



GUIDEBOOK

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**NUCLEUS
RESEARCH**

INCREASING STUDENT ENGAGEMENT WITH SALESFORCE.ORG EDUCATION CLOUD

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THE BOTTOM LINE

Higher education institutions are increasingly challenged to meet the changing needs and expectations of students while nurturing alumni and donor relationships. In an era of increasing student expectations, universities should provide a connected and personalized experience throughout the entire student journey. Just like a traditional marketing customer journey, higher ed can use the tools and capabilities of customer relationship management (CRM) to support that journey – but the data model and user experience must be tuned to meet the needs of educational institutions. Nucleus found that institutions using Salesforce.org Education Cloud were able to leverage Salesforce’s single platform and experience management capabilities to better attract, retain, and engage students, alumni, and donors through more data-driven decision making. Key benefits they achieved included increased productivity and student engagement, streamlined communications and processes, more data-driven decision making, and improved technology management.

THE SITUATION

In the past 10 to 15 years, the landscape for higher education has dramatically changed. No longer ivory towers where students come to listen and learn, they are increasingly business operations that are challenged to manage costs, increase revenues, and drive staff productivity.

Universities are also faced with arguably the most difficult customer base in the world: students that are demanding a return on their investment, with either strong career options or a path to advanced education. In the world of social media, the old measures of success – an entire school’s score in US News and World Report’s annual college rankings – have given way to micro-recommendations, with individual professors, courses, and campuses scored on social media on a regular experience-driven basis.

Universities should provide a connected and personalized experience throughout the student journey.

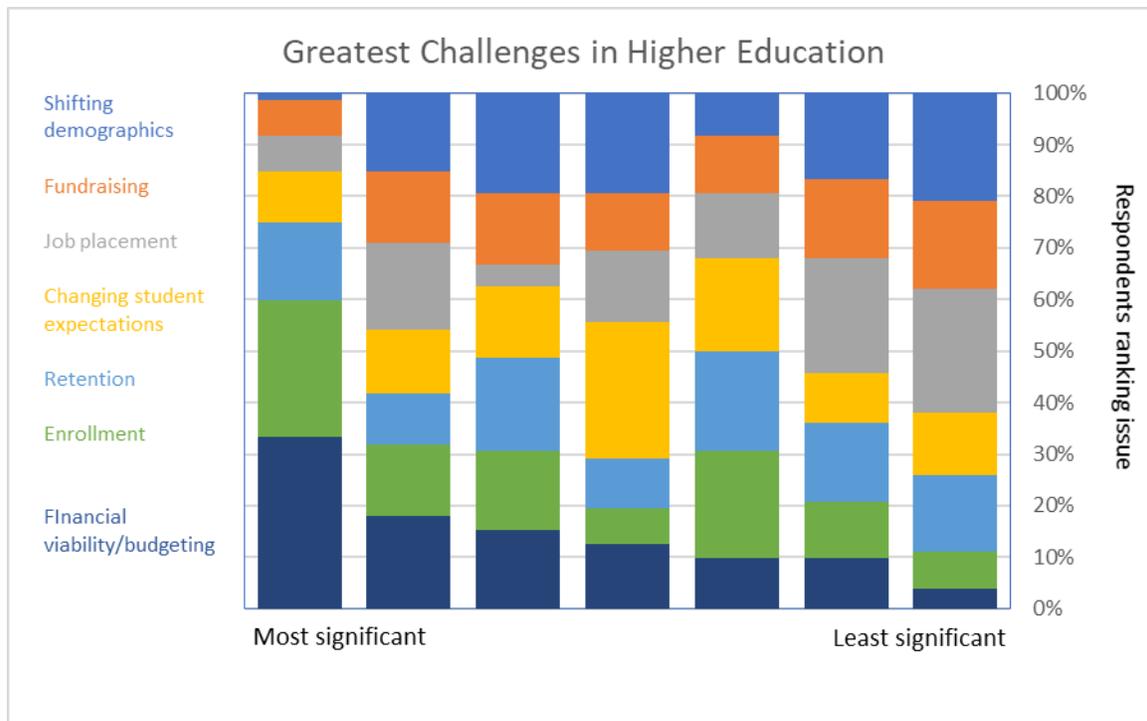
At a higher level, the ability of a student to graduate and obtain gainful employment is a primary measure of how institutions are ranked, which leads to greater enrollment and more revenues. At the same time, that return is dependent on the student’s willingness (or ability)

to stay engaged while matriculating – and disparate departments and processes have often put the onus of understanding how best to engage on the student.

