



Student Care
Guiding Principle
Orchestrated Assistance for Student Success
Elements
a) Enable & Reinforce Relationship-Driven Practice
b) Drive Consistent Advising, Mentorship & Coaching
c) Redesign the Mason Initiation Experience

All prospects and students should experience proactive and nurturing assistance from Mason via a consistent, coherent and coordinated interactions, services, and contact points across the institution. Ideally, prospects and students should always feel welcomed by Mason, guided by a level of care and personalization that is balanced and natural.

Students should have consistent information and knowledge of resources needed to become career-ready graduates and achieve their personal goals. Advising, in particular, will be enhanced through a team-based approach to provide scalable, consistent, proactive, tailored, and personalized guidance, coaching and support for each student. The team, supported by an array of services and resources, will be the primary mode of personal interaction with students, proactively identifying student risk levels and responding to individual risk as appropriate.

By removing obstacles, incorporating aligned communication that is timed with student actions and deadlines, and incorporating a personalized approach that intersects at each step along a student's journey, the first and continuing impression should be one that is positive and reflects the university's focus on student care starting day one and extending through to becoming a career-ready graduate and Mason alumnus.

Orchestrated Assistance for Student Success



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Elements
<ul style="list-style-type: none"> a) Enable & Reinforce Relationship-Driven Practice b) Drive Consistent Advising, Mentorship & Coaching c) Redesign the Mason Initiation Experience

Build rapport and integrity through consistent, coherent, and coordinated interactions, services, and contact points with all students across Mason. From application to graduation, every student should experience proactive and nurturing assistance from Mason that is both seamless and tailored to them. Practice should focus on the prospect/student and hide or eliminate superfluous replication and complexity.

- **Provide a seamless advising experience with a team based approach for all students:** freshmen, transfers, undergraduates, graduate students, online students, etc. Doing so will enable accurate, timely, meaningful and personalized information to reach Mason students when they need it.
- **Recognize that a team-based advising program is at the core of Mason’s student care effort,** and that the many voices across the university will need to work in harmony to support each student. Heroic solo efforts that are addressed in a vacuum, although appearing to serve students, perpetuate the shuffle and erode from a holistic care experience that Mason students expect and need.
- **Onboard students to address expectations, translate prior experiences to a Mason context, and establish a foundation for success.** Mason initiation should be a clear, consistent and highly orchestrated Welcome Experience that begins from first contact, grows to a crescendo as classes start and then tapers off into the first year for all students, regardless of prior higher education experience, location or learning modality.
- **Reflect what makes Mason, *Mason*.** Mason should authentically reflect its institutional brand through consistent communication and messaging, the offering of its services, and expression through its practices.

Student Care Gaps & Issues (1)



Innovation Debt	Change Fatigue	Expectation Gap	Business Processes
<p>Creates a streamlined process along the student pathway that avoids disparate outcomes.</p>	<p>Through leadership support and branding a level of commitment will be expressed to the Mason community allowing for all departments and colleges to invest their time and effort into their daily work instead of just waiting for the next new “_____.”</p>	<p>Accurately reflect the Mason experience in marketing and communications during the recruitment stage, and engage prospects/students in ways that inform them of what to expect when they arrive to minimize expectation and cultural disconnects.</p> <p>Students will receive timely and accurate advice, guidance and information from Mason and their advisors. Today students are not receiving consistent information, which hinders student success.</p> <p>Personalize the experience, which includes creating a clear pathway from prospect to enrolled student with appropriate contact, feedback and engagement at each stage.</p>	<p>Creates consistent advising policies, procedures and practices across Mason; provides substantive training and professional development for advisors; and actively promotes the adoption of common technologies and protocols to serve student advising needs.</p> <p>Streamline forms, data integration and use to create a coherent and single student-focused pathway, which promotes a unified new student experience, especially for first-time and international students, deemphasizes office-to-office shuffle, and eliminates confusing points-of-entry based on esoteric university criteria such as credit classification.</p>

Student Care Gaps & Issues (2)

