To get a sense of what’s new in digital, blink twice: helpful, innovative products are cropping up everywhere. But to build an institutional structure for digital engagement that will stand the test of time, organize once—smartly and creatively.
Change is now our norm. The last decade has produced a rapid and stunning transformation in digital behavior. Students arriving on college and university campuses in the fall of 2014 were born in 1996; back then, college students visited a physical location—a computer with a modem on a desk—to connect to the Internet and their new electronic-mail accounts. By the time today’s freshmen were in kindergarten, 62 percent of U.S. adults had mobile phones. Once the students reached middle school, iPhones were everywhere. This generation has grown up during the seismic shift from computing as a discrete activity to living with a ubiquitous Internet.

Today, people don’t simply replicate offline activities online; rather, they create and engage in new mobile and social behaviors. Our very language has changed. The graduating class of 2014 Instagrammed their selfies and Snapchatted their campus farewells before Ubering to the airport. Today, more than 90 percent of U.S. adults own mobile phones, 65 percent have smartphones, and 74 percent participate in social networks. The explosion of the mobile and social Internet thus extends far beyond the student body to the rest of the campus environment. Because of these deep-seated and rapid-fire changes, current digital engagement and expectations require fresh approaches to forging and maintaining connections with students, alumni, faculty, and staff.

Over the past five years, Harvard University has developed a strategy to advance digital communications and engagement. One key takeaway for us was simply this: why, how, and where an institution builds a state-of-the-art digital system is as important as, if not more important than, the technologies an institution ultimately chooses for building the system. That’s because if the first part is done right, the system will work far better, with both internal and external audiences vested in its success. In this process, strategic and audience-driven thinking trumps 3.0 tech.

Strong partnerships spanning campus communications and IT organizations, various schools, and the university’s central administration—as well as the core belief that we are co-developing these solutions with, and not simply for, our audiences—have buttressed our approach. Although there is no one simple roadmap for all higher education institutions, we laid out five steps that can ensure a solid foundation on which to build:

1. Understand the Environment
2. Position the institution for digital success
3. Develop a product management mindset and approach
4. Champion user experience
5. Prepare for the next wave of digital and social engagement

### SAMPLE PERSONA

**Elena Cambanis**

“I want to learn about policy—but also have the kind of long, dining-hall conversations about ideas that I did back in college.”

**User Goals**

- Enhance understanding of law and policy for professional and personal advancement
- Connect with peers interested in similar exploration and discussion
- Be able to study asynchronously, given full-time employment

**Questions**

- How impersonal will online learning be? Can I ask questions of the faculty member?
- Can I get any kind of badge for my LinkedIn profile to show my employer?
- How much does it cost?

**Personal**

- 24 years old
- Bilingual: English and Spanish
- Lives in Chicago
- College graduate
- Tech-savvy, with multiple devices
- Mobile-first content and news consumer

**Role**

- Works as a paralegal and may return to law school
- Watched video lectures in college but has not enrolled in any online-only courses

This persona description is the artifact of an iterative persona-development process, which should inform product management and the digital approach.
 personas in part by studying what is learned from a review of current system usage. For example, an institution might assume that prospective freshmen are using the desktop version of the admissions site, but the team might discover, from web analytics, that the audience is entirely mobile.

To assemble a picture of the digital environment, inventory the enterprise systems intended to reach those audiences. The analytics on existing, official systems might include the following:

- Internal- and external-facing website statistics, including the proprietary packages often used for alumni and athletics
- Use of any centralized e-mail platforms and response rates to institution-wide e-mail
- Volume of mobile data traffic on the network
- Aggregated reporting on ticketing systems and helpdesks
- Adoption of self-service, web/blogging-creation tools

In an ideal world, metrics on systems like these would roll up into a single sophisticated dashboard for reporting. But a manual aggregation of current systems is an important first step to understanding the digital environment needed to promote engagement.