Traditional institutions are also faced with competitive pressures from online nontraditional programs that market their offerings as student centric. With online courses and counseling, flexible scheduling, and perks such as free laptops, these schools challenge traditional ones to prove their value to those demanding – and vocal – customers. Unlike online institutions that started in the cloud, traditional institutions must also deal with the rising costs of managing multiple processes, applications, and data silos.

Beyond revenues from students as customers, institutions also must effectively engage with alumni and donors as their other primary sources of revenue. Most institutions’ fundraising efforts are well-oiled machines. However, they are often disconnected from other campus operations and begin after graduation with little contextual detail about an individual alumnus’s or company’s experience and relationship with the school.

To better understand the challenges and priorities of higher education, Nucleus surveyed 72 higher education decision makers, primarily in North America and Europe. We asked them about the challenges facing their institutions, their current technology strategies, and what grade they would give their institutions’ performance in key areas such as student engagement, career placement, retention, attracting students, and alumni engagement. Not surprisingly, financial viability was the number one challenge, with one third of institutions rating it as their number one concern. Financial viability was followed by enrollment (the top challenge for one quarter of respondents), and retention (the top challenge of 15 percent of respondents).



THE DISCONNECTED CAMPUS

In talking with higher education administrators, Nucleus found that lack of coordination between departments – and lack of a common CRM that spanned recruiting, retention, and alumni and donor management – was at the core of both financial and student engagement challenges. Administrators said:

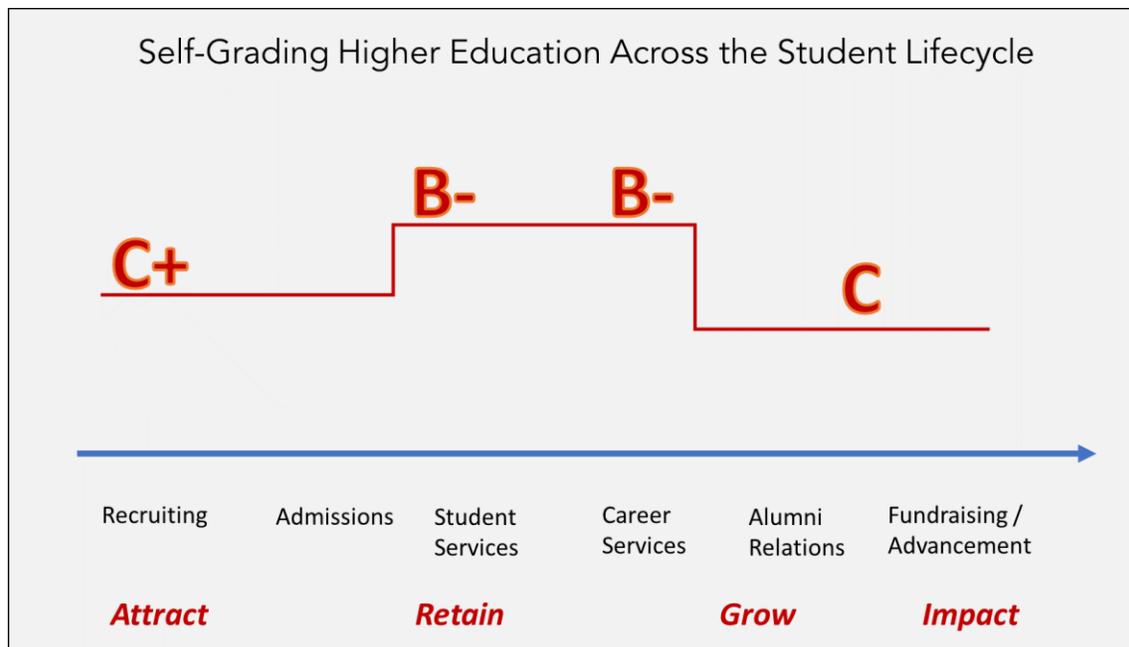
- *“If you were in admissions, once the student enrolled they were dead to you.”*
- *“People use Microsoft Excel, Access databases, Oracle PeopleSoft for student data, and handwritten notes. We had an issue with a major donor where the school was engaging them for one amount, and a student group for another ... it was very unprofessional.”*
- *“To be effective, the student had to be the integrator of all offices and systems. Just for career services, students had three siloed platforms they had to remember and access.”*