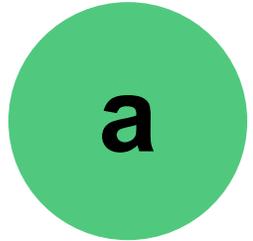


Communication Gap	Data (and Trust) Gap	Context Gap	Lifecycle Coherence
<p>Increase contact time via the technologies students most prefer to increase student engagement.</p> <p>Drive student satisfaction through personalized contact to the right student at the the right time.</p> <p>Promote consistent communication across all programs and fields of study, so that students have a similar experience interacting with Mason and its advisors. Alignment on brand values will create a foundation for messaging.</p> <p>Coordinate contact with prospects and students by tracking lifecycle engagement, providing interaction and responsiveness transparency, and increasing attractiveness and interest through personalization.</p>	<p>Integrates data, monitoring and reporting of advising activities to promote transparency, consistency, and coordinated responses to student needs and issues.</p>	<p>Students, faculty and staff should have a better idea of why decisions are made and certain initiatives move forward as they relate to the Mason identity and innate values. It will also give leadership guidelines for direction in decision-making.</p> <p>Clarifies and streamlines advising across the institution, and provides consistency in the interpretation and execution of policies, procedures and practices.</p>	<p>By initiating students to Mason over a longer timeframe, and by using a consistent and common approach toward all new students, Mason will establish a shared knowledge foundation that will launch students with a distinctly Mason experience and underpin ongoing engagement.</p> <p>Defragments the current advising experience while balancing university and college/school advising needs.</p> <p>Establishes a common and shared approach toward engagement with prospects and students, which continues along their entire Mason experience.</p>

Enable & Reinforce Relationship-Driven Practice



Path Element

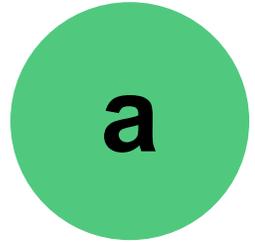


Ensure that the process of becoming and being a student is intuitive and enable access to nurturing and proactive assistance by building rapport early in their journey.

- **Promote relationships, transparency, and communication by selecting and deploying a lifecycle customer relationship management system (CRM)** across Mason to provide a single point of recording, referencing and viewing of all actions, decisions, and information provided to and on behalf of all students throughout their student journey. Encouraging Mason staff and faculty to assist in the CRM discovery and implementation.
- **Shift to lifecycle-based communications** to organize strategic delivery amongst teams covering prospects, applicants, students, and alumni. Define student lifecycles that represent the Mason student population, span across undergraduate and graduate pathways, and facilitate a Mason-wide communications audit to create a comprehensive view into the volume and success of all Mason communications. Create a plan using the details of the audit by developing campaigns that align well-timed communications with particular student actions or 'triggers.'
- **Encourage transparency and optimize CRM-captured student activity data** by creating reports that enable Mason users to have visibility into the success of communication plans, admission procedures, and retention efforts. Complete a report audit to address concerns, feedback, defects, and the continuity of critical reporting needs.



Path Element



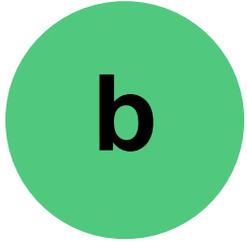
Ensure that the process of becoming and being a student is intuitive and enable access to nurturing and proactive assistance by building rapport early in their journey.

- **Provide Mason resources to deliver proactive communications** to promote the seamless transition from prospect to applicant to student, providing necessary expectations. Train these resources to engage and connect with students by means of consistent and natural conversation. Invest in dialing technology and online chat capabilities to enhance productivity – increasing positive connections with more students. Create and configure ongoing communication plans within the CRM that map to student profiles and/or programs of interest. Use the capabilities of the lifecycle CRM to automatically communicate with students based on lifecycle and action ‘triggers’.

