The Complete Guide to

Email Management in Higher Education

Help Scout

At the University of Bologna in Italy, classes have been taught since 1088, some 548 years before Harvard was founded. There are still students studying at both institutions today, and we can safely assume that those students represent much the same mixture of eagerness, inspiration, and effort of every generation before them.

Students may not have changed much, but the world around them has shifted dramatically. The long move toward digital education has been given an enormous push over the last two years, and higher education institutions around the world are scrambling to reshape their approach to teaching and to the many elements required to support that teaching.

The combined effects of new remote technologies, drastic budget cuts, unpredictable enrollment numbers, and rising student expectations make for a new and challenging environment in which to operate. The key to success in this new environment is effectively managing online communications with students, staff, faculty, alumni, and other stakeholders.

How can your institution stay ahead of the game, keep delivering exceptional education, and stand out in the suddenly expanded world of educational possibilities? That's what this ebook is here to help you with.

Who is this ebook for?

This ebook is for employees in higher education who find themselves overwhelmed by the volume and disorganization of digital communication with students, parents, donors, and other staff and faculty. Specifically, we'll focus on teams whose jobs include a significant volume of email communication, like:

- Admissions officers who handle a high volume of applications and who must adapt processes for entirely new ways of working.
- Faculty members who are challenged by the shift from in-person engagement and discussions to long email threads and new technologies to learn.
- Residential advisors who receive the same questions repeatedly and who must navigate ever-evolving COVID-19 regulations.
- Alumni engagement teams who are looking for new ways to keep alumni connected and updated.

If you wish there was a better way to keep those incoming digital conversations under control, this ebook is for you.

What will you learn?

We hope you will gain insight into why communication can feel overwhelming, how things have gotten to this point, and solutions that can help. Read on to:

- Identify the causes of email overflow and the risk it represents.
- Learn how to take control of your workload.
- Understand how to effectively manage the new and higher expectations of parents, students, faculty, and others.
- Discover how cost-effective, easy-to-use and quick-to-implement tools can make a real difference in managing high-volume communications.

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CHAPTER 01

Handling high email volumes

Across the higher education industry, professionals are under pressure and are overwhelmed by dramatically increased workloads. The COVID-19 pandemic greatly accelerated the existing shift from in-person to digital communication, but while the world has changed seemingly overnight, many of the systems and processes it uses have failed to change or adapt.

Overworked staff and faculty are faced with an influx of requests, often from people who are themselves learning to use online tools for the first time. Those overflowing email inboxes can lead to missed messages, slow response times, and, ultimately, to disappointed students, faculty, alumni, and donors.

Effectively managing these newly high volumes of digital communication requires understanding the root causes as well as the tools that exist to help you get more done with less effort.

Why higher education inboxes are busier than ever

If you are feeling abnormally busy, you are not imagining it. Volumes of email in higher education really are at new highs, for a number of reasons.

Real-world conversations have moved online

Over the last couple of years, internal conversations from faculty, staff, and students and from outside sources like alumni, donors, and partners have rapidly shifted from in-person to digital mediums. What may have been a two-minute chat in the office might be drawn out into a days-long, back-and-forth conversation over email, multiplying the work involved.

Online education changes behaviors

When education moved online, all new workflows were created for everyone involved. Students, teaching staff, and administrators needed to learn new tools and many found emails and online searches preferable to their older methods. It's a win for the individual, but it creates new work for the people on the other end. Hybrid models, with some physical attendance and some virtual, can also greatly increase the amount of communication needed to keep everyone informed and updated.

Uncertainty creates conversation

Entire categories of new questions have been created by the constantly shifting reality of pandemic living. Will there be in-person classes to attend? What are the safety protocols to follow? How will online work be graded? These are just some of an endless series of new questions that need to be organized, distributed, and responded to.

Budget cuts have impacted staffing

Staffing digital inboxes was always a challenge, especially given the seasonal spikes and dips in volume associated with the academic year. Today, at a time when budgets are uncertain and often heavily reduced, hiring additional help is rarely an option.

High volumes are a problem inherently; we're all working with the same limited set of hours every day. But increased volume brings new challenges that can lead to significant consequences.

When the volume gets too high

If you only have one or two people responding to conversations and you don't need a lot of collaboration, a single email account is a perfectly serviceable way to handle incoming conversations — at least for a while.

When the volume rises and you need to squeeze more folks into the inbox, sharing a standard email account can be messy. It can lead to:

- **Accidental duplication:** Several people might respond to the same email thread, not knowing it was already being addressed by a colleague. This leads to confusion and wasted time and energy.
- **No conversation history:** If, for example, a student has already emailed in about a related issue earlier, that may not be visible to the person answering their current question.
- **Missing context:** Is this a current student or an alum? What information have they already provided? Email doesn't have any easy way to surface useful context.
- **Missing or lost emails:** In a busy inbox it is easy for emails to be read but not responded to, especially if it isn't clear who is responsible for answering.
- **Inconsistent responses:** When multiple people are answering questions, accidental inconsistencies can creep in, resulting in confusion for the recipients.
- **Collaboration challenges:** With no easy way to assign emails to the individual who should respond, shared email accounts quickly become crowded and unclear.
- **Missing the big picture:** For your team, knowing the answers to questions like "What are people mostly asking about?" and "How long are people waiting for an answer?" is difficult in a traditional email tool.
- **Losing track of feedback:** There is no easy way to bring important information and insights from your stakeholders to the attention of the right people internally.