The average institution has 35 different applications to manage the student journey.

Common factors impacting these grades included multiple systems, applications, and processes; lack of data integration; and lack of access to or expertise in digital tools of engagement. However, these structural problems were overshadowed by the prevailing theme of the changing expectations of students.

Consumer-grade technology experiences, support for special needs, personalized career planning and placement, and a clear ROI are increasingly being demanded by students. At the same time, higher education institutions have grown and evolved over time, with varying levels of technology investment. In our survey we found the average institution had 35 different applications or systems to manage recruiting, enrollment, engagement, job placement, and alumni and donor engagement – with nearly one-fifth of institutions having 70 or more.

This lack of connectivity challenges data-driven decision making across the student lifecycle. In our survey we also asked administrators to grade their institutions' performance in key areas such as recruiting, student services, career services, and alumni relations, and the results were telling: the average grade for the “top” and “bottom” of the funnel – recruiting and alumni relations – were C+ and C, respectively, and student services and career services – the key components of student engagement – each received a B-.



This creates both IT support and administration challenges and difficulties in effectively presenting a “connected campus” to students, donors, and alumni – with nearly 50 percent of administrators citing “ineffective communication” as a top obstacle to delivering services to students today.

“Ineffective communication” is a top obstacle to delivering services to students.

Rightly or wrongly, students increasingly perceived themselves as paying customers of an institution, and while the customer isn’t always right, they are demanding more support (both financial and otherwise) to reach their academic goals.

THE SOLUTION

Education Cloud for Higher Education, built by Salesforce.org on the Salesforce Platform, combines Salesforce.com’s expertise in customer experience with Salesforce.org’s expertise and investment in higher education. It is a cloud-based set of solutions that enable institutions to drive student engagement from recruitment to matriculation and beyond to alumni and donor engagement. Key components of the solution include:

- The Salesforce Higher Education Data Architecture (HEDA), a free open-source managed package designed to configure Salesforce out of the box for higher education
- Customized solutions for recruiting and admissions, student success, and advancement
- Salesforce Advisor Link, a specialized application to help advisors provide personalized engagement and advice and proactively identify and engage at-risk students
- Salesforce Marketing Cloud capabilities for marketing and recruiting, student engagement, and alumni relations and fundraising
- Salesforce Einstein and Einstein Analytics, for AI and data-driven decision making
- AppExchange apps from Salesforce partners that integrate with Education Cloud

To better understand the capabilities of Education Cloud and how it delivers value, Nucleus conducted in-depth interviews with a number of Salesforce higher education customers in the United States and Europe.

Breadth of capabilities, data security, and innovation investments were key factors in choosing Education Cloud.

WHY EDUCATION CLOUD

Nucleus found there were four main reasons why higher education customers chose Education Cloud: its higher-education specific capabilities, data security, breadth of capabilities within the solution and the Salesforce ecosystem, and Salesforce.org's investments in ongoing innovation.

