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WashU Olin Business School Partners with Huron to Deploy Salesforce Enterprise CRM

OLIN BUSINESS SCHOOL – WASHINGTON UNIVERSITY IN ST. LOUIS

Founded in 1853, Washington University in St. Louis is a private research university in Greater St. Louis. WashU Olin Business School (WashU Olin), founded in 1914, is a leading research-oriented business school that serves more than 2,280 students across 17 degree programs, including undergraduate business programs; MBA programs in full-time and part-time, online, and executive formats; various specialized masters programs; and PhD/DBA programs. The school also offers graduate certificate programs and executive education offerings. WashU Olin strives to produce leaders that make better decisions by considering both values and data. The school prioritizes a personalized teaching approach grounded

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in experiential learning with a global perspective. WashU Olin also has a dedicated career center that supports undergraduate and graduate students, as well as alumni. WashU Olin is ranked 30th in Best Business Schools and 12th in part-time MBA programs in the 2021 edition of *U.S. News & World Report: Best Colleges*. In addition, WashU Olin's full-time MBA is 25th in the world and 12th in the US, *Financial Times*, 2021 rankings.

INITIAL CHALLENGES

For several years, WashU Olin utilized two disparate CRM systems for recruitment and admissions, managed by non-technical recruitment teams that held limited CRM expertise. Data and leads were handled independently by each department. The Office of Corporate Relations used Microsoft Dynamics, and the MBA and Executive MBA program offices each used a separate instance of Hobsons. Toward the end of 2017, Paula Crews, Associate Dean and Director of the WashU Olin Marketing and Communications Department began to explore options for an enterprise CRM that could centralize data across the business school, enable transparency into how departments produce leads and provide analytics on key performance indicators. Crews was looking for a technological approach to provide a unified and integrated enterprise-wide solution that could scale beyond the recruitment application to support Corporate Relations, the Weston Career Center, the executive education programs at both WashU Olin and WashU at Brookings, and the school's research centers. To house data from multiple departments in a single system of record, the solution would need to support a data governance structure for sharing contact information.

SELECTION AND IMPLEMENTATION OF A NEW CRM FOR STUDENT RECRUITMENT AND BEYOND

WashU Olin conducted a competitive RFP process for a unified CRM solution that lasted nearly four months. After evaluating the RFP responses and seeing vendor demonstrations, the selection team determined that Salesforce offered the most robust functionality and was the best fit for the school. WashU Olin chose to deploy the Salesforce Marketing Cloud, Salesforce Experience Cloud (previously the Salesforce Community Cloud), and the Education Data Architecture (EDA). WashU Olin also selected the Salesforce Social Studio to support social listening and provide analytics for generating leads from the school's social channels directly into Salesforce.

The WashU Olin Salesforce initiative has executive leadership at two levels. A steering committee initially defined how the school would deploy the CRM, including the phases and budget, and continues to assist in the decision-making of upcoming plans. WashU Olin also created a Center of Excellence team comprised of key stakeholders from each department

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using the CRM. The team members are responsible for cascading communications throughout their department and bringing new ideas and use-case scenarios to the table as they work with Salesforce.

WashU Olin selected Huron Consulting Group as its Salesforce implementation services partner. Washington University at St. Louis had previously worked with Huron on multiple projects and was confident in the firm's ability to deliver the project. The implementation began in early 2018, and the team carried out the project in a phased approach.

- During phase one, Huron worked with WashU Olin to build Corporate Relations functionality that allowed the department to track its data in Salesforce.

- In phase two, the Huron and WashU Olin teams built out the recruiting functionality and brought in graduate admissions data. Today, WashU Olin uses Salesforce to receive and process more than 5,000 master's program applications annually. In June of 2018, during the launch of its recruitment functionality, WashU Olin hired CRM Manager Patti Chesler to oversee the phased roll-out and support all incremental CRM projects, bug fixes, and enhancements. The school also hired a full-time system administrator and a Salesforce Marketing Cloud administrator to support Chesler. The team currently relies on Huron for

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ongoing development, and Crews reports that Huron has provided stability throughout the planning and phased deployment, which has lasted over three years. The WashU Olin team has built relationships with the Huron consultants and developers, whom they have worked with consistently throughout the project.

- During the third phase, the Huron team focused on delivering functionality for the Weston Career Center, which handles career support for all business students. The team also implemented enhancements to the corporate relations experience based on requests the department had identified since phase one.

- Currently, at the conclusion of phase four, the Huron and WashU Olin teams are delivering Salesforce functionality and data migration for WashU Olin's Executive Education certificate programs. During phase four, the CRM team added a second system administrator. In addition, an internal team at WashU Olin is building a custom learning management system (LMS) called learn.WashU.online, which integrates with Salesforce to provide students with a more unified user experience. The team is building integration that automatically authenticates course registrants into the LMS, providing participants with course information and materials upon registration. The ultimate goal is to bring academic advising functionality and lifelong learning communities into the same platform. Alumni will also use learn.WashU.online to interact with discussion boards, access the school calendar, and more.