The next task is more difficult. How are new digital engagement tools flowing through and around the institution? As low-cost, high-functionality SaaS (software-as-a-service) offerings proliferate, academic and administrative units seeking to engage with their constituents are rapidly adopting these services, which include the following:

- Bulk e-mail sending (e.g., MailChimp and Constant Contact)
- Customer relationship management (e.g., Salesforce.com and RelateIQ)
- Web analytics and measurement tools (e.g., Google Analytics and Chartbeat)
- Social media publishing and measurement tools (e.g., Hootsuite and SocialFlow)

Alongside an analysis of these services, begin to inventory the overall volume of websites and social media accounts. It’s worth assessing how many are actively maintained and how many are zombie accounts (created once and later abandoned).

The analyst firm IDC considers these services (social, mobile, cloud, and big data) to be part of the “third platform” of digital transformation, following the advances of the “first platform” (mainframe) and the “second platform” (client/server). IDC estimates that 61 percent of technology spending is influenced or...
directly spent by business units outside of the IT organization, looking to solve a problem. Higher education is no exception, as groups charged with digital engagement leap forward to adopt local solutions.

Conduct qualitative research as time and budget allow. This effort can be as sophisticated as holding dedicated focus groups and 1:1 user interviews or as “MacGyvered” as adding a few questions to existing in-person touchpoints, perhaps during an alumni event or staff onboarding. In either case, hearing actual responses alongside the quantitative data will help to inform digital engagement outreach.

Survey the landscape of digital competition. There’s a tendency to benchmark against peer academic institutions, and doing so can prove helpful. However, in the digital world, colleges and universities are fighting for Internet attention against a range of other competitors, from media outlets to retailers to social networks. So the user experience design for a student information system should be informed by the mobile, social interface of Instagram, for example. Studying the actual competitive landscape alongside the digital usage trends outlined by firms such as the Pew Research Center and Nielsen provides a comprehensive view of an institution’s visual engagement.

Finally, consider how the institution is measuring the success of its digital engagement initiatives. Do staff rely more on reported behavior such as focus groups or survey results? Which engagement behaviors are being measured: e-mail open and clickthrough rates, content consumed, fundraising metrics? Most important, how are the employees who are responsible for using these systems empowered to make changes based on what they learn about engagement?

5. Position the Institution for Digital Success

Digital capability resides throughout an institution, so centralizing these efforts can seem curiously counterintuitive or anachronistic. There is no one-size-fits-all design for success, but every institution has the challenge of keeping up with digital expertise while empowering local practitioners. One approach is to create a center of excellence that can catalyze, connect, and advance the thinking about, and practice of, digital engagement across the institution. Any centralized approach should work with IT leadership to understand and build off strategic initiatives and policy decisions. A center of excellence should align closely with overall institutional objectives and resist the temptation to adopt tech for tech’s sake. Consider how to empower digital-first thinking and spread digital literacy. Below are a few of the approaches used at Harvard.

Find the right people to advance core digital initiatives—and recognize that they may not come from a traditional background or have taken a traditional career path in the institution. This shift from the traditional should involve a close partnership with the human resources (HR) department, in order to think differently about job titles, term-limited roles, career trajectories, and the role of professional development. Identify the institution’s digital leaders—internally, independent of the org chart. To whom do people turn for digital expertise? How can those people be empowered as contributors?

Embrace matrixed reporting and project teams. For example, an online learning portal at Harvard will drive digital engagement with a range of audiences that include lifelong learners, involved alumni, and prospective students. A matrixed staff from the provost’s office, communications department, alumni affairs, and various schools works together from concept to delivery and is involved with ongoing governance. Although a small team owns decision-making, this broader group provides feedback and offers updates to local stakeholders. A matrixed structure improves visibility into a project and puts skin in the game, so people are more likely to provide solutions to problems than to engage in issue spotting. We’re fond of joking that nothing breaks down barriers to collaboration more effectively than an exchange of hostages.

Elevate digital project management as a discipline. Traditionally, IT project managers were versed in waterfall
methodologies, which were well suited to complex ERP (enterprise resource planning) software rollouts. Today, these skills should be complemented by a new digital project management capability, influenced by iterative models like Agile development and innovative means of working with new collaboration tools. Build a community of practice where digital project management skills can be nurtured and spread.