HIGHER-EDUCATION-SPECIFIC CRM

Nucleus found that the customized capabilities Salesforce.org has built to support the specific needs of higher education institutions and the product roadmap were a key reason why decision makers in higher education decided to deploy Salesforce. Education Cloud is built specifically for institutions of higher education.

Unlike some competing products which are little more than enterprise customer relationship management (CRM) software with different field labels, Salesforce.org works continuously

with universities to develop and upgrade its solution that is built to drive student success. As one customer said, *“No companies in the world outside of higher ed have over 20,000 high-paying customers without a dedicated CRM, so Education Cloud is necessary for success, now and moving forward.”*

DATA SECURITY

Nucleus also found that concerns about data security, and the recognition of Salesforce as a trusted cloud provider in terms of data security, were another important factor in the decision to go with Education Cloud. Universities handle vast amounts of highly-sensitive student data such as financial information and medical records, so any software that will be used to handle that data needs to be protected and compliant with federal regulations. One customer said, *“We get tons of sensitive information from applicants, so we need to be FERPA and HIPAA compliant, but with Education Cloud we can adhere to such protocols while still having centralized data and being able to collaborate in the cloud.”*

BREADTH OF CAPABILITIES

Nucleus also found that the breadth of capabilities within the Salesforce portfolio, as well as the broader ecosystem, made higher education customers comfortable that an investment in Education Cloud would meet their functional needs. With the extensive Salesforce partner network and third-party point solutions available on the AppExchange, Salesforce customers are confident that their specific business needs can be met using Salesforce technology. For example, one customer said, *“With all the applications and tools available through Salesforce we can configure the system specific to the procedures and workflows of our university. Other vendors have begun to offer CRM for higher ed, but none are as mature or flexible as Salesforce.org Education Cloud.”*

SALESFORCE.ORG PARTNERSHIP AND ONGOING INNOVATION

Salesforce.org is invested in its customers' success, often serving as implementation partner and consultant with technical support, knowledge transfer, and best practices. Customers feel confident that Salesforce.org products will be regularly updated with additional functionality and that their needs and concerns will be addressed. A customer said, *“The relationship with Salesforce post-deployment was a big factor in our decision. We know they are truly committed to our long-term success and that of our students; plus, nobody knows their products better, so we wanted to use them as a consultant to help us find apps and integrations to improve our deployment.”*

KEY BENEFITS

Key benefits Nucleus identified from investing in Education Cloud included increased student engagement, increased user productivity, faster communication with students and prospects, adoption of a data-driven decision-making model, and improved technology management.

INCREASED STUDENT ENGAGEMENT

Student engagement is defined as the level of psychological investment that students make in their own education. This extends into how students are motivated to learn and move forward with their studies, in addition to the frequency with which students engage the university and the quality of those engagements. In an increasingly cluttered world, distracting forces are continuously competing for student attention and interest, which in turn leads to lower academic performance. Using Education Cloud, institutions have been able to support students and generate increased engagement through centralized student information and a responsive two-way communication infrastructure between student and institution. Student engagement can be measured by tracking attendance to classes, lectures, advising meetings, and other university-held events as well as academic progress and participation in extra-curricular activities. Nucleus found among institutions tracking such metrics, student engagement was increased by up to 40 percent by taking advantage of the capabilities of Education Cloud. Customers said:

- *“With Education Cloud our student engagement has definitely gone up. Before, only 11 percent of students knew they had a career advisor – now 88 percent do.”*
- *“We set a goal that 90 percent of graduated students are placed to a job within 3 months of graduating. Each year since our Education Cloud deployment, we’ve exceeded that 90 percent mark.”*

Student engagement can be increased by up to 40 percent.

MORE EFFICIENT COMMUNICATION

Nucleus also found that adoption of Salesforce in higher education drove improvements in data accessibility, cross-departmental visibility, and communication, both with students and within the university. With marketing automation tools, universities can automate outreach to prospective students and alumni with personalized messages.

