Successful Phase I Customer Relationship Management (CRM) Implementation

Experience. Success.

WISCONSIN INDIANHEAD TECHNICAL COLLEGE

WITC

ACCT Leadership Congress
San Francisco, CA, October 2019

Overview

- Enrollment and attainment

- Strong academic outcomes

- Assess and modify pre-enrollment processes and services

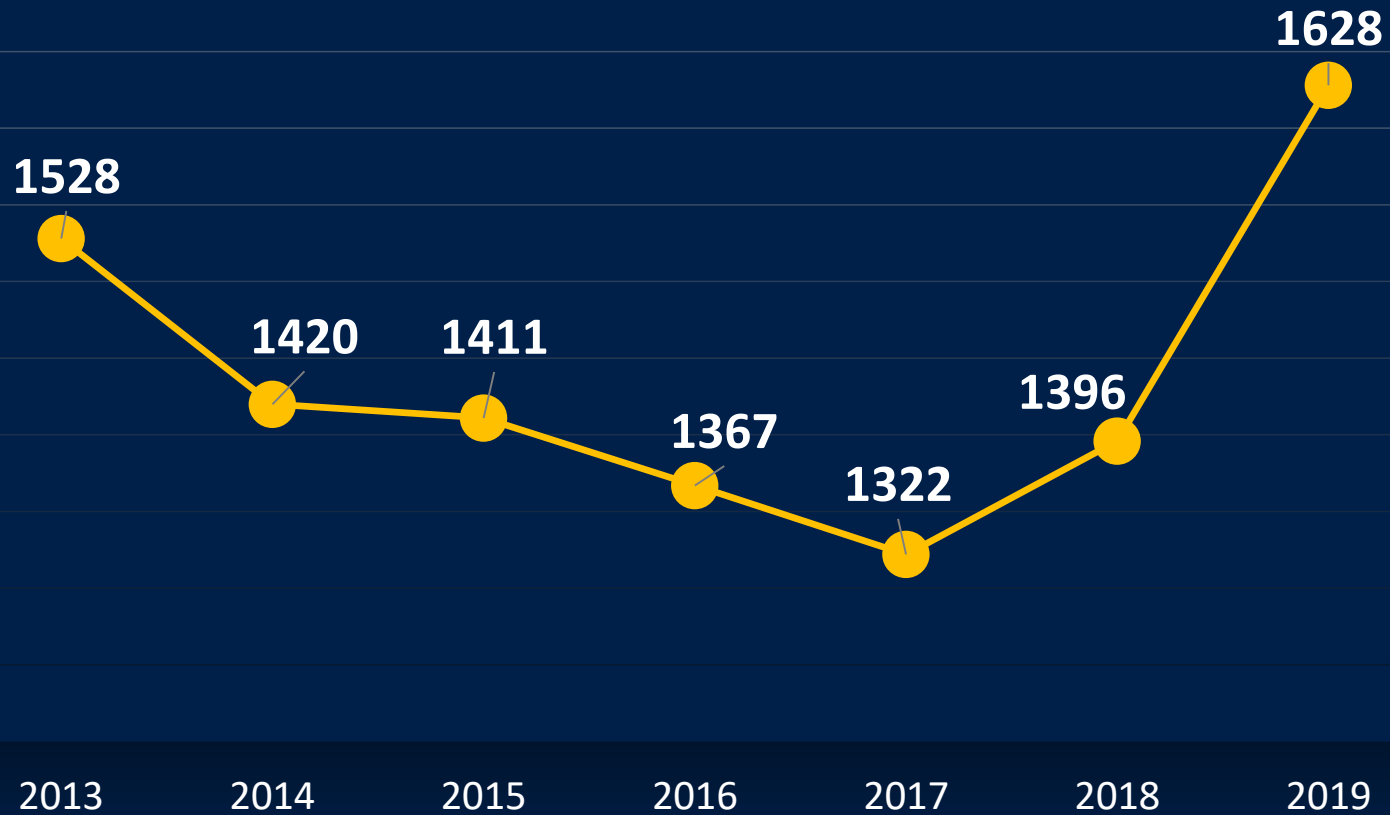- CRM is seen as a tool to support change (not drive it)

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Superior
Ashland
Shell Lake
Administrative Office
Rice Lake
New Richmond
Green Bay
Madison
Milwaukee

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Outcomes

New Program Students

Year	2013	2014	2015	2016	2017	2018	2019
New Program Students	1528	1420	1411	1367	1322	1396	1628