These problems tend to sneak in quietly and grow over time. Each one can be managed by diligent efforts, but the amount of time and energy spent to work around the limitations of email could be better spent on productive conversations and other important work.

Fortunately, there are tools built for exactly this situation that both give you back that time and add entirely new capabilities.

How to take control of your email inboxes

When sharing an email account is holding you back, it's time to step up to a dedicated software platform, often called a shared inbox. A shared inbox sounds similar to a shared mailbox, but it differs in several important ways. A shared inbox:

- Is a dedicated software program that is separate from your team's email accounts.
- Provides a central place for all communication to be collected, processed, and stored.
- Allows all of your staff to respond from a single, designated email address.
- Has collaboration and automation features that make responding to large volumes of email more manageable.
- Includes reporting functionality to provide insight into your team's productivity and the types of questions and requests you receive.

Getting started with a true shared inbox can be easy. From the outside, nothing needs to change. People can still send a normal email to one or more email addresses, but those emails will be piped into the shared inbox system.

Once received, they can be sorted, assigned, organized, and reported on much more quickly using tools built for the task. Each team member can easily see what they are responsible for handling, keep an eye on how long people have been waiting, and make use of automation to save time and effort.

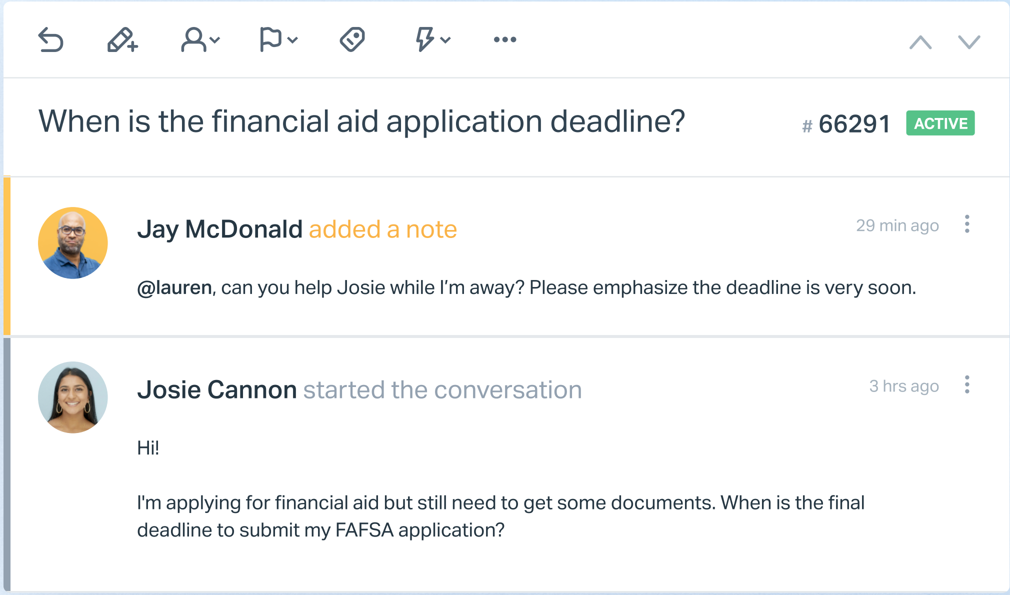
Manage your inbox with Help Scout

An answer to an email is often the first experience prospective students, donors, and staff have with your team. Missed opportunities here can directly impact your department's goals. Level up your internal and external communications by using Help Scout's suite of tools. Here's how they can help.

1. Collaborate with your colleagues

When you're working in a shared email account but need assistance from another member of your team, you typically have to take that conversation out of your inbox; otherwise, you run the risk of accidentally copying the sender on a message that was intended to be private.

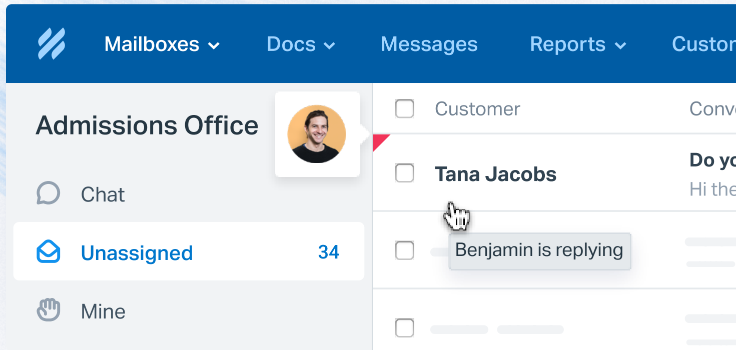
Help Scout's shared inbox solves this problem with private notes that appear in-line with the email text but are only visible to members of your team.

