

# BUILDING RELATIONSHIPS ACROSS THE ENTIRE STUDENT LIFECYCLE

## RECOMMENDATIONS

- Implementation partners are key in developing successful methodologies for change management and making a plan for the path forward.
- Active engagement with end-user communities can help communicate best practices, successes and ideas to stakeholders.
- A flexible solution should include robust capabilities to drive your institutional transformation, not impede it.

Many institutions face challenges getting the buy-in needed to adopt a constituent relationship management (CRM) solution across campus. Ovum's recent white paper, developed in collaboration with Huron's Higher Education practice, discusses how universities can successfully approach the journey to a campuswide solution.

To ensure a CRM initiative meaningfully transforms your institution, it's key to:

- 1. Involve the right mix of people:** Technology is only one component of a campuswide CRM initiative, so the stakeholders involved should extend beyond the IT department. Engaging a diverse group of representatives from across departments and levels is critical to ensuring acceptance and adoption.
- 2. Develop sustainable processes:** A successful implementation is more than a one-and-done project. Instead, it's an ongoing effort that demands long-term planning, thoughtful communication and detailed governance.
- 3. Find the right partners:** Deep change management knowledge and experience implementing CRM solutions at multiple institutions throughout the student lifecycle are vital in an implementation partner. From planning through implementation, understanding how best to leverage the technology to meet your institutional needs will play a part in the initiative's success.

Huron is committed to helping institutions resolve complex student lifecycle challenges. Our higher education professionals work closely with clients to develop tailored approaches that align each institution's unique vision, organizational strategy, technology and financial resources to improve the student experience, student outcomes and institutional financial performance.

We've seen how, with the right implementation partner and CRM solution, institutions can develop meaningful relationships with students from recruitment to graduation and beyond.

Read more about deploying campuswide CRM solutions to successfully manage relationships across the entire student lifecycle.

# The Transformational Journey to Campus-Wide CRM

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A practical guide to harnessing second-wave CRM adoption for more powerful student lifecycle management

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Nicole Engelbert

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## Summary

### Catalyst

Disruption in the higher education industry has created an imperative to adopt campus-wide CRM strategies to support a platform of engagement across the entire student lifecycle. While the adoption of CRM solutions has proliferated, particularly around recruitment and development activities, many colleges and universities are struggling to make significant progress beyond department-led initiatives. Nettle challenges exist across multiple factors, including institutional and technological ones. Nevertheless, some institutions have boldly persisted, and their early initiatives are delivering results. This report will explore the powerful lessons to be learned from their successes to help other institutions make progress with campus-wide CRM.

### Ovum view

A myriad of factors is driving colleges and universities to seek out new ways to differentiate their education services and to deliver them more cost effectively. Positioning relationships with students, across the entire lifecycle, as a strategic resource is gaining momentum. Early institutional advocates of this approach are leading the way, and their successes are providing rich insights into how others can accelerate their own efforts. Their experiences suggest that campus-wide CRM is not a technology initiative but an institutional transformation one, and thus progress depends on intentional investments in the individuals tasked with execution and directly cultivating student relationships. Similarly, the right structures and processes provide a valuable "tailwind" to propel this journey of student engagement, particularly in the areas of iteration, governance, communication, and measurement. And finally, early decisions about solution providers have a material impact on an institution's ability to build more sustainable, flexible, and innovative approaches to CRM.

At the end of the day, the journey to campus-wide CRM is a long and challenging one. But best practice is emerging rapidly and easing the way for more widespread uptake. The right small steps can have a profound impact. And given the potential of institution-wide platforms for improving student engagement, and ultimately outcomes, it is a journey well worth taking.

### Key messages

- The value is clear but the path is not for campus-wide CRM.
- Focus on the people who will transform institutional relationships.
- Investing in the right processes creates a virtuous cycle.
- Seek out the right solution providers and partners.

### Recommendations for colleges and universities

- **Embrace the reality that campus-wide CRM will be a transformational journey taken in small steps:** The ability to manage relationships strategically across the

entire student lifecycle often requires dramatic changes in how stakeholders perceive their own roles, the delivery of education services, and even the purpose of higher education. The implementation of technology is only a small part of this undertaking. Consequently, institutions should embrace the long-term reality of campus-wide CRM and commit to an iterative and phased approach, where interim successes are celebrated and missteps positioned as valuable learning opportunities.

Implementation partners will be a key element in doing this effectively as they can contribute best-practice methodology for change management and offer a third-party view of the way forward through challenging periods.

- **Lean on communities of best practice and contribute to them:** The collaborative culture of the higher education industry is one of its most unique and valuable assets. While competition for faculty, students, and funding has increased recently, colleges and universities continue to share best practice, new ideas, and even software code openly and without hesitation. Early adopters of campus-wide CRM are capturing valuable "field intelligence" on what works, but without question, there is still considerable knowledge to be gained about the most effective path forward to managing relationships across the entire student lifecycle. Consequently, it is critical – for the success of not only individual institutions but the industry overall – for stakeholders to engage end-user communities actively to create these insights.
- **Harness the power of a platform:** The journey to campus-wide CRM will be long and unpredictable, particularly from the perspective of meeting student expectations and differentiating on education services as the higher education and consumer markets shift and change. Relationship management practices that are considered innovative today will become the price of admission tomorrow. The CRM solution should serve as a platform for student engagement in whatever form it may take and from wherever it might occur. Consequently, institutions must seek out technology partners that deliver flexible solutions, robust capabilities, and rapid development and deployment models. Ultimately, the solution should drive rather impede institutional transformation.

## Progress is possible with the journey to campus-wide CRM

### The value is clear but the path is not for campus-wide CRM

A myriad of forces is driving profound disruption in the higher education industry. Globalization, economic turbulence and resulting workforce displacement, demographic upheaval, political shifts, and technological innovation, to name just a few, are calling into question long-held beliefs about the role of education and its delivery. Surviving and even thriving in this environment will depend, in large part, on an institution's ability to cultivate meaningful relationships with its students across the entire lifecycle and to use insights from those relationships to structure education programs and services in increasingly dynamic ways. Unfortunately, putting this student lifecycle management into action has proven more nettlesome than early advocates anticipated.