Drive Consistent Advising, Mentorship & Coaching



Path Element



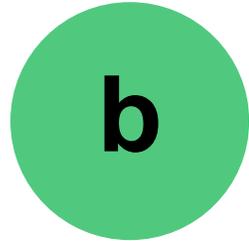
Adopt a team-based approach to student support and advising to scale its reach and ability to consistently and proactively serve students. The **Mason Student Support Network (MSSN)**, a unified team-based approach to student support, will coordinate different and diverse advising, coaching and mentoring needs for each student under one umbrella to better serve students; enable colleges and schools to focus and amplify academic advising, coaching, and mentoring; and offload and concentrate domain-specific advising needs onto subject-matter specialists.

In its team-based approach, MSSN will bring specialists together to serve each student and reduce the need for anyone with an “advisor” role (broadly defined and interpreted) to be all things to all students.

- **Establish a the role of a Chief Experience/Guidance Officer** who will be responsible for the guidance, management and support to steadily lead the transformation to the MSSN model.
- **Define and standardize the Mason Student Support Network through the review and creation of well defined policies that have clear effect on student touchpoints** and enhance student pathways.
- **Draft the MSSN charter for endorsement and approval by senior leadership.** The charter should include the vision and plan for the Mason Student Support Network that includes a collaborative approach that blends a unified team model with decentralized services. The charter should include a timeline to full final implementation.
- **Create the role of a Mason Liaison who will lead the MSSN team for each student** with the responsibility for coordinating Mason-level student care; handle broad, university-level advising and policy guidance; and encourage specialist advisor, mentor and coach contact and engagement.



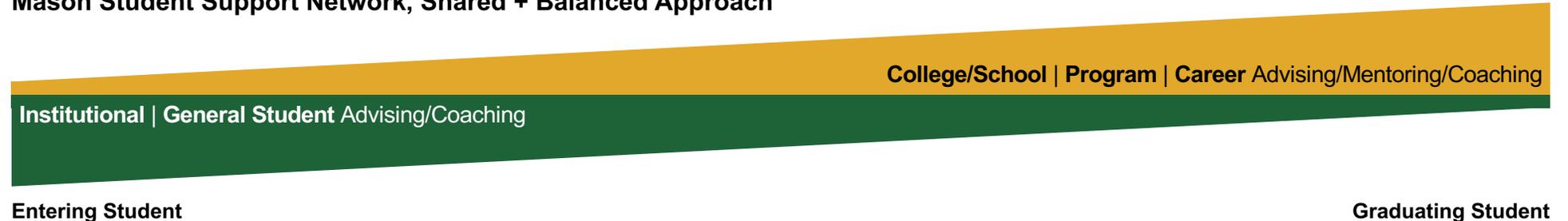
Path Element



Adopt a team-based approach to student support and advising to scale its reach and ability to consistently and proactively serve students.

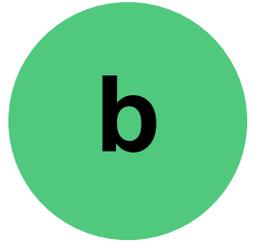
- **Assign a Mason MSSN Team to each student and establish transparent contact and communication.** The Mason Liaison will be the point person for the MSSN team, supported by members from Academic Advising, Financial Aid, Student Accounts, Student Life, Career Planning and a Faculty Mentor. All communication with each student will be captured and made available to the MSSN team to promote transparent and personalized contact.
- **Strengthen the ability of academic advisors to focus on their students and their academic needs.** By offloading non-academic advising onto the Mason Liaison and the MSSN team, academic advisors can concentrate on serving the academic needs of each student knowing that the team will be there to handle non-academic issues when needed.

Mason Student Support Network, Shared + Balanced Approach





Path Element



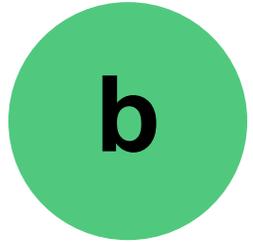
Adopt a team-based approach to student support and advising to scale its reach and ability to consistently and proactively serve students.