Additionally, with activity capture and contact management tools, users across the university can access contact information as needed for outreach, solicitation, or problem-resolution. Customers said:

- *“Scheduling has always been an issue for us; it used to take an average of 6 e-mails and at least an hour of time to schedule a meeting. With Education Cloud, we’ve implemented an online portal where each student can easily schedule a meeting in 5 minutes.”*
- *“The new generation of students demand instant access to information and the ability to handle business online. Education Cloud puts our staff in position to know who a student is and what their situation is without needing a time-consuming explanation.”*

INCREASED USER PRODUCTIVITY

Nucleus found that with the Higher Education Data Architecture (HEDA) common data model and a single streamlined source of data and processes, Education Cloud drove higher productivity for users through task automation and less time spent searching for information.

Education Cloud increased user productivity by 12 to 18 percent – with some institutions seeing increases of up to 80 percent.

Although there was significant variability in productivity increases depending on the level of integration of previous systems and Salesforce modules deployed, Nucleus found that it was not unusual to see user productivity increase by 12 to 18 percent, with some organizations seeing dramatic increases of up to 80 percent. University staff spend less time searching for data, carrying out simple data preparation, or creating reports, among other things which allows them to refocus on creating more engaging and personalized student experiences. Customers said:

- *“We can automate low-value tasks like emailing alerts on the platform and redirect our staff to spend the time saved engaging with prospects. Personal engagement and service are the most important things to us and Education Cloud has helped us organize our business around that belief.”*
- *“Using our legacy system, some users were unable to create reports. With Education Cloud, each user can deliver custom reports hours faster than was possible on the legacy software.”*

CUSTOMER PROFILE: PRIVATE AMERICAN RESEARCH UNIVERSITY

A major university in the United States with more than 18,000 students had a goal of creating a centralized digital hub for student and alumni information. Prior to deploying Education Cloud, university staff relied on Microsoft Excel spreadsheets and pen-and-paper reporting, but this was inefficient and error-prone, and the administration wanted a modern solution to improve user productivity and data accuracy. The university considered Microsoft Dynamics and other advancement-tracking point solutions with some CRM functionality, but ultimately selected Education Cloud because of Salesforce.org's investment in specific capabilities that met its needs.

The deployment was executed using a phased approach, beginning in 2016 with an alumni package built to track advancement with focus on fundraising. After successfully implementing that module, in 2017 the university deployed Salesforce Advisor Link with online access portals for students and staff. Going forward, in 2019 the university plans to configure additional modules for recruitment and administration and is considering adopting HEDA.

Currently there are more than 1000 users on the system with plans to purchase more user licenses as additional modules and functionality are included. The main aspects of the deployment that have delivered benefit include:

- The system has increased flexibility for data management with open APIs and numerous third-party integrations.
- Sensitive data is secure on the platform as federal protocols such as FERPA and HIPAA are supported.
- The system is highly usable, even to untrained student workers, which has contributed to the system's adoption rate over 70 percent and reduces the total cost to the employer to onboard new users.
- Data is centralized in a single university-wide hub and is accessible in real-time with the appropriate permissions.
- The solution is scalable on the cloud to accommodate increased usage as the product's footprint at the university grows.

Moving forward, the university remains satisfied with its Salesforce.org investment and optimistic about its future plans to expand the deployment. As one administrator said, *"Salesforce.org is truly committed to our success – before, during, and after our deployment."*

IMPROVED TECHNOLOGY MANAGEMENT

Nucleus found that moving from multiple disparate systems to a single connected platform for managing student, alumni, and donor engagement – although it doesn't happen overnight – drives improved technology management. In fact, we found the move to

Education Cloud could reduce overall IT and data management costs by 40 to 60 percent while improving IT service delivery. With Education Cloud, all institutional, student, and alumni data can be connected from all the various departments and data sources to be unified on the cloud. This breaks down data silos and ensures that permissioned users regardless of department can find and use the data they need to create better and more personalized experiences. Customers said:

- *“All of the data is in one place, and all departments are using the same software. This, and the fact that Education Cloud easily integrates with other tools like Microsoft OneDrive and Sharepoint, has helped consolidate our siloed data and improve efficiency across the board.”*
- *“Before at each touchpoint with a student, the data was recorded and stored separately. Some departments were using multiple disparate CRM applications, and there was no central hub for information. With Education Cloud we have democratized our data on the cloud and been able to retire redundant legacy CRM applications.”*

Moving to Education Cloud can reduce IT costs by 40 to 60 percent.

