

State-Funded University Chooses Software as a Service (SaaS) Solution



Candor. Insight. Results.

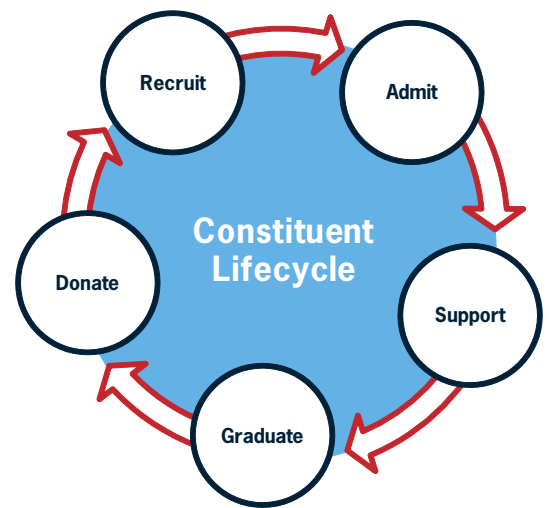
This large state-funded university (the University) was founded more than 150 years ago and has multiple campuses across the state today – including outreach and research centers. It collaborates internationally on education, research, and business; educates more than 60,000 students each year; and has an alumni base of more than 400,000.

The business challenge

Academic and administrative units across the University have expressed a growing need to develop stronger constituent relationships to improve graduation rates, alumni donations, and the student experience. Leaders agreed on the need to enhance communication with internal and external audiences and deliver additional value that contributes to the success of the institution and its constituents.

The University lacks a comprehensive set of enterprise technologies and supporting processes to systematically gather, interpret, and leverage constituent information across the organization. This makes it difficult to capture and analyze interactions across the institution throughout the constituent lifecycle from recruiting to stewardship. The absence of an enterprise solution has led to a patchwork of non-integrated applications with varying levels of compatibility and maturity within the University, and has resulted in redundancy, higher costs, and a lack of institution-wide focus on the constituent.

The University's ability to realize the full benefits and desired outcomes of a new enterprise CRM (constituent relationship management) solution will depend on how well it can align people, processes, and technology to improve experiences and develop lasting relationships with a wide range of constituents.



The Baker Tilly solution

The University turned to Baker Tilly to help execute two projects: 1) develop a CRM strategy, and 2) evaluate and select an enterprise software solution.

The consulting specialists at Baker Tilly conducted stakeholder interviews and a thorough situation analysis, then helped the University develop its new CRM strategy. This work included:

- > Competitive positioning
- > Core competencies assessment
- > Constituent experience improvement opportunities
- > Supporting CRM functionality assessment
- > CRM infrastructure current state assessment
- > Impact of change assessment by stakeholder
- > Preliminary budget guidance and cost influencers

State-Funded University Chooses Software as a Service (SaaS) Solution



Candor. Insight. Results.

During the CRM strategy work, the Baker Tilly team crafted a solution landscape, which identified the technical elements and core functional capability required. From that exercise, it became clear that a CRM solution delivered on a Software as a Service (SaaS) platform was the only acceptable model that could provide a cost effective solution. The criteria for the evaluation project included a heavy emphasis on SaaS capabilities. The second project, which is underway, includes the following items:

- > Development of evaluation criteria
- > Development of requests for information/quotes/proposals
- > Evaluation of formal vendor responses
- > Creation of structured demonstration scripts to match constituent lifecycle processes
- > Evaluation of formal vendor demonstrations
- > Identify a finalist vendor

Business results

Baker Tilly has guided the University in developing a tailored CRM strategy that focuses on their needs and desired benefits. Once an enterprise CRM solution is selected and implemented, the potential outcomes include:

- > Improved retention rates – by using constituent data to identify and proactively address behavior and patterns indicative of student dropouts, and by identifying best-fit students for recruiting.
- > Improved graduation rates – by providing better service and removing artificial impediments that lead to longer graduation times.
- > Improved constituent satisfaction – by increasing visibility of the full constituent relationship and through more targeted and timely communications.
- > New revenue opportunities – by identifying and marketing non-credit extension and international programs to new internal and external audiences.
- > Operational efficiencies, cost savings, and risk mitigation – by eventually eliminating redundancies in technology and reducing reliance on internally built systems.

Enterprise CRM solutions are now being evaluated by the university based on business requirements in the areas of contact and interaction management; communication management; event management; service case management; analytics and reports; and integration, technology, and usability.

Baker Tilly offers a specialized consulting team with deep vertical knowledge and exceptional Software as a Service (SaaS) evaluation and implementation skills. The group applies best practice methodologies to organizational needs and successfully implements SaaS business solutions. Baker Tilly takes out the complexity and risk of challenging software deployments. For success with SaaS solutions, connect with Baker Tilly at 800 362 7301 or bakertilly.com.

Based on the University's CRM strategy and budget constraints, Software as a Service (SaaS) was the only acceptable model.