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The Transformational Journey to Campus-Wide CRM

Nicole Engelbert

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Agenda

- The value is clear but the path is not for campus-wide CRM
- Focus on the people who will transform relationships
- Investing in the right processes creates a virtuous cycle
- Seek out the right solution providers and partners
- Field intelligence from early adopters
- Recommendations for the road ahead

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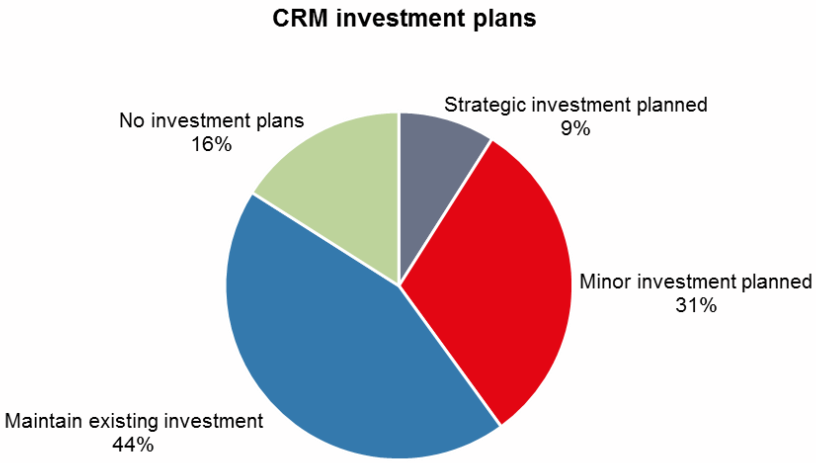
The value is clear but the path is not for campus-wide CRM

- Relationships are the foundation for teaching, learning, and research
  - Knowledge transfer & creation is not a transaction, but an ***interaction***
  - The longest relationship…
- A myriad of forces are driving disruption
  - Consumer market innovation
  - Shifting demographics & political priorities
  - Economic volatility & workforce requirements
- Institutions are investing accordingly
  - Department versus campus-wide
  - Change is difficult
- Early adopters are blazing a trail
  - A non-linear path: department-led & institution wide
  - Building capacity for relationship management
  - A journey of continuous transformation



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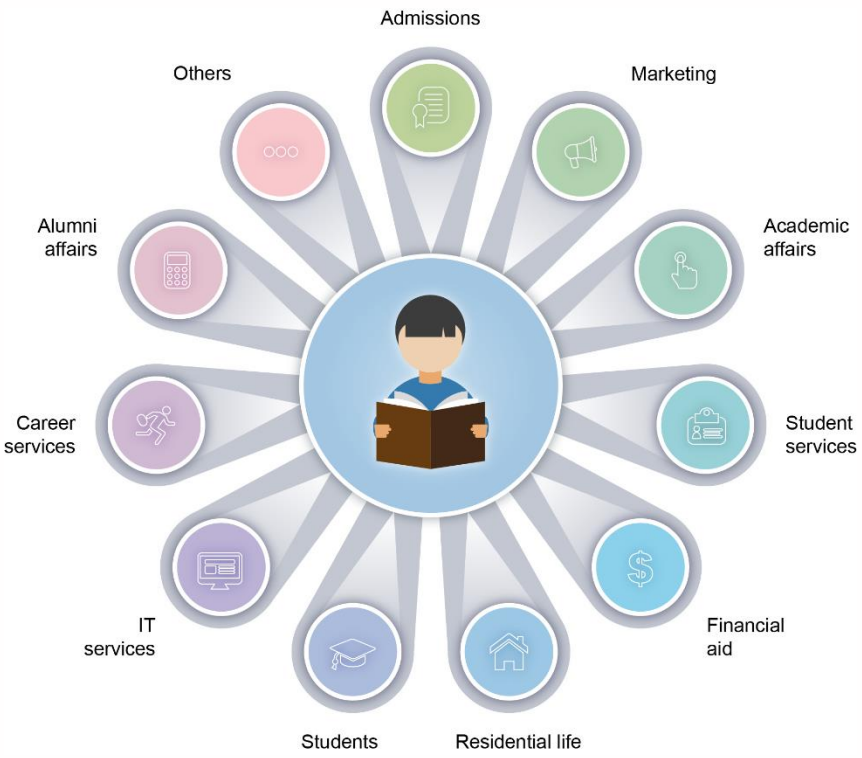
“The overarching goal of any campus-wide CRM strategy is to facilitate, and even transform, the interactions among students, faculty, administrators, staff, employers, and beyond to improve institutional services on a continuous basis.”