- **Position the Mason Student Support Network at the core of the Mason student experience. Share the initiative with the Mason community** and higher education more broadly to demonstrate Mason's commitment to student care.
- **Provide all Mason Liaisons with professional and standardized training** that will ideally enhance and build upon the current Mason Advising Certificate.
- In coordination with One-Stop efforts and campus stakeholders, **student pathway touchpoints should be well-defined, tracked and have expected and specific outcomes.** Touchpoints include (but are not limited to): acceptance, admission, orientation, enrollment, student goal setting, pathway support, career planning, financial aid/student accounts, grades/absence/crisis intervention, social gatherings/participation/belonging, mid-terms, re-registration, pathway checks, credit audits, graduation, employability, alumni, etc.
- **Grant access to data** to provide the MSSN team with insight into student patterns, needs and expectations.¹

¹ Example practice: Arizona State University eAdvising (<http://www.nytimes.com/2012/07/22/education/edlife/colleges-awakening-to-the-opportunities-of-data-mining.html>)



Path Element



Adopt a team-based approach to student support and advising to scale its reach and ability to consistently and proactively serve students.

- **Personalize and streamline the student experience through MSSN** to create a single source of guidance that is built upon individualized programs, and will address the needs of all students who arrive at Mason from different backgrounds. Augment and support with One-Stop services to provide consistent, on-demand, and meaningful contact.¹
- **Make proactive and personalized connections with each student** as often as possible and provide multiple modes of contact and interaction.^{2,3}
- **Partner and work in coordination with ITS and Institutional Research to promote the availability of reliable and timely data.** Create a data analytics team focused on student success research and contribute to and use a single source of data in order to obtain insights, inform the evolution of the Mason Student Support Network, predict trends, and define and implement advising cohorts to supplement and scale MSSN efforts.⁴

¹ Example practice: University of Texas, Austin (<http://www.nytimes.com/2014/05/18/magazine/who-gets-to-graduate.html>)

² Example practice: Georgia State University (http://www.theuia.org/sites/default/files/UIA_predictive_onepagers.pdf)

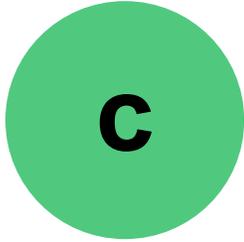
³ See also [http://www.nacada.ksu.edu/Resources/Academic-Advising-Today/View-Articles/Proactive-\(Intrusive\)-Advising!.aspx](http://www.nacada.ksu.edu/Resources/Academic-Advising-Today/View-Articles/Proactive-(Intrusive)-Advising!.aspx)

⁴ Example practice: Georgia State University (http://www.theuia.org/sites/default/files/UIA_predictive_onepagers.pdf)

Redesign the Mason Initiation Experience



Path Element



Establish goals and learning objectives for all attendees and ability to document requirements, consolidating goals and objectives as much as possible to create a baseline initiation experience for all students.

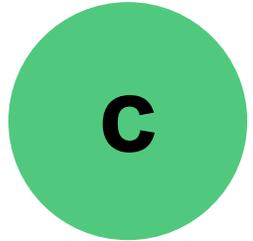
- **Unpack the existing and overloaded Mason Orientation effort** into its component elements such as those activities required of all students, required of subsets of students, optional for all students, optional for subsets of students, informative for any student, etc. Identify and map orientation needs for each community including freshmen, transfers, international, graduate and online students; etc.
- **Coordinate communications.** Identify current communications plans across the university (central offices, colleges, functions). Determine overlap and holes in communications. Develop new organizational communication plan (content calendar) by audience with allowable inputs for different stakeholders. Minimize replication and the perception of Mason communication as spam.
- **Develop and evolve a holistic Mason Initiation program and plan** that is inclusive of all key stakeholders and open to all units for contribution and participation. Clearly define lines of authority, decision-making pathways, and responsibilities. Adopt a continuous improvement process to update and revise the document in order to incrementally improve the initiation experience over time.

Reinforce Access for All in the Mason Initiation Experience, from first contact and into the first term.

- **Provide the broadest possible access to Welcome Experience** so that all students can view the information provided at events, sessions and activities. Offer virtual sessions for off-campus students, provide online recordings of presentations and workshops for asynchronous access, publish up-to-date digital materials, etc.



