Educational Session

2367 - The Four Disciplines of Execution (4DX) Model: A Case of Transfer Student Retention and Success

Leadership and Strategic Planning, Partnerships and Collaboration

This presentation will take participants on an innovative journey into strategic planning using the Four Disciplines of Execution (4DX) model, and will reveal both the simplicity and benefits of this creative method of strategic focus. Participants will then have an opportunity to work on specifically designed 4DX activities to conceptualize how this model may be utilized within their own teams.

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University of Central Florida
4 Disciplines of Execution
Agenda

- Overview of the 4DX Model
- 4DX in Action!
- Activity
4DX: A New Method to Meet Strategic Goals

New approach and new method

Different than traditional ‘strategic planning’

Fun and engaging

Driven by committed teams
Typical Strategic Planning

1. Gather Info/Facts
2. Define Goals
3. Define Metrics
4. Define Strategies
5. Execute
Typical Strategic Planning

Gather Info/Facts  Define Goals  Define Metrics  Define Strategies  Execute

Often where breakdowns happen!
Typical Strategic Planning

Breakdown of Execution Results from Inherent Problems in the System

- Leadership driven, but staff expected execution
- Lack of clarity in the objectives
- Lack of commitment to the goals
- No accountability
- No idea how to achieve goals
- Are not held accountable
Typical Strategic Planning

Gather Info/Facts → Define Goals → Define Metrics → Define Strategies → Execute

Leadership driven, **but staff expected execution**

**Daily Whirlwind**

Staff have their Whirlwind: Their day-to-day duties and responsibilities.

Asking them to take on the added task of executing a strategic plan takes them away from their primary responsibilities. Either their duties, or the plan, risks suffering due to lack of attention.

**Often where breakdowns happen!**
4DX Method

4DX takes us inside the whirlwind, and allows us to focus more intentionally on what we already do!

We’re asked to draw on our daily activities, and to better measure our impacts in the areas on where we have expert knowledge.

We get to take things to the next level!
4 Disciplines of Execution (4DX)

1. Focus on the WIG (Widely Important Goal)
2. Act On Real Time (Lead) Data
3. Keep Score
4. Demand Accountability
4 Disciplines of Execution

1. Focus on the Wildly Important Goal (WIG)
   • Focus less to achieve more
   • Focus on a single, achievable target...that you develop

From X to Y by when
2. Act on the Lead Measures

- Lag Measures = data of what has already happened
- Lead Measures = data on current behavior or action
  - Routine collection and review of data (week-by-week) to see increases or decreases
  - Allows your team to make quick, real-time corrections as needed
4 Disciplines of Execution

3. Keep a score!!
   • Capture the score of the game, as it is being played!
   • See the movement of the data in real-time
   • Lets you act immediately to:
     • Build on best practices
     • Shift from poor strategies
4. Maintain a Cadence of Accountability

- Keeps data and goals in front
- Brings the teams together
- Places importance on knowing what is happening
- Demands accountability
4DX IN ACTION!
UCF Connect 4DX Model

Wildly Important Goal (WIG)

BIG GOAL!!

Increase retention rates for UCF Connect, UCF Continuing Education, and UCF Global students by 2% by Fall 2020.

Team Marketing
Increase the number of students who sign up for DirectConnect by 10% by fall 2020.

Team Continuing Education
Increase retention in the SHRM program from 70% to 85% by fall 2020.

Team UCF Global
Increase retention in the English Language Institute by 2% by fall 2020.

Team Connect Specialists
Increase the number of students who are scheduled by Connect Specialists for an appointment with a Success Coach from 0% to 2% by fall 2020.

Team Orientation
Increase the number of students who complete their orientation within one month of registering for orientation from 10% to 12% 2020.

Team Coaches
Increase the number of students who enroll after orientation completion by 2%.

Team Libraries
Increase the number of student encounters with a Connect librarian for reference service (1-on-1 assistance) by 5% by fall 2020.

What can the teams INFLUENCE to move the big WIG?
Team sub-wigs MUST impact movement for the organizational WIG!

Actionable APPROACH!!
4DX in Action!
4DX in Action!

- **Team UCF Connect Marketing:** Increased DirectConnect signups by 33% (Fall ’19-Fall ’20)

- **Team Orientation:** Increased by 14% the number of students who completed orientation within one month, or less. (Fall ’19-Fall ’20)

- **Team Connect Specialists:** 73% of prospective students contacted scheduled an appointment with their Success Coach. (Fall ’19-Fall ’20)

- **Team Success Coaches:** 42% of students who completed orientation then enrolled in classes during a Success Coaching session. (Fall ’19-Fall ’20)
4DX in Action!

• **Team Libraries:** 141% increase in student encounters with a librarian for reference services (one-on-one instruction). (Fall '19-Fall '20)

• **Team Continuing Education:** Increased retention rates in the SHRM program from 67% to 93% fall 2018 to fall 2019, and from 81% to 98% spring 2019 to spring 2020.

• **Team UCF Global:** Increased average retention rates in ELI from 52% to 66%. Also increased advising visits, at-risk outreaches, events, and social media impressions. (Fall '19-Fall '20)
UCF Connect 4DX Model

Wildly Important Goal (WIG)

Increase retention rates for UCF Connect, UCF Continuing Education, and UCF Global students by 2% by Fall 2020.

Team Marketing
Increase the number of students who sign up for DirectConnect by 10% by fall 2020. Met

Team Continuing Education
Increase retention in the SHRM program from 70% to 85% by fall 2020. Met

Team UCF Global
Increase retention in the English Language Institute by 2% by fall 2020. Met

Team Connect Specialists
Increase the number of students who are scheduled by Connect Specialists for an appointment with a Success Coach from 0% to 2% by fall 2020. Met

Team Orientation
Increase the number of students who complete their orientation within one month of registering for orientation from 10% to 12% 2020. Met

Team Coaches
Increase the number of students who enroll after orientation completion by 2%. Met

Team Libraries
Increase the number of student encounters with a Connect librarian for reference service (1-on-1 assistance) by 5% by fall 2020. Met

What can the team do TO move the big goal forward?
Team sub-wigs MUST impact movement for the organizational WIG!

Actionable APPROACH!!
4DX in Action!

- 4DX puts a laser focus on bottom line.
- We're now thinking differently about student engagement.
- Coaches are beginning to understand that each touch with a student is important.
- Shows the importance of reaching out to students and the effects.
- Gives us a deeper understanding of the student experience.
- Collaborating and focusing together can lead to such a benefit for the students.
- We have a greater understanding of how everything we do all ties together (from marketing to enrollment).
- Increasing ownership, leadership, consistency, and collaboration.
- Having data right in front of us, and seeing movements in those data, has been helpful.
- We’ve created a forum for best practices; we formalized it. We now have lots of follow-through, and continued momentum building. Interest hasn’t waned.
- Has exposed some of our weaknesses.

4DX is increasing teambuilding and collaboration.
Activity
Activity!

BIG GOAL!!

What is one BIG goal that your team would like to meet (the WIG)?

What is one action/strategy that you can focus on week-over-week by which you can track movement toward reaching your goal?

Actionable STEPS!!
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