THE GROWING CRM FOOTPRINT

Deploying constituent relationship management systems across the enterprise

By Esther Shein

Vanderbilt University's medical school is among the best in the country, but its officials still wanted to create awareness of it with prospective students—those who are only in high school.

The undergraduate admissions office had deployed a constituent relationship management (CRM) system, but university officials knew from the outset that the system could be used across campus to share information and target students for specialized programs.

"We needed to think about relationships that are bigger than just undergrads, and we had to think in a broader enterprise [context]," says Douglas Christiansen, vice provost for enrollment and dean of admissions. Christiansen, a champion of the Nashville-based university's Oracle PeopleSoft CRM system, has brought together people from Vanderbilt's nursing, medical and divinity schools to get a better sense of how they go about developing relationships with prospective students.

"What CRM has done is bring the human element of very divergent offices together to learn from one another," he says. "It is driving greater discussion from some of the brightest minds as they think about relationship management for their students."

As a result of those discussions, admissions staffers will be trained so that when they interact with high school students, "they're talking about the medical school and planting a seed as part of our full relationship with that student. That would never have happened before," he says.

Typically, university undergraduate and graduate admissions offices—and other offices and departments across campus, for that matter—tend to operate in a silo when it comes to using CRM systems to develop relationships with prospective students. Or, as Christiansen puts it: "They do their own thing and never do the departments meet."

Most institutional leaders have long recognized the value of sharing student information to create the fabled "360-degree view of the student experience" and improve retention initiatives, says Nicole Engelbert, a practice leader at research firm Ovum. But cultural, political, process and even regulatory concerns have impeded realization of that scenario in practice.

"The introduction of more flexible CRM solutions, with roots in the corporate sector, offers the potential to manage these concerns," she says. The systems enable institutions to start with a few departments, expand over time, and then link the installations when the college or university is ready to support that 360-degree view.

This approach also allows institutions to branch out into using CRM within organizational functions outside of the more obvious recruitment, retention and development. These less-obvious areas may include the IT help desk, employer relations, continuing education, conferences and even faculty and staff recruitment.

Additionally, a cloud-based tool such as Salesforce could be implemented on a department-by-department basis, allowing users to view information in a single, centralized format.

Enterprise CRM in the cloud
United Theological Seminary in Dayton, Ohio, recently deployed a cloud-based CRM system for admissions and enrollment management functions. A new
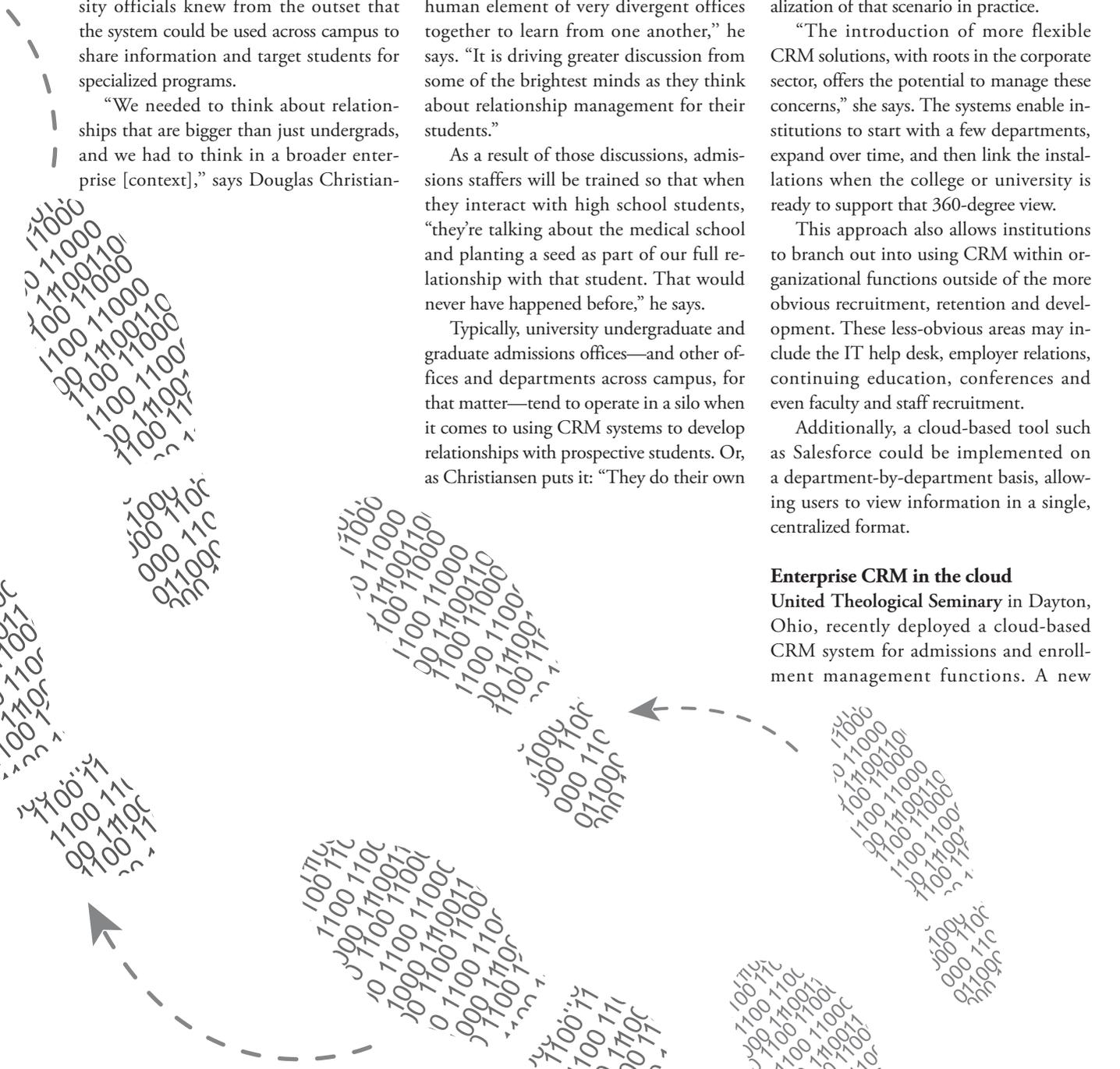
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Administrators in the IT department *at the University of Ottawa help get staff in other business units excited about CRM by explaining its benefits.*

