A Unified CRM System Enhances Collaboration And Personalization to Support Gonzaga University's Strategic Priorities

Throughout its history, Gonzaga University (GU) has become a premier liberal arts institution in a competitive environment. To maintain this distinction as peer institutions across the country face economic and enrollment headwinds, GU leaders regularly evaluate opportunities to improve decision making, educational delivery and student support.

Gonzaga University updated its strategic commitments in December 2017 to emphasize this spirit of continuous improvement, with increased focus on providing dynamic educational experiences and equipping employees with the resources to position the institution for success for decades to come. To deliver on these commitments, Gonzaga needed to improve its support structure to spur meaningful collaboration across the university.

"Having cabinet-level support and sponsorship is critical to breaking down silos and sharing data across the university. We're solving issues we hadn't discussed before."

BORRE ULRICHSEN, CIO OF GONZAGA UNIVERSITY

A 360-Degree View of Prospects, Students, Alumni and Donors

Aging technology caused a variety of challenges related to collecting, tracking and analyzing student, alumni and donor data required to meet strategic goals:

- The undergraduate admissions department had no customer relationship management (CRM) solution and relied on extensive manual work to deliver hands-on, individualized engagement.

- Graduate enrollment and university advancement units each had their own respective solutions that were not meeting the needs of the departments.

- Data on prospective students, current students, alumni and donors was siloed within departments, with data sharing happening manually and only by request.

Borre Ulrichsen, chief information officer of Gonzaga University, recognized that a unified solution could best meet the needs of each department — as long as there was executive buy-in and sponsorship. "To make this investment attractive to the board of directors, we had to present a united front," he explained.

A cross-department project team collaborated to present GU leadership with a case for investing in a 360-degree view of prospective students, current students, alumni and donors. With strategic goals to strengthen GU's brand position and recruit and retain a more diverse student population, the institution needed the resources to coordinate and personalize outreach to these groups at each stage of their unique journeys. A centralized, intuitive system would also reinforce GU's focus on empowering faculty and staff to participate in building the institution's future through data-driven decision making. GU's leaders clearly recognized that consolidating their siloed systems and data sources into an integrated CRM solution would be critical to carrying out the strategic plan and gaining a more complete picture of the populations the university serves.

"The power of this solution is getting our information in the same place so it can be used across the board," said Jon Billings, director of graduate enrollment. "If each department tried to do something smaller, we wouldn't have the executive support, the IT support, the budget or the benefits of working together collectively to be successful at scale."

A Collaborative Approach

GU partnered with Huron to evaluate, select and implement a solution for this ambitious goal. To ensure the solution would meet the needs of each department and to prepare for the cultural, technical and operational implications of deploying CRM across the university, the project team:

· Interviewed more than 100 members of the Gonzaga community, including students, faculty, staff and administrators, to understand current pain points and communicate the advantages a CRM solution could enable.

· Established change management and communications planning strategies.

· Mapped current and future-state business processes.

· Established key performance indicators (KPIs) to track engagement and identify redundant technologies to sunset post-migration.

· Identified and prioritized functional and technical requirements and strategic objectives from across the enterprise to incorporate in a request for proposal (RFP).

· Rigorously evaluated request for information (RFI) and RFP responses, CRM vendor demonstrations and stakeholder-managed peer review conversations.

HURON CONSULTING GROUP®

GU leadership approved the project team's vendor recommendation, and implementation is underway. GU's project management office has continued to partner with Huron to help ensure implementation, integration and overall project success.

Personalized Engagement Strategies

Choosing a unified CRM solution is only the beginning of the journey; departments must now continue their collaboration by developing data sharing and data governance practices.

"Having cabinet-level support and sponsorship is critical to breaking down silos and sharing data across the university. We're solving issues we hadn't discussed before," said Ulrichsen.

Once the CRM solution is implemented, GU staff will benefit from automated processes and readily accessible data. GU department leaders and outreach staff look forward to more efficiently and effectively personalizing experiences for potential students, current students, alumni and donors.

"We have a lot of strategies we have been wanting to deploy widely," said Dori Sonntag, associate vice president of university advancement. "The new CRM solution will allow us to scale up strategies we've used in smaller or more manual ways."

The CRM technology will enable transformation across teams:

- Admissions will be able to personalize communications based not only on the program or major a prospective student is interested in, but also their unique extracurricular and career interests, financial aid needs, search preferences and specific questions.

- The office of the provost will be able to proactively identify trends and address issues in student success.

- University advancement will be able to more effectively build personas for GU's alumni and donor base to better understand and address their needs. The department will segment and share content tailored to these personas' interests and goals through their preferred communication channels.

Unburdened by manual communications and processes, departments will have more time to act on — rather than gather or interpret — data, allowing GU to build stronger relationships with past, current and future students. Gonzaga University's integrated approach to data sharing will help its teams serve as strong stewards of the institution's strategic plan and transform engagement throughout the student lifecycle, from prospective students to alumni.

HURON

huronconsultinggroup.com