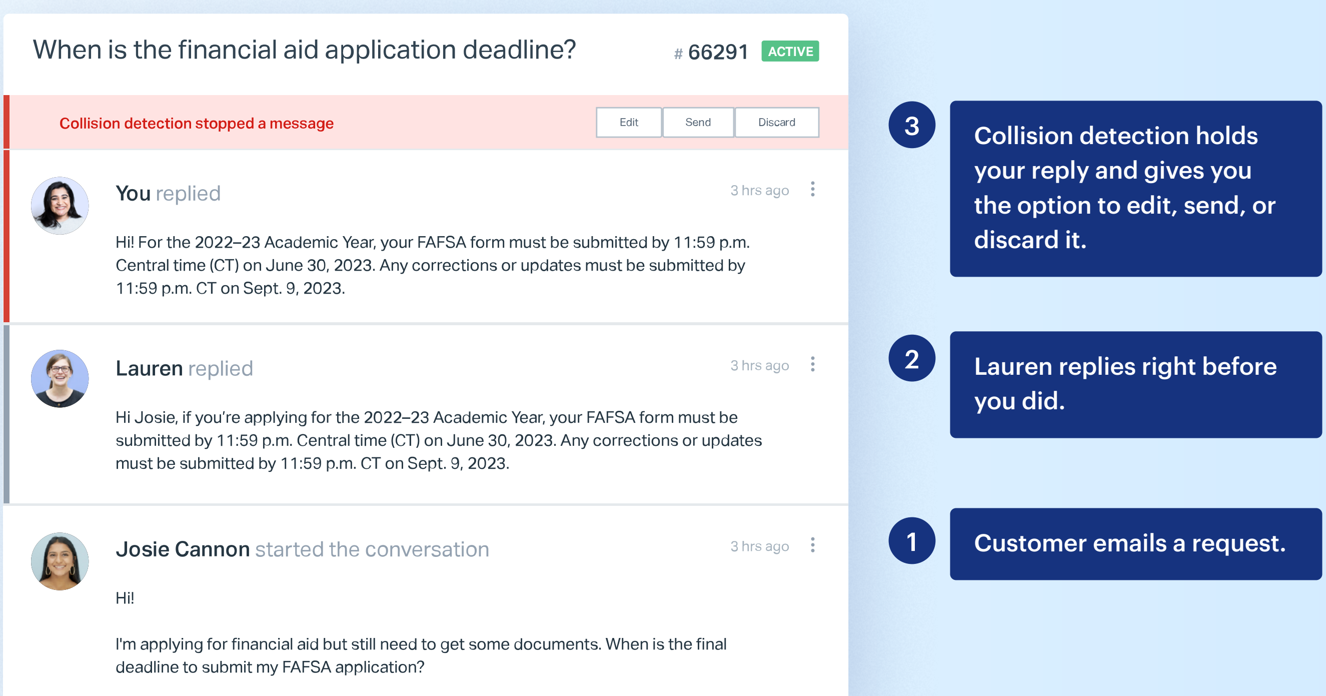


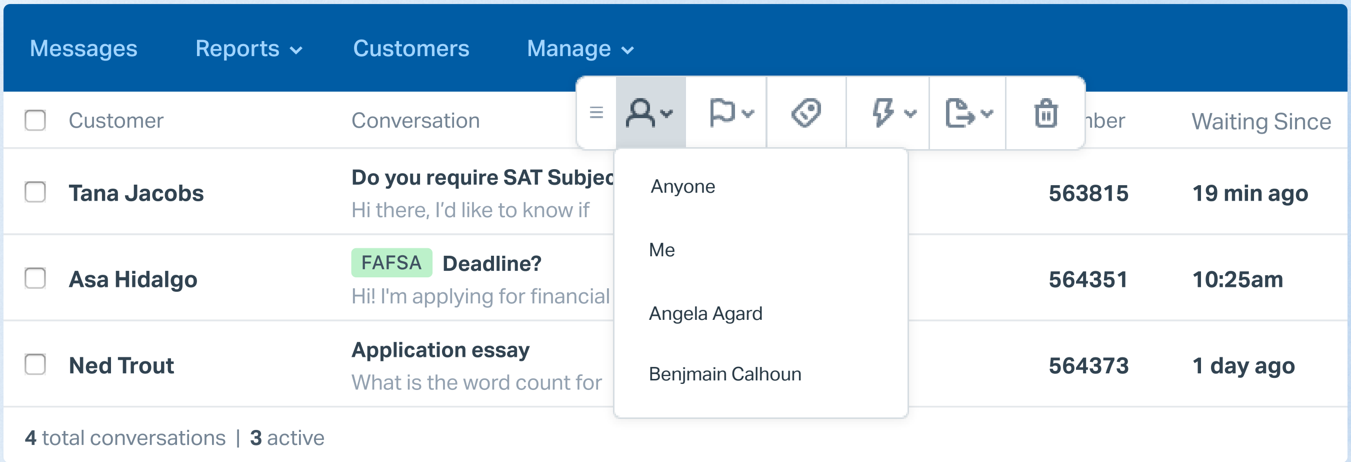
2. Avoid stepping on each other's toes

It is frustrating to spend time reading through a long conversation and writing up your answer only to find that a colleague is already working on it. Help Scout's collision detection indicators solve that problem completely. A yellow triangle shows you that another user is viewing the conversation, and a red triangle appears if someone else is currently responding to the conversation.

Collision detection will also prevent you from sending a message if another person already replied during the time you were working on your response.