Invest (publicly) in short-term bets that can advance quickly—or fail fast. Creating a culture of short-term beta projects can inspire innovative approaches and enable more at-bats, with the ability to cut losses quickly after a strikeout. Remember, the best baseball players fail two-thirds of the time, and if a player can’t get the job done, another takes his place. At Harvard, for example, we recently experimented with two technologies to drive digital engagement. One was a social media aggregation platform integrated into websites, and the other was a real-time web personalization tool. The first was a success. Engagement was high with aggregated, topic-specific content that was previously accessible only through multiple sites. The second was a failure. Its difficult administrative integration and low results (despite high-volume traffic time) means that it won’t get past the beta stage, at least for now. The team conducted sunset reviews on each project and reported to management and peers on both the success and the failure.

Another example of a beta program for advancing digital engagement is HarvardX for Alumni (http://alumni.harvard.edu/x). Alumni had access to a seven-unit “sampler” of online courses and were asked to provide feedback on the platform and the content. Rather than create bespoke programming, the Harvard Alumni Association was able to leverage and remix the existing HarvardX units; it then embarked on a rigorous communications plan to generate awareness and to explain the beta nature of the program. More than 21,000 people signed up, and the hundreds who stayed engaged throughout the 14-week program provided vital qualitative feedback as well as a statistically significant sample to improve alumni educational programming.

Develop digital guidelines that spread knowledge and enable user contributions. By nature, digital is a rapidly shifting landscape, so both the culture and the tools evolve quickly. Harvard’s guidelines website addresses a wide range of digital best practices, from social media optimization to e-mail communications. Providing a shared resource reduces duplication of work (e.g., so that not everyone is researching best e-mail open rates), increases understanding of norms (e.g., whether a student’s photo should be ReGrammed on Instagram without permission), and empowers local practitioners to improve the guidelines through their own submissions.

Create complementary learning paths to extend digital capabilities across the institution. The first pathway is on-the-job learning. If a project needs resources, people can learn as they go with targeted, just-in-time training. Types of new skills could include conducting e-mail A/B testing, mastering the basics of audio editing; and entering content and metadata into a course management system. Learning this way may add to the project timeline, but it has the benefit of being assimilated in the field. A second pathway is dedicated training. This can be formal, such as in-person/off-site courses or lynda.com-style videos, as well as the kind of informal focused, peer-to-peer training that happens at brown bag lunches or on quiet afternoons. Such skill building is ideal when there is a new methodology to be learned (e.g., Agile) or an opportunity to
research but also drive all academic priorities and initiatives. Just as we look toward emerging digital trends among students to inform user experience, digital engagement initiatives benefit from faculty research and prototypes. Harvard Web Publishing, a recently formed web services group, is built on an open-source platform called Open-Scholar, a research-driven initiative initially created to surface faculty profiles and publications. “It’s great to have a collaboration that builds on existing thinking and software,” said Gary King, the Albert J. Weatherhead III University Professor and director for the Institute for Quantitative Social Science. “Harvard Web Publishing provides an opportunity for scale and feedback, so we can put what we learn through the deployment back into the code.”

Similarly, our faculty members teaching in disciplines like design have been an asset in educating teams charged with digital engagement. Beth Altringer, a lecturer on Innovation and Design, has introduced concepts around prototyping and testing innovative ideas quickly using a variety of different software tools (e.g., digital illustration, multimedia storytelling, 3D modeling and printing, sound design, exhibition design, and app design), aiding projects such as alumni engagement and social media outreach.

3. Develop a Product Management Mindset and Approach
Education is not a product, but the process of framing the digital means for reaching our audiences can benefit from product management thinking. Currently, too many digital initiatives suffer from a project-only approach. A website or service is stewarded until its launch, but there is little consideration of ongoing development and support. Or projects are developed in isolation, reporting through organizational siloes without consideration for the impact on the intended audience. How is product management thinking different?

- has an owner with vision, operational responsibility, and awareness of the landscape;
- may have a roadmap that’s user-driven rather than vendor-driven; and
- has a lifecycle, which sometimes includes an end-of-life to make way for a new product.

