

MEMORANDUM

TO: STRATEGIC PURCHASING INITIATIVE COMMITTEE

FROM: ENTERPRISE SOFTWARE COMMITTEE

RE: ENTERPRISE WIDE CUSTOMER RELATIONS MANAGEMENT SOLUTION

DATE: September 20, 2017

INTRODUCTION

On September 6, 2017, the Strategic Purchasing Initiative Committee (Committee) convened to consider the proposal of the Enterprise Software Committee (ESC) to procure an enterprise wide Customer Relations Management Solution (CRM). Members of the ESC, along with Greg Shabram, presented an overview of the features of a CRM and its capability to provide a consolidated and unified solution across multiple disciplines¹ within the University. In addition to the reduction of upwards of 17 dissimilar CRMs on campus, the presentation included discussions of increased coordination across disciplines, elimination of redundancies, marketing advantages, cost savings, and budget distribution. The ESC and Greg support the proposal.

Greg advised the Committee that ESC would provide a summary of the primary objectives of the proposal along with a summary of the desired specifications needed to meet the stated objectives.

PRIMARY OBJECTIVES²

1. To implement a campus-wide system that supports recruitment, enrollment, retention, donor development, constituent communications, outreach, departmental objectives, centralized organization and access to data, intra campus data exchange, and other development goals.
2. To implement a robust, user-friendly system that improves effectiveness of interactions by delivering an intentional, consistent and sustainable experience.
3. To manage interactions with and outreach to prospective, current, and former students, as well as alumni, patrons, donors, families, employers, high school personnel (e.g., principals, counselors, superintendents), elected officials, UO personnel, and third party organizations, professional, and educational

¹ The ESC has discussed the proposed CRM procurement with key stakeholders, some of whom include: Admissions, Financial Aid, the Registrar, the Graduate School, Advancement, Communications, the Career Center, LCB, IS, Student Services, AEI and International Affairs.

² ESC has identified numerous objectives. Those indicated here highlight the primary objectives sought to be achieved by a campus-wide CRM.

constituencies, with the ability to tailor interactions/correspondence and data collected based on defined attributes or criteria.

4. To provide a unified, 360-degree view of constituent interactions, supporting the complete lifecycle of students and a variety of other constituents.
5. To implement a system that offers a variety of methods of communication, supporting personalization and individual preferences, a variety of content types (e.g., audio, video, and text), streamlined communications, and effective student response/feedback mechanisms.
6. The ability to manage the complete student recruiting process, in direct support of undergraduate, graduate, and distance education programs.
7. The ability to implement a system that facilitates the admissions process for undergraduate, graduate, and distance education students.
8. To have the ability to configure functionalities to support the needs of the university stakeholders.
9. The ability to implement a comprehensive student retention system that supports student engagement and success, including the ability to quickly identify and contact students who meet defined risk indicators.
10. To have the ability to record participation in and maintain relationships with those attending campus-sponsored activities and events (e.g., performing arts events, athletic events, conferences, youth camps, etc.).
11. To implement a system that supports the consolidation and integration of systems and data to facilitate analytical, data-informed, and evidence-based decision-making.
12. To provide improved access to data, resulting in more effective decision making.
13. To review, evaluate, and transform current business and operational practices when appropriate.
14. To develop a streamlined, integrated system architecture, additionally eliminating the need for redundant and/or “shadow systems.”
15. To develop a solid technological base system with a web-based approach to application deployment.
16. To decrease the manually intensive nature of current processes.
17. To have the ability to secure the system by type of constituent and provide appropriate access as needed to all faculty and staff at the university.

FUNCTIONAL SPECIFICATIONS (GENERALLY)³

The following specifications identify the functionalities required by the University to effect the objectives of the enterprise CRM. Vendors will be required to describe how they will meet these functions in their proposals.

³ Note: The functions listed herein are not meant to include all administrative, security, maintenance and technical requirements. More specificity will be included in the actual procurement documents.

Prospect Management

Creation of prospects, web-based forms, self-service options, prevention of record duplication, customizable inquiry forms, management of prospect relationships over time, ability to define target groups, predictive modeling scoring, recruitment metrics, centralized database for use by all university constituents (students, families, schools, donors, counselors, friends, alumni, employees, customers, legislators, affiliates and inter university/professional association contacts).

Admissions/Applications

Product support for undergraduate, graduate, and distance education student populations, application processing, importing of student data such as majors, uploading of documents, export of uploaded documents into UO's document management system, solicitation and collection of recommendations, and customization of applications on a program-by-program basis.

Student Success

Process functionalities to capture data to improve student retention capture career interests, identify student's strengths, import test data, associate students with relevant interests, survey students, identify at-risk student and other risk factors, refer students for assistance and possible early intervention.

Student Advising

The CRM should include student advisement functionalities to permit academic and career advisement, retention processes, program and career planning, electronic appointment calendaring with email or SMS reminders, and centralized access to GPA, course grades and discipline records.

Human Resources

Functionalities to include support of employee's professional development opportunities, registration and event management and tracking, and enhancement of recruitment of new employees.

Business Operations

Vendor accommodation and tracking, communication tracking of students' parents, importing of data and prior communications from existing CRMs.

Communication Plans

Ability to define a series of communications to targeted constituent groups, create options for automating communications across multiple channels, identify populations for targeted communications, import external data, support mass communication, send communications and use templates or forms from specific UO organizations.

Communication Methods

Ability to communicate domestically and internationally, send email as text, send email as HTML, send letter/mailling, send text messages (SMS), provide instant message/chat, telephone, including telemarketing, social media and “do not contact” emails, letter/mailling, text message, instant message and telephone. Ability to identify the manner in which an email message engaged the reader, link usage analytical data, contact log reporting, communication summaries and special email handling.

Event Management

Ability to define event, support registration and payment, manage event budget, cap attendance and wait lists, track attendance, integrate with communications functionality within the system, cancel, track sub-events/break-outs and attendance, support off-campus events, and generate communication with prospects before events.

Administrative Contact Recording and Reporting

Ability to record office visits, consultations, or meetings between administrators and constituents, report contacts by purpose and type, associate/link documents with specific visits/meetings/consultations, and track status of action items.

General Functionalities

- Ability to leverage and access existing student information data.
- Allow for the creation of new attributes by area *e.g.*, admissions, advancement, advisement, communications, registrar, financial aid, career center, LCB, *etc.*
- Record parent alumni status.
- Record work history and organizational memberships.
- Record information such as philanthropic history, alumni status, ticket purchase, career field.
- Ability to manage lists of “key contacts.”
- Robust web analytics/campaign tracking capability.
- Ability to capture digital body language *i.e.*, the ability to “score” prospects based on interactions with communication plans, enrollment history, organizational participation, *etc.*
- Ability to define target audiences, categorize, rate, and score prospects, target communications, and create communication plans.
- Ability to communicate to communicate in multiple languages.
- Ability to comply with accessibility requirements set forth in UO Policy.