# THE CONNECTED CAMPUS

Key Learnings to Transform Your Institution from Recruiting to Retention and Beyond

# SIMPLUS

Simplus White Paper Series

# Introduction

Around the world, higher education institutions are beginning to transform their operations, each hoping to achieve an ambitious, threefold goal to

1  **identify and attract the best candidates,**

2  **create a continuous journey of seamless, personalised, and lifelong engagement for each student, and**

3  **simultaneously build a single, cohesive institutional view of each student from recruiting and enrolment to student retention, success, placement, and alumni engagement. In other words, they hope to build a Connected Campus.**

Achieving the goal of the Connected Campus is not without its challenges and obstacles. The situation is no different in Australia. In this white paper, we'll explore

- the background of Australia's higher education,
- why higher education must adapt,
- the benefits and challenges of digital transformation,
- how technology can drive a move to a student-centered approach,
- the Salesforce solution for higher education,
- lessons from the commercial and government sectors,
- challenges and obstacles, and
- case studies.

# Background

## Higher Education Under Pressure

Higher education institutions are under increased pressure. They are expected to do more with less, to stay **relevant in the digital age,** and to maximise the service they deliver to key "customers"—students, research partners, stakeholders, etc.—while dealing with rigid budgets and tight staffing levels. And expectations from these customers are high: prospective and current students expect educational institutions to deliver services that meet the standards they receive in the wider market from retailers, telecommunications companies, and other commercial service providers.

As such, higher education institutions are expected to provide a stronger digital experience. According to the **2018 EDUCAUSE report,**

**"Students are arriving on campus (or online) with a consumer outlook, and they're comparing their higher education experience to their experiences in other aspects of their lives. Student engagement is key to [digital transformation]; students expect to engage seamlessly with the institution and each other and to use data to guide them through their experiences."**

**Higher education must adapt quickly to remain relevant in today's digital economy.**

The Connected Campus is the end-game for the educational institution which has undergone digital transformation, adapting traditional practices and incorporating new ones to remain relevant in today's technology-enabled world.

As higher education in Australia stands at a critical crossroads, the Connected Campus will be part of the long-term transformation of this vital sector.

# Why Higher Education Must Adapt

## Current Higher Education in Australia

As Australia's economy transitions from the resources boom, our higher education institutions will play a vital role in Australia's long-term prosperity. Improved education, research, and innovation are key to diversifying our economy, raising our national standard of living, and delivering social cohesion and employment in cities and regions.

Higher education is now Australia's third largest export sector, with international student tuition fees contributing an estimated **31.9 billion** dollars to the GDP in 2017. Domestic demand remains high, with Deloitte predicting that **3.8 million new graduates** will be needed in Australia over the next decade.

In 2016, around 175 higher education providers registered with the **Australian Tertiary Education Quality and Standards Agency**, enrolling close to 1.5 million students, of whom 29 percent were international students. Universities make up the bulk of the sector, catering for 91 percent of higher education students.

"We all know that work is changing, people are now expected to have six or seven careers in a lifetime—and that changing work environment is changing the way we learn," says Matt McKeown, a solution architect at Simplus. "We're now expected to retrain every five to ten years, and that's changing the way that universities address their market, because it's no longer good enough to be transactional."

As universities move to a pattern of lifetime learning with their students and alumni, the relationship model becomes more complex. "Universities will be engaging their customer base with new and exciting things, offering tasters, seminars, leading to paid short courses and eventually further degrees," McKeown says.

With so much riding on our higher education, adaptation will be crucial, not only to the sector's success but our country's as well.

# Digital Transformation

Higher education is far from the first industry to turn to digital transformation, but it stands to benefit in ways common to others and unique to its needs. A 2017 survey of 138 higher education officials by the **Center for Digital Education** (CDE) assessed the status of Connected Campus projects across public, private, and technical higher education providers. The survey found that the underlying drivers behind the adoption of Connected Campus initiatives were cost savings (cited by 48 percent of respondents), increasing student retention (43 percent), and improving student learning (38 percent).