Focus on the people who will transform relationships

- Change management is fundamental
  - Capacity building rather than a process or event
- It takes a broad range of stakeholders
  - Department-led has more clear lines of command, influence, and structure
  - Campus-wide crosses borders, processes, and languages
- An executive sponsor is a *sine qua non* for success
  - Cabinet level is not out of scope
  - Decisive, diplomatic, consensus-building
- The campaign trail is a long and winding road
  - Create a compelling narrative
  - It's an epic poem - invest in its retelling
- Build a center of excellence
  - Library of Alexandria or simply a bookshelf



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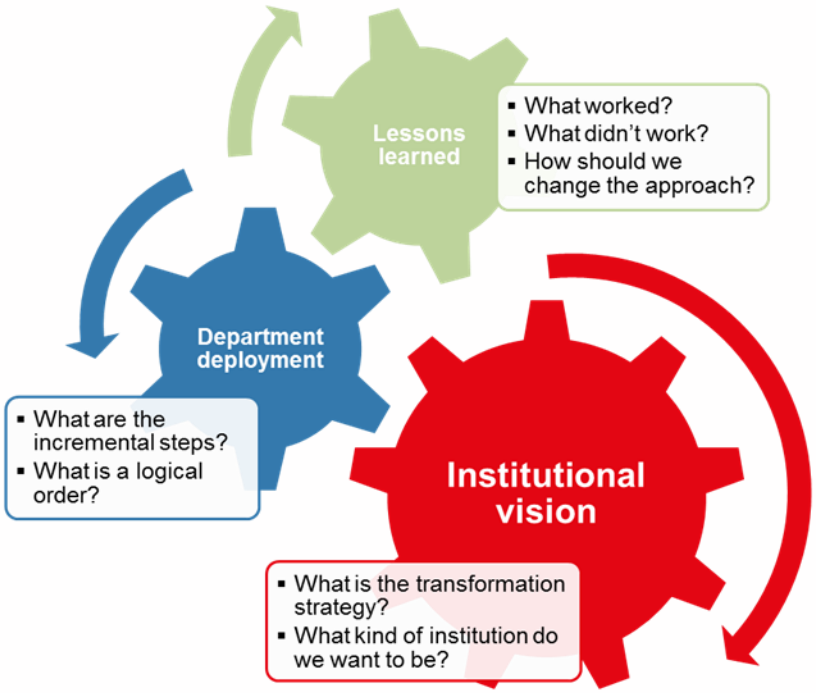
“These processes, however, are not stepwise actions for implementation but rather intentional organizing principles and perspectives related to iterating, governing, communicating, and even measuring the CRM initiative.

Investing in the right processes creates a virtuous cycle

- A long-term vision should guide your incremental steps
  - Strategic rather than disjointed incrementalism
- Good governance will be your lighthouse in the storm
  - No single role "owns" relationship management
  - Contentious decision making around data, customizations, and exceptions
- Communication matters; plan for its execution
  - Intentional, proactive, transparent
  - Leverage a more modern set of channels
  - Data helps stakeholders manage competing priorities



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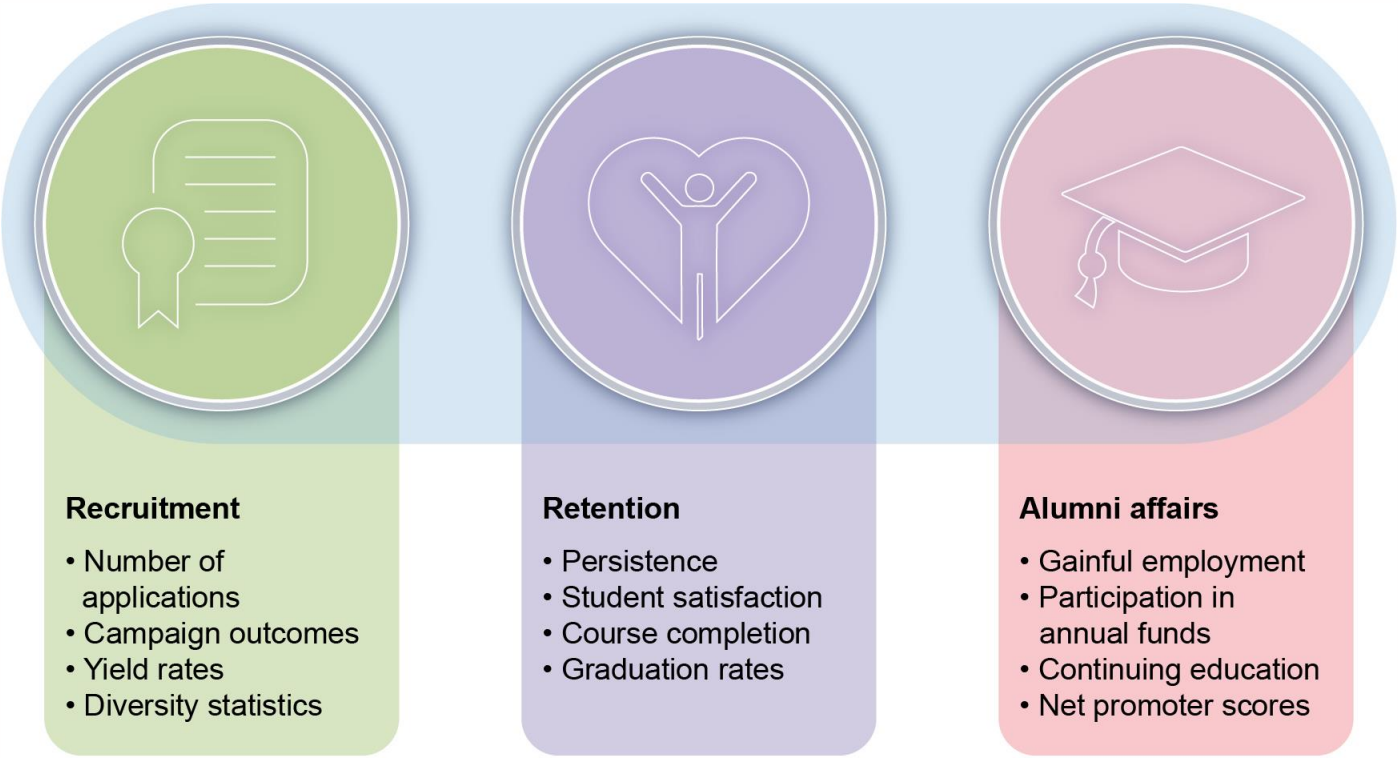
Relationships are qualitative, but CRM must be quantified



