

# Building An Internal OPM: What to Ask and How to Determine Your Operational Readiness

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DISCOVERY WORKBOOK

# Welcome.

## Let's Start Collaborating.

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### Rethinking your current OPM approach? You're not alone.

In fact, according to a recent snap poll by UPCEA, **60% of higher education leaders are reevaluating their current OPM relationship**. What once seemed like a golden opportunity for schools to enter and succeed in the online program space has quickly turned into golden handcuffs, leaving schools tethered to engagements that offer no visibility into critical aspects of their operation and limit their revenue — revenue that could be used to build more internal capabilities.

Now you're left with unanswered questions:

- *Where and how is money being spent?*
- *What marketing investments are producing the best results?*
- *What does our entire marketing and enrollment funnel look like?*
- *Is the student experience on-brand and mission-aligned?*
- *How do we access our student-level data for the entire student journey — enrollment funnel through matriculation? Can we see the raw data?*

These issues and others have prompted schools to exit their rev-share agreements with traditional OPM providers, aspiring instead to operate more autonomously and reclaim control of their online programs.

This is much easier said than done. Many schools have struggled to bring OPM responsibilities in-house due to financial constraints, technology deficiencies, talent gaps, and incomplete (or inaccurate) data.

**We're here to help you** better understand the operational structure, strategies, and support required to manage and grow online programs successfully. We will cover the key questions you need to ask your leaders and their teams to assess your institutional readiness, discuss the differences in supporting traditional on-campus learners and their online counterparts, and determine what good looks like from a data, technology, and talent perspective.



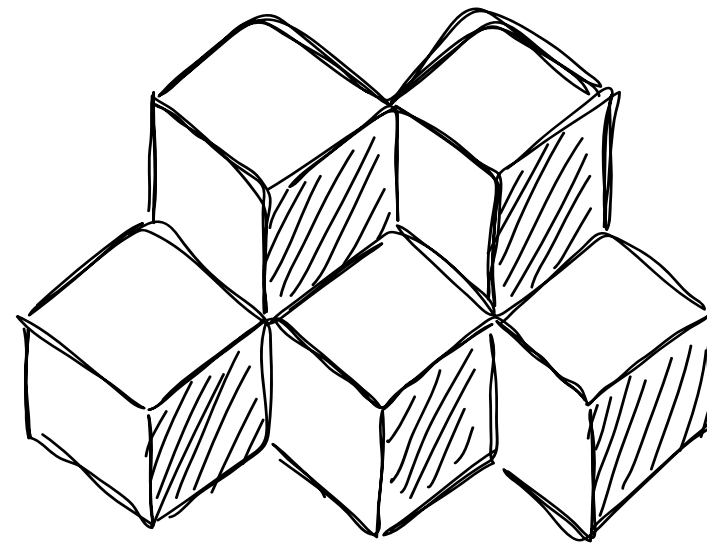
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# PART 1: Foundational

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**What is the strategic direction and vision for the school?**

What role do online programs play today? What role do you want them to play in the future?

**Why do you want to bring online program management in-house?**

What are the reasons? If there was a specific trigger, what was it?

**What is your objective when bringing online program management in-house?**

What are the supporting goals and tactics to help you achieve this objective?

**What does success ultimately look like for each of these goals?**

What about the initiative as a whole?

### What is the school's appetite for risk?

Is it a risk-taking or risk-averse environment? What are the key drivers for the risk environment? Why and how?

### Specific to program strategy:

#### How are underperforming programs addressed?

#### How do you align your programs with adult learner needs and expectations?

How is this evaluated and optimized? How often does this occur?

#### How are faculty and program leaders made aware of adult learner programmatic expectations?

How are programs encouraged and held accountable for adopting adult learner best practices?

**Who at the school is well-positioned to lead this initiative?**

Does this position have decision-making power? To what degree?

**How much time do you foresee the leader devoting to OPM-related activities?**

Will they be fully dedicated or a fractional resource?

**Where does accountability lie for key OPM areas under this leadership umbrella?**

**What work are the president and council doing to set this leader and initiative up for success?**

**Considering all levels of leadership, administration, staff, and faculty — who are the initiative advocates?**

Who are the detractors? Who is indifferent?

What experience or factors contribute to these mindsets?

**What areas and aspects of online programs are handled internally today?**

What is going well? What is not going well? Where do you see opportunities? What is contributing to the successes and shortfalls (pain points)?

