



# **Program Pathways Mapper Customer Success Plan**

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# 1. Introduction

**Purpose:** The PPM Customer Support Plan ensures consistent, high-quality support throughout the customer journey, from onboarding to ongoing use. It outlines processes and responsibilities to assist schools and users effectively.

**Scope:** This plan covers the full spectrum of user support, including onboarding, setup, and continued service. It applies to all users (administrators, faculty, and staff) and addresses routine and complex issues.

**Audience:** College and high school staff, district administrators, and prospective/existing users.

# 2. Program Overview

The **Program Pathways Mapper** (PPM) provides students with a clear roadmap to earn degrees, certificates, or transfer eligibility. By simplifying course sequences and requirements, PPM empowers students to make informed academic decisions and assists colleges in maintaining accurate, up-to-date program information.

## **Customer Segmentation:**

- Public and private college users
- Dual enrollment high school users
- District-level users

# 3. Support Team Roles

**Implementation Manager:** The Implementation Manager leads the initial customer engagement, providing an introductory meeting and product demo and conducting the formal kickoff session. After the kickoff, the Implementation Manager hands off the account to the assigned Account Manager. In addition to these responsibilities, the Implementation Manager may also serve as the Account Manager for some schools, managing those relationships directly.

**Account Managers:** Each school is introduced to its dedicated Account Manager during their kickoff meeting. The Account Manager is responsible for managing the relationship, supporting the school through onboarding, managing the initial data cleaning and software configuration, and providing ongoing support throughout the academic year. Account Managers will maintain proactive communication with schools to ensure they have all of the necessary tools and resources to get the most out of the PPM tool. Schools may receive communications from their Account Managers through our Customer Success Platform, **Totango**.

**Support Specialists:** Support Specialists serve as the first line of support, primarily responding to support tickets in the self-service portal (**Zendesk**). They handle routine technical inquiries, troubleshoot common issues, and escalate more complex concerns to Account Managers or the Senior Program Manager as needed. Support Specialists will maintain reactive communication with schools and will loop in Account Managers when necessary.

**Guided Pathways Regional Coordinators:** Regional Coordinators provide critical local support for colleges and districts as they implement the Guided Pathways framework. They foster regional collaboration and serve as liaisons between colleges/districts and the California Community Colleges Chancellor's Office. As ambassadors for PPM, they are available to help answer questions or direct to the customer support team, share new resources, and provide insight to the customer support team on the challenges the colleges are facing with PPM.

**Senior Program Manager:** The Senior Program Manager handles escalated customer issues and ensures customer retention by resolving complex concerns.

## 4. Support Processes

### Support Channels

**Email:** [ppm-support@foundationccc.org](mailto:ppm-support@foundationccc.org) (urgent matters and technical support).

**Business Hours:** Monday - Friday, 8 AM - 5 PM (PST)

**Zendesk:** 24/7 access to a self-service portal with articles, submit support tickets, FAQs, and community knowledge-sharing

(<https://admin-support.programmapper.org/hc/en-us>)

**Office Hours:** For screen-share support, visit (<https://admin-support.programmapper.org/hc/en-us>) to register/book a call. Office hours are held on a weekly, recurring basis.

**1:1 Meetings:** You also have the option of communicating directly with your assigned Account Manager to schedule a 1:1 meeting during normal business hours.

## Request Handling

**Intake:** Support Specialists will respond to support tickets submitted through [ppm-support@foundationccc.org](mailto:ppm-support@foundationccc.org) or through our [help center](#) within one business day. Account Managers will respond to emails within one business day.

**Prioritization:** Issues will be categorized by severity level:

- Severity 1: Critical service outage for all users
- Severity 2: Service outage for a subset of users
- Severity 3: Temporary service disruptions to a service or feature
- Severity 4-5: Minor errors or cosmetic issues
- Escalation pathways will follow as outlined in the Incident Response Plan

## Resolution Workflow

1. **Step 1:** The Support Specialist will assess the severity level of the issue.
2. **Step 2:**
  - a. For **Severity 1-2** issues, the Support Specialist will notify the entire PPM team and follow the Incident Response Plan.
  - b. For **Severity 3** issues, the Support Specialist will collaborate with the Product Manager to assess if escalation is needed.
  - c. When necessary, the Support Specialist will loop in the school's Account Manager.
3. **Step 3:** If the issue cannot be resolved at the current level, it will follow the appropriate escalation path.