- Data helps stakeholders manage competing priorities
- Insight delivered in the language of key initiatives
- Communication and iteration

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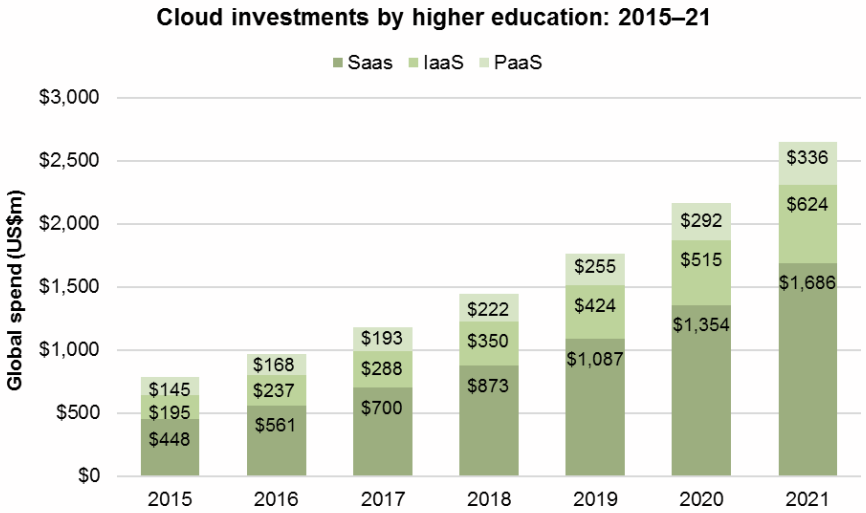
“The CRM solution, consequently, becomes a mission-critical application, joining the ranks of the student information system (SIS) and learning management system (LMS).”

Cloud readiness is a critical success factor to campus-wide CRM

- SaaS spending will more than double over the next 4 years growing to $1.7bn in 2021
- The success of campus-wide CRM deployments depend on cloud deployment models
- An increasingly rich view of the student experience depends on sustainable and scalable approaches to integration
  - Beyond point-to-point integration
  - Building the right IT skill sets
- Shifting the 80:20 paradigm
  - Evolve the structures, operating processes, and culture of IT
  - Centers of excellence and dual appointments