However, achieving these benefits will be challenging. Most of those surveyed (77 percent), acknowledged that their current computing infrastructure was inadequate to sustain Connected Campus activities for the next five years, with 36 percent of institutions requiring better data analytics, cybersecurity, and networked components, and a further 33 percent highlighting a need for greater spend on cloud infrastructure.

Further, leaders will face struggles of a human nature. A **2018 PwC UK report** on the digital university notes that there are significant cultural and institutional barriers to digital transformation in higher education. "University IT departments who need to support digital initiatives are not always well equipped to do so. Inflexible policies, aging infrastructure and inexperience working with digital agencies can delay or prevent new digital initiatives from taking shape."

For example, institutions may experience pushback when attempting to build their social media presence. The report highlights the importance of effective social media management and recommends a strategic approach to embedding social media which involves removing barriers and empowering university departments to create their own voices on social media. "A university with a rich social media presence can keep followers up to date with relevant information and provide an alternative means of interacting with the institution." Unfortunately, "academics can be wary of entering 'personal' social spaces, such as groups set up by students on Facebook, and university representatives who appear defensive when negative comments are made on social media platforms, can give the wrong outward impression."

## Campus Initiative Adoption Drivers
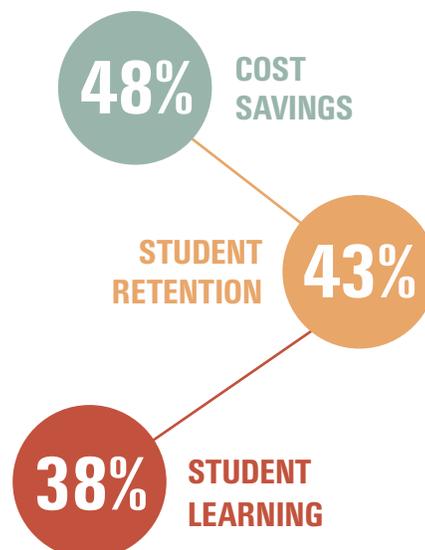
**48%** COST SAVINGS

STUDENT RETENTION **43%**

**38%** STUDENT LEARNING

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# How Technology Can Encourage a
## Student-Centred Approach

The necessity for higher education institutions to move to a student-centered approach is clear. In **Gartner's 2018 CIO Agenda Survey,** student enrolment topped the business priorities listed, with one-third of the included 247 higher education CIOs selecting this; student success was the next favored business priority, chosen by 22 percent of respondents.

Both enrolment and student success will influence growth and market share, notes Jan-Martin Lowendahl, distinguished analyst and Gartner's vice president. According to Lowendahl, higher education is among the least digitised industries. "Considering that higher education is, in principle, an 'information' industry with huge digital potential compared to other industries, digitalization needs to become a top priority," he says.

A **2018 PwC Australia Higher Education report** points out that the higher education sector must think of students as customers and recognise that customer experience is a crucial differentiator. Good customer experience "needs to be quick, convenient and consistent," and digital must underpin this experience "seamlessly and without error." As such, the report recommends that universities aim to interact with students via digital platforms that are "mobile-friendly, intuitive, provide added value to students and personalise the experience. That is, they hit all the important points of good customer experience—speed, convenience and consistency."

Digital transformation is the key to delivering on ambitious goals of a student-centric Connected Campus. But before embarking on expensive and time-consuming development projects, higher education organizations may find that proven tools in the market will deliver results faster, cheaper, and more effectively—and institutions can tap into robust processes, tried and tested in multiple situations.

Customer relationship management (CRM) software is a proven backdrop to manage ongoing customer relationships, explains McKeown from Simplus. **"These connections are more complex than the standard business-to-business data model, but a good CRM allows you to do the same kinds of things, bringing a complex web of relationships between different parts of the university—such as student marketing, alumni connections, prospects, faculties, donors and corporate partners—and collating and connecting those linkages for each person as they evolve across a range of different areas."**

> "
> McKeown adds that CRMs give you visibility. **"That's what effective management is about these days; you need to see it to measure it; and you need to measure it to assess it, improve it, and make sure it is still doing what you need it to do."**

# The Salesforce Solution
## for Higher Education

Just as higher education faces unique challenges and possesses unique goals, Salesforce has prepared unique solutions. The company already provides the world's leading CRM platform for sales, service, and marketing, and is behind the scenes of leading customer-focused organizations globally. The highly-customizable CRM was first launched in 1999 and provides an interface to track and manage customers, tasks, and projects; includes social network interactions and analytical tools; and can be adapted to a wide variety of web properties. Here's how Salesforce has adapted to higher education.

