How Can I Prioritize Competing Technology Needs?

Module 4.4

Contents

This resource will be most useful for institution leadership, technology procurement teams and/or steering committees engaged in student success technology strategy

COMPLETE COLLEGE AMERICA

The Ada Center

ADVISING SUCCESS NETWORK

Prioritizing Technology Needs

After gathering feedback from across the institution, procurement teams often realize that end-user asks may call for many different types of features, or even completely different types of products. For example, interviews with the admissions team may highlight a need for a better prospect management and recruitment CRM. But advisors, on the other hand, may insist that a case management system for enrolled students is really what's most important.

Additionally, within each of these product categories, users may have varying feature requests. One admissions counselor may advocate strongly for a better chatbot feature, while another may value the ability to run more complex email and text campaigns.

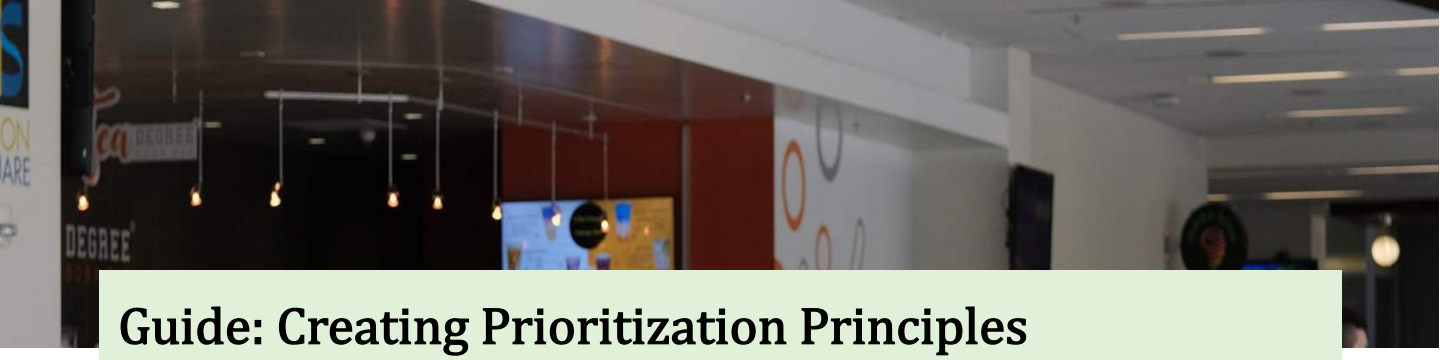
Often, institutions cannot afford to meet all of these asks at once. And more importantly, The Ada Center research has found that parallel-tracking multiple major technology investments at once is almost always less efficient, more expensive, and more prone to major missteps than pursuing a more focused, sequenced strategy.

Similarly, within projects, teams are for more successful when they start simple by focusing first on just a few of the most vital product features and then expanding functionality over time.

In short, prioritization is vital, both within and across technology projects. While our mission to serve students may drive our urgency to run full speed at all technology needs, this approach typically only leads to depleted resources, stalled projects, and widespread initiative fatigue. The most impactful institutions understand that strategic sequencing is what most reliably moves us forward.

In this module, we will establish mission-aligned prioritization principles and then apply those principles to create a living prioritized features list for new product procurement. However, this same process can also be used outside of the procurement process. For instance, certain institutions leverage this process to shape their overarching technology strategy, helping them prioritize the sequence of technology initiatives effectively.

This packet contains the key worksheets for this exercise. The full module content and worksheet instructions can be found in the Module 4.4b Webinar. We suggest starting there!



Guide: Creating Prioritization Principles

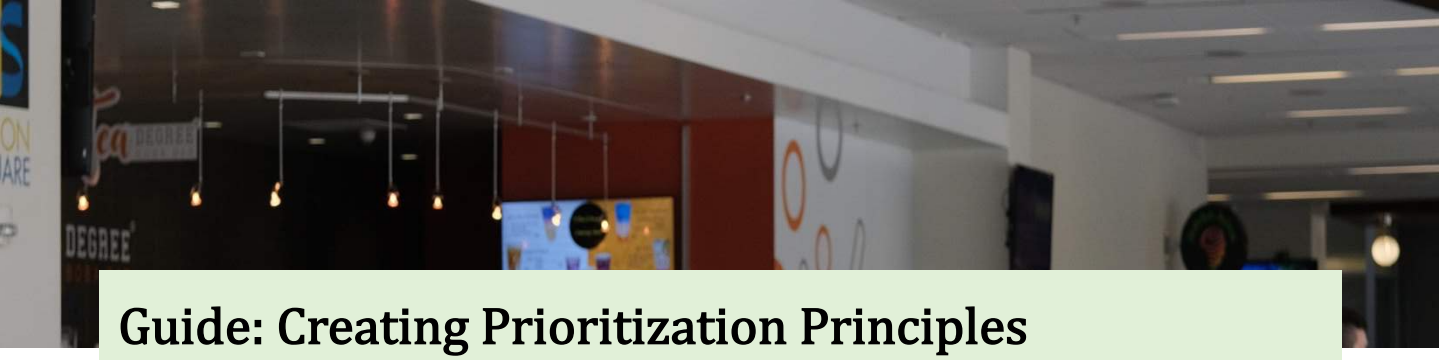
Prioritization principles serve as a set of guidelines that ensure decision-making is consistent, transparent, and purpose-driven. They help leaders navigate the complexity of technology decision-making, allowing them to identify and prioritize those initiatives that best contribute to the organization's overall success and mission.

