JENZABAR WHITE PAPER

A Buyer's Guide to CRM For Higher Education

Jenzabar®
TRANSCENDING EDUCATION

Allow Me to Reintroduce Myself

The Current State of Affairs in Higher Ed and How Technology Fits In

Many offices are being asked to do more with less, while experiencing increased pressure to reach and maintain enrollment goals. Student demographics are undoubtedly changing and with that come unique needs and challenges that can affect recruiting success and completion rates. With caseloads in the hundreds or even thousands, facilitating and nurturing relationships with students can seem daunting or nearly impossible at times.

If your office is experiencing pain points associated with managing the state of higher education today, know that you are not alone. Today's prospect market requires institutions to evolve their student recruitment and retention approach. This evolution is highlighted by recent efforts to redesign the student experience across higher ed to create a consistent, cohesive, and compelling journey for students throughout the entire student lifecycle—from their first touchpoint as a prospect through graduation.

Most choose their role in higher ed because they have a passion for helping students and seeing them succeed. Now, it's time to take a stand against the mundane, manual administrative work that's getting in the way of doing just that. Implementing the right CRM solution can set your campus apart by supporting innovation to stay on top of trends, centralizing data, automating internal business processes, and most importantly — engaging students.

Trust Me, You Need This

CRM and Why it's Important for Higher Education

CRM stands for "constituent relationship management," and its application is no longer limited to the business and sales worlds. In fact, many higher education institutions have implemented a CRM on their campus to manage recruitment, marketing communication, enrollment, retention, advancement, and more.

One of the main advantages associated with adopting a CRM is the inherent breakdown of departmental silos. Being able to view student data all in one centralized location allows for operational efficiencies in areas like routing prospective students to the appropriate team member, connecting students with the right department for seamless support, and easily viewing constituent information for enhanced engagement (i.e., a 360-degree view).

If the thought of never-ending Excel spreadsheets, the number of trees you waste during application season, or using a clipboard and highlighter to manage a campus event makes you cringe, it's time to begin automating your processes with the help of a CRM. Implementing a CRM for the first time can also help replace disparate systems across your campus and eliminate departmental silos by centralizing student data in one comprehensive solution.

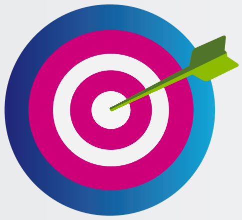
On the other hand, if you already have a CRM but it is not accessible by students or staff on mobile, it's antiquated and no longer able to serve your institution's needs. This means that it's probably time to revisit the market and evaluate new alternatives.

Ask yourself: Is the CRM I implemented years ago the same as today? If the answer is 'yes,' you should look into the pros and cons of refreshing your current system vs. implementing an entirely new CRM. Your CRM vendor can always provide a "refresh" demo and show new features and functionality that have been added since you've implemented. A refresh has no cost associated with it, and can provide insight into add-ons that you may have been looking for elsewhere but actually exist at your fingertips with the latest upgrade.

The benefits of software-as-a-service (SaaS) offering is that it's constantly changing and evolving. If you have adopted a SaaS solution, then it should never be truly implemented. You should be challenging yourself (and your team) to keep up with the latest technology in the market so that you can work smarter, not harder. SaaS solutions are innovative and respond to market needs based on client feedback, which in turn, help you respond to the emerging needs of today's student population.

Industry Snapshot

Which types of solutions are available today?



Single Point SaaS

SaaS solutions that address the needs of a specific office or department within higher education.

Scalable SaaS

SaaS solutions designed for higher education with scalability to cover multiple units or functional areas.

Enterprise Solutions

Larger enterprise platforms used in the commercial world without a higher education focus.

Searching for the Glass Slipper

Preparing to Find the Best-Fit CRM for Your Institution

When beginning your CRM search, there are five key factors to take into consideration.

1 Identify Your Stakeholders

Determine which departments or offices will benefit from implementing a CRM and should be part of this process - these are your "buyers" on campus that will eventually become end users.