## Education Cloud

Salesforce has launched Education Cloud to address common challenges of higher education providers. Most institutions aim to create a continuous journey of lifelong engagement for each student but are stymied in this goal by the siloed technology that lies behind their operations, which makes it hard to create a cohesive approach along the entire student lifecycle. Discrete technology solutions in higher education may address one part of the student experience but fail to create a single, cohesive view of the whole student, from recruitment and enrolment to tracking student retention and achievement, placement, and alumni interaction.

Salesforce's Education Cloud for higher education is a CRM-based set of solutions that enable institutions to manage student engagement across the lifecycle, from recruitment to alumni. Within Education Cloud, rapid innovation, fast builds for new custom apps, and simple integration to legacy and ongoing software and infrastructure is all quite straightforward.

## HEDA

Included on Education Cloud, the Salesforce.org Higher Education Data Architecture (HEDA) is a solution set for recruiting and admissions, student success, and advancement. HEDA was built over a number of years in response to requests and in collaboration with higher education partners and customers. It comprises a community-driven data architecture and a set of best practices designed to configure Salesforce out of the box for higher education institutions. Starting out with the industry-proven data model, higher education providers can then configure the system to meet their own needs.

HEDA is cloud-based, scalable at an enterprise level (catering to institutions with dozens of students to those with student numbers in the hundreds of thousands), and has already-established APIs into dozens of different software programs used by higher education institutions, along with independent software vendors (ISVs). Installed in over 800 higher education institutions globally, HEDA has grown rapidly since its 2016 launch.

Used properly and with the right guidance, Salesforce's solutions can lead higher education institutions to the same success enjoyed by Salesforce customers in all other sectors.

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# Lessons from the
## Commercial and Government Sectors

As higher education is late to the digital transformation landscape, institutions may look to other sectors for examples of transformation and success. Libby Adams, Simplus deputy general manager, has been involved in managing major digital transformation projects for over a decade and says that time has seen a big evolution in the way that business operates in Australia. "We began by delivering Salesforce as a simple CRM implementation that took an internal-business focus and basically automated the sales process, with some flow-on benefits to customers," she says. "Now, the platform has evolved to be customer-centric, because that is the expectation in the marketplace."

According to the Salesforce State of the Connected Customer Report, customer expectations are at an all-time high, with 70 percent of all customers stating that their standard for good customer experience is higher than ever. Another 85 percent of all customers said it was very important for companies to treat them as a person, not a number. Significantly, 85 percent of business buyers want the same experiences and level of service as they expect as a consumer.

**"The digital experiences we have in our daily lives as consumers— whether we buy a concert ticket online, shop for insurance, or even renew our driver's license— overall, these are very seamless, smooth processes,"** Adams says.

"We are seeing digital transformations becoming broader, touching on more elements of the organisation; they are becoming much deeper, so they touch more systems and more stakeholders. And finally, they're also becoming far more customer-centric."

