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CRM Oversight Team Assessment: Review & Recommendations

Summary:

This review will update the sponsor team with the activities that were completed as a result of the [original project scope](#) to address the current status of the CRM to the EOU staff who use it daily. This review also responds to the [CRM assessment report](#) submitted by [Huron Consulting Group](#), who evaluated Eastern Oregon University's (EOU) current business processes and systems assessments in determining an approach to managing our Salesforce environment and evaluated our current setup for the future development and business needs.

Impact Team Update:

The CRM Impact Team was developed from the [original project scope](#) to attempt to address some of the smaller issues with the CRM that were correctable to improve its effectiveness in the short term for EOU staff. Each project completed by the Impact Team along with the newly formed CRM Oversight team (who ultimately took over the duties for the Impact team) resulted in additional resources to be able to work on CRM related issues within the IT Department and resolution of many backlogged projects to improve effectiveness. Additional best practices were adopted and now currently used and reviewed monthly by the CRM Oversight Team.

[Huron Consulting Group](#) was brought into this project and they also assisted in closing some of the backlogged CRM projects, along with creating an assessment of the CRM as a whole. Based on their recommendations, they felt that TargetX, the software as a service that EOU selected to host their CRM environment separately, needed to be replaced to see greater efficiencies with the CRM in the future or else EOU would continue to experience various bottlenecks and limitations based on some of the projects that they worked on for EOU.

Recommendations:

The goal of this CRM assessment is to provide guidance and pathways towards improving the CRM functionality with our staff and students to be able to take better advantage of the opportunities this technology provides EOU to grow enrollment and improve retention.

The [original project scope](#) objective was to “*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*”.

[Huron Consulting Group](#) and the CRM Oversight Team is recommending EOU ends its relationship with TargetX when our contract ends on February 2022 and move towards Salesforce Education Data Architecture (EDA) along with purchasing a new Salesforce environment to migrate all business functions into before the February 2022 contract expires with TargetX.

The sponsor team has two options they can consider in this situation.

Option #1	Remain with TargetX and renegotiate the existing contract to attempt to keep the costs within projected budget ranges. This decision will still result in low support from TargetX due to the number of modifications and customizations EOU has created to make existing business practices for recruitment and retention. Huron Consulting has listed reasons why to avoid this scenario below. A conversation with TargetX also confirmed that their products couldn't be split up from the original modules EOU purchased, including the online application in the event EOU wanted to retain portions of the TargetX product that worked currently.
Option #2	Create a five-year plan for the migration and then create an RFP for a consultant to work with EOU in creating a new Salesforce environment where EOU can easily migrate off of TargetX onto Salesforce EDA before the end of the TargetX contract on February 2022. The flexibility of this system will result in a better user experience with the software and allow EOU greater control over its own business processes with recruitment and retention. This decision will result in a greater technical ability for the CRM to assist EOU with recruitment and retention along with providing EOU with many additional tools in the future that is lacking from TargetX currently.

There are several reasons that [Huron Consulting Group](#) is making this recommendation that are listed below:

- **Salesforce is investing heavily in EDA:** EDA undergoes regular maintenance and development, with additional enhancements pushed frequently (as often as every 2 weeks). It will be the basis for several Salesforce product offerings moving forward (Student Advisor Link, Gift Entry Manager for Advancement, etc.). Being on the platform will allow for greater scalability and compatibility with Salesforce offerings.
- **Dynamic nature:** With EOU's strategic plan and several of its initiatives, there will continue to be challenges with architecting around TargetX design limitations. As EOU implements new programs and initiatives (e.g. regional high school student matriculation, service-learning tracking), these will only become more apparent.
- **Evolving to meet student needs:** Based on Huron's own experience (consistent with what EOU has stated to them multiple times), TargetX clients who are the most frustrated are running multiple departments or campuses in a single instance of TargetX. One client had 7 schools using the same org. This created multiple issues around lead/contact/record ownership when students inquired to multiple programs. They tried to solve this for many years, but the workarounds came with limitations and complications, especially with the assignment of communication plans.

- **EDA includes Table Driven Trigger Management (TDTM):** This is a dynamic framework that allows for dynamic controls of trigger functionality. A system administrator can declaratively view and set the order for trigger operations and can easily activate or deactivate triggers (something that can't be done with TargetX triggers). In addition to this level of fine-grain control in native EDA, it provides greater capability to develop additional functionalities that leverage TDTM (Huron has developed several components to that end).
- **EDA is natively Lightning ready:** While TargetX has largely moved off of Classic and is hitting the bare minima to be deemed Lightning-Compatible, standard Salesforce comes with Lightning fully enabled and active.
- **Reporting:** The TargetX data model is designed to work with the TargetX reports, but the reporting needs beyond those are difficult to configure. (Huron misspoke about reporting because EOU currently uses Salesforce reporting)

Based on the limitations with our current CRM/TargetX system, the CRM Oversight Team is requesting the opportunity to complete and submit a “five-year” plan to this sponsor team based on Huron's roadmap solution they submitted with the [CRM assessment report](#). The CRM Oversight would create a full project scope involving the various milestones that would be needed to complete this changeover and truly meet the objective from the [original project scope](#) to ensure a smooth changeover for EOU if the sponsor team chooses to move forward. We feel this will ensure we meet the objective as laid out by this sponsor team and gain a better return on investment with our CRM system.

