Jitterbit

SYLLABUS FOR SUCCESS

Higher Education Application Integration Checklist
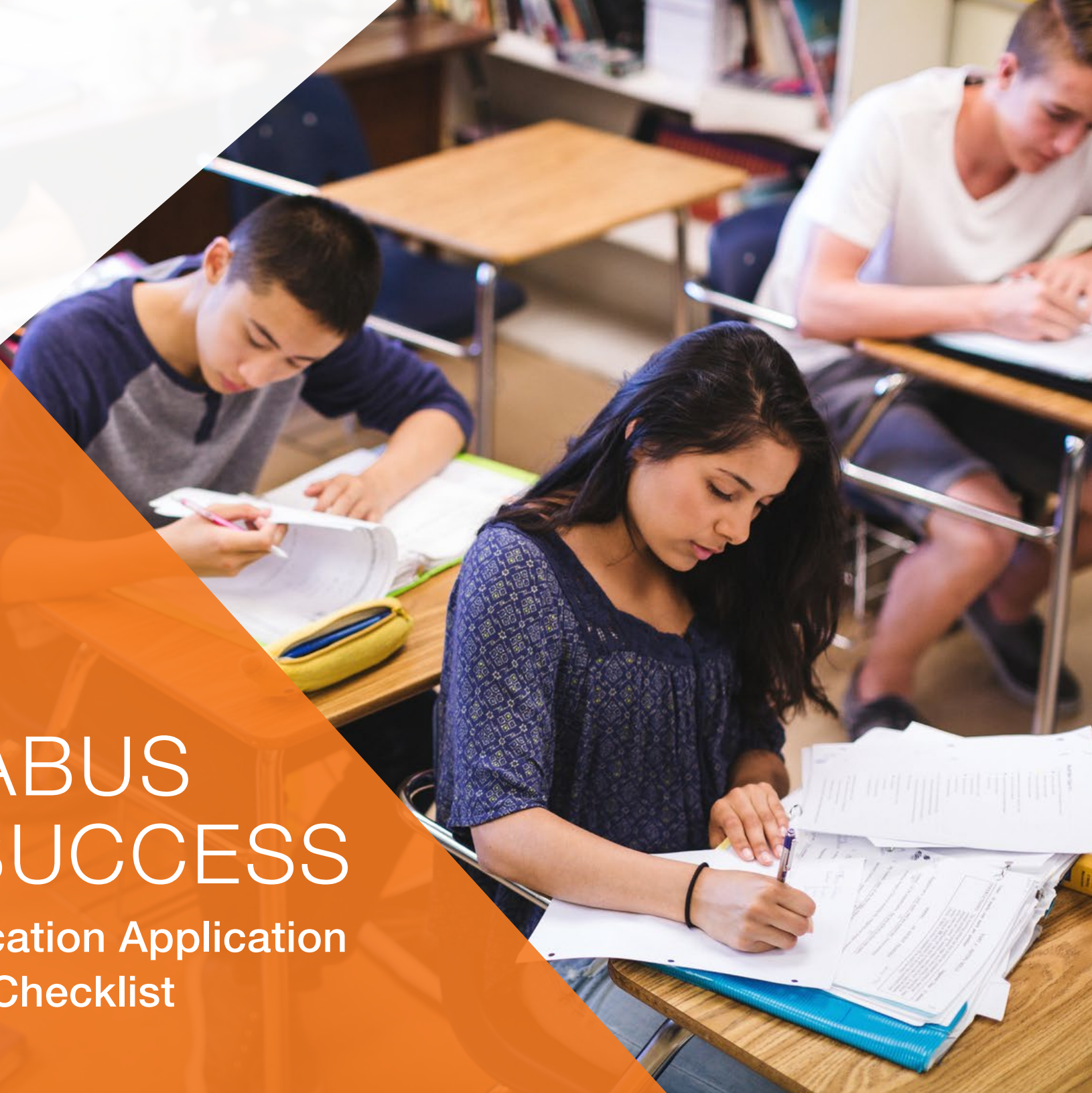
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5 Steps to Success
(Plus Extra Credit)

Colleges and universities need to accurately manage large amounts of student, staff, and faculty information, from class schedules to tuition bills to paychecks, in order to ensure an A+ student experience. But schools can't give themselves top marks when important data is stored in various formats across multiple applications and legacy systems, each of which is owned and used by a different department of the university. These cumbersome data silos and redundancies create lots of manual work, compromise data quality, and slow down adoption of new technologies and tools that could help students, staff, and faculty alike.