Is this a strategic project for both undergraduate and graduate admissions, or only one office? Is this an instance where other departments like international admissions or extension programs can get involved and benefit from the technology? Are satellite campuses in different locations part of the overall equation to create a truly uniform admissions experience across the enterprise? Taking all of these factors into consideration will help dictate requirements and ultimately find the right partner to accommodate the needs of all potential end users on campus.

Who will be responsible for maintaining the CRM?

As mentioned earlier, SaaS is never truly "implemented" since it's continuously being updated to benefit customers. Enhancements being made to the solution result in system upgrades that should be the responsibility of a designated campus resource in order to stay current and facilitate user adoption. Having a dedicated resource on campus is a huge part of your institution's success. Many campuses will create the role of a CRM Administrator as the point person to ensure ongoing use and success of the solution.

To implement or not to implement a CRM: Who makes the ultimate decision?

Depending on which buyers will be involved in the process, the ultimate decision-maker differs widely across higher ed. For instance, if this is a campuswide purchase and decision for both undergraduate and graduate departments, often times the decision-maker is the CIO. If this is a singular decision and purchase for one particular department like undergraduate admissions, the decision-maker may range from the VP of Enrollment to the Dean.

Searching for the Glass Slipper (continued)

2 Outline System Requirements and Establish Your Evaluation Team

Now that you've determined which offices would benefit from a CRM and identified the buyers on campus, it's important to decide which of your colleagues will be involved in the overall evaluation and selection process.

Based on who your end users will be, make sure you involve the appropriate people from corresponding departments. For instance, if your main campus and satellite campus' admissions teams will be the solution's end users, you should involve those that oversee the admissions process from both locations so that they can explore how their efforts and initiatives can be enhanced with a CRM and provide valuable feedback.

While the input of functional users is critical to the ultimate decision, IT representation is just as important. For any CRM project to be truly successful, it must integrate with other systems on campus — most commonly, your student information system (SIS). Having IT representation early in the project will allow not only for a successful implementation but long-term viability of the system overall.

NOTE
the phrase "too many cooks in the kitchen" is applicable here, so make sure you are selecting an evaluation team that's lean enough to keep the process moving forward on campus.

Once you've selected who will be involved, you should set roles and responsibilities within your representative teams as early as possible.

Some best practices include having an executive sponsor for the project — in many cases this involves leadership representation like a CIO or VP of Enrollment — and ensuring adequate participation from subject matter experts across all teams included in the process. Help facilitate cross-departmental collaboration with everyone on the evaluation team to aid in the decision-making process whenever possible.

Searching for the Glass Slipper (continued)

3 Communicate the Value of Implementing a CRM

If you include your decision-maker on the evaluation team, you will likely need to communicate the value that a CRM would bring each office involved in the project by demonstrating ROI outside of what vendors will tell you and show in their demos.

Essentially, you will have to sell the idea of a CRM internally to get buy-in from your decision-makers and the leadership team. This is where the old saying "the more the merrier" comes into play — involving more than one office in the purchase can be highly beneficial because of the operational efficiencies attained. Implementing the same CRM for multiple departments saves time and money, and who doesn't like the sound of that?

A note on making the sale internally: Vendors will go on and on about the ROI that their client institutions have seen using their solutions, but in order to seal the deal with your decision-makers, you need to make the value more personal. Do your research, read case studies, speak with peer institutions that have already implemented a CRM, and put together an internal justification document or slide deck for the purchase that shows how you envision specific department(s) will benefit from the new technology.

4 Determine a Budget That Supports Your Requirements

It's crucial to allocate appropriate financial resources in order to start the research and evaluation process to determine which solution is right for your campus.

When building your budget, or allocating a grant, make sure you consider annual software costs as well as staff resources for proper implementation, user conferences, and post-launch resources. It's better to be prepared initially than surprised down the road when associated costs pop up that you might not have thought about.