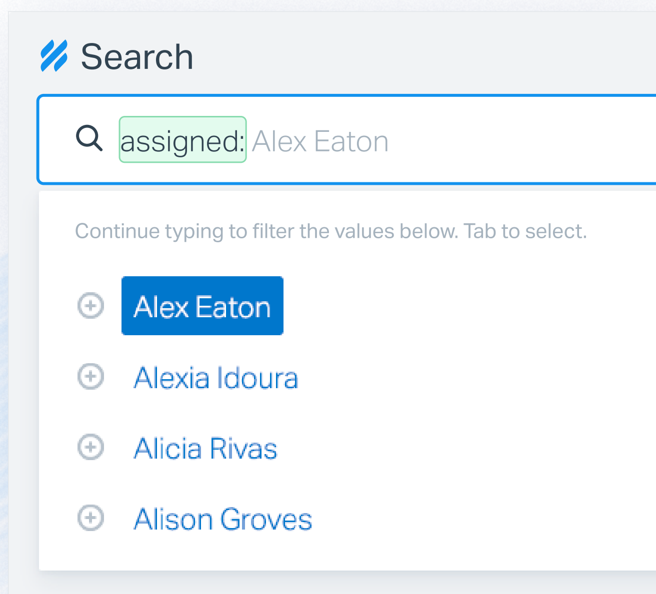


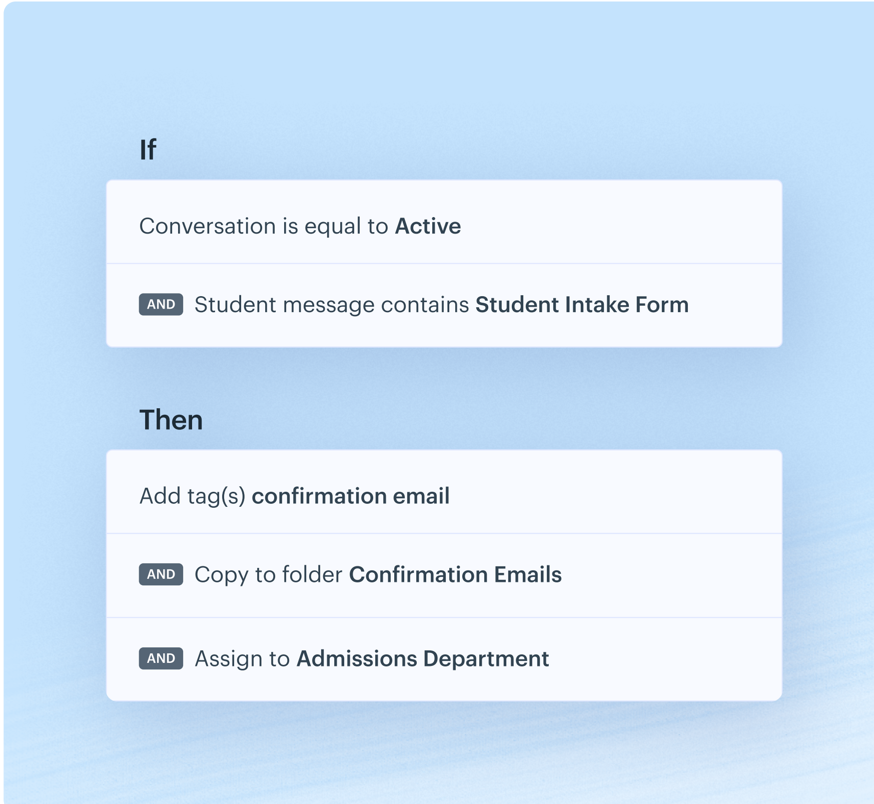


3. Route conversations to the right people

When a conversation comes in that, for example, should be handled by the financial aid department but instead goes to the admissions department, Help Scout lets you quickly assign it to an individual or a team. That way it is clear who is responsible for providing a response.

You can also sort conversations by the assignee to ensure that nothing gets dropped in the shuffle if a team member is out for the day or leaves the department.





4. Automate time-consuming manual effort

Invest your time in building relationships and solving problems instead of hunting through messy inboxes. Use Help Scout to apply tags and create workflows to automate common tasks. For example:

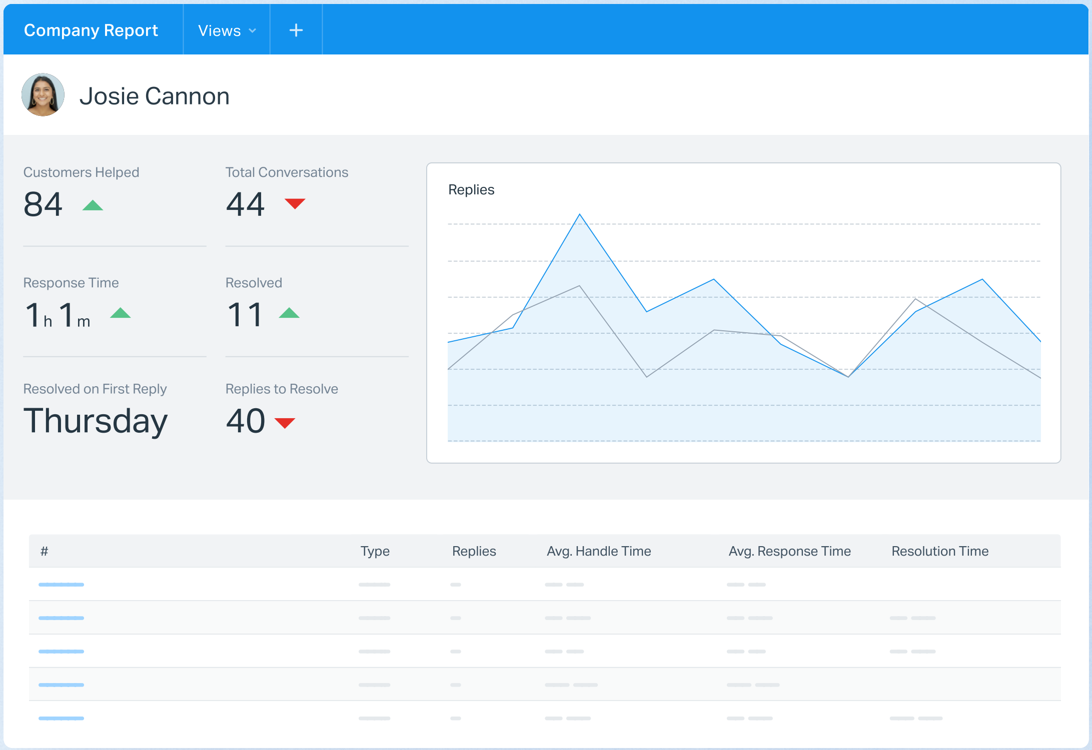
- Automatically assign accommodation issues to the residential team.
- Identify urgent problems and automatically raise their priorities.
- Spot important donors in the queue and flag them for special response.
- Utilize saved replies to save time and keep you from typing the same responses over and over

5. Understand the causes of your high email volume

It is easy to know when you're extremely busy, but it is not always easy to tell why. Help Scout's reporting tools help you to organize, sort, and understand all those conversations more deeply and with much less effort.

For example, find answers to questions like:

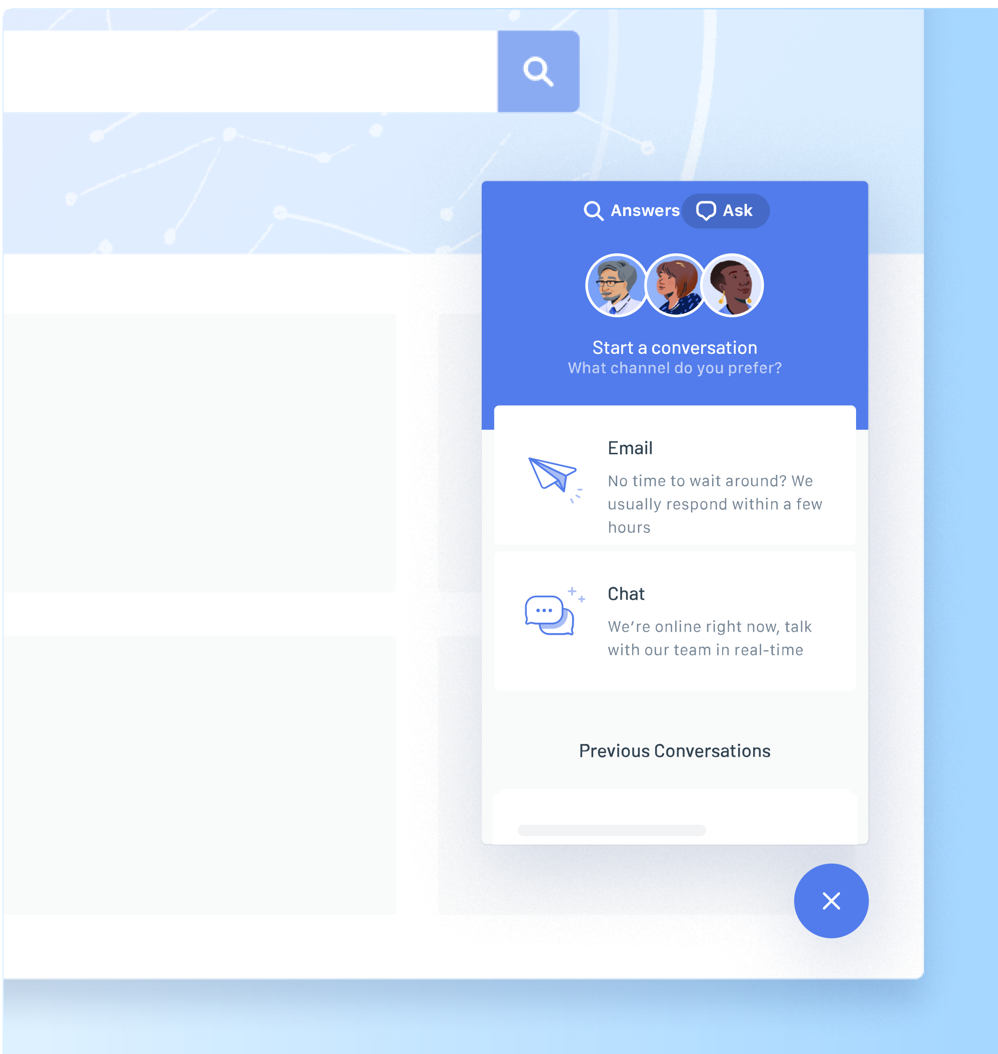
- When do most people need help, and how long does it take you to reply to them?
- Where are people asking for help most often, and how is that changing over time?
- What are the most common questions faculty members have, and which answers are you giving most often?
- How satisfied are your alumni with how quick and helpful your responses are to them?