Adams adds that organisations must now include digital transformation as part of their strategic agenda. If they don't go down this path and deliver on these customer experiences, these organisations will simply not survive.
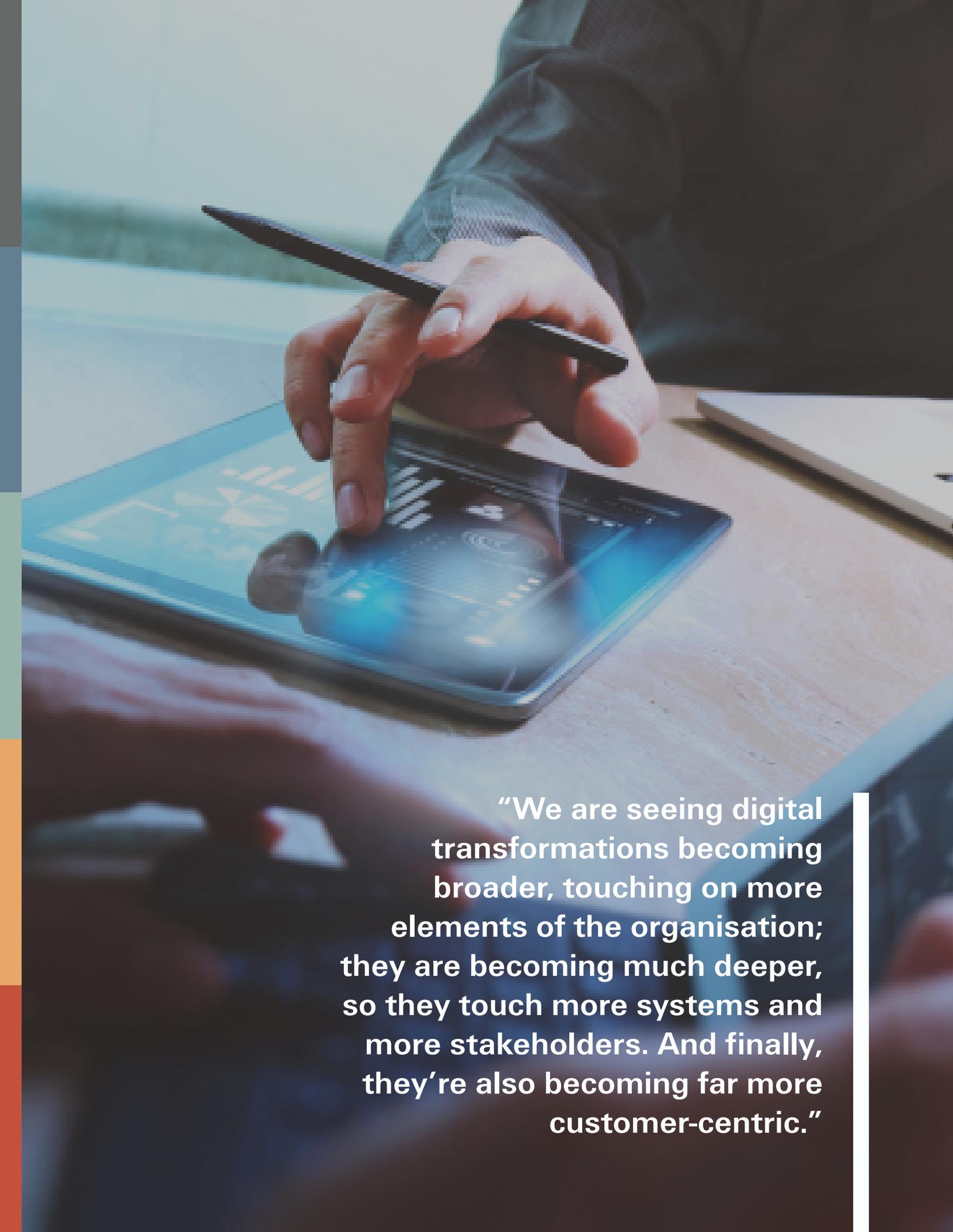
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# | **Challenges** and **Obstacles**

Going down the path—installing an enterprise-wide student tracking and marketing platform to integrate with existing systems—involves a significant organizational transformation. Like most technology-driven change management programs, the main challenges to adoption are unlikely to come from the platform, particularly when dealing with a widely used program such as Salesforce.

The **PwC UK Digital University 2018** report identifies a range of barriers to going digital. In particular, it notes, "the digital agenda needs to be driven by senior management who in turn need the support of individual departments to take ownership for their own contribution towards achieving the necessary outcomes and tying individual activities back to the overall strategy and vision."

The report flags four keystones to consider when introducing digital transformation to higher education:

1   Ensure programs begin in, and are led by, the user department rather than by IT.

2   Link digital programs to the university's overall vision and strategy.

3   Invest in training and mentoring, establish digital innovators and support networks.

4   Focus on meeting customer needs, embedding opportunities to capture feedback and to change in response.

An in-depth customer study by Salesforce in 2013 examined the key challenges to adoption faced by organisations in the not-for-profit sector, which have since been recognised for their relevance to the adoption of digital platforms in the higher education sector. Comprehensive customer interviews have also linked key learnings with each of these challenges to adoption.