A CRM's price will fluctuate based on how robust the technology is, in addition to a variety of other vendor-specific factors. It's helpful to understand the current software contracts you may be able to consolidate with the purchase of a CRM — say goodbye to disparate systems and multiple contracts with different vendors that currently cost your campus a fortune! Plus, it's likely that your institution will quickly reap the benefits of opportunity costs associated with intangibles like overall time saved with CRM automation and workflows.

Searching for the Glass Slipper (continued)

5 Know Your Purchasing Process and Create a Timeline

Every state and/or school has a different purchasing process, so it's good to be familiar with yours ahead of the CRM search to anticipate a timeline to final contract signature.

For instance, many state-funded institutions are required to go through the RFP process. Other schools must present their purchasing decisions to a board or committee for final sign-off. Avoid potential delays in your timeline by becoming familiar with your own individual purchasing process and setting key milestones internally.

Before you dive in to what you want and when you want it, make sure that you know how long it will take to get it.

For instance, if it takes six months for the RFP process and final purchase, you will be an entire admissions cycle later than when you first thought you'd be able to implement. This type of information commonly changes what you are looking for and/or need in a CRM.

A quick note on preparing to go to RFP: Often times, it can be helpful to have demos from vendors that you're interested in prior to writing your RFP. That way, you already have a basic understanding of the CRM solutions in the market and can use the RFP as a tool to dig deeper and uncover what you don't already know. Talking with peer institutions or vendor references before issuing your RFP can also give you insight on topics and questions those schools wish they would have asked in their RFPs.

It may be possible to present a sole source document to purchasing and avoid an RFP altogether if you have seen a demo from a vendor with a unique offering.

Make sure your timeline includes purchasing, implementation, AND adoption.

Implementation speeds vary greatly depending on the amount of resources you have dedicated to the project leading up to go-live, so keep that in mind to help set realistic expectations for those involved.

A Perfect Fit

Replacing Your Current CRM

If you are looking to replace your current CRM with a new solution, keep these four factors in mind.

1. Timing is Everything

You are well-aware of the amount of time it took to implement, go live, and facilitate user adoption with your current system. Make sure you are adequately preparing in advance and developing a timeline to sunset your old CRM - likely based on an upcoming contract expiration date - and adopt a new CRM.

2. Reevaluate Your Requirements to Find the Best Possible Partnership

Understand that every CRM solution has unique features, so make sure that your updated CRM wish list is composed of business requirements and not necessarily feature requirements. Even with the best upgrades, there will be legacy features that your staff will miss. Now, your goal is to find a better fit - keep in mind that there is no such thing as "perfect fit" when it comes to technology, even with a custom-built solution.

During this evaluation, you may discover that a refresh of your current system is best or more affordable at the time. Don't forget that you always have options and don't necessarily have to implement an entirely new CRM solution if you can meet your updated requirements with a refresh of your current system.

3. Budget Changes Are Inevitable

In most cases, you will be pleasantly surprised when reevaluating vendors as feature-for-feature comparisons can result in a cost decrease between your current legacy system and the new CRM solutions on the market.

On the other hand, it's important to be realistic about cost in the event of a price increase based on your expectations for the new system. For instance, if you are planning on going campuswide with a new CRM and want to scale the solution so that it serves multiple different areas within your institution, there will be an increase in cost.

4. Get Ready for Implementation Round Two

Keep in mind that data will need to be migrated from the old system directly to the new system, or from the old system to your SIS and then back into the new system. This is why it's strongly recommended to involve IT staff or more technical resources in the search for a new CRM solution, especially if you are hoping for a smooth transition, as they know this subject matter best and will likely have data migration questions for each selected vendor.

Hmm, Let Me Think About It

The Vendor Evaluation Process

Today, there are so many CRM solutions available that it's become more important than ever to do your due diligence on vendors until you feel confident that the organization will provide a great partnership in supporting your institution. It's essential that the vendor you select understands the industry you work in, so in this case it's best to partner with a vendor that specializes in higher education. You also want to identify with their core values and vision - they should truly see you as a partner and not just a contract! As far as CRM solutions available to higher ed institutions go, you need to understand the type of solution that is right for you. One size definitely does not fit all in this industry. If you have decided that partnering with a vendor is the right approach for you, there are three general types of solutions available today. Here's a little breakdown of each so you can decide which types of solutions to evaluate based on your unique needs.