student information system is expected to go live in April.

UTS, which has around 650 students and offers masters, predoctoral and doctoral degree programs, is using Enrollment Rx, and will implement its StuTrax cloud-based SIS to improve collaboration for a better student experience, says CIO Marcus Milligan.

"Instead of a laser focus on CRM for admission, we wanted to make sure whatever platform we were on would also be able to handle student information functionality as well," he says. "We didn't want to get stuck in what I call 'silo software.'" That's where systems are implemented and then IT has to develop interfaces between them.

When the SIS is rolled out, it will have a portal where students can register for courses and check the requirements for their degree program, among other actions. During the initial rollout of Enrollment Rx, Milligan says, other departments expressed interest in using the system for events management, alumni relations and continuing education.

Milligan has encouraged enterprise-wide usage of Enrollment Rx and StuTrax because, he says, it's a good way to integrate all departments on the same platform. This will "create synergies and get away from siloed platforms," and automate a lot of their work, he says.

Salesforce has very evolved contact management features related to campaigns, events and marketing, he says. By customizing their CRM down the road, administrators working in these areas can create event and email templates.

Now, Milligan says he tells others on campus that, "once you're on these systems, as we learned with admissions, you're going to get very valuable data and be able to act

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> **—Marcus Milligan, United Theological Seminary**

on that data." It can be used to make decisions that are much more informed and tangible, which in turn moves the seminary in a direction that benefits students.

Ramping up retention

On some campuses, CRM is first used by an admissions or marketing office. But officials at **Ramapo College** in Mahwah, N.J., initially turned to CRM to increase the student retention rate. The institution has an 88 percent first-to-second-year retention rate and a 59 percent four-year graduation rate. Officials' goal is to increase retention to 90 percent and four-year graduation to 65 percent by 2018, says Joseph F. Connell, director of student success. The college has about 5,600 undergraduate students.

A task force formed to study retention selected Starfish Retention Solutions, which offers an early alert feature to improve outreach to students identified early in a semester as needing support. With Starfish, officials can determine if a student has missed classes or assignments or hasn't paid a bill on time.

The school also has deployed Starfish's Connect feature, which helps students and faculty manage their schedules online. Students can log in to Connect via the school's web portal and view their team of advisors, faculty and peer mentors, says Connell.

The Starfish system was implemented in the fall of 2013 for first-year students. Ramapo spent approximately $35,000 for the two components, including implementation. Connell says the cost was based on the number of students.

Starfish's ongoing successful adoption is due to a strategy of including stakeholders, including enrollment and admissions personnel, every step of the way—from selection of the software to implementation, says Connell.