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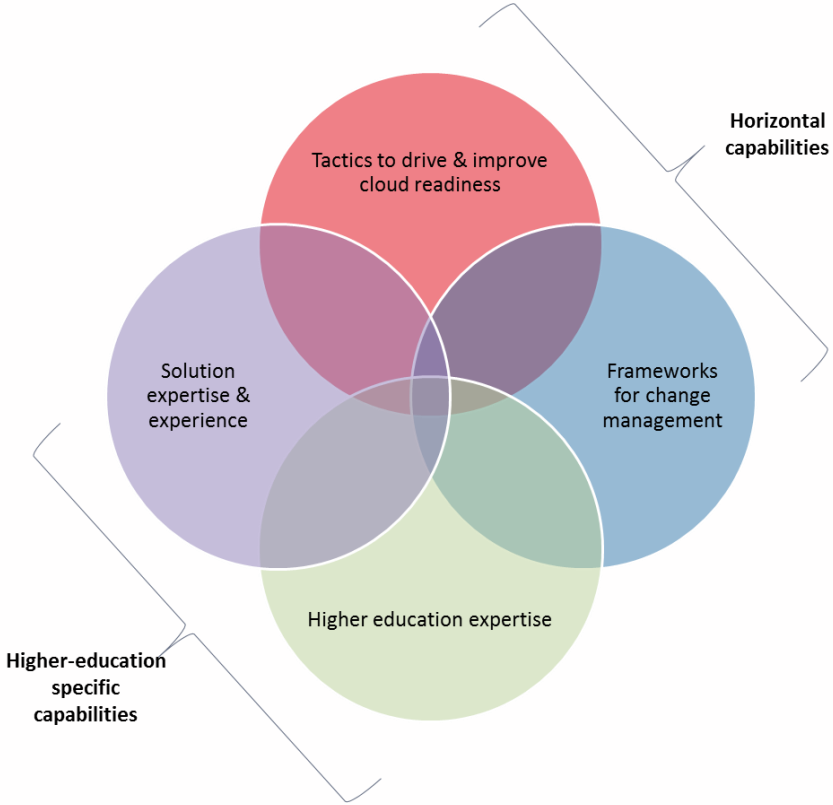
Seek out the right solution providers and partners

- Flexible, agile, and future-proofed technology is the foundation
  - Disruption will only accelerate
  - Solution providers must have **sufficient and consistent** investments in R&D
  - Robust capacity for configuration
- Partners support change management on both sides of 'lights on'
  - A journey of institutional **transformation**
  - Deep professional services capabilities
- Open standards & a thriving partner ecosystem are key
  - Future targets of student lifecycle management and unique departmental needs
  - CRM breathes **new life** into legacy solutions
  - A virtuous cycle expanding the ecosystem's capabilities



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Field intelligence from early adopters

Georgetown University

- Ensure student experience reinforces Georgetown as "home"
- Creation of the Georgetown360 initiative
- Sparked by needs of alumni affairs but rolled out to faculty first
- Cultivated leadership support
- Transparency at every stage
- Engagement with stakeholders across the university
- A foundation for moving rapidly through subsequent phases

University of Wisconsin-Extension

- UW Flexible option exposed the need for a solution to manage new enrollment model
- Combined CRM & SIS functionality into single solution
- Moved from waterfall to agile for development & conceptualization
- Invested in training, support, and change management
- Effective processes kicked off virtuous cycle making next phase easier

University of Miami

- The need to stay competitive in the market drove an initiative for best-in-class student experience
- A single platform for supporting institution-wide student recruitment
- Committed to a cloud-first strategy
- Leveraged the CRM platform as its cloud development platform
- Cloud platform and ecosystem accelerated its ability to make progress on campus-wide CRM

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Recommendations for the road ahead

- Embrace the reality that campus-wide CRM will be a transformational journey taken in small steps
  - Small steps and mis-steps are part of the experience
  - Implementation partners provide valuable insights for change management and third-party perspective
- Lean on communities of best practice and contribute to them
  - Get involved in solution-focused communities
  - Invest in centers of excellence
  - Reach out informally to early adopters
- Harness the power of a platform
  - The journey is long, future-proofing is key
  - The solution should encourage sustainable models and flipped paradigms

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Appendix

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Nicole Engelbert

Nicole Engelbert is the Director of Research & Analysis for Ovum's Technology team, which produces research and analysis on infrastructure solutions, applications, and industries.

Nicole's individual research work focuses on how education institutions use mission-critical applications such as SIS, CRM, LMS, and other vertical-specific technologies to garner efficiencies and improve services. In recently published reports, Nicole has presented a framework for evaluating IPM solutions, conducted a comparative analysis of leading CRM solutions, and offered guidance on the future of cloud in the higher education industry. Recognized for her work in these areas, Nicole is quoted regularly in publications such as *Campus Technology, DestinationCRM, University Business, The Chronicle of Higher Education, EdWeek, T.H.E. Journal, The New York Times, Government VAR, Dow Jones and TechNewsWorld.*

Prior to Ovum, Nicole was the Vice President of Educational Services at TestU, where she worked with secondary schools to develop programs that used technology and assessment to improve student achievement, as well as led the development of its client reporting systems. Nicole also has experience in higher education, having held leadership positions in admissions and career services.

Nicole holds an MEd from Columbia University and a BA from Union College, where she graduated *magna cum laude.*

Nicole.Engelbert@ovum.com

http://ovum.com/authors/nicole-engelbert/

@nengelbert

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