Cloud-hosted, one-point SaaS solutions that address the needs of a specific office or department within higher education.

- These CRM solutions allow specific offices to operate independently of other departments on campus. What they add in simplicity, they often times lack in scalability as they are designed with one office in mind. With the right resource allocation, these systems can be implemented relatively quickly.

Cloud-hosted, campuswide SaaS solutions designed for higher education with scalability to cover multiple units or functional areas.

- These solutions allow for the customization and management of a securely hosted, third-party vendor application or the customization and management of an entirely custom application that is built to your school's exact requirements.
- Many institutions choose to phase their implementation, starting small with a third-party vendor application on the same platform and growing toward a connected enterprise model. That way, you can eventually break down departmental silos and view student data from a full lifecycle perspective campuswide.

Larger enterprise platforms used in the commercial world without a higher ed focus.

- These platforms are commonly used by businesses, both large and small, across a variety of industries. However, you will not find higher ed-specific features, functionality, or naming conventions within these CRM solutions.

What to Look For

Now that you have a high-level understanding of the different types of CRM solutions that are available in the industry, you should also know which features are standard for these systems.

- ✓ **Email and workflow automation**
- ✓ **Text messaging**
- ✓ **Reporting, anayltics, and dashboards**
- ✓ **Mobile device support**
- ✓ **Ability to integrate easily with other systems**
- ✓ **Consolidated/relational data model (Ex: contact relationship management)**
- ✓ **Chat support**
- ✓ **Applicant/student portal**

To Build or Buy, That is the Question

A Note on "Build vs. Buy" for Cloud-Based, Enterprise Solutions

When it comes to enterprise solutions, there's a natural fork in the road. Once you have decided you definitely want to be on an enterprise platform, you then need to decide which path you'll take as it relates to your institution's needs.

BUILD

Building a custom solution that is completely unique to your institution or department's business needs, either on your own using internal resources or, more likely, hiring an external technology consulting firm.

The main benefit here is that you are creating a solution that fits your unique needs and business processes from the ground-up, giving you full ownership of the final product. On the other hand, any time you want upgrades or changes made you will likely have to go back to the technology consultant you worked with in building the custom solution for this additional work to be done. It makes sense to account for these situations in your overall CRM project budget and plan ahead for an ongoing service package to ensure success.

BUY

Buying a third-party vendor application, or "managed package" solution that sits on top of a cloud-based platform with out-of-the-box features and functionality, designed for higher ed.

If you're interested in expanding your CRM solution to multiple areas on campus, or even satellite campuses, this is a great way to get your feet wet with a cloud-based, enterprise platform. Contrary to custom-built solutions, third-party applications continuously innovate and release new features and enhancements on a regular basis due to feedback received from other clients as well as market trends. That being said, taking this route means that you begin with a solution that is predefined. But, you can always expand when you're ready.

NOTE

It's possible to use a managed package solution as the backbone for your campus' CRM initiative while simultaneously partnering with a technology consulting firm to build some custom features according to your needs. Essentially, it is possible to "have your cake and eat it too" here if that's what you're looking for!

Build vs. Buy

Check out the helpful "Build vs. Buy" chart below to evaluate which path is best for you by considering the benefits and risks associated with each.