[Huron Consulting Group](#) has also identified the following areas needed for improvement. The CRM Oversight Team is offering our response and recommendations to the sponsor team based on the “five-year” plan we are proposing to move forward with to see a total improved system for our staff and students to utilize in the future.

Huron Consulting Group Objectives for Improvement	EOU CRM Oversight Team Responses for Improvement
<p>Governance: CRM stewardship needs more definition of roles and responsibilities, with consistent intake and transparent support processes. A CRM governance program is necessary to oversee the use, deployment, management, development, integrations, and provide an environment that EOU can use to build or install Salesforce applications.</p>	<p>Prior to this project's initiation, the IT department worked with the President's cabinet to establish a "Data Governance" group to address the lack of governance in ERP Oversight and CRM Oversight. These teams provide data oversight to ensure quality, security and the ability to easily access data to be able to make intelligent business decisions. Since these teams were approved in February of 2019, they have made incredible strides in governance in terms of both the ERP and CRM systems, along with implementing a change management system to track specific changes and project management that are shared with the team members for increased transparency.</p>

<p>Business Analysis: Processes are inconsistent, unclear, poorly defined, and/or highly individualized. Many are not well-documented. Documented processes and process evaluation, with clearly defined objectives, allow for a smoother build and better outcomes.</p>	<p>The CRM Oversight team agrees with this finding and is currently working through a backlog of projects with the IT Department to address improvements and efficiencies while also better-aligning processes with the strategic plan. The CRM Oversight team would like the opportunity to address these further in our proposed “five-year” plan to the sponsor team.</p>
<p>Sandbox Management: Partial sandbox is primarily used to house various in-progress development projects and has not been refreshed. No release management or sandbox management documentation or process established. Clear release and testing cadences with periodic refreshes; using full/partial sandboxes for testing instead of development</p>	<p>The IT Department had a backlogged project that was completed in July 2019 that created a full sandbox environment for all CRM users to test out new updates and new business processes in a controlled test environment. The CRM Oversight team will be reviewing their proposed recommendations for enforcing testing with this new CRM test environment to ensure better quality for any changes in the CRM going forward.</p>
<p>Student Service: Tracking is a largely manual process done by advising and student program staff and is a critical piece of EOU’s strategic plan. Academic affairs and program managers should use Salesforce CRM for visibility into student progress and related academic programs to support strategic goals around enrollment and retention.</p>	<p>The CRM Oversight team doesn’t agree with this finding and feels that the Huron Consulting Group possibly didn’t have enough time to truly review all of the automated processes in place to accurately track students through the student lifecycle. The Data Oversight team is currently documenting the entire student lifecycle, based on the work originally initiated from the CRM Impact Project team. It is scheduled to conclude their work by December 2019 to have available for all EOU staff.</p>
<p>Extensibility: We heard several times that the system has hit its limits and that users and IT are developing workarounds to address system limitations. In the short-term, the system needs additional business units to be onboarded. Long-term, consideration of an org migration to EDA, and evaluation of a mass marketing tool.</p>	<p>Huron has made a large procurement recommendation on page 18 of their assessment report where they recommended EOU ends its relationship with TargetX, based on all of the system limitations they have with their CRM system, and we instead move to Salesforce Education Data architecture (EDA) system. EOU IT has currently programmed multiple modified and custom processes to ensure the TargetX system worked with EOU’s business processes. However, this leaves EOU with no technical support for their product when EOU modifies or customizes their baseline process.</p>
<p>Data Integrity: Current duplicate management is manual and relies heavily on post-data load cleanup. Duplicates are logged in the system to track various constituencies. Institutional Reporting and other staff do not trust the data in aggregate. Establish protocols that proactively and reactively manage data-using duplicate management rules and reports, eliminating intentional duplicate record creation, and using Update functions within Form Assembly, and</p>	<p>Duplicate data clean-up is a manual process currently at EOU based on the available tools TargetX has provided EOU. EOU IT has procured additional solutions to help address the issues to help sync the CRM with our ERP system Banner. EOU has data matching rules in place as preventative measures to help prevent issues. Duplicates to track constituencies are true, based on Huron’s analysis, but they aren’t really considered duplicates to EOU. Huron has provided EOU with additional business processes to address duplicate data in the CRM and we anticipate implementing these changes in the Fall</p>

<p>identify best practices to ensure clean and consistent data.</p>	<p>of 2019.</p>
<p>Reporting: We understand that users do not (justifiably) trust the data that they see in Salesforce reports; reports are limited to operational components without significant Salesforce accessibility. Improving data integrity, developing operational reports, and setting clear limits/protocols about reporting in Salesforce vs other sources will improve better abilities to track KPIs and Strategic Planning and Enrollment performance goals.</p>	<p>As reported in Huron’s assessment, TargetX has zero reporting features in its product and Salesforce is very limiting in its reporting abilities. When EOU modifies and customizes business processes in TargetX to enable functionality to meet our business needs, this (often times) eliminates the ability to report within TargetX. EOU IT has recently gone through to clean up the various desync issues related to reporting in the banner and the CRM. This review has provided a better crosswalk to help business users understand how the data is queried to ensure better business decisions. With the recommendation to move to Salesforce EDA, Salesforce reporting becomes more accessible because we’ll be organizing the data differently than we do with TargetX, which makes the possibility of better reporting possible. There will still be a few reports that are too complex for Salesforce reporting tools, in which the EOU IT department will use Millennium FAST to ensure business units have the information needed to make crucial business decisions.</p>