6. Enable self-service

Help people help themselves by offering clear, accessible answers through Help Scout's built-in knowledge base software called Docs (you might know this as a Help Center or FAQ page). You can add a simple button to your websites and applications to give people instant access to the most relevant FAQs and documents for the page they are currently on.

Whether it is a new crop of students with the usual questions or folks needing to keep up with constant pandemic changes, making self-service answers readily available saves everyone time and effort.



CHAPTER 02

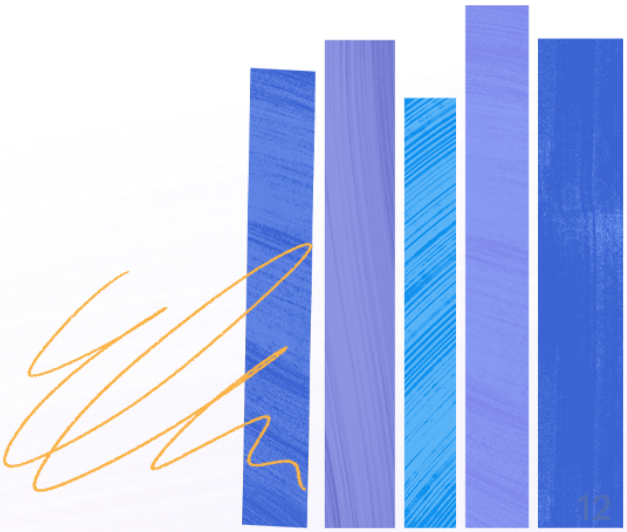
Dealing with low transparency and collaboration across departments, tools, and systems

Have you ever had a student or parent reach out and reference an email they sent in previously, but you're having trouble finding it? Have you wondered how the workload of handling requests is being split among staff? Has leadership ever wanted an overview of the work you and your team are doing and you weren't able to deliver concrete numbers?

All of these different issues come down to the same thing: a lack of transparency. To put it simply, transparency is a measure of how accessible information is. If it's very difficult to access information, there's low transparency. If it's easy, there's high transparency.

Since supporting and building relationships with students, parents, alumni, and others isn't the sole responsibility of one team but rather a group effort, transparency is a must-have. Having easy access to information allows you to deliver faster, more accurate responses and makes life easier for those asking questions and those finding answers.

In this chapter, we cover what contributes to issues with transparency, why it's important, and how you can address the issue effectively.



What causes low transparency?

Depending on your team, department, and institution, there could be any number of issues contributing to low transparency. In some cases, things like privacy or other safety and security measures can contribute to low transparency and may be difficult to work around. However, there are a number of common issues that negatively impact transparency that you *can* address.

Siloed information

Information silos really come down to one thing: limited access. It's not that the information doesn't exist, it's that you either don't know where it exists or you cannot access it. For example, let's say a student reaches out to ask about their financial aid application, but you're not able to see who their specific advisor is because it's in a team-specific document or system. In that case, the information is siloed.

Limited data

Sometimes an issue with transparency comes down to simply not having the information you need. For example, if you're working out of a Google Shared Inbox and you want to know how many requests you got in a certain week, month, or quarter, that information isn't tracked, therefore it's not available.

Disconnected tools

Different teams tend to have tools specific to their own areas of support. If those tools aren't able to "talk" to each other through things like integrations or shared access, it can make information more difficult to find.