Path Element



Reinforce Access for All in the Mason Initiation Experience, from first contact through the Welcome Experience and into the first term.

- **Empower students to personalize their experience** by offering the ability to select programming sessions that engage them in topics and areas of interest including opportunities to talk and interact with faculty, staff, etc. Establish physical and virtual locations where students and parents can take care of paperwork issues, get assistance, etc.¹
- **Tie Mason Welcome Experience themes into on-going programming** to reinforce the Mason experience. Audit student experience for opportunities to reinforce the values and traditions that are unique to Mason. Foster the moments and interactions that students have at Mason which become lifelong connections to the University.
- **Promote memorable happenings via social media** to build affinity and popularize Mason traditions.

Use Welcome Experience data to inform the evolution of programming and activities.

- **Offer students and parents the opportunity to evaluate Welcome Experience** sessions, activities and events via short surveys and customer service instruments.²
- **Treat the information gathered as an Institutional Data Asset** that can be used by any unit on campus to inform and improve the onboarding and introduction of new students to Mason.

¹ Example: Apple Genius Bar or a hotel concierge desk

² Example practice: Netpromoter (<https://www.netpromoter.com/know/>)

Ideal Implementation

- One-time action or activity
- Ongoing activity or effort
- Periodic, scheduled activity or effort
- Disbanding of a group



Start Month (based on 4-month periods, 64 months total)															Task Description	Key Dependencies		
1	5	9	13	17	21	25	29	33	37	41	45	49	53	57			61	
a) Enable & Reinforce Relationship-Driven Practice																		
																	Select and deploy a lifecycle CRM system	Leadership commitment, funding
																	Shift to lifecycle-based marketing communications	CRM, cross-team participation
																	Integrate and optimize student activity data into the lifecycle CRM; define and implement operational processes	Digital experience
																	Launch and sustain proactive communication across the student lifecycle. Monitor, update and revise on a periodic schedule, ongoing where feasible.	cross-team participation, operational commitment
b) Drive Consistent Advising, Mentorship & Coaching																		
																	Create Chief Experience/Guidance Coordinator (CEGC) who will lead the transformation of the Mason Student Support Network (MSSN) and orchestrate and monitor advising, mentoring and coaching (AMC). Establish CEGC-led task force (TF).	Executive commitment, funding
																	TF develops and refines charter and scope for MSSN. Seek approval from senior leadership including colleges and schools. Detail team-based model for MSSN; define the role of the Mason Liaison around a healthcare “case manager” model.	Senior institutional leadership endorsement, commitment
																	TF collects and reviews policies across Mason. Harmonize, repurpose, recommend and/or draft new policies to launch MSSN. Collect and identify quality institutional, college and school practice. Develop timeline, actions and protocol for each student pathway touchpoint; define common practice; and align practice with MSSN team roles.	
																	Scope MSSN pilot to a manageable set of programs/and or students. Define a control group. Identify policy and practice harmonization issues.	

Ideal Implementation continued

- One-time action or activity
- Ongoing activity or effort
- Periodic, scheduled activity or effort
- Disbanding of a group



Start Month (based on 4-month periods, 64 months total)															Task Description	Key Dependencies		
1	5	9	13	17	21	25	29	33	37	41	45	49	53	57			61	
b) Drive Consistent Advising, Mentorship & Coaching																		
																	Prepare Release 1 of MSSN policies, practices and protocols for pilot; develop and launch pilot communication plan; address practice and launch harmonization issues. Craft a pilot-level training program for Mason Liaisons and AMCs who will take part in the pilot.	
																	Launch MSSN pilot with Release 1 policies, practices and protocols; minimum ongoing for two academic years.	
																	Integrate MSSN with virtual one-stop. Establish transition and communication protocols for MSSN pilot group.	Lifecycle CRM, virtual-one stop
																	Augment MSSN with virtual one-stop services. Ongoing.	
																	Implement proactive practices and protocols for MSSN. Trial and monitor team referrals and virtual one-stop integration. CEGC and TF monitors pilot and control group. Evaluate at the end of the fall term. Survey MSSN pilot students and control group.	
																	TF compiles recommendations and adjustments to MSSN. Prepares changes for Release 2. Refresh training. Integrate call center/virtual one-stop into new student welcome process to proactively welcome admitted and enrolled students to Mason.	Lifecycle CRM, virtual-one stop and/or call center
																	Operational activity of task force transitions to an ongoing operational leadership group . Task force disbands when done.	Ongoing commitment, coordination.
																	Refresh and implement subsequent releases of MSSN. Stage rollout across campus. Integrate data and institutional data assets into student success programs and use predictive analytics to support MSSN.	IDAs, lifecycle CRM

