of Engineering”), but still accommodate the need for a final decision at the institutional level.

Ideally, the software you choose will also allow individual departments to modify any template you create, so they aren’t entirely locked into something that doesn’t align with their needs. Forcing colleges and departments to create workarounds because they’ve been saddled with a structure that doesn’t work for them is counterproductive. The right software will allow you to standardize and meeting compliance guidelines without sacrificing customization where appropriate.

***Recommendation:*** The right software solution will include a template or similar feature to create standardization across campus; importantly, however, it should include options for flexibility whenever possible to match institutional requirements.

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## 4 Technology should standardize information.

Standardization doesn't just pertain to the steps taken in a workflow. Perhaps there are other areas in which standardization would help your process. Simple things like committee naming conventions and how you collect materials can be formalized across your institution, even if the steps of review need to remain distinct between departments and colleges. Document management—which docs you require from faculty, how they are named and organized, and who has permission to view them at each stage—is another area where you might require more or less standardization across campus.

An often overlooked aspect of the tenure workflow process is the collection of information beyond a candidate packet or dossier. Think: does your institution want to know something about every job

applicant or promotion candidate? Perhaps there's a need to ask every tenure candidate the same question at the start and mid-way point of the process; or maybe you're seeking some standard collection of external scholars/evaluators who contribute to your institutional review.

The best academic workflow software will include forms to automate the collection of information at various stages of the process, so you can be sure that information and data is automatically included in the steps of your committee work. Whatever solution you find, make sure that it allows you to customize how you and your colleagues interact with documents and information so you can precisely match your institution's workflow needs.

***Recommendation:*** Seek software that doesn't overlook critical issues like permissions and document management; decide if it's important to gather data throughout your process and make sure your chosen solution includes options for both data collection and display.

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## 5 Technology should include the right people.

Nothing is more inefficient to your workflow than including more people than are necessary in a meeting or decision. Not everyone needs to see everything, all the time. Most institutions have a number of individuals who require access to the decisions being made in a tenure workflow, but aren't actively involved until the final decision. Other folks might have the initial responsibility of organizing or creating a sin-

gle case or decision at the department level, but then might not be needed as the decision travels higher at the institution.

If you're seeking a software solution to assist your workflow, try to find one that gives you the ability to invite or recuse people as necessary so that you maintain the security and efficiency of your decision-making process.

***Recommendation:*** User management is an important element of your software selection; make sure you're able to invite or recuse users in a way that maximizes efficiency and matches your existing privacy and security requirements.

**Conclusion:** Technology has the ability to tackle the most frustrating parts of your academic workflows, like logistics and repeatable processes, but it isn't an end of itself; at best it's a piece of the puzzle. Smart academic decision support software works best when driven by users who map their process onto the product and make it feel integral to the institution. Once you've adapted a piece of software to reflect the nuances of your institutional process, however, a truly powerful software tool should become invisible to users, so that faculty and administrators are left only the most vital elements of the task at hand: viewing the right data and information to make strategic, informed decisions make sure you're able to invite or recuse users in a way that maximizes efficiency and matches your existing privacy and security requirements.