Limited collaboration

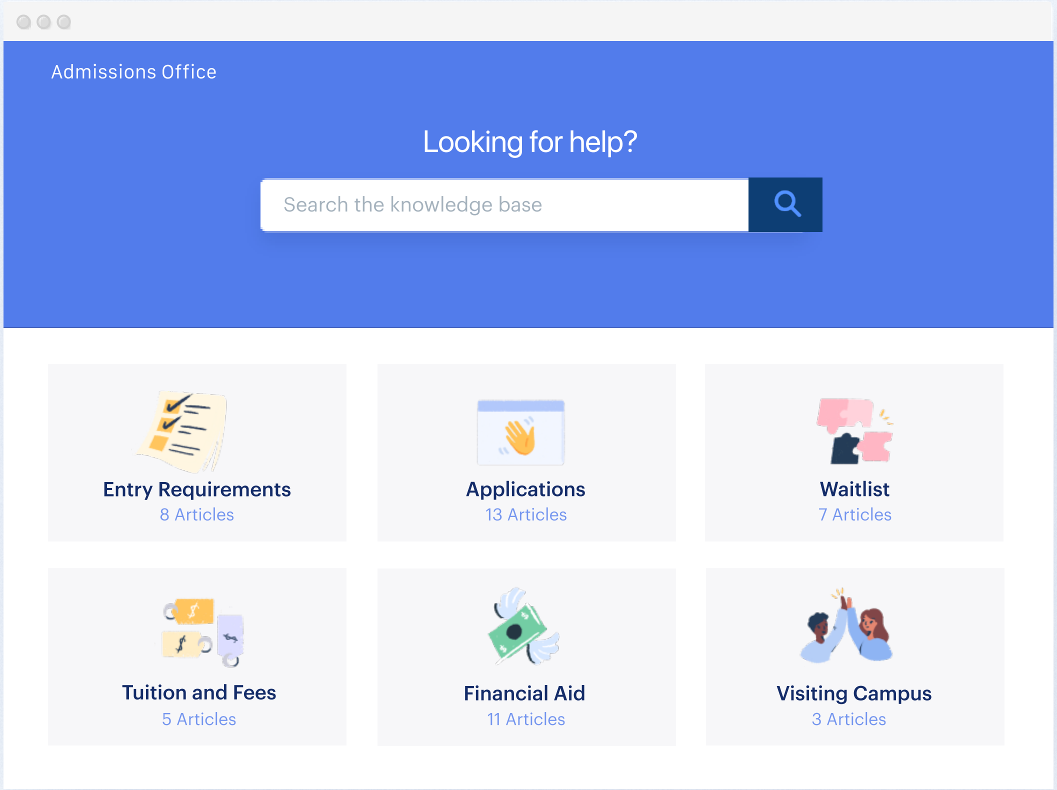
One of the most common ways to get access to information is to ask someone. The easier it is to ask, the easier it is to get access. However, if your environment isn't conducive to collaboration, then it might hamper someone from taking advantage of one of your best resources: your entire team.

How to improve transparency

Just as there are multiple reasons why you may have low transparency, there are also multiple ways to address the issue. Depending on what resources you have access to and your specific needs, some tactics may make more sense than others.

Make information public

Information is only useful if it's accessible. Creating public resources where stakeholders and staff can find answers to their questions is a powerful way to improve transparency. For example, your admissions department could create an FAQ page using Help Scout's Docs tool to share things like application deadlines, which documents to include with an application, and what applicants can expect through the process.



Communicate regularly

As the saying goes, “Sharing is caring.” If someone is outside your department or discipline, they probably don’t have the level of insight you might assume they have. The best way to fix that is by talking with them. Setting up regular meeting cadences or investing in tools with collaboration features can further open the lines of communication.

Track data

Sometimes the biggest issue with information is that you don’t have access to it in the first place. For example, if you’re curious about the most common questions students have for your admissions team and you’re using Microsoft Outlook, you simply don’t have a way to find that information because it’s not being tracked in the first place. Seek out tools with tracking options to limit your overall workload.

Invest in tools that support transparency

One of the best ways to improve something is to make it easier to do. If it’s easy to make information more transparent, the likelihood of that actually happening increases. With Help Scout you’re able to achieve better transparency through a variety of features like:

- **Reporting:** Reporting features help you monitor both team and individual performance. As discussed in Chapter 1, Help Scout comes loaded with pre-built dashboards as well as the ability to create your own custom views for the metrics that matter most to your team. Reports can also show what topics people contact you about most often and when you have the highest volumes of requests so you can plan ahead accordingly.
- **Duplicate response protection:** Duplicate responses to the same question not only cost your team time, they can also cause confusion and frustration for requesters. Help Scout’s collision detection feature shows when someone else is actively working on a certain request to limit (or totally eliminate) duplicate responses (see example in Chapter 1).

- **Tagging:** Tags allow you to categorize requests with different identifiers. For example, you might create tags for each department, or you might create tags to identify and sort the types of requests that are received. Help Scout can run reports based on tags to get an even deeper understanding of why people reach out and how you can better serve them.
- **Internal notes:** Notes not only let staff add additional context to requests, but they can also use them to ask others questions. For example, if a student is emailing their admissions advisor and asks a financial aid question, the advisor can ping someone in financial aid instead of referring the student to an entirely different department (or asking them to send an entirely new email), reducing their stress and creating a smoother interaction.
- **Assigning capabilities:** Forwarding emails can get messy and confusing really quickly. With Help Scout's assignment feature you're able to easily get requests in front of the right people to ensure a quick and accurate response. With Help Scout, you can automate that process using workflows.
- **Profiles:** Customer profiles keep a history of the interactions you've had with a particular person, creating a record of sorts. You're also able to add additional information to their profile. For example, you could list whether someone is a student, parent, alumni, or staff in their profile. Making that information accessible can help reduce back-and-forth messages and make interactions easier.

Higher education is a complex ecosystem. Keeping all the various departments and information connected is paramount for keeping things on track and creating the best experience possible for everyone involved. Without access to information and overall transparency, that's much more difficult to do.

CHAPTER 03

Managing increased support expectations from students, parents, and alumni

Higher education institutions have generally played a caretaker role for their students. Many attending are young people on their own, away from their support networks, getting their first real taste of independence. It's a lot to manage.

Though the task has always been a difficult one, in the mid- and post-COVID era, those responsibilities have grown. There are more considerations to be made, and there is a concerted effort to ensure students of all backgrounds and abilities receive the support they need.

When you combine those factors with the general increase in expectation we have of all support roles, the picture gets pretty clear: What worked before won't be sufficient moving forward. In this section, we'll cover the best tactics for managing new expectations for everyone involved.

