HIGHER EDUCATION WHITE PAPER



SIMPLUS

CHALLENGES TO THE CONNECTED CAMPUS:

Harnessing key learnings to start your journey towards a Connected Campus

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INTRODUCTION

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

Identifying and attracting the best candidate;, creating a continuous journey of seamless, personalised, and lifelong engagement for each student; and simultaneously building a single, cohesive institutional view of each student from recruiting and enrolment to student retention, success, placement, and alumni engagement.

This white paper explores the challenges and obstacles to achieving the goal of the Connected Campus and explores the role of Education Cloud and HEDA — the community-driven open-source Higher Education Data Architecture by Salesforce.

This paper has current case studies from Australian higher education institutions who have begun the process of digital transformation and looks at how you can start small, implementing pieces of the puzzle as you work towards an ambitious big picture.

BACKGROUND:

Higher education under pressure

Higher education institutions are under increased pressure to do more with less, to stay relevant in the digital age, and to maximise the service they deliver to key 'customers' — including students, research partners, and stakeholders — while dealing with rigid budgets and tight staffing levels.

And expectations from the 'customers' in higher education are high; students (prospective and current) expect educational institutions to deliver services that meet the standards they receive in the wider market, from retailers, telcos, and other commercial service providers.

The 2018 EDUCAUSE report ran focus groups with executives from nine higher education institutions. The report explains the challenge that higher education institutions face. "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 fast 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.

Higher education in Australia is at a critical crossroads; and the Connected Campus will be part of the longer-term transformation of this vital sector.

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1 pwC, The 2018 digital university Staying relevant in the digital age, p 3

2 Educause (2018), Report from the 2018 EDUCAUSE Task Force on Digital Transformation, p 5

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 $20.3 billion a year to the GDP. Domestic demand remains high, with Deloitte predicting that 3.8 million new graduates will be needed in Australia over the next decade.

Around 175 higher education providers registered with the Australian Tertiary Education Quality and Standards Agency in 2016, enrolling close to 1.5 million students, of whom 29% 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, who is 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.

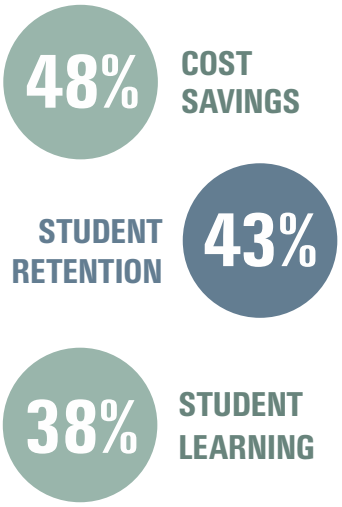
DIGITAL TRANSFORMATION:

What needs higher education experts identify

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% of respondents), increasing student retention (43%) and improving student learning (38%).

CAMPUS INITIATIVE ADOPTION DRIVERS



3 Universities Australia, 2018 PRE-BUDGET SUBMISSION, p 4

4 Deloitte Access Economics 2015, The importance of universities to Australia's prosperity, Deloitte Access Economics Pty Ltd, Canberra

5 TEQSA 2018, Statistics report on TEQSA registered higher education providers 2018

6 Center for Digital Education (2018), Preparing for the Connected Campus, p 4



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.

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

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."

The PWC Digital University report also 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.**

HOW TECHNOLOGY CAN DRIVE A MOVE

to student-centred approach

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

Both enrolment and student success will influence growth and market share, notes Jan-Martin Lowendahl, who is Gartner's Vice President and distinguished analyst.

Lowendahl says that 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, digitisation 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 to 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."

The Australian PWC 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."

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7 Center for Digital Education (2018), Preparing for the Connected Campus, p 5

8 PWC UK (2018) The 2018 digital university: Staying relevant in the digital age, p 6

9 PWC UK (2018) The 2018 digital university: Staying relevant in the digital age, p 9

10 Gartner (2018), Gartner Survey Finds Higher Education CIOs Expect Significant Business Model Change

11 PWC Australia, (2018) A failing grade: The higher education experience deficit

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 organisations 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.

CRM software is a proven backdrop to manage ongoing customer relationships, explains McKeown from Simplus. "These connections are more complex than 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."

CRMs give you visibility, McKeown adds.

> **"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."**

SALESFORCE SOLUTION
(EDUCATION CLOUD / HEDA)

Salesforce already provides the world's leading customer relationship management (CRM) platform for sales, service, and marketing, and is behind the scenes of leading customer-focused organisations globally. The highly-customisable 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.