Higher education application integration can solve these problems by bringing together all of the information that students, staff, and faculty need to create a complete picture of all the data required to lead to student success. Over the course of 10 years working closely with colleges and universities, Jitterbit has figured out the best strategies for successfully bringing together all of the applications that contribute to a successful student experience. Here are the 5 steps to getting connected for student success with higher education application integration, plus two post-grad steps for extra credit.
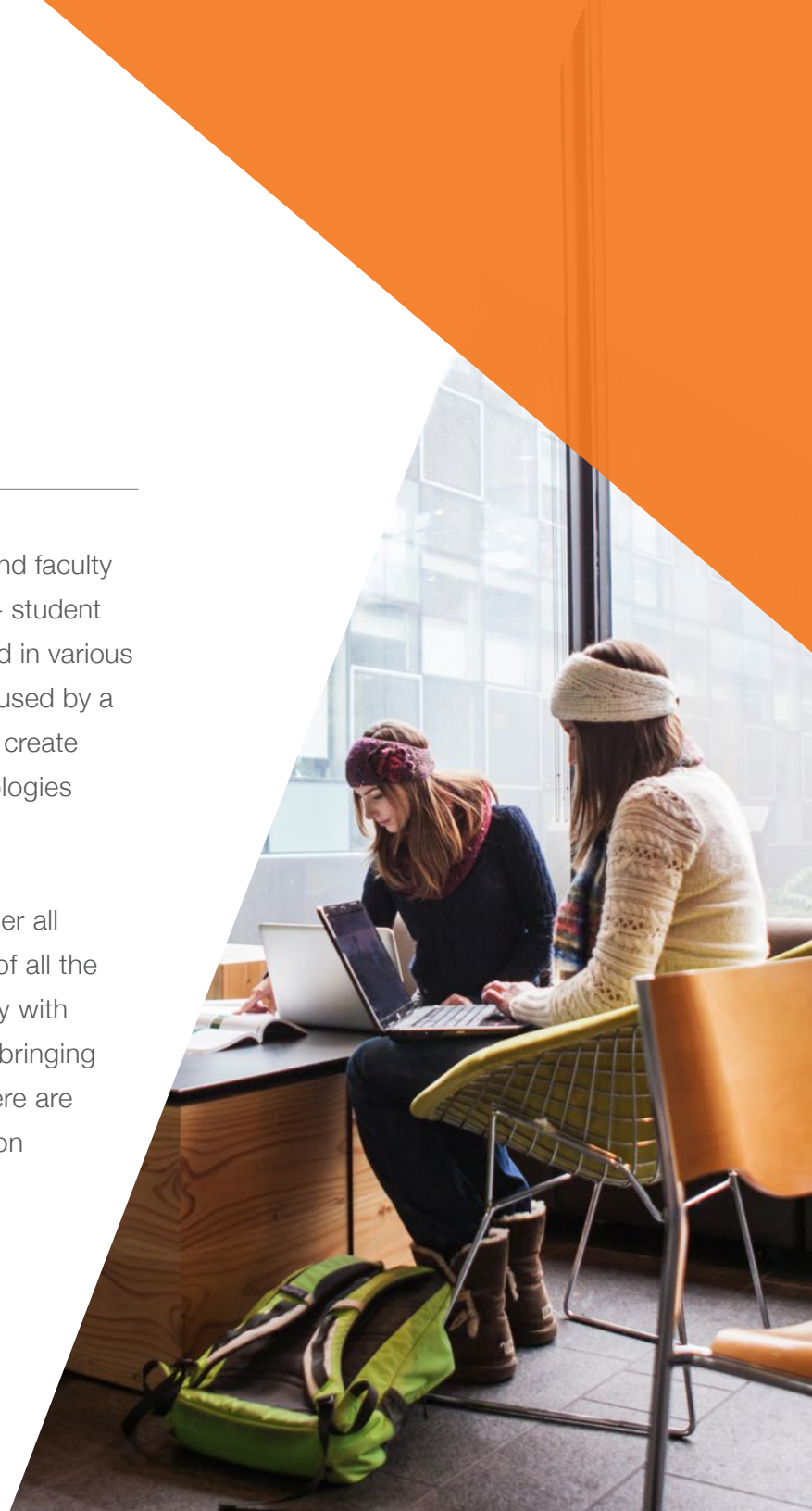
STEP 1.
Get your recruits in a row

Recruiting is a key and expanding initiative for colleges and universities. As the number of recruitment channels continue to grow, both online and off, it's more important than ever to integrate all of the systems being used for recruitment and track data about what works.