Increased expectations

It's only natural that people's expectations change over time. As we have new experiences and as tools become more sophisticated, the baseline rises. Higher education is no exception. Though there may be a number of different things influencing that change in baseline expectation, there are three that seem to be the main contributors.

More areas to support

Student life today is vastly different than it was just 10 years ago. The adoption of technology and distance learning at scale means that support staff at colleges and universities have more things to look after than ever before. Nowadays, a student may come to you asking for help with registering for a class, how to troubleshoot the online platform they use to sign up, or for resources to help with the stress of doing the first two.

Outside experiences

Almost every consumer brand has done its best to optimize for one thing: convenience. Amazon has one-click ordering; grocery stores offer curbside pickup. As those experiences add up, we start to form a new baseline expectation of service.

What was once acceptable is no longer up-to-snuff. It's typical for people to be upset if you take a couple of days to respond to an inquiry because we've all been collectively taught that we shouldn't have to wait. Further, they won't necessarily see the resource gap — all they'll experience is the end result.

General cultural shifts

Just a decade or so ago, we — culturally speaking – were more worried about the quality of a product or service than we were about the experience of using or owning that product or service. However, in recent years, that's changed.

According to research, nearly 80% of people say that experience is as important as the product or service a company offers. The fact of the matter is we are now much more sensitive to experience as a whole and also care about it more deeply than we have previously.

Managing expectations

The simple truth is that every team, no matter how well-resourced, will have limitations. Because of those limitations, you may not always be able to deliver the exact experience someone is hoping for, but it doesn't mean you can't still deliver a great one. Below are three tactics you can use to create a great experience for everyone you interact with.

Make it simple

Sometimes the most challenging part of a support interaction is just sending in a request in the first place. Your job is to make it obvious which channels you support and exactly how folks should contact different people and departments.

As mentioned above, Help Scout's Docs is a great tool to create FAQ pages where you can include all the pertinent information someone may need to get in touch. You should also make the information as visible as possible by including contact information and links on the main pages.

Help Scout's Beacon is a support widget you can use as a resource to further reduce the effort for those seeking info. With Beacon, you're able to give direct access to your knowledge base library without ever making someone click away from the page they're on. If they're not able to find the answer with that, they can submit a request directly through the widget for you to follow up on through email.

Empower stakeholders

Did you know almost 70% of people try to find an answer on their own before submitting a support request? However, only around one-third of companies offer a knowledge base or other self-help resources for people to access the answers they need.

Docs can help you develop a full-blown knowledge base full of answers. You can create articles in minutes using a text editor that offers multiple formatting options. You can also quickly upload images and videos to articles to make content even more robust.

Having a knowledge base not only makes things better for your stakeholders, it also reduces stress for staff. In fact, having a knowledge base can reduce requests by up to 30%. Docs also integrates seamlessly with Help Scout's shared inbox. Staff members can share links to knowledge base content directly in email conversations without needing to do any copying and pasting, which further reduces response times and hassle.

Measure performance

Improving support on any level is an iterative process. One key thing needed in order to make those continual improvements is some sort of baseline data that tells you how you're doing.

Tools like Google Shared Inbox and Microsoft Outlook don't have reporting capabilities, making it nearly impossible to spot the areas where you're excelling and the ones that need improving. With Help Scout you're able to see things like average response time and request volumes by time of day, day of the week, and month.

Having access to that information can make things like scheduling easier, helping you keep up with demand and ensuring quicker response times. If you use other reporting tools, like tags, you could see what types of requests are most common, which could help you create additional self-service resources.

Help Scout gives you access to pre-built reporting dashboards, or you can create your own custom reporting views to focus on the metrics that matter most to you and your team.

Higher education is a big investment. Because of that, people have high expectations for what they want out of your staff and faculty, includingthe communication they provide. Though providing support can sometimes feel like an uphill battle, with access to the right tools and tactics, it can be made easier.

Conclusion

The higher education market is in a historic period of disruption. Students have vastly more options available, including new tools to use when engaging with their chosen educational provider.

The institutions that thrive during this period will be those that are quickest to adapt — finding new ways to connect and engage their students, staff, and faculty. With thoughtful use of digital tools like Help Scout, you can improve your responsiveness, remove friction, and better understand the needs of everyone you communicate with.

About Help Scout

Help Scout is a shared email inbox platform that staff and administrators use to stay organized, collaborate, and respond faster. It equips student services, admissions, and other operational departments with the tools they need to support students, parents, and alumni via email, chat, and self-service. Help Scout is trusted among top-ranked schools, including Dartmouth, the University of Oregon, the University of Amsterdam, the University of Colorado Boulder, and more.

Use Help Scout to:

- **Collaborate from one place:** Unlike Gmail or Outlook, shared inboxes provide a unified workspace — giving staff and faculty the power to track, prioritize, collaborate, and respond all from one place.
- **Reduce manual work:** No more copying and pasting answers to FAQs and typing out the same answers again and again. Help Scout makes your job easier with assignments, saved replies, and other automations.
- **Get security you can trust:** Help Scout keeps data safe with a globally distributed security team and infrastructure that adheres to enterprise-level security standards.