

OFFICE OF THE VICE CHANCELLOR

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**Professional Service Customer Advisory Team
 Meeting Summary
 May 18, 2021**

- **Feedback on Lunch & Learn Series Strategy**
- **Web Strategy Update**
- **Photo Repository Update**
- **AgriLife Research Cloud**
- **COALS IT Migration**
- **Annual Report Discussion**
- **Open Discussion**

Susan Ballabina
Holly Shive
Holly Shive
Alan Kurk
Alan Kurk
Susan Ballabina
Members

Susan Ballabina – Lunch & Learn Series Strategy

- We are very excited to begin the Professional Services Lunch & Learn webinar series. This idea was brought forward by Holly Shive and is another step in our strategy to provide information for users to better understand the units and the services they provide.
- The topics will range in their focus and targeted audience, with some targeted to a specific group and many that will be useful AgriLife-wide.
- Please encourage attendance of all faculty and staff within your units.
- Webinars are held monthly – 3rd Wednesday of each month 12pm – 1pm
- Upcoming seminar topics, as well as recordings of past sessions, are available on the Professional Services website

<https://agrilife.tamu.edu/professional-services/lunch-and-learn/>

Holly Shive – Web Strategy & Photo Repository Update

See attachment for full presentation

- There are currently two major projects underway regarding web strategy
 - We are consulting with New City, a web design and strategy firm, to lead an assessment of the AgriLife digital presence and assist us with unification and branding. They will be helping to create a roadmap for web presence across AgriLife.
 - New City is focused on Extension first, as they have the largest web presence (over 750 unique websites)
 - We are currently in Phase II of the project, with an expected launch for Extension in early 2022
 - TFS and TVMDL are not currently included in the scope of work for New City but the agencies are open to consulting with them for potential future projects.
 - Internally, the Marketing and Communications team is working to triage existing sites that need urgent updates or technical issues that need to be resolved
 - Social media is not impacted by the current projects. There should be no impact/hinderance to any outreach that groups have in place.
 - The question of whether any sites would ultimately be shutdown. This is possible, but we are still collecting information and feedback and researching each site in detail to determine its place in our web presence

- Self-service templates for a myriad of digital and print media are available on the MarComm website, offering on-brand easily editable options for users to create outreach.
 - The templates launched less than one month ago and we are seeing a great response from users (see slide for download metrics)
 - An example of a department created brochure from a template is included in the slide presentation. In consultation with our design team, ECCB created an impactful and striking informational piece.
- AgriLife Photoshelter, our new photo repository, is launching today and notification will be sent AgriLife-wide later today.
 - The repository contains a wealth of photos, is searchable by topic, and contains downloadable photos that can be used with many of the self-service templates
 - We encourage suggestions on what additional subject matter users would like to see added to the site. Photos will continue to be added over time.
 - Historical photos was immediately suggested as an addition (Baltensperger).



MarComm May
2021.pdf

Alan Kurk –COALS Migration & AgriLife Research Cloud U

See attachment for full presentation

- COALS IT Migration
 - IT Services migration for COALS is currently in the testing phase, with migration scheduled to start June 7.
 - A formal communications plan has been implemented to ensure as much information as possible is going out to affected users
 - Live orientation and training sessions, including live Q&A, are planned June-August to assist users with the transition.
 - New user guide <https://firstcallhelp.tamu.edu/knowledge-base/new-user-guide/>
 - This guide is not unique to COALS – useful to all new employees across AgriLife as a part of their orientation process
 - Also available to all AgriLife users is a new Live Chat function on the website.
 - The migration for each user will be handled individually by the IT team. Appointments scheduled for a convenient time for the user will walk the user through the migration process. Users will each have a unique experience based on a number of factors, primarily the devices they use on a daily basis.
 - Several committees have been formed as a part of the governance of COALS IT. More info can be found at the link below; we are still recruiting members for each so please feel free to contact us if you would like to participate
 - <https://firstcallhelp.tamu.edu/knowledge-base/coals-it-governance/>
 - Question was raised – “What’s the worst thing that could happen in the process of my migration? Is there a chance I lose all my data?”
 - Data is not affected in any way for this migration
 - An older computer that lacks current updates may cause abortion of the migration. In this case, IT will assist with software/hardware fixes to resolve and then proceed with migration.
 - Question was raised regarding the capability to have Teams/contacts that are external to AgriLife, e.g. will COALS users continue to be able to connect with other college colleagues/external collaborators post-migration?

- Yes, there are over 9K external users that are already in existence that AgriLife users have added. Files can be shared with any user, and external users can be added to your MS Team membership as needed.
- The Microsoft Phone service offering is separate from this migration.

<https://firstcallhelp.tamu.edu/article-categories/phone-service/>

- AgriLife Research Cloud (ARC)
 - AIT is seeing a great deal of interest across teaching, research, and extension

<https://firstcallhelp.tamu.edu/knowledge-base/agrilife-research-cloud-service-center/>



AIT-CAB-MAY-2021-
Update.pdf

Group Discussion

- As presentations were being made, David Baltensperger brought up an important note regarding communicating effectively about services provided with new users in the future, during the new employee onboarding process.
 - AIT's new user guide is a great example that can be used across the Professional Services units.
 - Caitlyn Calvert, leader of the AgriLife Strategic Plan work group for leadership and professional development, shared that her work group is indeed working now on a uniform onboarding process for new employees in which this type of information can be shared across the agencies and COALS.
 - Angela Burkham also referenced a new professional development position they have created that will be working on the overall orientation process for new Extension employees.

Susan Ballabina – Annual Report Discussion

- We would like to create an annual report for the Professional Services units to include similar metrics to those in the sample document below. This is another step in creating transparency and accountability to our organization and users across AgriLife



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- Input from this advisory team is needed to help us determine which metrics should be included in the report. Please email Dr. Ballabina with ideas and suggestions.
- The goal is to have a report for EOY 2021 that will include metrics as well as goals for the next year.

The next meeting of the Advisory Team will be held in August.

Adjourn