Product management in higher education has often been associated with stewarding a large vendor’s product through the enterprise, perhaps an HR performance management tool or a student information system. Today that product management concept needs to extend to embrace new types of properties, such as high-frequency publishing websites built on open-source software. For example, the Harvard Gazette, a university newspaper founded more than a century ago, was reconceived in 2009 on the WordPress content management system and became digital-only a year later. Product management for the property today includes decisions about when to develop custom code versus using a plug-in, which mobile breakpoints to adopt for responsive design, and which social sharing platforms to support. Another new concept is product management for “rented” properties—for example, an institutional presence on Instagram or LinkedIn. Even though the technology roadmap is beyond our control, there are still decisions to be made about the criteria to meet when establishing an institutional presence, about the metadata to include with posts and shares, and about the speed to optimize for changes to the platform.

An example of Harvard’s shift toward user-focused product management is the launch of Harvard Web Publishing, the web services group noted above. Sponsored by the communications and IT organizations, this initiative had the following original goals:

- Meet demand by departments for unified services and shared software
- Improve the current user experience by providing more consistent language and by reducing the number of
Recommended Reading on Product Management

Syllabus for “Product Management 101,” course taught by Thomas R. Eisenmann, the Howard H. Stevenson Professor of Business Administration at Harvard Business School; https://sites.google.com/site/hbspm101/home/2014sessions-part-1/session-1-course-introduction


- Manage the roadmap, the community, and any chat rooms for the product and service to ensure transparency about the product, the service direction, and the process
- Own analytics and measurement to gather data for reporting and, more important, to generate insights that can inform product development beyond what people are asking for—in order to incorporate what they may not yet know they need

A user-driven product management approach will inform the development and growth of the product by publicly recognizing the stakeholders. Such practices help to define and measure the value and quality of the product over its evolution, ensure that each improvement is aligned with the business and user goals, foster trust by maintaining transparency in discussions over the prioritization of bugs and features so that users and stakeholders know that their feedback is valuable, and refine processes through constant evaluation and iteration.

4. Champion User Experience

A concept popularized in the early years of the commercial web, user experience (UX) is a critical capability for an institution invested in a digital engagement strategy. But user experience is a notoriously squishy discipline. Who owns it? How does it relate to user interface design or to information architecture? The following definition from Jakob Nielsen and Don Norman is dauntingly broad: “User experience ‘encompasses all aspects of the end-user’s interaction with the company, its services, and its products’.”

User experience in higher education can be thought of as an audience-oriented approach to interaction with the institution. User experience requires coordinated thought and action across multiple departments that are reaching out to important audiences. Expertise may be located in a central digital group, but in practice, user experience will also live with every group charged with outreach and engagement.

Perhaps it is easier to define user experience by looking at a specific audience. For example, students’ parents are likely to receive multiple, uncoordinated notices from different institutional departments, such as student health services and student billing, as well as more content-rich missives from the college communications team. None of this should be completely divorced from the physical experience of arriving at campus. The good news is that as more of those touchpoints become digital (e.g., online tours, mobile e-mail consumption), we can look at these efforts and assess the digital engagement opportunity. Analytics can play a significant role in preventing us from defining the product in terms of how we see ourselves versus how users come to the content. At Harvard, our research into search terms for the digital learning portal informed a good deal of the language and design used. Seeing how users were searching for online learning opportunities informed the structure of the site. It’s vital to have user experience advocates who are versed in analytics and who will ask questions such as: How do engagement efforts perform by day of the week? When does traffic from social media drive engagement with the site, versus outbound communications?

Who is the user experience champion in the institution? Ideally, everyone is. But senior leaders must champion...
outside-in thinking. For example, in 2009, the Harvard communications services team created the first university wordmark and identity guidelines. Fundamentally, user experience design will be distributed, but it’s vital to keep the knowledge and outcomes from being siloed with individual projects and products. Build a community of practice, and develop shared assets like a pattern library.