**What areas and aspects of online programs are handled externally by third parties today?**

What is going well? What is not going well? Where do you see opportunities? What is contributing to the successes and shortfalls (pain points)?



**What is the institutional will for bringing online program support in-house?**

What are the driving forces behind that level of commitment?

**How adaptable is the school to change?**

Is change embraced readily, or is it met with trepidation or resistance? What are some of the contributing factors that create this cultural mindset?

**How quickly is the school able to arrive at resolutions and unite under a clear direction?**

How does that process or approach change amid dissenting views and opinions?

**Where do you typically run into impasses?**

How do they get resolved — or do they get left unresolved? What are the most prominent barriers that prevent issue resolution? (Process? People?)

**What is the school's overall financial health today, and what has contributed to it?**

Is there any historical context?

**How does the school account for flexibility in the timing of revenue and expenses?**

**How does your school's budget and financial plan accommodate investments with longer timelines to profitability?**

**How agile is your school budget in accommodating initiatives or strategic investments that emerge mid-year or off-cycle?**  
What is contributing to that agility or lack thereof?

**What level of investment is currently provided by third parties supporting your online programs?**  
What visibility do you have into that investment process, and what factors inform it?

**What do you think is a reasonable and realistic investment to successfully stand up an internal OPM operation?**  
What insights or data are informing your estimation?

**How are marketing, recruitment, and retention investments allocated among programs to maximize ROI?**

What data talent (e.g., technical analysts, engineers, business analysts) do you have on staff at your institution?

How accessible and usable is data within your school?

What level of data governance do you have across the institution?

What data that is specific to the online learner population does your school have available (or can easily access)?

How do you ensure data integrity and thoroughness?

How do you access data across the enrollment funnel in a single location to provide a big-picture view of what's driving results?

How do you use data to determine priorities and effectively inform investments (e.g., marketing, recruitment, retention)?

How is data used to connect your upstream strategies, investments, and campaigns to downstream outcomes and student actions to determine return?

What tools and technology do your third-party partners currently use to support their online program management efforts?

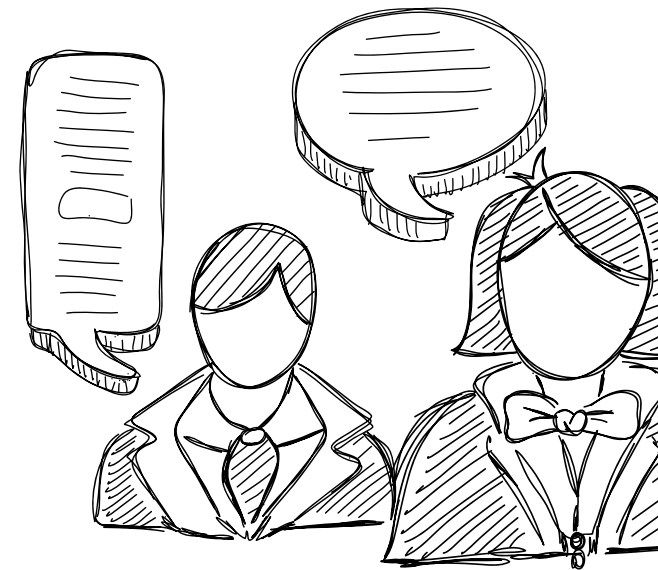
What tools or technology are you able to offer students to enable self-service?

How is your tech support team structured?

What do your help desk metrics tell you about effectiveness in supporting online learners?  
What is working well/not well?

## PART 2: Functional

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**What are the roles on the team?**

**By role, what is the level of expertise and experience serving the online learner population (non-traditional adult learners)?**  
Where are the gaps in their capability to serve this population?

**What does team capacity look like?**

What roles are operating under, at, or over capacity? What is contributing to these levels?

**What intellectual investment (expertise and capability) is provided today by third parties?**

**What resources and personnel are your third-party partners providing related to this functional area's role and responsibilities?**

How much of those individuals' time is dedicated to your school's online programs? (All? Fractional?)



What tools and tech are your third-party partners using to enable success within this functional area?

What tools and tech does your school currently have that can replicate the roles, features, and functionality of any third-party tools and tech?

Where are there gaps in your tech and tools, and what may be necessary for internal online program management at scale?

Does your internal talent have the capability and expertise to use all the tools and tech effectively to create value?



How and to what extent does the team use data to inform their strategies, actions, and decision-making?

What data sets and sources does the team leverage to support and serve students or inform strategy?