DATA-INFORMED DECISION MAKING

Nucleus found that more data-driven decision making was a key benefit that higher education customers achieved when moving to Education Cloud. With centralized and standardized data, particularly using a framework like HEDA, on-platform analytics are supported. Decision makers have access to the holistic profile of student data to make admissions and advancement decisions; in one case by efficiently leveraging applicant data, the internal admission decision process was shortened from eight weeks to one week. Customers said:

- *“We use Marketing Cloud and Einstein Analytics to create metrics for student engagement that are used to predict future student success. We’re building up a library of hard data to identify how student participation in events and organizations on-campus translates to classroom and career accomplishment.”*
- *“Our alumni group is very active, and when fundraising we’ve found that personal contact with donors leads to more successful campaigns. We use Education Cloud to identify the most likely donors and to develop a data-backed approach strategy to support our method of direct personalized outreach.”*

CUSTOMER PROFILE: PRIVATE INTERNATIONAL LAW SCHOOL

A leading private university with its main campus located in Germany deployed Salesforce technology to be a central repository for student data. Excel was the main tool used to catalogue data and perform analysis; however, data was siloed by department and the institution as a whole was operating below peak efficiency. The university considered Salesforce, SAP, and MailChimp for some applications. Ultimately, the university chose Salesforce over other CRM vendors because it was the least complex solution to use. With campuses around the world, it was important to choose a CRM solution with the infrastructure to synchronize data from all over and handle it securely.

The university deployed Education Cloud as a central hub for student information, applications, and programs. Community Cloud was chosen for outreach efforts to prospective students including targeting and automated email/social media communication. All student data is stored in HEDA for uniformity across the platform.

There are currently 16 main stakeholders online using the system with plans to expand the user base further as the system matures. The main benefits received as a result of the deployment include:

- Improved data accessibility. With all data centralized in one place, data siloes were broken down. Cross-departmental teams could access data easily via the cloud that before would have required manual searching and requesting access.
- Improved collaboration. Salesforce is very flexible to integrate with collaborative tools such as Microsoft OneDrive and SharePoint. With everything accessible online through the cloud, users can collaborate seamlessly from anywhere.
- Increased productivity. On the legacy system, some users were unable to create reports or perform analytics. With Education Cloud, all users have the power to create custom reports without code. Additionally, the platform enabled users to save time with automation and intuitive workflows, totaling an overall productivity increase of nearly 15 percent.

The deployment was just over a year ago to date, and the university is pleased with the functionality the product delivers as well as the level of ongoing support it has received from Salesforce. An administrator said, *"We were looking for a CRM product we could use for the next 10 years and we're convinced we have found it with Salesforce."*

CONCLUSION

Higher education institutions are challenged to manage costs, engage students and alumni, and drive staff productivity – but have been hampered by disparate systems and lack of a complete view of student engagement. With the heightened expectations of students and



increasing financial and other pressures from nontraditional competitors, institutions need modern processes and tools to remain competitive. They also need common data models that span across the student lifecycle so they can move toward more data-driven decision making.

In an era where data on almost every facet of student life is shared, ranked, and graded, institutions should be managing the student journey from end to end as any organization would manage a customer journey. Through this lens, data-driven decision making can be applied to streamline processes, improve communications, and drive engagement across the student lifecycle. Nucleus found organizations adopting Education Cloud were able to leverage Salesforce.org's experience management strengths and education-focused capabilities to enable a connected campus, driving not just greater student engagement and retention but increased productivity and competitiveness.



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