These principles are not rigid rules but are rather adaptable and may evolve over time as the institution's needs and external circumstances change. They help the institution stay focused on its core values and objectives while remaining flexible enough to respond to emerging opportunities and challenges in the technology landscape.

We suggest leveraging this discussion guide with your procurement team (See Module 4.1 How Should We Approach Buying New Technology?) and then socializing principles with leadership and each major stakeholder group that will be impacted by the technology.

Reflection: Imagine what your ideal-state technology-mediated student experience should look like, both for students and for the faculty and staff who support them. Share your ideas with your team.

Reflection: Consider your institution's mission and student success goals. Are there criteria that we could put in place to ensure that technology initiatives align with and reinforce these core values? (Refer back to Technology Plan in Module 2).



Guide: Creating Prioritization Principles

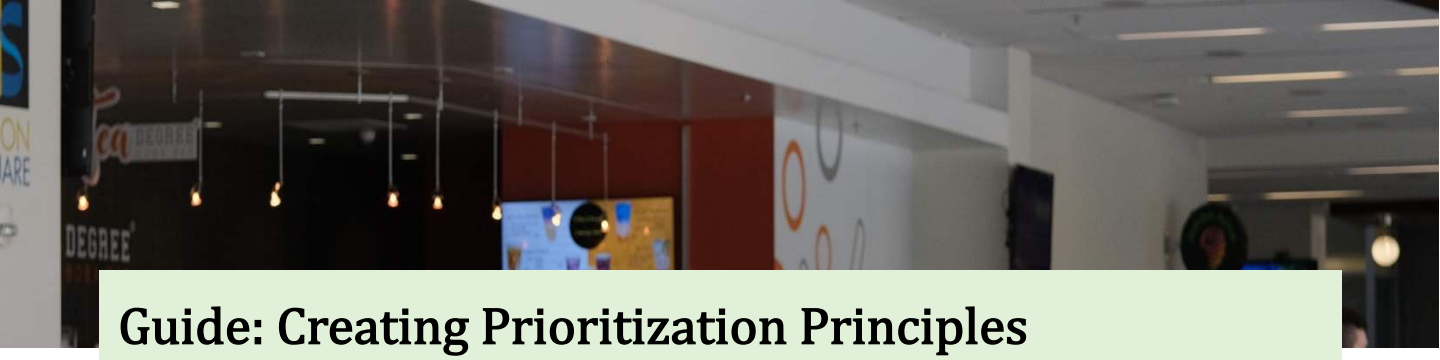
Prioritization principles can differ greatly from institution to institution. Criteria can shift depending on the institution's relative strengths, resources, existing technology ecosystem, and goals.

The following cheat sheet includes prioritization principles that have been used across a variety of 2- and 4-year institutions. Different sets of principles can direct procurement teams in completely different directions. For example, a team that decides to make "Students First" one of their prioritization principles may select a product with top-of-the-line student-facing features but a more limited advisor dashboard, whereas an institution that selects "Empower Faculty and Staff" might do the inverse.

Institutions may also define or interpret their prioritization principles differently. What is important is that all stakeholders ultimately coalesce around the top 3-5 principles, and that these principles are clearly defined and communicated across the institution.

Cheat Sheet: Sample Prioritization Principles

- Accessibility, Equity, and Inclusivity
- Security and Privacy
- Students First
- Empower Faculty and Staff
- Embrace Mobile First (Ahead of Desktop)
- Scalability
- Future-Proofing
- Integration and Interoperability
- Enable Data-Driven Decision Making
- Communication and Collaboration-Focused Feature Set
- Teaching and Learning Focus
- Optimizing What We Have
- Start With the Basics
- Aim for Innovation
- Cost-Effectiveness
- Clean User Experience Over Advanced Capabilities