Your Assignment

- Bring together data from multiple sources so that you can customize recruiting messages based on prospects' declared interests—academic, athletic, artistic, regional, or otherwise.

- Make sure that the messages you send are consistent yet appropriately customized for different platforms: email, social media, the web and more.

- Create and track important milestones in the recruitment process, like college fairs and campus events, as well as communication campaigns.

- Build recruitment groups and track prospect conversations across social media properties.

- Keep track of what messages successfully convert recruits into applicants.

- Continue to enhance and improve your recruitment strategies based on what works.

Who's Involved

- Admissions staff recruit students

- College communications departments shape messaging

- Athletic recruiters bring in prospective athletes

Systems Connected

- Salesforce
- Student Information System
- School ERP System
- Social Media Channels
- Marketing Automation System

Surprising Stat

40%

Research shows that only 40% of university recruitment and communications professionals have changed the way they approached student recruitment because of social media.[1] If you can use social successfully, that creates a big opportunity for you to stand out from the crowd.

Top Tips

- Keep communications aligned
- Track what works
- Make changes on the fly

Dean's List

U MIAMI

When the University of Miami decided to go cloud-first, the school connected Salesforce and PeopleSoft to make sure communications would be personalized appropriately for students. Before integrating these cloud systems, a lack of synchronization meant that applicants sometimes received communications intended for recruits. Now, all recruits stay on the right track—whether they're an academic superstar, champion sprinter, or both.

Learn more about the University of Miami

▸ SUCCESS STORY

▸ INTEGRATION Q&A

STEP 2.

Empower and acknowledge your applicants

Students may consider dozens of different schools and apply to 10 or more. Taking the step to apply to a school represents a significant level of interest and commitment on the part of the applicant, who should be able to rely on having their application and acknowledged appropriately.

Your Assignment

- Make sure application deadlines and requirements are clear and consistent.
- Help admission counselors coach students through application requirements as needed.
- Proactively reach out to students with incomplete applications.
- Have your systems ready to process large amounts of data when applications flood in.
- Acknowledge applications in a friendly and timely manner.
- Seamlessly process application fees or waivers and avoid miscommunications about payment.
- Never cross channels with the wrong messages once recruits change status to applicants.
- Get applications on track for thorough and timely review.

Who's Involved

- IT department connects systems
- Finance department processes application fees
- Admission counselors or administrative staff enter or confirm application data
- Students complete applications and receive acknowledgements

Systems Connected

- Common Application
- Naviance
- Portfolio Systems
- Student Information System
- School ERP System
- Marketing Automation System

Surprising Stat

50% The number of students applying to more than 7 colleges grew 50% from 2008 to 2014.[2]

Top Tips

- Have extra staff on hand to handle large volumes of data on application deadline days.
- Think through all of the systems that need to know if students have applied and make sure they are integrated appropriately.

Dean's List

Taylor University transitioned from Banner to Salesforce to better manage its inquiry pool of prospects. This helped the school customize its messages to students more accurately and ensure that communications didn't cross paths.

Learn more about Taylor University

▸ VIDEO TESTIMONIAL
▸ INTEGRATION Q&A

STEP 3.

Accept the best, reject (or waitlist) the rest

College admissions are becoming increasingly competitive, putting more schools in the position of having many qualified applicants. This requires a careful balance between accepting the right number of qualified students and understanding that not everyone who's accepted will enroll.

Your Assignment

- Get access to all the details that showcase applicants' skills, from their application itself to verified test scores and any portfolio items or supplemental submissions.

- Get input on all aspects of the application from relevant stakeholders.

- Make the right admission decision.

- Communicate the decision in an appropriate and timely manner.

- Keep tabs on waitlisted students and ensure they receive a final decision if requested.

- Manage financial projections for the upcoming class.

Top Tips

Manage applicant data securely and accurately to ensure appropriate communications.

