

 CASES FROM THE FIELD

What, How, Why? Addressing the Many Common Pitfalls of Onboarding Platform Implementation

By Amanda Coltri and Ane Turner Johnson

It is common for enrollment management professionals to encounter challenges in process and practice when implementing new technical systems (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). Challenges involving the implementation of a digital onboarding platform within established practices have potential consequences for both staff and applicants. These challenges also have significant impacts on the health of the institutional enrollment process as a whole. Using a university case study to illustrate the real-life manifestation of these challenges, this article lays out some of the most frequently encountered struggles surrounding new technology implementations and highlights key opportunities for addressing these issues.

Trouble Ahead for Enrollment Management

As new technologies provide more effective and efficient tools for managing enrollment operations in higher education, the need for enrollment management practitioners to adjust business processes and practices remains at the forefront of institutional success. Enrollment leaders are often well-versed in change management methodologies, yet tend to struggle when that change involves technological innovation (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). The implementation of a new technical platform can up-

root established ways of knowing and cultures, leaving staff feeling unsure and overwhelmed about the system (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). Careful management of the implementation and adoption of new technologies is crucial for successfully transitioning staff processes, practices, and attitudes to enhance the applicant experience (Coltri 2024).

Enrollment management staff, particularly those involved in onboarding, often view themselves as “boots on the ground” employees when assisting applicants with the transition to college (Mu and Fosnacht 2019). Historically, this work has been completed in person and on

campus, with applicants calling or emailing to secure additional assistance through scheduled one-on-one appointments (Mu and Fosnacht 2019). But with the increasing complexity of onboarding processes and the recent trend of applicants depositing at multiple institutions, the volume of work associated with these outmoded approaches is often untenable (Coltri 2024). Staff often find themselves overwhelmed with higher caseloads, spending more time per student to help them navigate complex situations in the hopes of preventing melt (Coltri 2024). With the arrival of the 2025 enrollment cliff in mind, institutions are tightly managing resources, and many enrollment teams are finding themselves understaffed. The result is a turn to technical innovation to digitize processes that help applicants reach matriculation.

Digital Onboarding Platforms to the Rescue

Ideally, each college and university would appropriately fund and staff the services needed to ensure the individualized attention and successful matriculation of each applicant. But in the absence of that necessity, the implementation of a digital onboarding platform can help improve matriculation outcomes and mitigate melt. A digital onboarding platform can be used to automate messaging and reminders, provide information and feedback about onboarding tasks, alert staff of high melt-risk applicants, enlist automated workflows to provide supplemental support, and empower applicants to navigate most onboarding processes independently (Coltri 2024). With proper execution, implementing a digital onboarding platform provides a streamlined user experience for onboarding applicants and a powerful, data-driven custom dashboard for enrollment staff (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). However, if the development and adoption of such a system is met with staff resistance or confusion, the result is an infrastructure that cannot properly support onboarding applicants and fails to reduce workload for staff (Coltri 2024). A recent case study conducted at State University highlighted the impact of onboarding platform development and adoption challenges on staff processes and practices as related to first-generation applicant support.

Key Challenges: Losing the What, How, Why at State University

State University is a public institution located in the Northeastern United States, with an enrollment of approximately 15,000 undergraduates. The authors conducted a mixed-methods study at State University aimed at examining the way enrollment management staff were providing support to applicants through its digital onboarding platform. The onboarding platform records for 2,276 Fall 2022 domestic first-generation college applicants were included in the quantitative phase, and interviews with ten professional enrollment management staff members, who were involved with onboarding processes, were included in the qualitative phase. What emerged from the research was evidence of how State University's mismanaged onboarding platform development and adoption approach led to staff confusion about what the platform did, how it should be integrated into support processes, and why it was critical for establishing equitable support practices.

What are we supposed to do with this?

When the study at State University was conducted, phase two of the onboarding platform implementation was just underway. Phase one had successfully focused on aligning data feeds between various systems across campus to ensure a high-level overview of the onboarding process for applicants. Phase two was planned with an emphasis on reducing melt through customization and personalization to better support deposited applicants as they progress toward matriculation. Although it had been more than five years since the platform's initiation, the investigation revealed, through both quantitative and qualitative data, that the platform was underutilized by many of the departments involved in onboarding operations. One of the staff members interviewed in the study noted, "Cross-departmental awareness has improved [with the implementation of the onboarding platform], but a lot of staff are still kind of doing their own thing." This comment was reflected in data from numerous interviews, illustrating a misalignment between digital and analog support processes and practices within the institution.