BENEFITS

BUILD: Custom Development	BUY: Managed Package
Bespoke to your current requirements	Faster to market
Full ownership of solution	Predictable long-term budget
Potential competitive advantage since others are not sharing your best practices	Roadmap that includes ongoing enhancements and upgrades
Ability to control roadmap	Customer community
Long-term cost savings if initial requirements do not change	Lower initial cost
	Ongoing support including documentation and training materials
	Potential competitive advantage, best practices are often built-into the product
	Minimal resource requirements from your end; easier to hire and onboard support staff

RISKS

BUILD: Custom Development	BUY: Managed Package
Business practices may change	Technology can become obsolete
Support for end users can be expensive	Product roadmap may not meet your future requirements
Documentation and training materials are critical	Longer-term financial commitment
Further customizations and enhancements require skilled staff, or re-engagement with outside vendor to avoid technology becoming obsolete	Difficult to switch products once implemented and adopted
Knowledge distribution is more challenging	
Difficult to switch products once implemented and adopted	

The One, The Only, **The Demo!**

Assessing Vendor Product Demos

After deciding on a solution type that will best suit your needs, it's only natural to begin exploring vendors' websites for a deeper dive into their products. You will never find all of the answers to your questions on a solution's features and functionality from a website, so the best next step is to request a demonstration of their solution(s) based on your requirements. Keep in mind, a vendor should be able to articulate their ability to meet your predetermined requirements in this demo — no two schools are the same in terms of business processes, so the demo should feel anything but cookie cutter. Across the industry, demos range from 1 - 2 hours long to an all day affair, depending on the vendor's approach.

Common Demo Formats:

- Live, virtual demo via Webex or some other videoconferencing platform
- Live product demo on your campus

General Questions To Ask During A Demo:

- How does this solution relate to my school type (large, small, public, private, community)?
- Here are our current processes that we need to keep — can your technology do this? This is what we want to change and do differently — can your technology do this?
- What is the UI like for staff? Is it easily trainable? Turnover is high in higher ed, so it's important for us to adopt a tool that can be easily taught and understood.
- How can our current student workers be involved with the solution?
- How is this solution going to connect and interface with our SIS?
- We need to track historical data. How does that integrate with your CRM solution?
- What is a typical implementation timeline?
- What does the work of your team vs. our team look like during implementation?
- Is there a dedicated implementation team or is it self-service?
- What support do you provide post-implementation?
- How can this solution be helpful for other departments on campus? How would it integrate with other processes on campus?
- Can this technology be scaled campuswide?

NOTE

An industry best practice for evaluating demos is to have the vendor on campus to show their solutions to your stakeholders. That way, you can get a better feel for the company by forming relationships beyond email correspondence and have the benefit of asking more technical, functional, or even process-driven questions that typically arise in a face-to-face format.

Partner With Your Partner

Selecting the Best CRM Provider for Your Needs & Ensuring Success

No matter how big or small your school is, adopting a CRM solution for your recruitment and admissions needs will provide considerable institutional value. With the current shift from transactional to consultative relationships, it's more important now than ever to share information across the various departments on campus that are making contact with the same students in order to provide a seamless student (and staff!) experience. CRM solutions help campuses across higher education get back to the business of putting students first by simplifying your processes, managing your data all in one place, cultivating meaningful relationships, and fostering student engagement — from initial inquiry through graduation.

Don't forget — the partner you select at the end of the buying process is just as important, if not more, than the actual technology itself. (And if this isn't your first rodeo, you know this all too well!) You should feel confident that your CRM vendor sees you as a partner, and not just another logo in their client base. The act of truly "partnering" with your CRM partner will extend your available resources and ensure long-term success of the system post-implementation. Staying connected with your partner as well as fellow institutions in the partner's CRM community will also lend to a successful overall experience.

Stay engaged with schools that have also partnered with your CRM partner via online user communities, conferences, and events to share your unique goals, challenges, and successes to help inform others' strategies and learn from their experiences with the same system. You'll never be alone in this journey with the resources and support available from your CRM partner and their user community, so be sure to enjoy the ride and learn as much as possible along the way!

What Would a 2% Enrollment Increase Mean for Your School?

Jenzabar Recruitment

- Manage your entire recruitment process with one unified tool
- Access your system anytime, anywhere
- Create and send personalized communications
- Automate workflows based on interactions
- Empower students to apply and track their progress
- Make visiting your campus easy for students and their families
- Increase efficiencies by avoiding data imports and exports
- Easily customize fields, workflows, dashboards, and forms
- Real-time reports provide real-time information

Sign up now for a live demo!
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Find out more

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