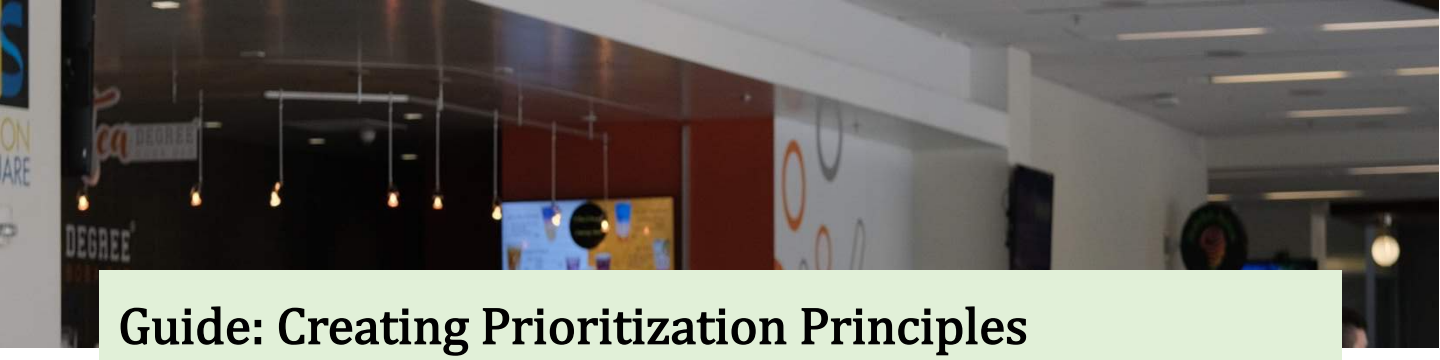


Guide: Creating Prioritization Principles

Individual Brainstorm: Consider your answers to the prior reflection questions and review the Sample Prioritization Principles on the last page. What are some prioritization principles that you think would be most helpful in guiding your institution's technology decision-making? Jot these down.

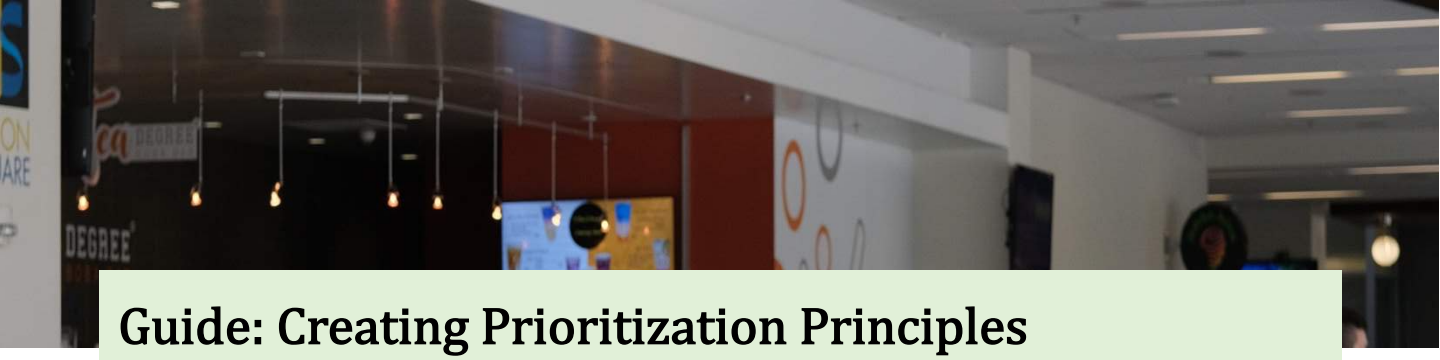
Share Out: Have all members of your procurement or technology strategy team share out their suggested prioritization principles. Where are there areas of overlap? Contradiction? Spend some time as a group discussing which 3-5 principles seem most vital for your initiative.

Draft: Write your team's draft prioritization principles below.



Guide: Creating Prioritization Principles

Define: Provide an explanation for each of your team's prioritization principles. How are you defining each one given your specific institutional context? Prioritization ultimately involves choices. What tradeoffs do each of your prioritization principles imply?



Guide: Creating Prioritization Principles

Finalize Prioritization Principles: Consider the feedback your team received during your broader share-out sessions. Are there any principles that you need to re-visit, tweak, or replace?

Consider any edits you need to make and then draft your finalized prioritization principles, including definitions for each principle, below.

Prioritized Features List: Example

The following worksheet is designed to be used by teams in the process of procuring a new technology. It therefore focuses on prioritizing specific product capabilities or features to allow teams to better evaluate best-fit vendors and products.

However, this process can also be slightly modified and used to help teams shape their overarching technology strategy. For example, rather than only focusing on user stories related to specific product features, teams might examine a more comprehensive list of potential technology projects.

Step 1: If procuring a new technology after "checking your basement," collect all user stories that represent capabilities you would like to buy (Refer to Module 4.3).