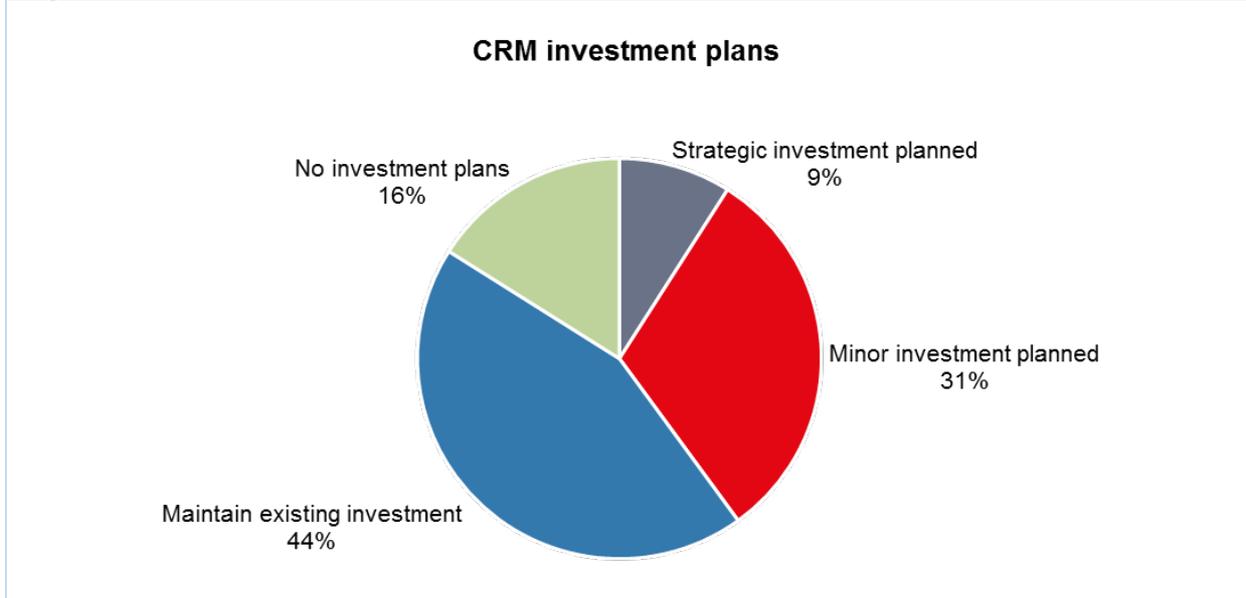
Nevertheless, visionary institutions persisted, and their early initiatives to position student relationships as strategic assets and manage them in coordinated ways across the entire lifecycle are delivering results. Constituent relationship management (CRM) solutions are moving from departmental applications to vibrant, institution-wide platforms for engagement. There are powerful lessons to be learned from their successes to help guide the next wave of institution-wide CRM adoption in the higher education industry.

### **Student relationships must be positioned as a strategic asset**

More so than any other industry, relationships serve as the foundation of higher education. The transfer of knowledge from faculty member to student, the creation of new knowledge among researchers, and the development of students by stakeholders across the institution occur through a series of individual points of engagement, culminating in deeply meaningful and productive relationships. While modern life may have shifted many of these interactions to the virtual realm, the tenure of a student's relationship with his or her institution remains a lifelong one, often starting long before submitting an application and ending long after receiving a diploma. In many ways, the institutional relationship is one of the most enduring and represents one of the largest financial investments he or she will make. Colleges and universities that not only recognize the primacy of these relationships but also position them as strategic assets critical to their long-term success will be far more likely to navigate the disruption facing the higher education industry effectively.

Recent research, conducted as part of Ovum's annual ICT Enterprise Insights survey, found that 40% of institutions globally planned an investment in CRM solutions over the next 18 months. This evidence suggests that many colleges and universities are already taking important steps to acquire the right technology to support student relationship management. However, managing student relationships and positioning those relationships as strategic, institutional assets are different, albeit related, endeavors. It starts with the extent to which the institution is deploying CRM on a campus-wide rather than a department-led basis.

**Figure 1: CRM investment plans**

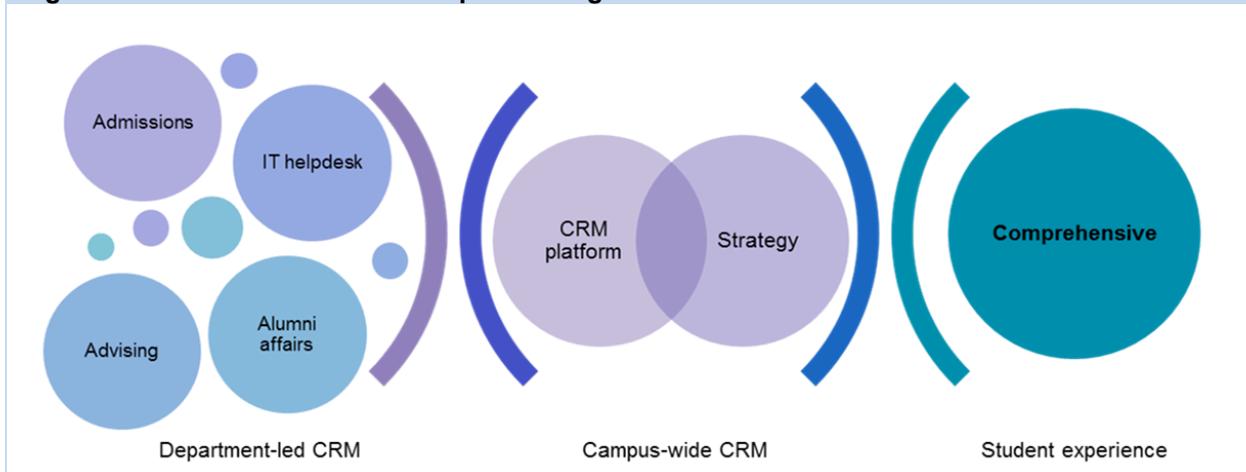


Source: Ovum ICT Enterprise Insights Survey, Global Education, 2016–17

**Early adopters offer powerful lessons on how to achieve campus-wide CRM**

While most institutions recognize the considerable potential of structuring their CRM deployments to mirror the student lifecycle, progress toward campus-wide has been limited. Loose collections of department-led CRM implementations prevail across campuses globally. Powerful CRM solutions, operating in silos, are helping colleges and universities to find valuable efficiencies in how they communicate with prospective students or alumni, execute marketing campaigns, manage IT service requests, and identify students at risk of dropping out, among others. However, these engagement points remain largely disconnected, stymieing institutions' ability to foster lifelong relationships with students through campus-wide CRM and ultimately to leverage insights from those relationships to deliver more intentional and personalized student experiences.

