Overview

• Enrollment and attainment
• Strong academic outcomes
• Assess and modify pre-enrollment processes and services
• CRM is seen as a tool to support change (not drive it)
Outcomes

New Program Students

2013: 1528
2014: 1420
2015: 1411
2016: 1367
2017: 1322
2018: 1396
2019: 1628

Experience. Success.
Outcomes

Enrollment Increase

37% Increased Applicants
63% Increased Conversion Rate

Experience. Success.
Outcomes

• Students enrolled earlier
  • 90% two weeks prior to start of fall classes
  • 14% increase vs. Fall 2018
• 10% increase in FAFSA completion
• 30% more students participated in non-mandatory orientation
All About the Timing

- The right moment
- Full Integration
- Cross-Functional Team
- Collaborative decisions

I’m not telling you it’s going to be easy, I’m telling you it’s going to be WORTH IT.

Experience. Success.
Discovery Time

- What is a CRM?
- Leadership & Project Management
- Audit & Document
- What do we want & need?

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Decision Time

- Feb 2015, RFP Oct 2015
- Budget $ 60,000
- RFP – 5 responses
  - Sticker Shock! ROI?
  - 4x and 10x
  - Others found this out too
- Required the complete package
- Feb 2016 – TargetX and Salesforce
- Project Manager
Implementation Time

- 60+ Project Team
- Sub-Group Leadership
- Everyone still had a job to do
- 6 months? Wait What?
  - Resources vs. Vendor $$$
  - Reality was 2 years!
Implementation Time-System

- Source of Record – Peoplesoft
- Deep integration – mission critical
- Training to understand the system
- Time to change business processes
- Define integration points
  - Two-way AND timing
- Don’t forget User Documentation
- Test, Test, Test......
- Go-Live? We knew the right time
Lessons Learned

• It’s your timeline, not the consultants
• It will not go as planned! 100% certain of that!
• Big Picture. Decisions made early affect later.
  • Vice versa
• Training to learn
• CRM changes everyone’s job
Impact on Student Experience

Application process fully online and automated.
Impact on Student Experience

Communication flow for entire funnel is automated, personalized, and tracked.
Impact on Student Experience

Communicate, track, and monitor recruitment events and high school visits.
Impact on Staff Effectiveness

Student Services staff can focus on assisting students.
Impact on Staff Effectiveness

Use reports to monitor staff outcomes and track student subgroups.
Outcomes

- More students!
- Students enrolled earlier
- Better processes and supports
- Better measurement tools
- Improved student experience
- Improved staff effectiveness
Questions?