Lastly, a core component of user experience is content strategy, which similarly suffers from a lack of clarity. Content strategy has been defined as “planning for the creation, aggregation, governance, and expiration of useful, usable, and appropriate content in an experience.” Although communications is clearly in the business of content strategy, not all content strategy resides in communications. Assets like course trailers and library archive materials can be deployed by communication professionals but can also be reached through websites, be shared via third-party services, and ultimately be remixed by the audiences themselves.

### 5. Prepare for the Next Wave of Digital and Social Engagement

This article has focused on ways to ensure an institution’s readiness for digital engagement. But perhaps the biggest shift to recognize is that many of the individuals on a campus are already digital engagement practitioners—with or without institutional imprimatur. Almost all of them have institutional e-mail accounts, and most of them already use social media. What some analysts have referred to as the “third wave” is coming, a time when the digital engagement strategy needs to move from enabling the few to mobilizing the many. So, how to prepare?

First, make sure guidelines are in place for individuals’ use of social media. This extends beyond the HR policy to include best practices for sharing institutional content online. Individuals’ use of social media has always been about authentic connections. Guidelines are intended not to offer scripting but, rather, to ensure that employees know the resources available to them.

Find the local social media leaders and empower them. All colleges and universities today have people who are passionate about their work and who are blogging, tweeting, and/or posting. For example, John Overholt, a curator at Harvard University’s Houghton Library, has developed an official Houghton Library tumblr account, but he also uses his personal social media accounts to feature interesting discoveries at the library. Find such people, support them, and connect them to others within the institution.

Adjust outreach efforts for the fact that the connected, mobile audiences are reshaping the nature of engagement. I began this article reflecting on a time when students physically went to a desk to access a computer that was connected to the Internet. Now the Internet and our e-mail social connections are with all of us virtually always. Accordingly, the level of intimacy and emotional connection to digital devices is high, with 17 percent of Americans stating that they would temporarily give up a best friend before giving up their mobile device. This ubiquity presents a new set of challenges and opportunities for engagement. Challenges arise because the perception is that all information is instantaneous and formatted for mobile—an assumption that is not trivial for enterprise institutions with processes and legacy software. But the opportunities are even greater, with new capabilities like location awareness and more time for engagement, such as during train commutes and in waiting lines at Starbucks. Mobile is no longer an afterthought, replicating desktop behaviors; it now offers a new, primary engagement scenario.
Finally, take advantage of the unique opportunity within higher education to leverage innovation by students. Digital engagement challenges to improve online event registration or social media aggregation, for example, can be assigned through computer science classes or IT-led student outreach. The more APIs we can provide to our students, the more innovation we can drive. At Harvard, our team has worked both with the Berkman Center for Internet & Society on a Digital Problem-Solving Initiative (DPSI) and with the Harvard Innovation Lab on ideas for engagement.

Conclusion

After doing everything possible to strengthen a college or university for digital engagement through institutional readiness and specific projects, products, and practices, what’s on the horizon?

It may feel like we’re already moving at breakneck speed, but in truth we’re still at the starting line of digital transformation in higher education. The evolution of online learning is ongoing. Since the MOOC hype exploded in 2013, we have generated meaningful data on online, residential, and hybrid learning models. Change is the new normal. That can create unsettling challenges, but it can also lead to exciting breakthroughs. If we manage that change well, we can help to empower our institutions and the people driving them. In short order, we’ll be able to use data more easily to optimize our digital engagement. Tools will improve, and the process of making data-informed decisions will become faster and clearer. There is still a wide gulf between the data we collect about digital engagement and our ability to optimize solutions based on that data. Developing data literacy alongside digital literacy will be critical to engagement.

Digital engagement is rapidly moving beyond even our pocket screens. Digital engagement with others now includes fitness bands and smart watches. Soon it will include augmented reality devices and a digitally enabled campus full of sensors. The practical, pedagogical, and privacy implications of a smart, connected digital campus engaged with its constituents have yet to play out. But colleges and universities need to be well positioned today, with effective strategies in place to handle whatever comes next. In planning for digital engagement, the future is now.

Notes


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