Who's Involved

- Recruitment and admission staff manage and communicate decisions

- Faculty may have input into admission decisions

- IT staff help connect systems and ensure availability

- Finance staff manage expected enrollment and tuition

Systems Connected

- Common Application

- Naviance

- Portfolio Systems

- Salesforce

- Student Information System

- School ERP System

- Marketing Automation System

- FAFSA and other financial aid information

Surprising Stat
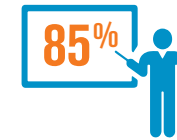
85% 85% of higher ed leaders are concerned about maintaining enrollment levels—a stat that is up 14 percentage points from 2013 and 19 percentage points since 2012.[3]

Dean's List

ST. NORBERT COLLEGE *DE PERE, WISCONSIN*

St. Norbert College makes a Graduation Guarantee to its students. To make sure its students can achieve this graduation goal, the school needs the three i's—information, integration, and integrity—to come together so that its applicant data will be accurate and complete and the school can make smart admission decisions and accept students who will excel.

Learn more about St. Norbert

▶ VIDEO TESTIMONIAL

STEP 4.

Maintain momentum to motivate yield and enrollment

Getting accepted is just the first step for prospective students. Schools must design a clear plan and process to move students from acceptance through committing to the school and completing all the tasks needed to enroll, like filling out forms and paying bills.

Your Assignment

- Send targeted and well-timed yield communications.
- Connect admitted students, current students and alumni online and in person to encourage yield.
- Hold special events for admitted students and encourage campus visits.
- Offer compelling communications and clear instructions to students who decide to attend.
- Track outcomes of yield efforts and expand on those that are working well.
- Make the enrollment process as simple as possible so students can complete it.

Who's Involved

- Recruitment and admission staff
- Faculty who may make admission decisions
- IT staff to help connect systems
- Finance staff to manage expected enrollment and tuition

Top Tips

Yield rates are plummeting even at the top universities. Simple personalization, like customizing communications by name and field of study, can help set your school apart.

Systems Connected

- Salesforce
- Student Information System
- School ERP System
- Marketing Automation System
- FAFSA and financial aid information
- Social media and other channels for engaging admitted students

Surprising Stat

45%		2008
36%		2015

Average yield declined from 45% in 2008 to 36% in 2015.[4]

Dean's List

Marian University created a process called "KnightQuest" (named for its mascot, the Knights) that used a single view in Salesforce to help administrators guide students through all the steps needed for successful enrollment, from completing forms to paying tuition. KnightQuest increased on-time tuition payments by nearly 60% and helped over 90% of students complete their KnightQuest in the first year of the program.

Learn more about Marian University

▸ SUCCESS STORY
▸ VIDEO TESTIMONIAL

STEP 5.

Manage student success

It's a long journey from interest to application to enrollment. But once students matriculate, they begin a new journey toward graduation, and it's more important than ever to gather the data they need to succeed. Here's how you can keep tabs on student success with application integration.

Your Assignment

- Ensure students enroll in appropriate courses each semester.
- Track student progress toward graduation.
- Give students the ability to gauge their own progress, especially compared with peers.
- Monitor coursework completion and intervene before students are at risk of failing a class.
- Connect students with academic support and counseling resources.
- Make it easy for professors to refer students for assistance.
- Engage students in non-academic activities for a well-rounded experience.
- Keep graduation rates high.

Top Tips

Enrolling full-time and taking foundational courses first make students more likely to graduate.[5]

Who's Involved

- Faculty
- Counseling staff
- Operational staff
- Students

Systems Connected

- Salesforce
- Student Information System
- Learning Management System (Blackboard, Brightspace, Moodle, etc.)
- Student Health Portal

Surprising Stat

40%

Only 40% of students have completed college 6 years after enrolling.[6]

Dean's List

BERKLEE ONLINE

Berklee Online connected multiple systems, including Colleague, Informer, and Marketo, to create a single 360-degree view of student success that's all accessible from Salesforce. Before, it was hard to tell when a student was struggling. Now, student advisors can simply use Salesforce to proactively monitor student success and reach out to students who aren't attending classes or completing their coursework. Berklee is also using big data to predict what students might be at risk of attrition, so they can intervene early and get those students back on track for success.

Learn more about Berklee

▸ SUCCESS STORY
▸ VIDEO TESTIMONIAL
▸ DREAMFORCE PRESENTATION

POST-GRAD
Find them a job

The expectation for increasing earning potential is one of the major reasons that people go to college—on average, those who earn a bachelor's degree earn nearly twice as much as those with only a high school diploma.[7] But more and more students are graduating with large amounts of debt and poor career prospects. To sustain interest in their academic offerings, colleges need to connect alumni with compelling career opportunities.