Salesforce has now 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 Education Cloud for Higher Education is a CRM-based set of solutions that enable institutions to manage student engagement across the life cycle from recruitment to alumni. It includes the Salesforce Platform, HEDA (Higher Education Data Architecture), solution sets for Recruiting & Admissions, Student Success, and Advancement.

Education Cloud also includes purpose-built products like Salesforce Advisor Link, which allows student advisors to automate simple tasks such as email follow-ups, tracking application completions, and monitoring a student's status across the institution.

The Salesforce Higher Education Data Architecture (HEDA) was built over a number of years in response to requests and in collaboration with higher education partners and customers.

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12 PWC Australia, (2018) A failing grade: The higher education experience deficit

HEDA comprises a community-driven data architecture and 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 for 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.

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.

LESSONS FROM THE COMMERCIAL AND GOVERNMENT SECTORS

Simplus Deputy General Manager Libby Adams 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."

The Salesforce State of the Connected Customer Report revealed that customer expectations are at an all-time high, with 70% of all customers stating that their standard for good customer experience is higher than ever while 85% of all customers said it was very important for companies to treat them as a person, not a number to win their business. Significantly, 85% of business buyers want the same experiences and same 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."

Organisations must now include digital transformation as part of their strategy agenda, she adds, because if they don't go down this path and deliver on these customer experiences, these organisations will simply not survive.

13 Salesforce (2018) State of the Connected Customer Report (2nd Edition)



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CHALLENGES AND OBSTACLES

Installing an enterprise-wide student tracking and marketing platform to integrate with existing systems involves a significant organisational 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 PWC report flags four keystones to consider when introducing digital transformation to higher education. These are:

- Ensure programs begin in, and are led by, the user department rather than by IT
- Link digital programs to the university's overall vision and strategy
- Invest in training and mentoring, establish digital innovators and support networks
- Focus on meeting customer needs, embedding opportunities to capture feedback and to change in response.

CHALLENGES AND KEY LEARNINGS

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 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:
It's critical to gain support from the top to establish accurate expectations.

Accurate expectations of the investment and focus need to be set from the outset. Strong executive-level buy-in is critical. University leaders must understand the investment, 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.

14 PWC UK (2018) The 2018 digital university: Staying relevant in the digital age, p 12

15 Salesforce (2013) 4 Key Challenges NPO's Face When Implementing Salesforce

CHALLENGE #2:

We didn't know how or where to start.

KEY LEARNING #2: Select an experienced implementation partner.

The chances for a successful implementation increase dramatically when organizations work with a good implementation partner. 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 ability to get valuable data back out. If the data doesn't have integrity, people don't trust the system and lose 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 getting and maintaining staff and leadership buy-in, communicating clearly about the vision and value of the project, and having a thorough plan for training staff and supporting them as they learn the system. Some organisations have even had success from "gamifying" staff adoption.

CASE STUDIES

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: MONASH

Monash University, Melbourne

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: LAUREATE

Laureate International Universities

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.

Q AND A:

DAVID BOWKER:

Getting Started with Salesforce

Simplus Higher Education Account Executive David Bowker has spent over five years helping organisations in the education sector and across corporate and government to implement Salesforce CRM. Here's his tips on successful implementations.

START SMALL

Putting a CRM in place is a big job, and you need to spend some time making sure that the way you use the system is in tune with your organisation, your culture, and your customers. The best way to do this is by running a small pilot in one area of the organisation. Start with one department so that trial and error is easy to do.

AVOID OVER-CUSTOMISING

Salesforce has in excess of 150,000 licenses and nearly 4 million users across over 100 countries, with more than half the sales coming via partners. There is probably a way to do almost anything you think you'd like the software to manage. Salesforce is highly customisable, but use the templates supplied where possible so that future upgrades are straightforward, especially if you are connecting Salesforce to other platforms. Connect with your salesforce partners to find out how other organisations used Salesforce out of the box to deliver the best long-term outcome.

EMPLOY SCALABILITY

Because Salesforce is cloud-based, it is massively scalable from the beginning, saving a huge investment in servers and capacity — it's inbuilt. But before rolling it out across the organisation, make sure you have the systems in place to support it. You need management support, training, and mentors established before you switch to a full-scale CRM-driven operation.

SEED AND GROW

Nurture your early adopters, selecting staff who will make great future mentors across the organisation. Ensure they have access to full support and training — then give them the space and authority to help other sections of the organisation as the implementation spreads. Establishing in-house user groups and support teams will help your organisation's adoption of digital transformation via Salesforce progress seamlessly.



CONCLUSION:

The goal of a Connected Campus is entirely 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.