Findings showed that many support processes at State University were being executed through analog, manual practices. While the onboarding platform was being used as an enrollment tool by the admissions and marketing teams, staff involved with onboarding tasks were relying on actions outside the system to support applicants. Participants in the study noted that they were often engaged in one-on-one interventions with applicants that were neither initiated nor tracked in the platform. Reasons for avoiding the platform included not knowing what to do on it, not having a business need for it, and generally, not trusting it to assist with applicant support work. It was evident from the data that, outside of providing applicant status reports, the staff did not understand what the platform could do to assist them in their daily work of supporting applicants through the onboarding process.

How am I supposed to use this thing again?

In addition to not understanding the full potential of the platform's capabilities, many of the staff interviewed in the study lacked the necessary training to effectively leverage the system's power. For example, on the platform, it was possible to set up workflows that identified applicants in need of assistance in order to automate personalized communications offering support. However, staff often opted to download lists of students from the platform manually and email them directly through their personal university email accounts. To this point, one participant stated, "I know there's a checklist in the onboarding platform, but we still send the applicants emails through Outlook." Many interviews in the study captured similar responses, showing that staff were expending time and resources doing mundane tasks that could be automated by the system.

Findings showed that staff were becoming overloaded with the extra resource expenditure, particularly regarding one-on-one manual support efforts. Participants recounted how applicants who struggled with onboarding through the platform would come to campus, without an appointment, to find help. Staff described helping applicants as both rewarding and taxing. One participant said, "I'm exhausted, sometimes putting in

way more than 40 hours plus [per week] to support these kids." Failure to leverage the power of the platform as an avenue for providing applicants with remote support meant that more time and effort were put into providing support in person. Without proper platform training, staff were unaware of how to set up digital processes that would help them mitigate onboarding issues and prevent urgent campus visits.

I'm helping students, so why does it even matter?

Many of the study's participants expressed pride in their one-on-one work with applicants, and there was evidence of successful melt reduction in their recollections. Their analog practices were tried-and-true methods of one-on-one intervention that had characterized onboarding processes for generations. However, the rising number of applicants and the introduction of the onboarding platform complicated historical processes. Enrollment management leadership had implemented the platform to manage applicant processing at scale. Yet, the execution of digital applicant support was not fully realized within the system. This left a gap in support that staff felt compelled to fill, even though it was an inefficient use of resources that often led to burnout. One participant explained, "The way our system is set up, it's one size fits all. There's no specific help, so I feel like [applicants] come to us." Participants who engaged in manual support interventions felt as if they were the applicants' last chance and only hope for reaching matriculation, and that their support efforts were compensating for shortcomings in the platform.

However, the staff's desire to help in this way inadvertently caused inadvertently caused equity and accountability issues. The inconsistent delivery of support resulted in some applicants receiving more support than others. Those who were able to come to campus received the most assistance, while those relying solely on the onboarding platform did not. This meant that those without the means to visit campus were at a disadvantage. Additionally, the untracked, ad hoc nature of one-on-one analog interventions meant that there was no way to measure the efficacy of support practices at

the institution. There was a general lack of transparency and accountability regarding the quality and frequency of staff support interventions, the volume and demographics of applicants receiving extra support, and how those factors impacted melt. Ultimately, while well-intentioned, the staff's manual interventions undermined the intent of the onboarding platform, obscured the broader support picture, and exposed the university to scrutiny over inequitable practices.

Saving State: Opportunities to Get Back on Track

Despite its current issues, State University's onboarding platform implementation started strong with solid data integrations and a clear plan for providing applicants with a comprehensive view of their onboarding requirements. Where the implementation seemed to meet challenges was in considering platform usage across each of the departments associated with onboarding. *What.* It was clear from data indicating staff confusion about the platform's capabilities that business process changes were not fully mapped out and implemented across departments during the platform's rollout. *How.* When participants described engaging in inefficient practices that could be resolved with platform functionality, it became clear that staff desperately needed a robust training model on how to utilize the platform to their advantage. *Why.* However, instead of embracing the system, many circumvented it, and the unintended consequences of these practices demonstrated that the staff were not aware of the platform's power as a tool for transparency and accountability. The following recommendations are aimed at addressing the what, why, and how challenges faced by State University and are shared here in hopes of helping other institutions anticipate and mitigate similar challenges during onboarding platform implementations as well.

Knowing What to Do: Alleviate Business Process Confusion

A common issue that arises in the implementation of a digital onboarding platform is a failure to reimagine business processes. Often, staff are wary of new tech-

nologies "taking their jobs" or reducing the importance or impact of their work (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). This occurs when business process adjustments are not well-defined or are not made clear at the time of implementation. This leads to resentment of the platform, with staff mistrusting its purpose or reliability. Staff can be resistant to change, refusing to use the platform altogether or reverting back to their previously comfortable practices that circumvent the system. This not only leads to an inefficient use of resources but also undermines the onboarding strategies intended by enrollment management leadership, as demonstrated in the State University case study. Not using the system as intended only further exacerbates the strain on resources.