Your Assignment

- Start early—build a database of internship opportunities and encourage current students to explore them.
- Match students to career options that align with their course of study.
- Connect current students or young alumni with successful alumni for career shadowing or mentorship opportunities.
- Encourage successful alumni to hire current students and recent graduates for jobs and internships.
- Identify companies where your graduates succeed and invite them to campus for career fairs.
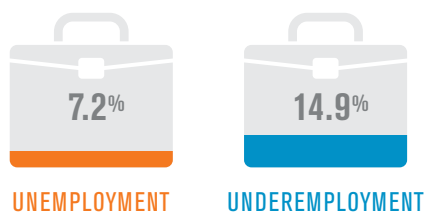
Who's Involved

- Career services
- Recent alumni
- Successful alumni in various fields
- Current students

Systems Connected

- Student Information System
- Alumni Information System
- Fundraising System

Surprising Stat

7.2%
UNEMPLOYMENT

14.9%
UNDEREMPLOYMENT

The unemployment rate for young college graduates is currently 7.2 percent (compared with 5.5 percent in 2007), but the underemployment rate (which includes students employed in jobs that don't require college degrees) is 14.9 percent (compared with 9.6 percent in 2007).[9]

Top Tips

Showing clear links between academic and other goals has been proven to improve student motivation,[8] so show students how their coursework connects to jobs.

Dean's List

TEXAS EXES

With more than 100,000 members, the Texas Exes alumni association for the University of Texas is one of the largest alumni associations in the world. Integration helps the Exes get necessary alumni information from the University, as well as send back updated information to streamline communications. This means the Exes always know where alumni live and work, and can connect alumni and students accordingly to improve job prospects.

POST-GRAD
Keep them engaged

Fundraising is a major undertaking for every college and university. Make your fundraising campaigns easier to execute and more effective by bringing together accurate data from different sources, enabling precise campaign targeting and tracking.

Your Assignment

- Stay in touch with alumni after they graduate.
- Keep track of what alumni achieve.
- Identify promising fundraising opportunities.
- Diversify funding sources—create new donors and sustain existing ones.
- Formalize a recognition program to thank donors.
- Engage alumni and donors with events and other outreach beyond fundraising.
- Raise the funds that will keep the school going.
- Show donors how their gift is helping the school.

Who's Involved

- Fundraising
- Alumni department
- Career center
- IT department

Systems Connected

- Salesforce
- Oracle/SAP Databases
- Career Center
- Fundraising Systems (Salesforce, Giftworks, Raiser's Edge)
- Financial Systems
- Social media channels for alumni engagement and recognition

Top Tips

Organizations increasingly see the vast majority of their funding come from a small number of donors; diversifying the base is useful but may not pay off immediately.

Surprising Stat

64%

Relationships matter, especially at the top: 64% of multi-million-dollar donors cite relationships as a motivating factor for donating.[10]

Dean's List

UCSF
The University of California, San Francisco is one of the world's leading research institutions. The UCSF Foundation raises money that helps keep the university operating smoothly. To make that happen, UCSF Foundation connects Salesforce with Oracle, PeopleSoft, SunGard Banner, SQL Server databases, LDAP accounts, and more. This enables the foundation to synchronize all types of fundraising data, including donor contact information, donor transactions, and gift transactions.

ALLEGHENY COLLEGE
Allegheny College had been using integration for several years to connect Salesforce with Colleague and bring in information from the Common Application, including PDFs and videos. Allegheny then graduated to the next level with integration by building Gator Connect, a Salesforce Community Cloud portal for students and alumni that enables alumni to stay engaged with their community, find one another, and become mentors for current students.

▶ VIDEO TESTIMONIAL

In conclusion

Integration is the foundation of successful recruitment, enrollment, and postgraduate success for colleges and universities. Just as students need to take a variety of classes to become well-rounded, schools need to access a variety of data sources to serve students well. Without access to the right information at the right time, schools risk losing qualified prospects, seeing dropout rates rise, and failing to support their graduates. Being able to see the correct data in the appropriate system will help improve all types of initiatives across any school, improve student success, and prepare students for exciting careers beyond the classroom walls. We hope you'll follow our syllabus for success and get your campus connected.

Sources

[1] Communications Management
[2] NACAC State of College Admission Reports
[3] KPMG
[4] NACAC State of College Admission Reports
[5] MDRC
[6] BLS
[7] National Student Clearinghouse Research Center
[8] Hanover Research
[9] EPI
[10] Dini Partners

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