Project Scope: CRM Impact

BACKGROUND & PURPOSE:

EOU purchased the recruitment and retention modules from TargetX, a customer relationship management (CRM) software solution that utilizes the Salesforce infrastructure platform in 2014 and 2015, respectively. The original purpose for purchasing the recruitment module was to improve the online application, give the admissions counselors a better tool to manage their applicants to increase recruitment effectiveness and efficiency, and greatly improve the email and printed communications plan to new applicants and students. The original purpose for the retention module was to improve the workflows of advisors to more easily manage their advisees within one system, thus allowing them to spend more time directly with students.

To date, the following departments utilize the CRM to interact with students: communications, admissions, ROI, and advising. Key departments not currently utilizing the system include financial aid, residence life, veteran recruitment and athletics.

Since implementation, the TargetX base product has been modified by EOU's information systems staff to meet the needs of existing EOU processes and users. Both the recruitment and retention modules have been heavily modified to add additional departmental access to the CRM that the base product did not include. A need to re-evaluate and potentially re-define the role of the CRM for enrollment management at an institutional and department level has been identified by executive leadership.

CORE THEME & STRATEGIC PLAN LINKAGE:

This project is linked to Core Theme 2, Objectives 1, Indicators 1 & 2 (CT2.1.1 & CT2.1.2) and Strategic Plan Goal 3, Objectives 1-3 (SP3.1, SP3.2, SP3.3).

OBJECTIVES:

Optimize the functions and usage of TargetX to support mission fulfillment and progress toward strategic goals of the institution in the areas of student enrollment, retention, and completion.

WORK DEFINITION:

Project administration

- Initiate discussion to help inform project scope
- Draft project scope
- Confirm group membership
- Review and finalize project scope

Project execution

- Define role of CRM in enrollment management for EOU – Project Team
- Approve CRM role definition – Sponsor Team
- Approve student lifecycle stages – Sponsor Team
- Operationalize CRM role definition – Project Team
  - Student Lifecycle Process mapping
    - Lead/Inquiry – Tressa Seydel subteam leader
    - Applicant – Mary Barnett subteam leader
    - Student – Kathleen Brown subteam leader

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- o Gap analysis of existing functions with goals
- o Strategy development
- Create an implementation and sustainability plan – Project Team
- Approve implementation and sustainability plan – Sponsor Team
- Implement the plan – Project Team (and supporting resources)

Sponsor team

- President – Tom Insko (sponsor)
- Dir. IRP – Holly Chason (lead)
- VPFA – Lara Moore
- Provost – Sarah Witte
- EDROI – David Vande Pol
- VPUA – Tim Seydel
- VPSA – Lacy Karpilo
- AD – Anji Weissenfluh

Project team

- Dir. IRP – Holly Chason (lead)
- Dir. IT – Jeff Carman
- Stu. Comm. Mgr. – Marianne Sipe
- ROI Ops. Mgr. – Tressa Seydel
- Registrar – Emily Sharratt
- Dir. Adm. – Gina Galaviz-Yap
- Advisor – Miranda Johnson
- Athletics - Mary Barnett
- Coord. Stu. Success – Kathleen Brown
- Dir. Stu. Acct. / Fin. Aid – Sandy Henry

DELIVERABLES/END PRODUCTS:

1) Implementation and sustainability plan (to include CRM training protocols)
2) Report on accomplishments relative to the plan and the impact on recruitment, retention, and completion effort goals

KEY MILESTONES:

1) Approval of institutional definition of CRM role in enrollment management by August 15, 2018
2) Approval of student lifecycle stages by August 15, 2018
3) Implementation and sustainability plan draft by September 15, 2018
4) Approval of implementation and sustainability plan by October 15, 2018
5) Implement actions/changes as outlined in the implementation plan by July 31, 2019
6) Team adjournment by July 31, 2019

CONSTRAINTS:

1) Current contract may be a limiting factor for proposed changes

KEY ASSUMPTIONS:

1) Current processes may be changed through strategy development
2) Any additional resources that are required can be obtained at an acceptable value for the price
3) There will be executive level support and collaboration, without which impact will be adversely affected

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SPECIFICALLY EXCLUDED SCOPE:

_____   8/16/18
Sponsor   Date

_____   8/16/18
Leader   Date