Sample

User Story *One per line, specify user title and function (e.g., Advisor can…[action]," Faculty can…[action]", etc.)*	**Do We Already Have This Capability? (Y/N)** **If "Yes", What Is The Name of the Existing Tool?**		**Next Step:** *Indicate:* • *Buy* • *Build On Existing* • *Improve Usage of Existing*
Advisor and support staff can see student profile with classes, recent communication, grades, and notes from other support staff and faculty	N	N/A	Buy

Prioritized Features List: Worksheet

Prioritization Guide:

- ***High:*** *Foundational requirement for product, must-have in near term, deeply aligned with all prioritization principles*
- ***Medium:*** *Important for long-term viability and scale, aligned with most prioritization principles*
- ***Low:*** *Nice to have as an upgrade over time*

Feature User Story *Pull from list of "Buy" stories in Part 4: Identify Gaps and Opportunities in Current System*	**Priority (High/Medium/Low)** *What is the relative importance and urgency for this feature?*

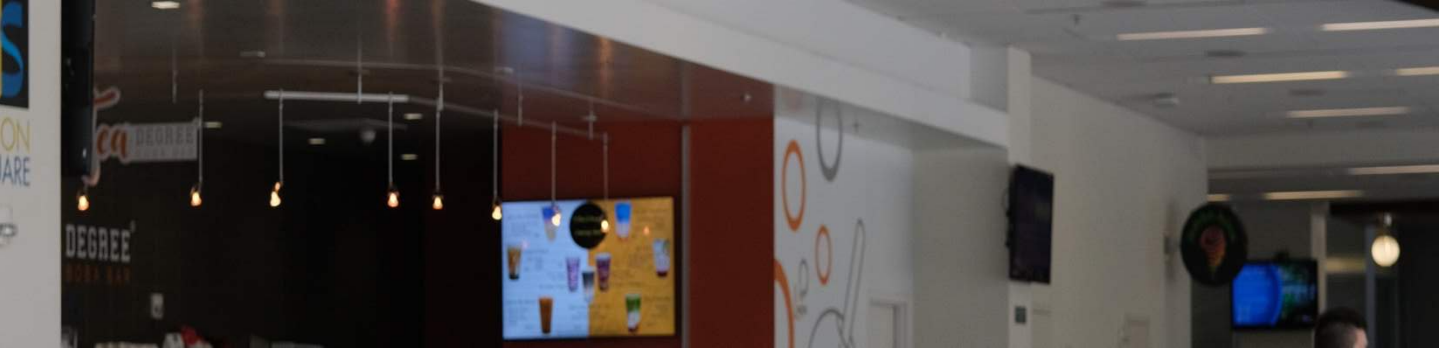
Next Steps

Prioritization is often one of the most difficult parts of the procurement process, but if done well, it can make the next few steps a lot easier. In the next few sections, you and your team can use these prioritized features to help shape a mission-aligned RFP and eventually, to select a mission-aligned vendor and product.

- [x] *Read* Module 4.1 How Should We Approach Buying New Technology?
  - <1 hour
- [x] *Watch and Complete* Module 4.2 Creating "User Stories" to Guide Procurement – Webinar
  - 3-4 hours
- [x] *Review and Complete* Module 4.3 Check Your Basement: Avoiding Duplicative Technology
  - 2 hours
- [x] *Watch and Complete* Module 4.4 How Can I Prioritize Competing Technology Needs? – Webinar
  - < 1 hour
- [ ] *Read and Apply* Module 4.5 RFP 101: Getting Insight Without "Giving Away the Answers"
  - 3-4 hours
- [ ] *Read and Apply* Module 4.6 Vendor Engagement Toolkit
  - 1-2 hours

Module 4.4 Individual Reflection:

1) How might you leverage your team's prioritization principles beyond product procurement? Would they need to be adapted in any way to be used for broader technology strategy planning and decision-making?
2) How might you and your team ensure that you continue to come back to your prioritization principles as you make decisions about product procurement?



About This Series

This five-part instructional series on Student Success Technology is designed for minority serving institutions (MSIs) and their friends. Taken together, these instructional resources aim to provide practitioners with the tools to establish and maintain a technology ecosystem that effectively supports the institution's broader student success and equity goals. The exercises and resources within these modules are also widely applicable across the higher education field.

This resource was compiled with generous funding from the Bill & Melinda Gates Foundation and was authored by The Ada Center based on six years of insight from The Ada Center's work with hundreds of MSIs and access-focused institutions. The curriculum would not be possible without the thought partnership and support from Complete College America and the Advising Success Network.

For additional curriculum modules, please visit:
www.completecollege.org/navigating-student-success-technology

For questions about this resource, or to explore additional higher education technology research and tools, please visit www.theadacenter.org/resources.

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