Outcomes

Enrollment Increase

37% Increased Applicants

Increased Conversion Rate **63%**

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Outcomes

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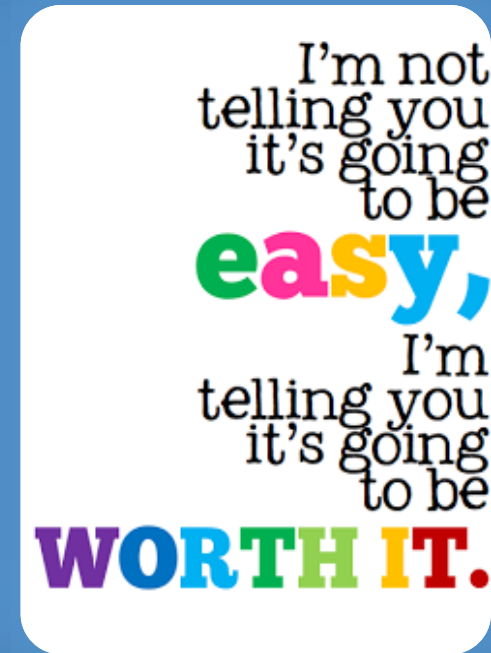- 30% more students participated in non-mandatory orientation

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All About the Timing

- The right moment

- Full Integration

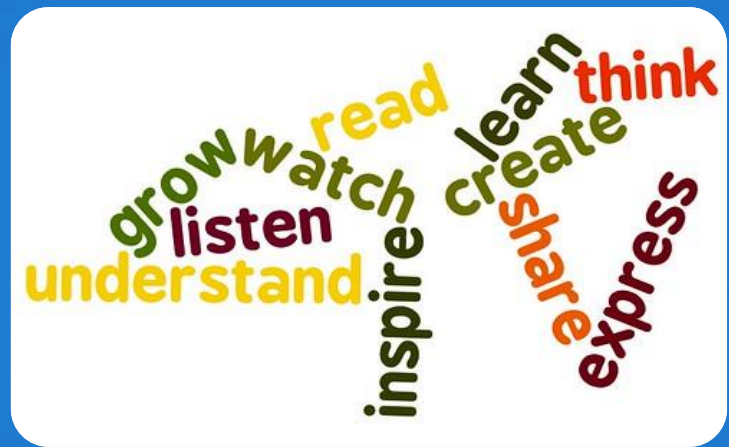- Cross-Functional Team

- Collaborative decisions

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

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

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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!

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Project Team – Future So Bright...

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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.

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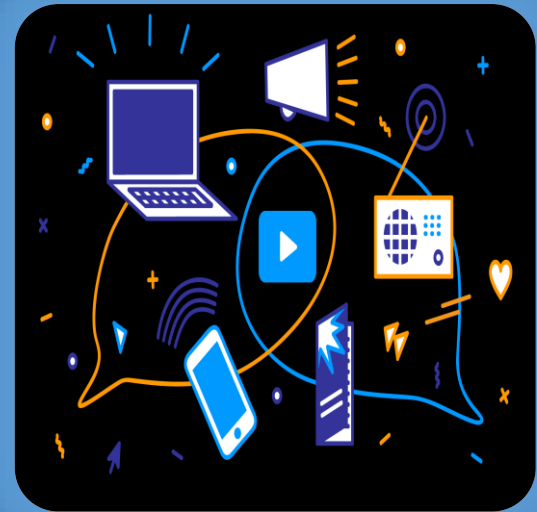
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Impact on Student Experience

Communicate, track, and monitor recruitment events and high school visits.

Impact on Staff Effectiveness

Student Services staff can focus on assisting students.

STAFF EFFICENCY

#166002011

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

New Program Students

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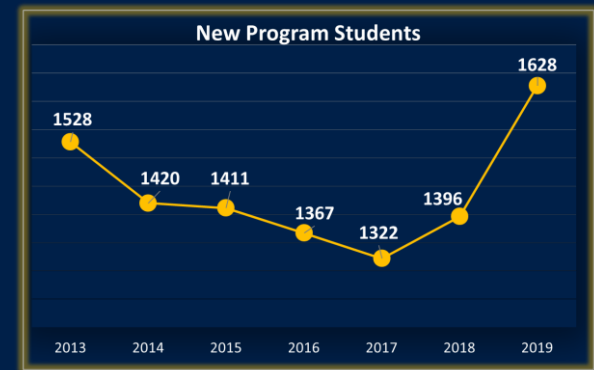
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Questions?

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