Innovations in Transforming the Student Experience: How CRM Can Help

PRESENTED BY:
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Who We Are

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We want to hear from you!

Are you using CRM at your university?

A. No
B. We’re thinking about it.
C. Yes
D. I don’t know.
We want to hear from you!

In what areas are you using CRM?

A. Departmental
B. School
C. Campus
D. University System
We want to hear from you!

What is your primary focus?

A. Admissions / Recruitment
B. Student Services
C. Alumni / Advancement
D. Marketing / Communications
E. Other
We want to hear from you!

What does CRM mean to you?
Customer relationship management (CRM) is a business strategy that optimizes revenue and profitability while promoting customer satisfaction and loyalty. CRM technologies enable strategy, and identify and manage customer relationships, in person or virtually. CRM software provides functionality to companies in four segments: sales, marketing, customer service and digital commerce.*

* Gartner IT Glossary
What CRM Means to Indiana University
What CRM Means to Cornell University

FIND THINGS
Drupal or other solution

DO THINGS
Salesforce

CMS Platform
Opportunities  Resources  Clubs  Courses  People

Apply  Check-In  Sign Up  Register  Contact

CRM Platform

Bio major, transfer student, loves music, hates writing papers, speaks Chinese
What CRM Means to the University of Colorado Boulder (Leeds School of Business)
Higher Ed Student Relationship Value Chain
Landscape of Companies Focused on Managing Higher Education Student Relationships

Lead Generation
- admittedly
- callstar
- anycollege
- Avenue100
- Cappex.com
- Chegg
- zinch
- CollegeBoard
- COLLEGE Navigator
- Education Dynamics
- fastweb
- NICHE
- Noodle
- Petersons
- QUIN STREET
- Scholarship.com
- StudyAbroad
- UNIGO
- Velocity

Enrollment Mgt
- Greenwood Hall
- Higher Ed Growth
- royall & company
- RUFFALO NOEL LEVITZ
- Application Mgmt.

Retention / Student Success
- Blackboard
- Copley Retention
- GradesFirst
- Greenhouse Hall
- Higher One/campusjobs
- ORACLE
- Pharos
- PERSIST
- Rapid Insight
- Starfish

Career
- AfterCollege
- Blackboard
- CareerArc
- edmentum
- endorse.me
- Evisors
- quAD Wrangle
- Sunlight
- Talentboard
- The Fulbright Program
- HireArt
- Kaplan
- LinkedIn
- Meritful
- Pearson
- the Princeton Review

Advancement
- Donor Mgmt / Analytics
- abila
- blackbaud
- Campus Management
- DonorPro
- ellucian
- iMoodle
- Jenzabar
- Quad Wrangle
- RUFFALO NOEL LEVITZ
- ORACLE
- AlumniFire
- blackbaud
- crownrise
- DataDescription, Inc.
- evertrue
- ellucian
- GIVECORPS
- Gradway
- KIMBIA
- LAUNCH
- REEDER
- RELSCI
- SEED
Figure 1. Magic Quadrant for the CRM Customer Engagement Center

Source: Gartner (May 2018)
Use Case: Recruitment / Admissions

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Solution</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple distributed enrollment management offices with misaligned recruiting missions and increasing functional needs</td>
<td>Enterprise Salesforce CRM with open data model including 1:1 interaction management, web forms, print, event management, and complex automated communication workflows</td>
<td>Holistic platform that provides modern recruiting capabilities across the university while facilitating the 360 degree view of potential students</td>
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</table>
**Use Case: Student Services**

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<td>Scaling service in a personalized way to anticipate and meet student needs.</td>
<td>A ‘Campus Engagement Platform’ that blends system of record data with engagement data and CRM tools for workflow automation.</td>
<td>We have a whole new class of engagement data that is captured naturally (instead of via surveys and notes) -- it can be used to see trends (not just who IS but who ISN’T), create nudges based on what we know about a student.</td>
</tr>
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</table>
## Use Case: Marketing and Communications

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</thead>
<tbody>
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<td>Highly distributed mass communication tools used by departmental communicators with varying levels of expertise resulting in oversaturation without effective strategy</td>
<td>Enterprise Salesforce CRM platform with integrated Marketing Cloud that is provided to all central and departmental users</td>
<td>Single point of tracking all communication history and analytics for the purposes of reducing “noise” and improving university communication strategy</td>
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Use Case: Study Abroad

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</thead>
<tbody>
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<td>Students can’t find things -- they have to go to hundreds of websites</td>
<td>A Netflix-like discovery platform where students can find programs and apply and administrators can take advantage of CRM tools for program and application management</td>
<td>Institutional alignment; process orchestration from beginning to end to support students</td>
</tr>
</tbody>
</table>
No One Size Fits All
GOT QUESTIONS?
Please take a moment to evaluate this session
There are two ways to access the session and presenter evaluations

1. In the online agenda, click on the “Evaluate Session” link

2. From the mobile app, click on the session you want from the schedule > then click the associated resources > and the evaluation will pop up in the list