## 5. Customer Onboarding and Outreach

### Phase One: Pre-onboarding

#### **Inquiry Received**

Once we receive your inquiry, expect a response within 24 hours (within normal business hours, Monday-Friday). We'll answer any initial questions and work with you to schedule an Introductory Meeting/Demo. If we don't hear back, we'll follow up every 2 weeks for up to 4 attempts. After that, we'll stop direct follow-ups, but you'll remain on our mailing list for updates and newsletters.

#### **Introductory Meeting/Demo (Optional)**

At this meeting, we'll provide an overview of the PPM highlighting its background, impact, and benefits. We'll discuss your eligibility for the grant (for California schools only), and walk you through the grant agreement and the required deliverable template (implementation or institutionalization plan). The Implementation Manager will go over the PPM Onboarding Agreement and answer your questions. At the end of the meeting, we will schedule your kickoff meeting. If you're not ready to schedule at that point, the Implementation Manager will follow up with you every 2 weeks to check in. If there's no response after 4 follow-ups, we'll stop reaching out directly but keep you on our mailing list for updates.

#### **Onboarding Agreement Process**

Once you decide to move forward, please reach out to your Implementation Manager. The Implementation Manager will notify the Contract Specialist that the school wants to move forward. The Implementation Manager will share a Google Form to obtain key school contacts to start the onboarding process. The Contract Specialist will reach out to you to facilitate the execution of the Onboarding Agreement.

### Phase Two: Onboarding

#### **Kickoff Meeting**

During the kickoff meeting, your Implementation Manager and Account Manager will outline the onboarding process, provide an overview of the materials, and walk through the next steps for successful implementation. Afterward, your Account Manager will share the curriculum data templates and add your school's PPM team to the PPM Office Hours as a channel for support through Zoom.

## **Curriculum data templates include:**

### Template 1: College Info

Contains information that is important in configuring your Program Pathways Mapper instance. This template includes links to your online catalog, application page, registration page, and where to schedule an appointment with an advisor or counselor.

### Template 2: Program Group Names and Descriptions.

Provides the names and descriptions for your Program Groups (Interest Clusters/Meta Majors).

### Template 3: Program Group Lists (Interest Clusters/Meta Majors)

Defines which programs go under which Program Groups (Interest Clusters/Meta Majors).

### Template 4: Programs

Contains your local program curriculum data. The required fields are Program Name, Award Type, Min/Max Units, and Description.

### Template 5: Courses

Contains your local course curriculum data. The required fields are Course Name, Course Code, Min/Max Units, and Description.

### Template 6: Program Map

As part of onboarding, the PPM team will author one map for you. This template is how we require the map data to be delivered to us. **NOTE: This template is not required for all of your maps. It is for the one map the PPM team will author for you.**

### Template 7: Course Lists

This template is for any course list that will be used in multiple maps. Your CalGETC (and other general education patterns) will be taken from your online catalog. If you have any questions about this template, please contact [PPM-Support@foundationccc.org](mailto:PPM-Support@foundationccc.org).

### **Kickoff Meeting Completed**

After the kickoff meeting, schools are expected to complete the curriculum data templates. This generally takes about 4 weeks. We will follow up after 1 month to check on your progress. If we don't hear back, we'll follow up every 2 weeks for a total of 4 follow-up attempts. After that, direct follow-ups will stop, but you'll remain on our mailing list for updates.

### **Templates Completed**

Once you complete your curriculum data templates and have sent them to your Account Manager, we'll get back to you within 24 hours to provide the next steps for moving forward.

### **Data Cleaning & PPM Configuring**

Once your Account Manager receives your completed templates, they will complete the data cleaning and software configuration for your school within 4 weeks. This turnaround time may vary based on your school's number of course lists or school-specific General Education patterns.

### **Ready to Begin Authoring**

After the data-cleaning process is completed, your Account Manager will invite your school's main point of contact into the system. We will provide instructions to add necessary school team members into the PPM to assist with the Map Authoring efforts. We'll provide you with a detailed error report along with training materials (the PPM Admin Help Center) to guide you in resolving them.

## **Phase Three: Authoring**

### **Map Authoring**

If map authoring hasn't begun after template completion, we'll follow up monthly. If progress stalls after the initial phase, we'll check in quarterly to ensure the project stays on track. Your Account Manager is available to answer any questions and provide training when necessary. Please reach out to your Account Manager if you'd like to schedule a meeting to discuss questions or join our twice-weekly PPM Office Hours on Tuesday at 11 AM PT or Thursday at 4 PM PT.

## Phase Four: Published

### Promote PPM Maps

After completing your PPM Maps for the current curriculum year, it's important to drive traffic so that your hard work is accessible to your students as well as prospective students. Your Account Manager can provide some guidance on how to drive traffic to your PPM Maps in multiple ways, on your school website, through social media, etc.