**Figure 2: Three waves of CRM adoption in higher education**



Source: Ovum

Campus-wide is chiefly the realm of forward-looking institutions with a specific set of attributes and capabilities. It is time, therefore, for higher education to learn from these bold trailblazers and take steps to put themselves on a path to student lifecycle management. Early research suggests the path is nonlinear, with department-led deployments from across the student lifecycle and campus-wide initiatives operating simultaneously, building long-term institutional capacity for managing the student experience more strategically. It is not an "all or nothing" scenario, but a journey of continuous transformation.

The next three sections of this report will delve into the strategies and actions taken by those colleges and universities that have broken free of department-led CRM and are making progress with campus-wide and even student experience models. The journey is a difficult one, but the stories of transformation and improved institutional outcomes from these early adopters suggest that it is one well worth undertaking.

## Focus on the people who will transform institutional relationships

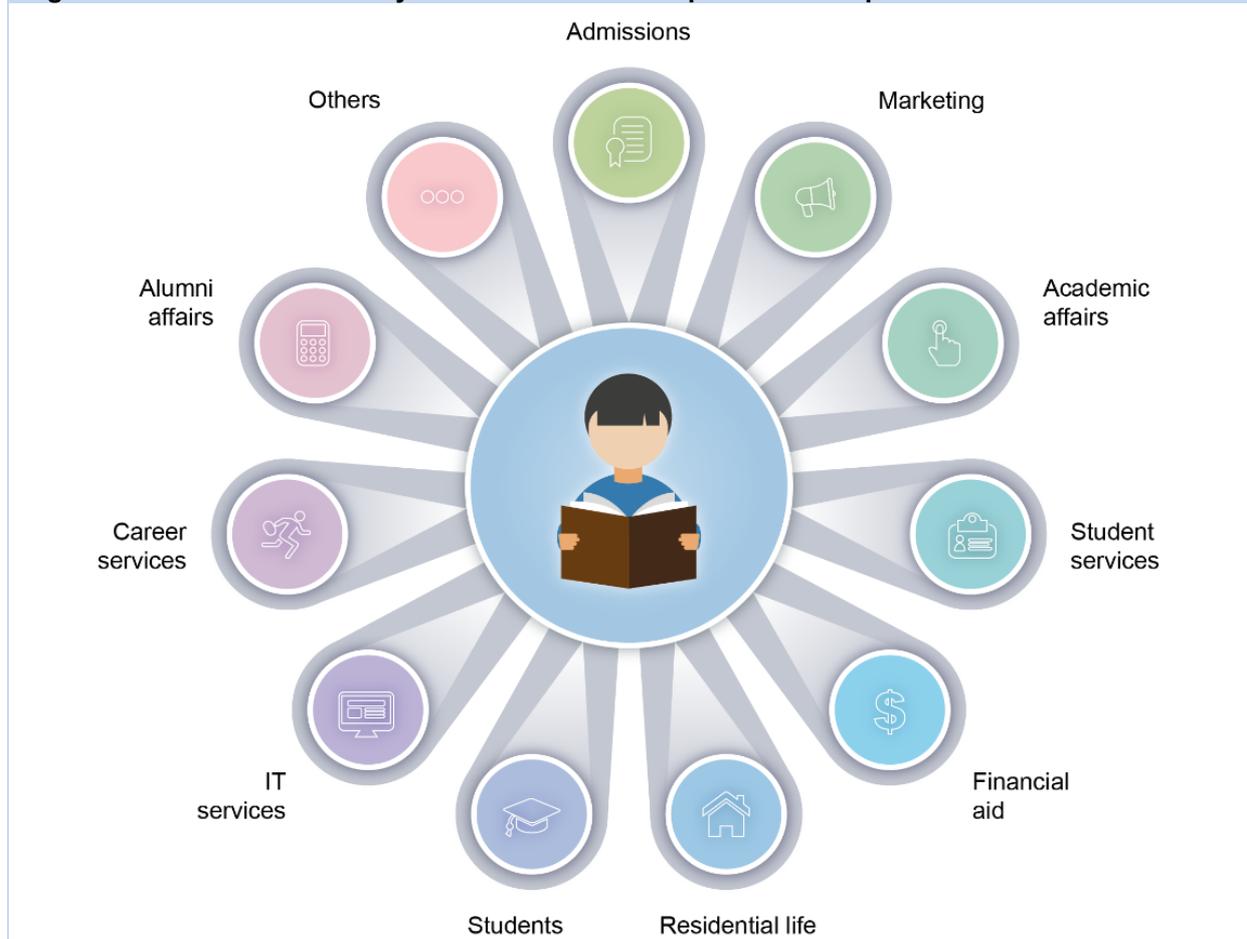
The overarching goal of any campus-wide CRM strategy is to facilitate, and even transform, the interactions among students, faculty, administrators, staff, employers, and beyond to improve institutional services on a continuous basis. Change management, therefore, shifts from a separate activity to a pervasive activity or even a cultural attribute. Consequently, the success of campus-wide CRM rests not on the selection of the right CRM solution but on the extent to which the college or university has invested in supporting how faculty, staff, and administrators engage with students and cultivate those relationships. Consequently, the first area of focus for any campus-wide CRM initiative must be on the people who will bring it to life. In this section, we will explore how the following people factors impact the journey to campus-wide CRM:

- A broad range of stakeholders will influence success or failure.
- An executive sponsor is a "sine qua non" for success.
- The campaign trail is a long and winding road.
- Centers of excellence help disseminate best practice.