WashU Olin is now two years into collecting recruitment data in Salesforce. As the team acquires more data, it is beginning to use analytics to gain insight into trends around incoming student populations to optimize its marketing strategies. Chesler also reports that WashU Olin is working on creating a formal data release cycle and archive process.

WashU Olin has integrated Salesforce with its student system and career platforms. Integration with WashU Olin's Google Ad Words account enables reporting on new Salesforce contacts to help the school optimize ad purchases. Integration with CASHNet allows the school to take fees and deposits. Other integrated solutions include Blackthorn for events management, FormAssembly for public-facing requests for information and applications from unauthenticated users, Conga Composer for reporting and merge letters, ScheduleOnce for group scheduling, and Spanning Backup for archival backup recovery. The school has also integrated Salesforce with LinkedIn Sales Navigator to display LinkedIn data on constituent profiles. The Graduate Admissions team has integrated Kira Talent to collect recorded verbal responses on interviews.

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LESSONS LEARNED AND BEST PRACTICES

Crews reports that the team has learned several best practices as a result of this project. While the excitement for new systems can drive staff and end-users to move forward quickly, institutions should make sure they are not rushing the discovery phase. Crews provides the following recommendations to institutions planning to embark on a CRM system deployment.

- Identify the project's goals, KPIs, and success metrics before the project begins.

- Identify a change management strategy and create a detailed change management plan. Crews advises that institutions focus on desired outcomes during the discovery process rather than replicating current business processes. Everything should be on the table for discussion and optimization. WashU Olin decided to handle change management internally.

- Address any significant departmental reorganizations or other time-intensive projects in partnering departments before deployment.

- Create a data plan that defines data policies for data hygiene, review, archiving, security, and privacy. The data plan should also include appointing an in-house data expert and identifying data owners and decision-makers across departments and key functional areas.

- Establish a project governance committee responsible for organizing and managing priorities and the investment and deployment of resources.

- Hire one or more internal CRM administrators that have Salesforce experience and, ideally, application-specific experience.

- Design a communication plan that reaches constituents across all departments to facilitate collaboration and cross-departmental support. Make sure that employees understand project goals and resource requirements. Crews underscores the importance of making sure department leaders take responsibility for understanding the needs of their end-users so that they can lobby for the appropriate functionality. To communicate project information to the broader WashU Olin community, the team built a website. Sharing wins with the community is vital to keeping up morale and ensuring potential users understand the system's capabilities and benefits.

- Build in extra time after go-live to address enhancements and blind spots. Crews reports that it is difficult to estimate the time commitment for testing the system, so institutions should plan to be flexible. WashU Olin paused at the end of each phase for user acceptance testing, and, according to Crews, the process of gathering feedback, refining, stabilizing, and adjusting at the end of the third phase took about nine months.

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> *Feedback from end users across each department showed that the Salesforce solution had enhanced continuity in business processes.*

SOLUTION BENEFITS

During the third phase of the deployment, the WashU Olin marketing team solicited feedback from end-users across each department to gain insights into the solution's perceived benefits. Feedback showed that the Salesforce solution had enhanced continuity in business processes. For example, while the turnover rate for recruiters can be high, Salesforce helps create transparency in the transition from one recruiter to the next by allowing new recruiters to immediately see the communication history with a prospective student and where the student is in the application process. Recruiters have also reported that communications automation increased the applicant yield by providing more time for personal engagement with potential students.

WashU Olin has also experienced increased collaboration across departments with Salesforce. WashU Olin's recruitment manager uses Salesforce to identify bottlenecks in the application process and meets with recruiters and the marketing and communications department to facilitate solutions. According to Chesler, staff have also benefited from seeing who each contact in Salesforce has a relationship with at the school. If a staff member wants to reach out to a new contact, they can see the contact's history with the school, obtain permission from the staff member connected to the contact, and make an informed decision on how best to engage with them.

The Salesforce application is also helping departments better track their return on investment (ROI). For example, the system has enabled the WashU Olin Marketing and Communications Department to track the ROI of its marketing spend and recruitment to track the ROI of its travel spend. Salesforce helps staff capture nearly 20 percent of event attendees as leads for the Graduate Recruitment Office and almost 24 percent of event attendees for executive education. Once an attendee fills out an event registration, they become a new contact in Salesforce and receive a Marketing Cloud journey.

REFERENCES

As part of this research, Tambellini briefed with Paula Crews, Associate Dean and Director of the WashU Olin Marketing and Communications Department, and Patti Chesler, CRM Manager at WashU Olin. Those briefings helped inform this case study. Tambellini also utilized publicly available information for this study.

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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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