What data sets and sources are your third-party partners using to enable success within this functional area related to online programs?



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How much of those individuals' time is dedicated to your school's online programs? (All? Fractional?)

**What is the team's capability to create and manage omnichannel marketing, including optimizing the website to generate leads organically?**



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**How and to what extent does the team use data to inform their strategies, actions, and decision-making?**

**What data sets and sources does the team leverage to support and serve students or inform strategy?**

**What data sets and sources are your third-party partners using to enable success within this functional area related to your online programs?**

**How do you evaluate the effectiveness of marketing investments and channel performance?**

How quickly are you able to pivot to maximize performance?

**What is the process for ranking leads, managing leads, and handing leads off to recruitment team members?**



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Where are the gaps in their capability to serve this population?

**What does team capacity look like?**

What roles are operating under, at, or over capacity? What is contributing to these behaviors?

**What intellectual investment (expertise and capability) is provided today by third parties?**

**What resources and personnel are your third-party partners providing related to this functional area's role and responsibilities?**

How much of those individuals' time is dedicated to your school's online programs? (All? Fractional?)



How quickly is your team able to respond to online program inquiries?

How many inquiries can an individual team member handle per day/week?

What methods of contact does the team use to engage prospects post-inquiry?

What is the communication and outreach protocol for post-inquiry lead nurture and engagement?

Do you have the capability to offer transcript collection? If so, how is that support provided, and what does the process entail?

How is your team equipped to engage in proactive outreach?





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Does your internal talent have the capability and expertise to use all the tools and tech effectively to create value?



**How and to what extent does the team use data to inform their strategies, actions, and decision-making?**

**What data sets and sources does the team leverage to support and serve students or inform strategy?**

**What data sets and sources are your third-party partners using to enable success within this functional area related to your online programs?**

**What is the process for ranking leads, managing leads, and handing leads off to recruitment team members?**

**What KPIs are used to measure team effectiveness?**  
How do these KPIs translate to action taken by the school?



**What are the roles on the team?**

**By role, what is the level of expertise and experience serving the online learner population (non-traditional adult learners)?**

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**What intellectual investment (expertise and capability) is provided today by third parties?**

**What resources and personnel are your third-party partners providing related to this functional area's role and responsibilities?**

How much of those individuals' time is dedicated to your school's online programs? (All? Fractional?)



**How quickly is your team able to respond to student inquiries?**

**What is your average issue resolution time?**

**What methods of contact does the team use to engage enrolled students?**

**What is the communication and outreach protocol to proactively engage students on retention-related issues?**

**How is the team structured to ensure students can access support resources and operational offices remotely and outside regular business hours?**

**How is new student onboarding handled for the online learner population?**

## Part 1: Functional



**What tools and tech are your third-party partners using to enable success within this functional area?**

**What tools and tech do you currently have that can replicate the roles, features, and functionality of any third-party tools and tech?**

**Where are there gaps in your tech and tools, and what may be necessary for internal online program management at scale?**

**Does your internal talent have the capability and expertise to use all the tools and tech effectively to create value?**



**How and to what extent does the team use data to inform their strategies, actions, and decision-making?**

**What data sets and sources does the team leverage to support and serve students or inform strategy?**

**What data sets and sources are your third-party partners using to enable success within this functional area related to your online programs?**

**What metrics and KPIs does the team use to identify at-risk students?**

What is the process for proactively engaging students identified as at-risk?

**What KPIs are used to measure team effectiveness?**

How do these KPIs translate to actions taken by the school?



**What are the roles on the team?**

**By role, what is the level of expertise and experience serving the online learner population (non-traditional adult learners)?**

Where are the gaps in their capability to serve this population?

**What does team capacity look like?**

What roles are operating under, at, or over capacity? What is contributing to these behaviors?

**What intellectual investment (expertise and capability) is provided today by third parties?**

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How much of those individuals' time is dedicated to your school's online programs? (All? Fractional?)

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What tools and tech do you currently have that can replicate the roles, features, and functionality of any third-party tools and tech?