Task force members have made presentations to show faculty the system's benefits, which include communicating more easily with students and being a one-stop shop for student outreach. And peer facilitators have

taught first-year students how to use the system to communicate with faculty and staff, and arrange appointments.

Fostering discussions and best practices

Vanderbilt has been using PeopleSoft CRM since 2012 for enterprisewide recruiting, admissions and reporting. Administrators now reach out to students "who, as incoming freshmen, voiced an interest in a business-related field and were admitted to Vanderbilt, but chose to attend a different institution," says Christansen. Using information received during the application

> At the University of Ottawa, when emails come in, employees can see the contact records and history of interactions with a particular student.

process, such as test scores, transcript and class rank, the university has the ability to reach out to these students two years later, in the early spring of their sophomore year.

In tandem with Oracle's Enterprise Performance Management (EPM) system, school officials also have been able to extract data from the CRM system to identify students at other colleges who might attend the medical school.

"In the past, Vanderbilt would think it's a brand new relationship with a student, but it's not, because we've had a relationship with them for three years, perhaps," even if they chose another school, he says. "We're continuing the relationship; we're not starting a relationship."

The business school takes a similar approach. Undergrads and recent grads who attend the Accelerator—Vanderbilt Summer Business Institute, an intensive

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immersion program, are contacted afterward about considering the Vanderbilt Owen Graduate School of Business when applying to b-schools.

Ultimately, CRM "is bringing a campus together to talk about one integrated system," Christensen says. And that integration "has created greater discussion and greater practices in our institution."

Managing the student lifecycle

Six years into its 10-year road map for deploying enterprise CRM, several departments at the **University of Ottawa** have had ample opportunity to witness the benefits. The Canadian university has just over 42,000 undergraduate, graduate and professional students. So far, it has implemented Talisma CRM from Campus Management in recruitment and admissions, the registrar's office, student finance, housing, and at 10 schools within the university, says Denise St. Jean, information technology manager.

"The tool has done so much for the institution," St. Jean adds. "It has been widely adopted and of course, everyone comes knocking at the door. So there is no lack of interest."

The university is the world's largest bilingual institution, so all communications to students are in English or French—a big factor in Ottawa officials needing to automate and personalize communications and, hence, become an early adopter of CRM, says St. Jean. The system is being used to manage all types of interactions, as well as workspaces for various business units.

The most successful example of usage is in the student finance department, which replaced Microsoft Outlook email with the CRM to better divvy up work and identify who is doing what, she says.

Employees are able to better manage their own workflow, and if someone in the department specializes in refunds, all interactions would be assigned to that person. Also, when emails come in, employees can see the contact records and history of interactions with a particular student.

"They got so tied to the tool [and] were excited about the metrics we were showing them," St. Jean says of the staff.

And at Vanderbilt, officials have learned, without the CRM system, the university would not have the ability to strengthen its ongoing relationships with students. "It is an invaluable tool as colleges and universities realize that student-school relationships

do not end with an 'undergraduate admit/deny-enroll' decision," says Christiansen. "It is just the beginning of the story." **UB**

Esther Shein is a technology-focused writer based in Framingham, Mass.

Resources

Aptean (Pivotal CRM), www.aptean.com

Campus Management (Talisma CRM), www.campusmanagement.com

CollegeNET (Prospect CRM), www.collegenet.com

Enrollment Rx (StuTrax), www.enrollmentrx.com

Ellucian, www.ellucian.com

Education Systems (EMAS Pro), www.maspro.com

Hobsons (Education CRM Suite), www.hobsons.com

Oracle (PeopleSoft CRM), www.oracle.com

Ovum, www.ovum.com

Salesforce, www.salesforce.com/solutions/higher-ed

SAP (SAP 360 Customer), www.sap.com

Starfish, www.starfishsolutions.com

Sugar CRM, www.sugarcrm.com

TargetX, http://targetx.com

WHERE IN THE ENTERPRISE IS THE CRM?

Vanderbilt University
> **USING:** Oracle PeopleSoft CRM
>
> **FOR:** the entire student life cycle, including recruitment, retention, fundraising/alumni relations, career services

Ramapo College
> **USING:** Starfish Retention Solutions (Connect and Early Alert components)
>
> **FOR:** student retention and scheduling

University of Ottawa
> **USING:** Talisma CRM
>
> **FOR:** the entire student life cycle, except for alumni and career services

United Theological Seminary
> **USING:** Enrollment Rx and StuTrax
>
> **FOR:** admissions, enrollment, student information system—and, eventually, events management, alumni relations and continuing education