## Phase Five: Receiving Traffic

### Monitor Analytics

After a couple of months, your Account Manager will share your school's Google Analytics dashboard to provide valuable insights on which maps are receiving the most traffic, their sources, where your traffic is coming from, etc. If you'd like, you can schedule a meeting with your Account Manager to better understand your dashboard so that you can use your PPM tool to make data-driven decisions for your institution.

## Ongoing Support

### Next Academic Year Catalog Availability

Your Account Manager will notify you when the next academic year catalog becomes available in the Data Clean-up Tool (DCT), typically between December and March. This update enables you to transition to the new curriculum year in the Authoring Tool.

To proceed, you'll need to import your local curriculum data and merge it with the COCI data in the DCT. This step may require additional alignment, and training materials are available to guide you. Once your data is finalized, it will be ready for publication and use in the Authoring Tool.

To ensure seamless support, please share your catalog update timeline with us. This will help us schedule follow-ups efficiently and avoid unnecessary reminders.

### Ongoing Engagement

Throughout the year, we'll continue to communicate with you to offer support and provide information on other relevant programs and resources. We will also seek your feedback to enhance our support services and ensure we are addressing your needs effectively.

### **Sending Analytics**

At the end of each quarter, we'll reach out with Google Analytics reports to give you insights into how your published maps are being used by students and staff, considering peak times when students might view the site. This will allow us to highlight successes and suggest ways to improve site traffic to bring more value to your maps. Additionally, you will always have access to a self-service dashboard where you can pull these Google Analytics reports at any time.

### **Continuous Process Improvement**

The PPM team is committed to continuous process improvement, a structured approach focused on enhancing performance, efficiency, and outcomes. This involves regularly assessing and refining processes to identify inefficiencies, bottlenecks, and opportunities for improvement. The PPM Customer Support team will collaborate with colleges and districts to pinpoint areas for enhancement and implement more efficient practices.

### **Professional Development**

The PPM Customer Support team will provide professional development opportunities to help PPM users continually enhance their skills, knowledge, and competencies. Through training, workshops, mentoring, and cross-functional collaboration, the PPM program cultivates a culture of continuous learning and growth.

## **6. Communication Protocols**

To ensure you don't miss any important updates or support communications, please add [ppm-support@foundationccc.org](mailto:ppm-support@foundationccc.org) to your list of contacts. This will help make sure that our emails, including notifications, reminders, and updates, reach your inbox.

### **Proactive Notifications**

You'll receive proactive emails from your account manager with key deadlines, system updates, or check-ins to ensure smooth progress.

### **Feedback Loop**

We'll also gather feedback annually through client satisfaction surveys and other feedback opportunities to assess and improve our services.

## 7. Training & Development

We are committed to providing ongoing training and support to help you make the most of the Program Pathways Mapper. Here's what you can expect:

- **User Group Convenings:** Each quarter, we host User Group Convenings where schools can come together to share insights and best practices and learn about new developments in the Program Pathways Mapper and the Guided Pathways framework.
- **[PPM Discussion Board](https://admin-support.programmapper.org/hc/en-us/community/topics):** Our Zendesk platform offers a community forum where you can connect with other schools, share ideas, and discuss industry trends and best practices. This is a valuable space to collaborate and learn from your peers. Visit <https://admin-support.programmapper.org/hc/en-us/community/topics> to join.
- **Help Articles and Training Videos:** On Zendesk, you'll find a library of help articles and training videos that provide guidance on using the Program Pathways Mapper effectively. These resources are available to you anytime for self-service support.

Our goal is to ensure that you have all the tools and support you need to use the Program Pathways Mapper to its fullest potential.

## 8. Ongoing Enhancements and Support

At Program Pathways Mapper, we're continuously working to enhance your experience and ensure our tools and services meet your needs. Here's what you can expect moving forward:

- **Enhanced Support:** We continuously improve our response times and support processes to ensure that you receive timely, high-quality assistance.
- **New Features and Updates:** As we gather feedback from schools, we use it to guide the development of new features and resources that can make your work with Program Pathways Mapper more efficient and effective.
- **Continuous Learning:** We're committed to providing new articles, training materials, and resources on our Zendesk platform to help you stay up-to-date and make the most of the +tool.

- **Feedback-Driven Improvements:** Your input is important to us. We use your feedback from surveys, user group meetings, and direct interactions to continually improve our services and the tools we provide.

We're always here to help and look forward to supporting your continued success with Program Pathways Mapper.