### **A broad range of stakeholders will influence success or failure**

It is an obvious statement, but its importance cannot be overstated – when embarking on campus-wide CRM, institutions must involve a diverse array of stakeholders early in the journey and sustain that involvement over time. Building a stakeholder community with department-led CRM is relatively straightforward. Established processes such as recruitment or admissions determine which faculty, staff, administrators, alumni, or even student employees will impact the success or failure of the CRM initiative. Moreover, department leadership knows these individuals well, exerts some degree of formal or informal influence over them, and has already put communication structures in place, such as team meetings, email distribution lists, or enterprise social networks.

**Figure 3: A more diverse array of stakeholders is required for campus-wide CRM**



Source: Ovum

With campus-wide CRM, the initiative must draw from beyond departmental borders. An inventory of all the interaction points an institution has with students, from the first inquiry as a prospect through an annual fund donation as alumni, would be massive. And even taking a narrower view of campus-wide by including just retention efforts, stakeholders would include representatives from academic affairs, student services, residential life, financial aid, and IT services, among others.

Without question, building consensus – or even approximating it – with such a large and diverse set of stakeholders is challenging. Few established processes and structures exist for working collaboratively in such a cross-institutional way. Priorities may vary widely across departments, and even conflict, making it difficult to find common ground. Stakeholders may even find communication frustrating as departments such as financial aid, IT services, and academic affairs each have their own unique languages and regulatory environments. Nevertheless, Ovum encourages institutions to soldier on with bringing these stakeholders together. In some ways, it is the building of cross-departmental pathways and subsequent student centrality that delivers a significant proportion of the value from student lifecycle management. Tenacity is a virtue, and doubly so when it comes to achieving campus-wide CRM.

## **An executive sponsor is a "sine qua non" for success**

As the institution is building a groundswell of support for student lifecycle management through a diverse and engaged set of stakeholders, it is critical for the initiative to have a strong and visible executive sponsor. Given the mission-critical nature of student relationship management, it is not out of scope to consider individuals as senior as the provost or chancellor. More so than any other factor, the absence of a project sponsor will undermine a campus-wide CRM initiative. Few colleges or universities have been successful without this individual. This is not simply a matter of financial or budgetary support; it is about providing an overarching direction for the project and explicit links to the institutional mission, vision, and strategy, as these elements should drive how the student experience is transformed and the ways in which CRM supports these changes.

Moreover, there will be times when potentially contentious issues related to governance, data stewardship, rollout schedules, and customization boil over, requiring a senior leader to make difficult decisions and blaze a diplomatic path forward. Consequently, when possible, it is critical for institutions to select the right type of executive sponsor to guide their journey to campus-wide CRM. He or she must not only be decisive but also have the institutional credibility to inspire disparate groups to work together. Of course, some experience with transformation projects involving technology is a positive, but it is not requirement, which leads to the final word on executive sponsorship. While the CIO is a vital stakeholder in any CRM project, he or she should not be its owner or sponsor. Technology supports the initiative, whereas strategic relationship management is the initiative.

## **The campaign trail is a long and winding road – plan accordingly**

Building consensus, transforming processes, and envisioning new approaches to engaging students takes time, and thus the journey to campus-wide CRM is often a long and unpredictable one. It is therefore important for institutions to develop and communicate a compelling narrative about the value of investing in campus-wide CRM – one that answers the question, how will this initiative make our institution better? Leveraging concrete (ideally quantitative) examples and using line-of-business rather than technical language, this story will help to not only inspire stakeholders, and ultimately end users, to participate in the program, but also muster the tenacity of early advocates to stick with it when contending with difficult challenges and roadblocks.

Ovum has found that successful early adopters of campus-wide CRM often built in time and resources for institutional leaders to campaign on behalf of the vision and the benefits of program participation. Moreover, these efforts were not structured as one-off events, but as a consistent, ongoing effort over the course of the initiative and beyond. The narrative or CRM story was told repeatedly, to the extent that it became part of the institutional consciousness. While the direct cost of such efforts is likely to be minimal, time is a scarce resource for most faculty, staff, and administrators, so making time available for "campaigning" should be factored in when planning for a campus-wide CRM initiative.

## **Centers of excellence help disseminate best practice**

Although campus-wide CRM is not yet an established practice in higher education, lessons about what works and what does not are being learned by colleges and universities every day. Yet, in the "fog of war," it is often difficult to disseminate the knowledge of individuals about best practice to the

larger institution systematically. Consequently, the lessons learned become the craft knowledge of specific programs or departments rather than best practice shared by the institution, which reduces the ability to progress more rapidly with campus-wide CRM.

Ovum has found that creating formal centers of excellence around CRM has been a pivotal factor in the ability of colleges and universities to accelerate the adoption of their student relationship management strategies. It is not about reaching "lights on" with the solution, but about advancing the institution's ability to leverage relationships as a strategic asset. The centers typically compile lessons learned about change management and process transformation as well as solution implementation and usage, and then devote time and resources to delivering targeted training and support across the institution. This may include some of the campaigning efforts discussed in the preceding section.

It is also important to note that the lifespan of the center typically extends beyond the formal borders of the CRM initiative and solution implementation, supporting the ongoing development and evolution of relationship management, as well as including dedicated personnel. Similarly, the creation of the center of excellence often has more in common with evolution than "big bang" theory; the institution starts small, building the center in parallel with the implementation plan or transformation strategy and often targeting specific communities of stakeholders such as faculty or student affairs. This "lightweight" approach to building a center of excellence enables the institution to realize a quick win by establishing buy-in with a key faction.

While supporting a cloud-based solution is less onerous than on-premises ones, from a technical perspective, Ovum advises institutions to chart detailed specifications for technical and business skills. A center of excellence can be helpful to accomplish this task and grapple with challenges associated with staff recruitment and, more notably, retention in competitive employment markets.

### **Georgetown University**

Founded in 1789, Georgetown University is a highly selective private research university located in Washington, DC. It is the oldest Catholic and Jesuit university in the US and fosters a community of exceptional students, faculty, alumni, and professionals dedicated to real-world applications of its research, scholarship, faith, and service.

The university is committed to innovative methods for delivering higher education and ensuring a student experience that cements Georgetown as "home" to all alumni. As a result, over the past three years, it has launched the Georgetown360 initiative to replace its systems for organizing alumni and faculty information. It is also working to create an interactive portal for students, faculty, and staff in order to deliver a more personalized experience for all institutional constituents.