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**How and to what extent does the team use data to inform their strategies, actions, and decision-making?**

**What data sets and sources does the team leverage to inform course design and strategy?**

**What data sets and sources are your third-party partners using to enable success within this functional area related to your online programs?**

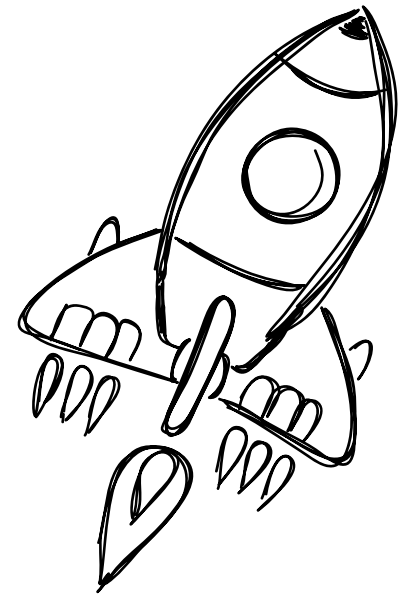
**What is the process for ongoing course optimization, and what data is used to drive course optimization?**

**What KPIs are used to measure team effectiveness?**

Do these KPIs translate to actions taken by the school?

## **PART 3:** Building the Action Plan

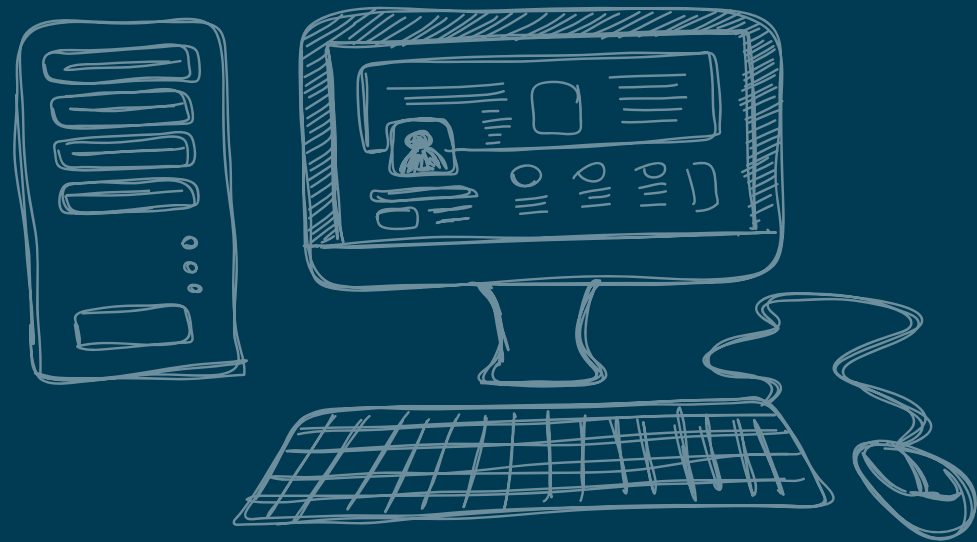
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# Move from inquiry to evaluation.

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What is your operational readiness to support online programs at scale?



Once you've completed your discovery, it's time to conduct a gap analysis related to your school's ability to successfully manage and sustain online programs at scale.

In what areas are you proficient? Where do you have a basic understanding of online program management but still need to develop core competencies and expertise upon review?

And finally, where do you lack the capability, capacity, and skill to support and grow your online programs?



An excellent way to start evaluating your school's online readiness is to review your findings through the lens of your data, technology, and talent.

Consider the following:

- How easily can you access, assess, and act on clear and comprehensive data specific to the online learner population?
- Is your technology stack robust and widely adopted across the school, enabling teams to operate more efficiently and reduce manual effort?
- Does your internal talent possess the skill and mastery to effectively target, engage, nurture, enroll, serve, support, retain, and motivate the online student population? Do they also have the capacity to support the influx of your online degree programs?

# Data + Tech + Talent Assessment



## Instructions:

Based on the answers you collected, use the stoplight rubric to score each functional area in the categories of data, technology, and talent.

# Data + Tech + Talent Assessment



Market Research			
Marketing			
Recruitment + Enrollment			
Retention			
Academic Services			

# Functional Area Gap Analysis



## Instructions:

Based on the answers you collected, use the stoplight rubric to score each functional area's overall ability to support, evolve, and scale online programs.

## Functional Area Gap Analysis

	<b>LACKING</b> <i>Need a Partner</i>	<b>Developing</b> <i>Consider a Partner</i>	<b>Proficient</b> <i>Take In-House</i>
<b>Market Research</b>			
<b>Marketing</b>			
<b>Recruitment + Enrollment</b>			
<b>Admissions</b>			
<b>Retention</b>			
<b>Academic Services</b>			

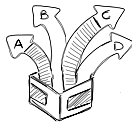


# Pick the right partner to provide support.

Supporting online education requires broad knowledge and skills, and the breadth and depth of expertise required to attract and retain students will only continue to grow. In the areas where you lack capacity or are developing skills, it's important to engage external partners to strategically fill those gaps while also leveling up your internal resources.