Ideal Implementation continued

- One-time action or activity
- Ongoing activity or effort
- Periodic, scheduled activity or effort
- Disbanding of a group



Start Month (based on 4-month periods, 64 months total)															Task Description	Key Dependencies		
1	5	9	13	17	21	25	29	33	37	41	45	49	53	57			61	
c) Redesign the Mason Initiation Experience																		
																	Charter a task force (TF) to redesign the Mason Initiation experience.	Leadership commitment, cross-campus participation.
																	TF unpacks, identifies and catalogs the elements of Mason Orientation, Welcome Week and the admissions/enrollment period before orientation. Informed by the catalog of elements, TF establishes goals, learning objectives, documentation and communication requirements and capabilities.	Cross-team participation
																	TF designs Release 1 of the Welcome Experience program and applies conference planning best practices. Takes into account broad access needs (in-person, virtual, mobile, asynchronous, etc.), personalization desires (conference-like planning, scheduling and tailoring to student, parent), and points of access (physical, virtual and asynchronous online).	Accessibility compliance requirements, cross-team coordination and participation, digital infrastructure
																	Develop and implement a coordinated communication plan across the institution, colleges and schools, and functional/operational units. Integrate with lifecycle CRM and social media efforts. Ongoing.	Lifecycle CRM, operational commitment, multi-modal communication and monitoring
																	Implement Release 1 of the Welcome Experience.	
																	Integrate Welcome Experience themes into Mason student programming. Promote memorable happenings via social media and make materials accessible online to students, parents, advisors, and the Mason community.	
																	Solicit input from parents and students regarding Welcome Experience; TF evaluates release 1 and recommends changes for Release 2. Transition work to an ongoing operational leadership group . Disband task force.	
																	Review, improve and implement ongoing updates to the Welcome Experience on an annual basis. Focus on continuous improvement.	

Projected ROI/Value on Investment



- **Mason community operating as one institution** in supporting its students and not perceived as competing or conflicting schools, colleges and offices.
- **Increased student satisfaction:** By developing an initiation experience that is both personalized and technology savvy, incoming students will experience having their needs and wants met by Mason from day one. This early positive engagement with Mason has the potential to positively influence and increase student satisfaction and drive retention.
- **Retention-driven revenue impact:** Retaining 1% (or 240) students can have a retention-driven revenue impact as high as \$2.7M.¹
- **Increased inquiries and applications:** By removing obstacles to request for information or apply quickly, more prospects will intuitively complete those steps. Mason will engage with more prospects and applicants solely by removing the “thinking process” of how to submit the necessary steps.
- **Increase enrollment rate:** By allowing technology to increase the efficiency and productivity of prospect/ student contact, resources can focus on delivering a personalized and meaningful conversation to set expectations and provide proactive nurturing along the enrollment funnel increasing application yield.
- **Improved and streamlined advising practices** will allow for academic advisors at the colleges to provide more meaningful and effective advising for students.

¹ Based on a calculation using publically-reported IPEDS-report tuition and fees, external financial aid and associated appropriations from a 32,000-student (25,140 undergraduate) 4-year public university.

