

## Charting the Future Workgroup Report

**CTF Workgroup:** Student Support Technologies

### Part A. Workgroup Recommendations

**Recommendation #1:** Complete a request for proposals (RFP) for a constituent relationship management (CRM) solution that can store required student data fields within a single relational database.

#### Background

A Request for Information (RFI) for a Student Lifecycle / Constituent Relations Management System-wide, Complete Student Lifecycle Solution was conducted by the workgroup. Seven vendors responded to the RFI request for their solutions and capabilities in the following six areas:

- Foster constituent engagement
- Gather and deliver information
- Deliver calls to action/alerts
- Develop and support relationships
- Generate and sustain records
- Deliver reporting functionality for student and institutional use

In each of these areas the vendors were asked to show how these functions could be used to address the following student lifecycle areas:

- Marketing & recruitment
- Admissions and enrollment
- Course & degree management (mapping and planning)
- Degree progression (advising, retention, performance tracking, analytics/reporting)
- Career services and career counseling

From the seven vendors that responded, four vendors were asked to provide product demonstrations. These vendors were Hobsons, Oracle Service Cloud, Target X, and Enrollment Rx. Hobsons and Oracle Service Cloud are currently used for a variety of functions at a significant number of Minnesota State institutions. Target X and Enrollment Rx are services that are built upon the Salesforce CRM platform.

## **Findings**

### **CRM Platforms**

Findings from the RFI suggest CRM products can be architected two different ways.

1. Solutions that store required student data fields in a single relational database. Supporting applications and/or third-party products can utilize foundational datasets available in this database to perform specific functions (i.e. - communicate to constituents, track interactions, collect data, etc.) for phases of the student lifecycle.
2. Solutions that maintain separate databases that are used to store data and perform functions for specific phases of the student lifecycle.

### **Mobility**

Each responding vendor had a level of mobile access to their product by the end user. A small number of these vendors have also developed a mobile ready administrative side.

### **Alignment of functions to the Student Lifecycle**

- At present the CRM tools generally are focused on a specific type of activity in the student lifecycle. None of the products will fulfill all the needs across the entire student lifecycle without additional partner vendors and integrations being developed.
- A number of the vendors are focused on student recruitment and marketing. This focus on the early stages of the student lifecycle is the strength for these vendors.
- There are other vendors that have a more customizable toolset that is being used in other areas of the student lifecycle, like student engagement and retention.

**Detailed Recommendation**

Complete a request for proposals (RFP) for a constituent relationship management (CRM) solution that can store required student data fields within a single relational database. Supporting applications and/or third-party products can utilize the foundational datasets available in this database to perform specific functions (i.e. - communicate to constituents, track interactions, collect data, etc.) for each of the phases in the student lifecycle (from prospective student through alumni).

- The selected CRM would serve as the single location to maintain common data for constituents from each Minnesota State institution. This would serve as the single systemwide CRM solution to be integrated with ISRS, allowing data between the two platforms to be created, read, and/or modified.
- Using this single, common data platform, the selected vendor should allow institutions to perform -- through a suite of provided applications OR third-party tools -- institutional functions related to each phase of the student lifecycle (from prospective student through alumni).
- The product should provide tools to communicate with constituents (i.e. - email, SMS/text, phone, etc.), store interactions (walk ups, phone calls, chat, e-mails, web-forms, individual meetings, etc.) and engagements (participation in events, campus support services, etc.) that constituents have with an institution enabling coordination among appropriate staff members (identified by roles and permissions) to assist with different phases of the student lifecycle.

<b>Action Steps</b>					
	<b>Action</b>	<b>Responsible Party</b>	<b>Timeframe for Completion</b>	<b>Ease of Implementation</b>	
<b>#1</b>	RFP - By September 15, form a RFP workgroup representing corresponding bargaining units.	ASA	Early Win (< 6 months)		
<b>#2</b>	RFP - By December 15, gather RFP requirements by way of campus/stakeholder engagement and knowledge from the student support technologies workgroup.	Colleges, universities, and ASA	Early Win (< 6 months)		
<b>#3</b>	RFP - Complete RFP and select CRM solution	Colleges, universities, and ASA	Early Win (< 6 months)		

#4	Develop an implementation plan for the selected solution	Colleges, universities, and ASA/IT	Early Win (< 6 months)		
<p><b>Recommendation #2:</b> Knowing that it is unlikely for a CRM tool to satisfy all the requirements identified in the original initiative, system IT staff and DARs staff should work together to enable the "self-service" function of u.achieve, as a step towards fulfilling some of the requirements identified in the initiative.</p> <p><b>Background</b></p> <p>Nearly all responding institutions reported using u.achieve/DARwin (College Source) for the purposes of course/degree planning. Feedback provided through the campus inventory included a number of "feature requests" and/or changes to the existing services provided within e-services and/or u.achieve. As noted in recommendation #1, there doesn't appear to be a single solution that would address each phase of the student lifecycle.</p> <p>The existing course and degree management tool used by all responding institutions was u.achieve. Currently, Minnesota State owns the license to, but has not yet implemented, u.achieve "self-service." This tool is reported to provide the following features:</p> <ul style="list-style-type: none"> <li>• Students can run a 'what-if' audits for majors other than their declared major, including their Minnesota Transfer Curriculum completion</li> <li>• Allows tracking of transfer evaluation process by both staff and students</li> <li>• Provides a "course cart" functionality, which allows students to place needed courses from the Degree Audit into future terms. (Risk: Coordination needed because of current ISRS Registration course cart functionality already in place, although it allows for placement of courses only for the current registration term.)</li> <li>• Exceptions made on a student record based on Academic Petition are clearly listed. There is also a potential to decentralize the entering of Student Exceptions via the Self-Service Web app. Currently only staff with u.achieve client access may enter student exceptions.</li> <li>• Program Matcher - students can quickly and easily see what majors would most likely accept most of their credits. (u.achieve Self-Service collects and indexes every degree program at a school—every course for every program on campus is stored. Student coursework is compared against indexed programs from the current catalog.)</li> </ul> <p>Respondents to the inventory requested a tool that would allow students to perform "what-if" audits and register for outstanding classes via a student's degree audit report.</p>					

<b>Action Steps</b>					
	<b>Action</b>	<b>Responsible Party</b>	<b>Timeframe for Completion</b>	<b>Ease of Implementation</b>	<b>Resources Needed</b>
<b>#1</b>	Explore U.Achieve capabilities as an independent solution and how the data from the tool could be utilized by a CRM solution	ASA/IT	Early Win (< 6 months)	Easy	Time and personnel for representative group to review the tool's capabilities
<b>#2</b>	Draft Business Case for implementing the "self service" functionality of the U.Achieve tool	ASA/IT	Early Win (< 6 months)	Easy	Time and personnel to develop business case.
<b>#3</b>	Upon implementation of the "self-service" function of U.Achieve, analyze outstanding functions within the student lifecycle better suited with a different tool (i.e. - graduation planner)	ASA/IT	Medium Term (6-18 months)	Moderate	Time and personnel for representative group to review the tool's implementation