Mapping out business processes collaboratively with staff enables them to understand what actions to take within the system, thereby reducing mundane tasks and allowing them more time to make impactful contributions elsewhere. For example, automated outreach emails can be triggered when applicants fall below a certain threshold in the system. This can alleviate the manual process of checking applicant records daily to ensure they are on track to matriculate. Furthermore, outreach emails can be set up to appear as personalized emails that originate directly from the advisors, allowing them to focus on following up with applicants who respond for assistance. Having staff involved in discussing their pain points and identifying ways the system can take on tedious or complex aspects of their processes is a productive way to build staff buy-in. This engaged style of business process planning can reduce resistance to change and foster trust in the platform by helping staff understand how it can free up their time for more meaningful student support work.

Knowing How to Do It: Build a Robust Training Model

Often, the process of training staff to use technical systems is rushed, favoring a low-touch, less resource-intensive model where only the most basic formal training is provided at an early stage. Then, after implementation, the focus on training diminishes, and less

technically astute staff are left to rely on their more tech-savvy counterparts for support in using the system. In these cases, staff members often feel unsupported and overwhelmed by the system. Low-touch training models lead to inconsistent platform usage and lower technology adoption rates, particularly among complex systems, such as digital onboarding platforms (Rowan-Kenyon, Martinez Aleman, and Savitz-Romer 2018). As seen in the State University case study, without a robust training model, staff were more likely to return to their outmoded practices and circumvent the system.

Properly training staff to use complex data systems, such as onboarding platforms, requires astute resource and time management. The processes integrated into the system need to be refined and tested, documentation needs to be created, and training modules need to be produced. Effective trainers are essential for the proper adoption of technology, which may require additional professional development to turn them into platform experts. A meticulous training model needs to be developed, and time must be carefully allocated on a continuous basis to ensure staff receive the training and support they need. With proper training, staff gain confidence in their relationship with the platform and feel empowered in their technical abilities. Training makes it easier for staff to envision their workday working with the platform, rather than against it, and to identify and manage student support caseloads.

Knowing Why to Do It: Promote Transparency and Accountability in a Shared System

Digital onboarding platforms are intended to be used by each department involved in the transition to college period between deposit and matriculation (Literat and Brough 2019). This often includes housing, dining, academic advising, placement testing, orientation, student accounts, and financial aid, amongst others (Literat and Brough 2019). The platform can serve as a centralized tool that promotes transparency and accountability for each department, enabling them to track and measure the impact of their work. However, as illustrated at State University, when this purpose is unknown, it is over-

looked, and the workplace culture can quickly lose sight of transparency and accountability. Using an onboarding platform keeps data at the forefront of practices, while working in an analog capacity, with no tracking or measurement of practice, makes it difficult to track the quality and impact of that work. When that occurs, equity issues may arise and open the university to scrutiny and legal ramifications.

Continued staff education on the importance of using the platform as a crucial part of their work can help promote transparency and accountability. By having larger conversations about how being transparent and accountable ensures that practices are equitable, tracking applicant support interactions becomes a responsibility rather than a burden. Staff are able to take ownership of the platform as a valuable resource for assessment, professional development, and process refinement. Additionally, evaluating applicant records that include data from across the spectrum of onboarding departments can give a more complete picture of how that applicant was supported, both individually and in relation to other applicants. In a shared data platform, staff can gain insights into the onboarding experience as a whole, seeing beyond their departmental silos to develop strategic priorities that promote equitable support practices.

Conclusion: The Big Digital Picture

The case put forth in this article demonstrates the real consequences surrounding the challenges enrollment management professionals face when dealing with new technology implementations. However, even at institutions where a lackluster implementation has already occurred, there are opportunities to make course corrections. First, revisit each department's business processes and collaborate with technical teams to optimize the platform for their needs. Second, invest in professional development and training for staff so that using the platform is a pleasure, not a burden. Third, evaluate staff usage of the system to ensure the platform encourages transparency and accountability, both within and between departments.

Ultimately, the success of a digital onboarding platform relies on a well-designed and executed implemen-

tation and adoption plan. Business processes across multiple departments must be mapped out and adjusted to accommodate the new system. Changes made to business processes should enhance staff performance, making it more efficient to support applicants. Leadership needs to establish a robust training program that emphasizes the benefits of the platform and empowers staff to use it to its full potential. The system itself

should promote transparency and accountability through data management and tracking integrations. And most importantly, ensuring staff understand the *what, how, and why* of the platform can help ensure successful adoption and usage across departmental lines, allowing for better identification, engagement, and support of our applicants most at risk of melt during the onboarding phase of enrollment.

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