Leaders from the advancement and CIO offices sought feedback from other university leaders to bolster support for Georgetown360. Georgetown's leaders made a deep commitment to transparency in terms of the design and prototype to drive stakeholder engagement and buy-in and deliver the promised capabilities in a predictable way. The first step in the implementation phase of the project was the faculty portal, which officially went live in September 2017.

Georgetown360 continues to be rolled out across the university. Early investments in engaging stakeholders across the campus, aligning with the institutional mission, and cultivating pervasive leadership support has given the initiative a considerable tailwind and improved its likelihood of achieving campus-wide CRM.

## Investing in the right processes creates a virtuous cycle

Any journey begins with a map, however structured or entirely open it might be, and the journey to campus-wide CRM is no exception. Putting a series of specific structures or processes in place can help to create a virtuous cycle around the initiative, thereby improving the likelihood of its success.

These processes, however, are not stepwise actions for implementation but rather intentional organizing principles and perspectives related to iterating, governing, communicating, and even measuring the CRM initiative. In this section, we will discuss how the following process elements can have a material impact on advancing campus-wide CRM strategies more effectively:

- A long-term vision should guide your incremental steps.
- Good governance will be your lighthouse in the storm.
- Communication matters; plan for its execution.
- Relationships are qualitative, but the impact of CRM must be quantified.

### **A long-term vision should guide your incremental steps**

The path to campus-wide CRM adoption will be stepwise. Early advocates will rise from different lines of business – admissions, academic affairs, development, etc. – and campaign enthusiastically for their individual departments to serve as "pilots" for student lifecycle management initiatives.

Institutions should embrace this activism and move forward quickly rather than waiting for the achievement of broad consensus around vision and the development of a comprehensive project plan. The wait will be long, and consensus and concrete plans may never emerge – and if they do, they will likely be out of date with current student preferences and expectations by the time they are "approved." The recommended path for campus-wide CRM is akin to an agile rather than a waterfall methodology for software development. Shorter sprints – department deployments – should occur within a broad, but relatively flexible, framework – student lifecycle management – for overarching institutional value. This approach also supports the continuous delivery model for new solution functionality through cloud-based CRM solutions.

**Figure 4: Institutional vision and assessment enables strategic incrementalism**



Source: Ovum

For this model to work effectively, colleges and universities must construct a high-level institutional vision for student relationship management, ideally driven by the executive sponsor, but then take an iterative approach to its revision based on the experiences of department deployments and candid assessment of the implementation outcomes or lessons learned. Of course, this ties back to the need to engage a diverse set of stakeholders from across the institution. While at different times some stakeholders may not be directly involved with CRM, it is critical to keep them apprised of the lessons learned and to include their perspectives when charting the evolution of the vision.

### Good governance will be your lighthouse in the storm

Governance is one of the most common questions about how to approach campus-wide CRM. It is driven, at least in part, by the reality that no single institutional role "owns" relationship management across the entire student lifecycle. It is everyone's responsibility, and thus it is no one's day-to-day job. Too often, as mentioned earlier in this report, responsibility falls to the CIO, which makes CRM a technology rather than strategic initiative. Consequently, it is important for institutions to consider their own organizational structures and, in line with their vision for student experience, plan for long-term ownership of the initiative.

Although commonalities exist, governance is not the same as ownership. Good governance is the foundation for success with the implementation of any mission-critical technology solution, and CRM is no exception. Moreover, given its closeness to the core purpose of the institution and the variety of stakeholders, clear and consistently applied governance is a required element for success with CRM as it offers guiding principles and rules of engagement. Invariably, rather contentious questions will arise about the sharing of student data, particularly as the institution moves from insulated

departmental deployments and closer to a student lifecycle management approach. Strong governance will help institutions navigate these potentially fraught discussions successfully and find the right approach for their unique circumstances. Similarly, as more departments are added to the engagement platform, there will be requests for customizations to the solution or exceptions to established processes. A mature governance model will provide guidance on how to approach decision-making in these situations. Some institutions have taken an ROI method, where deviations are costed – including initial work and its ongoing maintenance – against its potential financial return. Others have created detailed rubrics that assess whether the exception is a commodity or differentiating function, and then only those contributing, in significant ways, to institutional differentiation are approved. There are other approaches as well, but ultimately, the adoption of these objective approaches to governing the solution provides a powerful lighthouse for colleges and universities in the storm of CRM implementation.

### **Communication matters; plan for its execution**

Unfortunately, communication about the progress of strategic and technology initiatives is often ad hoc or, worse still, reactionary when missteps or problems arise. Thus, key stakeholders, influencers, and end users – individuals who could have a material impact on the success of campus-wide CRM – are ill-informed and left feeling disconnected from institutional efforts. Therefore, Ovum advises colleges and universities to take a more proactive and intentional approach to communications by devising a structured plan that regularly highlights key milestones, celebrates successes and achievements at every level, and offers valuable lessons learned to the larger community.