Projected ROI/Value on Investment continued



- **Improved and streamlined advising practices** will allow for academic advisors at the colleges to provide more meaningful and effective advising for students.
- **Increased alumni participation:** Building a more cohesive experience for students that can be experienced year after year will build affinity for Mason by alumni that can positively impact alumni giving.
- **Data and reporting efficiencies:** Use shared data and common systems to eliminate redundancies and reduce resources needed to generate reports for multiple departments reducing costs over time.
- **Improve the quality of analytics:** Utilizing one CRM that has multiple integrations can allow staff and stakeholders to cut/slice data in the various ways needed to determine which processes and/or marketing efforts are more successful or less successful than others and making business decisions based on those conclusions.
- **Technology efficiencies:** By streamlining systems used, you will eliminate redundancies in technology and reduce costs over time.
- **Reduction in duplicated efforts:** By developing more streamlined communication plans and assets Mason will be saving internal resource time giving more opportunities for time spent on other projects.

Key Performance Indicators (KPIs)



Inquiry/Application/Registration Indicators

- **Inquiry Volume:** Count of leads submitted by various sources (e.g. web request for information, Recruiter Event Online Form); Increase shows ease of submission.
- **Application-Submission Volume:** Count of completed applications submitted by various student types (e.g. Undergraduate/ Graduate/ International); Increase shows ease of submission.
- **Registration Volume:** Count of registrations completed by timeframes leading up to deadline and post-deadline to show effectiveness of registration preparedness.
- **Lead-to-App Conversion Rate:** The rate at which prospects, or those that submitted an inquiry, move to an applicant status by completing an application.
- **App-to-Enrollment Yield Rate:** The rate at which an applicant completes necessary steps to move to a student status by registering for classes.
- **Speed-to-Lead or Lead Responsiveness:** The rate at which an inquiry engages with a staff member once a Request-for-Information form (RFI) is submitted online.

Student Indicators

- **Student Graduation Rate**
- **Student Retention Rate**
- **Student Satisfaction Rate**
- **Student Engagement:** Assessment of student participation during the Mason Initiation activities and across preferred communication channels.

Financial Indicators

- **Financial Aid Utilization:** Increase actual payment of financial aid is key to successfully helping students complete the aid process.
- **Financial Aid Melt:** Reduce the rate that prospects and students fail to complete the financial aid process.
- **Average Outstanding Student Receivables:** Reduce outstanding bills, allowing students to register on time/early and complete other tasks.



Key Performance Indicators (KPIs) continued

Brand/Alumni Indicators

- **Accessible Brand Tools:** Identifiable assets that drive brand communications and framework allow for internal stakeholders to more easily stay on message and build a cohesive experience.¹
- **Brand Engagement:** Consistent understanding of Mason “brand pillars” for incoming students identified through surveys and focus groups.²

Alumni Participation: Measured through alumni giving, event sponsorship and participation and career/outcomes support.³

Reputation: Mason’s status in the minds of prospective students and recruiters as measured by University rankings, surveys and recruiting quality and quantity on campus.

Staff Indicators

- **Staff Utilization:** Measure of contact time with students.
- **Staff Satisfaction Rate:** Survey results determining the effectiveness of the enrollment tools and procedures from the staff’s perspectives.

¹ See <http://welcome2mason.gmu.edu/>, online orientation materials, and University Life orientation exec summary.

² See <http://brand.gmu.edu/>

³ See Alumni Strategic Plan 2013-2018. Increase alumni giving rate – currently 3.09%.

Anticipated Key Resource Needs



Student Care
Guiding Principle
Orchestrated Assistance for Student Success
Elements
a) Enable & Reinforce Relationship-Driven Practice b) Drive Consistent Advising, Mentorship & Coaching c) Redesign the Mason Introduction Experience

- Senior leadership alignment with, commitment to and sponsorship of each Student Care element.
- Engagement of key stakeholders, and campus-wide investment of staff and faculty time in task forces, Tiger teams, working groups, etc.
- Professional program and project management that incorporates cultural and process change.
- Commitment to and investment in a lifecycle client/customer relationship management system (CRM) that will be adopted and used across all services and units across campus.
- Investment in new roles and realignment of responsibilities of current staff.
- Investment in and ongoing commitment to the development of a common knowledgebase to serve as a foundation for student support services.
- Ongoing investment in professional development and training to drive service consistency and a high quality student experience.