Be careful, though. You don't want to replace one restrictive partnership with another. The ideal DIY OPM partner should present a clear plan that helps you become self-sufficient and allows for the seamless transfer of roles and responsibilities over time, ultimately giving you more control over your institutional destiny.

# What to look for in a DIY OPM partner.



## Unbundled services

Let's you procure only what you need. Then, allows you to taper off or reallocate as internal resources level up.



## Short-term contracts

Offers a commitment of less than five years.



## Transparency

Gives you visibility into the data, investment strategies, and engagement approaches.



## Data integrity

Helps you increase your ability to make data-enabled business decisions through a solid data strategy and modeling approach.

# Collegis Education can help!

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The right mix of data mastery + technological innovation + exceptional talent to support every stage of the student lifecycle.



## You don't have to go into this alone.

Bringing OPM responsibilities in-house is a feat, but the long-term benefits are worth it. At Collegis, we've built a successful business helping schools align their **data + tech + talent** to enable **transformative impact**.

With a proven track record and a flexible service model designed to adapt and evolve over time, we can provide as much or as little support as you need.

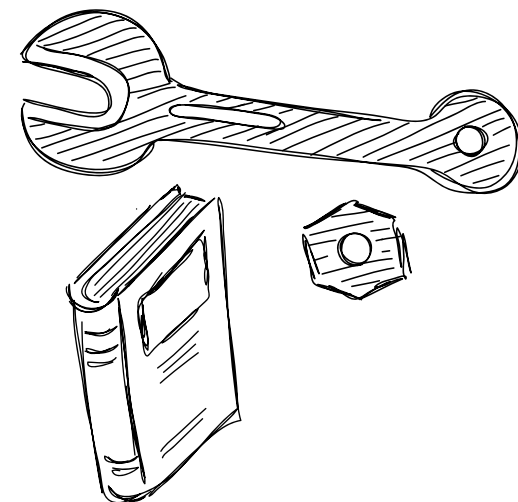
We can help you conduct and complete your online program operational readiness assessment or even jump in to immediately fill capability gaps and capacity constraints across your functional areas – all without disrupting your operational or ability to serve students.

**Let's keep the conversation going.**

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## PART 4: Tools + Resources

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## Identify and align key OPM tasks to specific roles with a RACI matrix.



### Instructions

Identify and list all the people pertinent to the project or initiative's success — place them in the top row of the grid.

Identify all the tasks pertinent to the project or initiative's success — place them in the first column of the grid.

Assign each person a role related to each task — are they responsible for it, accountable for it, consulted regarding it, or need to be informed about it?

ok, let's jump in.



## PEOPLE

### TASKS




# Quickly collect and catalog input from multiple individuals with rose, thorn, and bud.

## Time

30 minutes

## Materials

(3) sticky note pads per participant — one pink, one blue, one green

(1) Sharpie per participant



## Instructions

- Identify your topic or question for consideration.
- Pass out materials to each participant — a Sharpie and one sticky pad of each color.
- Explain the topic or question to the group and the color key
- Instruct each person to capture as many data points + insights as possible in a short time frame (10 minutes is good)
- Participants should not list more than one insight or observation on a sticky note. Use a 1:1 ratio — one insight, one sticky note.
- Have teams share aloud what they identified to spark dialogue and dynamic thinking.
- As the discussion unfolds, organize the group's sticky notes into clusters based on insight commonalities to identify patterns.

*Tip: Do **not** create clusters based on colors (e.g., putting all the roses together). Your clusters should be a mixture of roses, thorns, and buds.*

ok, let's jump in.





Asking these questions to a larger group of relevant stakeholders can result in better insights. One activity we often use at Collegis Education is rose, thorn, bud. This exercise lets you collect, catalog, and easily analyze insights. It can help you scope a problem by revealing focus areas, allowing you to plan the next steps.

**Rose**

**Roses represent positive feedback observations.**

*What's working well?  
What's creating value?*

**Thorn**

**Thorns represent negative or neutral feedback observations.**

*What's not working well? What are the pain points? What are the dissatisfiers?*

**Bud**

**Buds represent emergent and potential opportunities.**

*What should be explored in more detail? Where do you see potential? What are the untapped opportunities?*

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