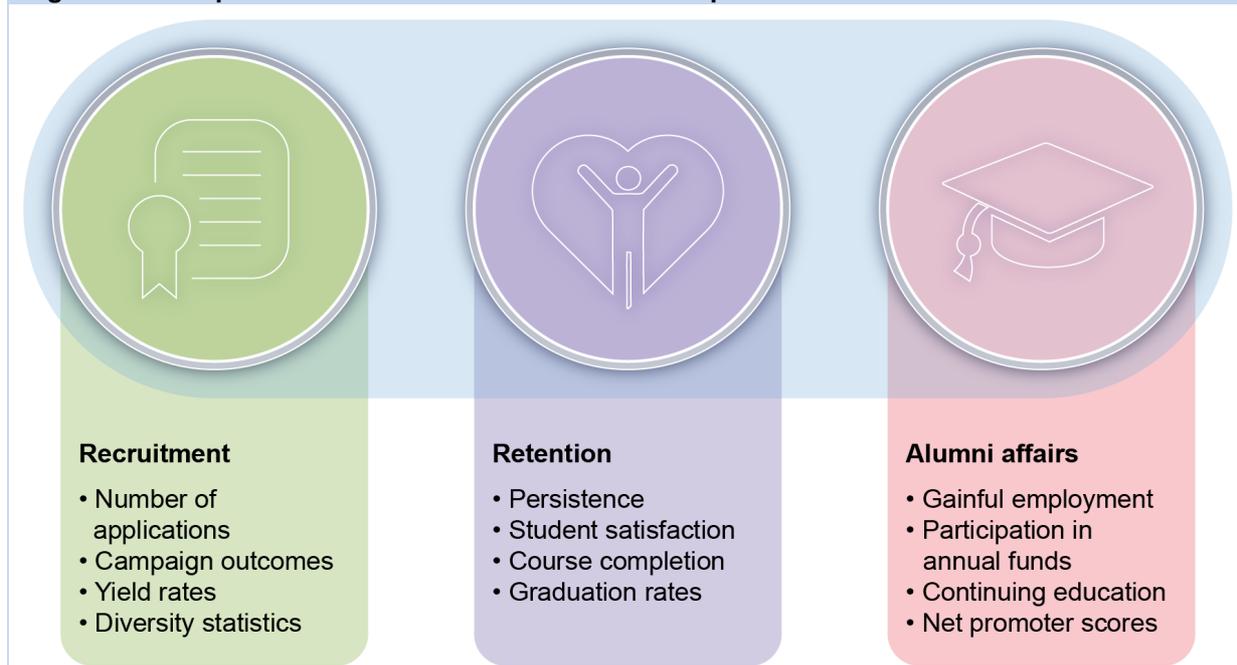
Communication channels and preferences have changed dramatically over the last decade. Consequently, institutions should incorporate these changes in their plans, expanding beyond email blasts and town hall-style presentations. If a successful CRM implementation leverages multichannel and omnichannel techniques, so should the institutional communications plan to inform and engage people about and around it. Social media, video, blog, listserv, text message, phone, and in-person communications, among others, should be included. Moreover, the communication plan should be bidirectional, empowering the institutional community to provide feedback, share best practice, and offer new ideas. This is a big step for many institutions and should be positioned as a journey of small steps and experimentation. Nevertheless, adopting a platform for engagement should extend beyond the student and transform the way a college or university engages with its employees and stakeholders as well.

### **Relationships are qualitative, but the impact of CRM must be quantified**

Change is difficult, and the transformational change required for campus-wide CRM can feel nearly impossible, but rest assured that it is entirely possible. Resistance emerges not because individuals and institutions are unwilling, but because time and resources are scarce, and thus they must make difficult decisions about where to focus among competing priorities. Data can be a powerful tool for making these decisions more effectively. While improving the student experience and creating a campus-wide platform for engagement might seem inherently qualitative, institutions that have realized the most success with these endeavors have quantified their outcomes and communicated them widely in specific ways.

However, it is not simply a matter of delivering a blizzard of data – which can be counterproductive – or a stream of CRM-specific data, such as number of interactions, case resolution times, or opened emails. Instead, successful colleges and universities link the usage of CRM capabilities to core educational services and priorities, which typically include recruitment, retention, and alumni affairs. When outcomes are quantified and presented in line-of-business language, such as yield rates, course completion, or gainful employment, they are far more accessible and ultimately compelling to nontechnical stakeholders, influencers, end users, and particularly executive sponsors.

**Figure 5: Examples of how the outcomes of CRM are quantified**



Source: Ovum

Quantifying CRM outcomes should not be used solely to tell a positive story with the intention of converting naysayers. Identifying where the campus-wide CRM initiative is struggling is also a critical use for data. Effective iterative processes depend on a consistent data stream to assess what is working or not working, to understand why that is the case, and to identify potential solutions or revisions. Consequently, data collection, analysis, and communication should be built into any plan for student lifecycle management and campus-wide CRM.

## **University of Wisconsin-Extension (UWEX)**

The University of Wisconsin-Extension is one of 14 independent institutions in the University of Wisconsin System. Its mission is to extend the resources of the university to the people of Wisconsin and beyond. One way in which it accomplishes this mission is by building innovative education programs using an array of learning technologies to provide new avenues of access. In 2013, UW-Extension led the development of the UW Flexible Option, a direct assessment, competency-based set of degree programs to meet the needs of busy, working adults. Unlike traditional semester-based programs, enrollment in UW Flexible Option programs is based on three-month subscription periods in which students begin any month of the year, learn as quickly as they wish, take breaks when they need to, and apply prior knowledge to expedite time to degree. The existing student information systems in the University of Wisconsin System were unable to accommodate this new structure, so UW-Extension staff had to develop an entirely new process for capturing and using student data. Instead of building another version of a typical student information system, UW-Extension chose to combine a customer management system and a student information system into what it calls a student engagement system. This new system is built on a Salesforce platform.

To implement, UWEX quickly shifted from a waterfall to an agile methodology in terms of both development and conceptualization. It was a difficult but necessary transition, requiring training, support, and cultural change. The team, consisting mostly of new hires, avoided constructing a bureaucracy around processes and instead adopted a light touch. That new approach was the preferred way to avoid missteps and move beyond a minimum viable solution.

The next phase of UW Flexible Option is to partner with campuses in the UW System to deliver more academic programs and to continue to innovate on the platform. The institution anticipates taking the best elements of the agile philosophy and combining them with a more structured development process, where UW Flexible Option staff engage deeply with colleagues to map out the processes and user stories before putting them into action with the technology. The investment in creating more effective processes has kicked off a virtuous cycle, making success for this next phase likely.