◤ Here are four key challenges identified and the associated key learnings from the customer study:

## Challenge #1

**"We didn't know what we were getting into in terms of time, budget, or complexity."**

## Key Learning #1

Gaining support from the top (i.e., executive-level buy-in) to establish accurate expectations is critical. Accurate expectations of the investment and focus need to be set from the outset. University leaders must understand the investment and why they're doing it and support and reinforce the desired strategic outcomes—e.g., building a culture of data in the organisation to prompt action and support decisions.

## Challenge #2

**"We didn't know how or where to start."**

## Key Learning #2

When organisations work with a good implementation partner, the chances for a successful implementation increase dramatically. Partners like Simplus can bring insights from other organisations in your industry and your location to help the institution navigate a maze of important initial choices, eliminate some key hurdles, and start on the right foot.

## Challenge #3

**"Data migration and ongoing data management."**

## Key Learning #3

Migrate with clean data and maintain a data hygiene routine. Incomplete or inaccurate data can break users' trust in the system and can stymie the ability to get valuable data back out. When data lacks integrity, people lose trust in and the impetus to learn and commit to the new system. Successful organisations institute formal protocol and processes to ensure consistent data entry, enforce processes for data entry, and put in place a regular cleansing regimen to correct inconsistencies.

## Challenge #4

**"Training or adoption for staff or leadership."**

## Key Learning #4

An organisational adoption plan is critical. Successful adoption plans include steps such as the following:

- Obtain and maintain staff and leadership buy-in.
- Communicate the vision and value of the project clearly.
- Establish a thorough plan for training the staff.
- Support staff as they learn and adopt the system.

# Case Studies

Already, higher education institutions are reaping the benefits of Salesforce implementation. Here are three examples of institutions whose success has laid the groundwork for continued growth.

## CASE STUDY 1: UTS

**The University of Technology Sydney — Corporate Partnerships division**

**REQUIREMENT:**
360-degree view of partners, Account Management, and relationship insights through Reporting and Dashboards.

**IMPLEMENTATION:**
Education experience for corporate relations leveraging Salesforce platform to deliver a foundational, scalable and quick implementation.

**OUTCOME:**
Increased productivity, automated reporting, identification and tracking of strategic partners, and single view of partner engagement across faculty and university function.

## CASE STUDY 2:

**A Leading Melbourne University**

**REQUIREMENT:**
Complex enterprise environment with 50 internal business stakeholder groups all with specific requirements; implementation and deployment delays for university marketing teams.

**IMPLEMENTATION:**
- Full re-architecture of current Marketing Cloud solution to deliver organisation-wide advanced marketing automation capabilities.
- Rollout of a unified governance and service delivery structure.
- Simplification and redeployment of a unified data model.

**OUTCOME:**
Increased productivity, automated reporting, identification and tracking of strategic partners, and single view of partner engagement across faculty and university function.

## CASE STUDY 3:

**A Global Higher Education Institution**

**REQUIREMENT:**
Adjust architecture to meet rapidly changing business needs, smoother domestic and international student acquisition needed, streamline marketing communications .

**IMPLEMENTATION:**
- Decouple backend systems from front-end sales and marketing systems to enable best-in-class customer experience for students.
- Facilitate 360-degree view of the customer (students).
- Manage front-end student acquisition process and integrate with existing on-premise and cloud applications for data integrations and synchronisation.

**OUTCOME:**
Increased productivity, automated marketing, automated reporting, single student view, faster student acquisitions, and improved student journey.

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# Conclusion

The Connected Campus goal is within reach for all higher education organisations. The higher education sector is ripe with opportunities to transform traditional processes and embrace a new digital world. By following these best practices, addressing challenges beforehand, and teaming up with an experienced Salesforce partner, higher education institutions will find greater visibility and a more tailored approach to connecting with their customers:

**The lifelong students.**

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