## **Seek out the right solution providers and partners**

As reiterated throughout this report, campus-wide CRM adoption is fundamentally a journey of institutional transformation. The CRM solution, consequently, becomes a mission-critical application, joining the ranks of the student information system (SIS) and learning management system (LMS). Colleges and universities must select the right type of solution provider to ensure a trusted vendor partnership emerges that is able to support change management and deliver solution characteristics that can evolve according to long-term institutional needs. In this section, we will consider the impact that technology solutions and the vendors that provide them have on an institution's journey to campus-wide CRM:

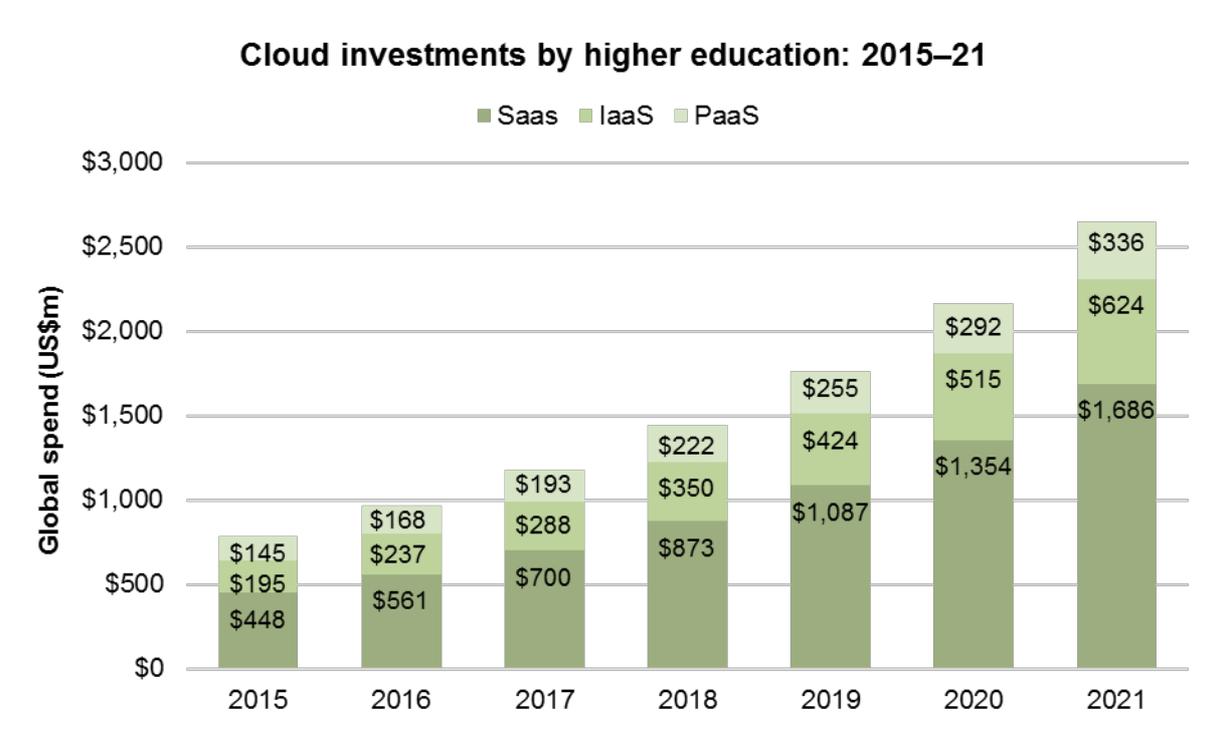
- Cloud readiness is a critical success factor.
- Flexible, agile, and future-proofed technology is the foundation.

- A partner should support change management on both sides of "lights on."
- Open standards and a thriving partner ecosystem are key to extensibility.

### Cloud readiness is a critical success factor

Higher education stands on the precipice of a great cloud migration. Ovum forecasts that colleges and universities globally will spend \$700m on SaaS in 2017 and more than double that by 2021, growing to \$1.7bn. A modern CRM solution is invariably delivered in the cloud, and the possibility of a campus-wide adoption model is predicated upon it. It is, therefore, essential to understand that the successful implementation and realization of value from such a deployment model is influenced, to some degree, by the readiness of the institution and its IT department for cloud.

**Figure 6: Global cloud investments by higher education: 2015–21**



Source: Ovum, Global Higher Education Technology Spending Through 2021

The role of the IT department shifts in a myriad of subtle but critical ways when implementing a cloud solution on an institution-wide basis. Ovum believes that in the context of campus-wide CRM, two are particularly important. First, as the institution builds a platform for student engagement across the lifecycle, the CRM solution must connect with a growing number of solutions, such as the SIS, the LMS, and enterprise resource planning (ERP). Building an increasingly rich view of the student experience using real-time data from disparate sources to inform relationship management and service delivery is the goal of any campus-wide CRM project. Under such circumstances, sustainable and scalable approaches to integration must be undertaken. Institutions must plan for the recruitment and retention of IT staff with these skill sets.

Second, IT departments must seek out ways to shift resources from maintaining solutions to helping end users innovate with those solutions. Theoretically, SaaS solutions reduce the maintenance burden, but IT leadership still must evolve the structures, operating procedures, and culture. New functionality is delivered on a more regular basis rather than through "forklift" upgrades, and thus the IT department must shift toward a continuous innovation model. The creation of formal CRM centers of excellence, as noted earlier in this report, can help prompt and sustain these efforts at IT transformation, and Ovum advises that some staff have dual appointments across the center and IT department.

### **Flexible, agile, and future-proofed technology is the foundation**

The journey to campus-wide CRM to build a platform for student engagement that spans the entire lifecycle is a long-term initiative. Given the level of disruption facing the higher education industry and the rapidly shifting preferences of students, institutions should assume that what they require of their CRM solution will change profoundly over the next decade. Ovum advises that colleges and universities specifically seek out CRM solutions able to flex and grow with changing business needs. While this is a difficult characteristic to assess, vendors that invest a significant percentage of their revenue in research and development and have a strong track record of delivering product roadmaps on time are more likely to keep their solutions ahead of the market. Institutions should also look for solutions with robust capacity for configuration, often delivered through the ability to develop unique features or functionality on a platform rather than customizing the baseline code. There is enough to worry about with a campus-wide initiative without the specter of supporting legacy solutions or being paralyzed from layers of restrictive customizations.

### **A partner should support change management on both sides of "lights on"**

As noted throughout this report, campus-wide CRM is a journey of institutional transformation far beyond the technology itself. Any journey of this magnitude requires a trusted vendor partner to provide guidance and support at every stage, from initial scoping and change management to implementation and evolution. Historically, the focus has been on implementation. But in a post-cloud world, if scoped properly, the mechanics of implementing a CRM solution are more straightforward and less resource intensive for both the solution provider and the institution. However, cloud delivery does not reduce the need for change management and ongoing attention to evolving best practices and innovative new ones. This is particularly the case for campus-wide CRM, as many of the processes and models of engagement have not yet been established and will likely continue to change with shifting student preferences.

Ovum advises colleges and universities to look for solution providers with significant professional services capabilities through internal resources and/or a vibrant partner ecosystem. These capabilities should not only bring innovative new ways of accelerating solution deployment but offer actionable guidance on how to build an institutional culture, structure, and processes that promote student lifecycle management. Partners should have a "deep bench" of consultants with significant higher education experience, but should also be investing in the development of new implementation and change management methodologies for student engagement.

## **Open standards and a thriving partner ecosystem are key to extensibility**

As the campus-wide CRM initiative gains momentum and new areas and programs within the institution seek to participate, it will be necessary to support an expanding set of needs. This will especially be the case in areas that have traditionally been untouched by CRM, such as residential life, library, campus security, or physical plant, to name just a few. To be certain, a best-in-class CRM solution will support many of these requirements through configuration or platform-based development, but there will be times when extensions are required. Bolt-on or brittle, point-to-point integrations pose long-term sustainability and flexibility issues.

Ovum, therefore, advises institutions to position open standards and APIs as a minimum requirement when considering a CRM solution. As discussed earlier, real-time, accessible data from a myriad of sources is critical to realizing the full value of campus-wide CRM. Supporting unique departmental needs through extensions should not compromise this capability. By reducing integration hurdles, open standards and APIs facilitate new participants in a campus-wide CRM initiative.

When open standards and APIs are combined with a robust development platform, the CRM solution offers institutions the powerful ability to build a system of engagement around existing technology solutions. This offers value in the case of legacy systems where although the technology no longer fully meets the institutional need, the potential disruption of replacement poses too high a risk. In other words, selecting the right CRM solution can breathe new life into other core solutions.

A thriving partner ecosystem also has a vital role in enabling the extensibility of the core CRM solution. There is a mutually beneficial relationship between solution providers and partners. When the partner ecosystem is successful, it creates a virtuous cycle, encouraging other partners to engage, which makes it increasingly easy for institutions to find the capabilities they need and extend their core solutions. It is also a signal to the market that the CRM provider – or any other type – is or is anticipated to be the market leader as partners are "placing their bets" through formalized partnerships with it. While selecting a vendor based on its popularity may not be the most strategic approach, successful vendors have more resources to invest in product development, which ensures that today's – and *tomorrow's* – needs will be well supported.

## **University of Miami (UM)**

The University of Miami is a private, research-intensive institution located in south Florida. While UM is well known for its athletics program, it is also highly selective for admissions, is lauded for its research programs, and maintains a nearly \$850m endowment. Nevertheless, the institution recognized the need to further its ability to deliver a best-in-class experience across the student lifecycle to remain competitive in the market. UM had recently invested in a new SIS, but found its ability to bring all the disparate solutions together in an integrated way to support student recruitment would be difficult. Consequently, the stakeholders decided to reinforce the institution's cloud-first strategy and invest in a CRM solution that would deliver a cloud development platform and support a campus-wide approach to prospective student recruitment.

Having access to this type of platform was a logical choice for UM's stakeholders given the requirement to support student recruitment as well as a myriad of unique functions across the university. They found that it not only delivers a wide array of third-party applications to extend the core solution but also dramatically accelerates application development, simplifies integrations, and improves the overall flexibility of the solution. By extension, this also improves the university's ability to deliver services to students and employees.

UM was the first institution to pilot the Salesforce.org Higher Education Data Architecture (HEDA) as a foundation for its connected campus implementation, starting with prospective student recruitment. As community-driven architecture, HEDA encourages community collaboration and development to extend the use of the architecture and platform as well as the ability to easily share it with the community. Additionally, UM leverages Salesforce as a rapid application development platform to extend and connect systems to provide solutions that replace legacy applications and fulfill requirements that are not included in delivered systems.

While every institution may not initially utilize its CRM solution as a cloud development platform, having this ability "at the ready" offers considerable value as their CRM implementations make progress toward campus-wide deployments. Flexibility and agility are key to supporting institutional innovation and implementation, as well as maintaining technology solutions efficiently. Ultimately, the ability of UM to make significant progress toward a campus-wide CRM deployment was enabled, at least in part, by choosing the right technology partner.

## **A final comment on the journey to campus-wide CRM**

The experiences of early adopters demonstrate not only that it is possible to achieve campus-wide CRM, but also that the journey to it delivers considerable institutional value. Embrace the journey, successes, and missteps, as they fuel and inform the overall institutional transformation around student engagement. Moreover, it is not a monolithic endeavor. Incremental steps, targeting discrete end users or individual departments are not "dead ends," but instead, when positioned within a larger campus-wide CRM strategy, are critical to long-term success. But, like any adventure, with whom you take it matters. Selecting the right technology partner and investing in the people and processes of your institution will make the journey to campus-wide CRM a far easier, more enjoyable, and ultimately value-rich one.

## Appendix

### Methodology

This report was produced through a combination of primary and secondary research. Primary research included discussions with colleges and universities, as well as ongoing briefings from software, hardware, networking, and services vendors serving the higher education industry. Ovum analysts specifically interviewed stakeholders from Georgetown University, the University of Miami, the University of Wisconsin-Extension, and directors from Huron Consulting Group for this paper. The author also drew on the findings of Ovum's annual ICT Enterprise Insights Survey.

Secondary sources of information included company reports and websites, international organization statistics, national and international industry associations, SEC filings, broker and analyst reports, and business information libraries and databases.

### Further reading

*Global Higher Education Technology Spending Through 2021*, IT0008-000310 (April 2017)

*Positioning Enterprise-Wide CRM as a Strategic Asset Delivers Long-Term Value to Institutions*, IT0008-000306 (March 2017)

*2017 ICT Enterprise Insights in the Higher Education Industry*, IT0008-000286 (November 2016)

*2017 Trends to Watch: Higher Education*, IT0008-000285 (November 2016)

### Author

Nicole Engelbert, Director of Research & Analysis, Ovum Technology

[nicole.engelbert@ovum.com](mailto:nicole.engelbert@ovum.com)

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[www.ovum.com](http://www.ovum.com)

[analystsupport@ovum.com](mailto:analystsupport@ovum.com)

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