Project Startup Report

Project Name: Customer Relationship Management Implementation - TargetX

Agency: North Dakota University System Core Technology Services

Business Unit/Program Area: PeopleSoft/Campus Solutions

Project Sponsor: Thomas McNaughton

Project Manager: Betsy Watts

Project Description
This project will direct the planning and implementation of a new online admission application and customer relationship management system, TargetX, throughout nine NDUS institutions - Bismarck State College, Dakota College at Bottineau, Dickinson State University, Lake Region State College, Mayville State University, Minot State University, North Dakota State College of Science , Valley City State University, and Williston State College - in partnership with NDUS Core Technology Services. Included in this implementation is guided installation, training, and professional support for the following systems and related tools for each participating institution: an individual SaaS instance of the TargetX CRM Recruitment Suite built on a Salesforce platform, an online admission application, licensing, server setup and configuration for Informatica Cloud ETL, TargetX Insights, Application Review, Territory Assignments, Travel Planner, Email + Campaign Builder (unlimited sends), Texting (1:1 and bulk messaging), Online UChat, Form Builder, Print Mailings, Reporting and Dashboards, Student Portal, Events and Event Management, Appointment Scheduler and Workflow Automation. Implementation details will be identified and shared with the institutions prior to the planning stages of the project.

Business Needs and Problems
1. Campuses have a way to provide personalized relationship experiences for recruiting, connecting with, and communicating to prospective and newly enrolled students at the North Dakota University System.
2. Campuses have streamlined processes and access to online training, a knowledge base, and support to assist new and existing NDUS staff.

Key Metrics		
Project Start Date	Project End Date	Original Baseline Budget
08/15/2022	10/04/2023	$697,194.43

Objectives	
Project Objectives	Measurement Description
<u>Objective 1.1:</u> Deploy the TargetX Customer Relationship Management System at all nine institutions.	<u>Measurement 1.1.1:</u> In a survey distributed three months after implementation, 6 of 9 campuses provide a success story around TargetX providing a personalized relationship experience on their campus.
<u>Objective 1.2:</u> Each campus creates their own customized CRM experience with unique objectives that define success for them.	<u>Measurement 1.2.1:</u> Within three months of Go-Live, 80% of campus staff using TargetX and responding to a survey give a 4 or 5 rating on a 5-point scale agreeing that the TargetX project was successful based on their campus' unique objectives defining success.
<u>Objective 1.3:</u> Students can complete numerous NDUS admissions applications using TargetX from multiple platforms and device types.	<u>Measurement 1.3.1:</u> All campuses report they can complete the entire application from a mobile device without any trouble during system testing prior to Go Live.

	Measurement 1.3.2: In a survey sent out three months after Go Live, 85% of responding campus staff Agree or Strongly Agree with the statement, "I have received fewer calls from students who are having technical trouble with the CRM system." Measurement 1.3.3: All campuses report they can complete and submit multiple applications for different terms during system testing prior to Go Live
Objective 1.4: Prospective students can see their interactions with campuses, communicate via text or email, upload application artifacts, save an incomplete application and finish it later, and sign up for campus visits within TargetX.	Measurement 1.4.1: In the six months after Go Live, monthly data will be compiled showing the volume of emails and texts sent out via TargetX as proof these two tools are being used. Nine of nine campuses will show email data and eight of nine campuses will show text data. Measurement 1.4.2: In the six months after Go Live, we will sample the text data from the Mayville State University and Minot State University Twilio accounts to identify the usage of text communication.
Objective 2.1: Automate manual tasks and simplify business processes being performed by NDUS Admission Offices and Recruiters.	Measurement 2.1.1: The integrated data feed between TargetX and Campus Solutions runs 98% error-free and will import data on time during the first three months after Go Live. Measurement 2.1.2: In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Agree or Strongly Agree to the statement, "TargetX helped simplify processes and decreased manual tasks on my campus."
Objective 2.2: Campuses have access to online training, a knowledge base, and access to vendor support.	Measurement 2.2.1: In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Not Applicable, Agree or Strongly Agree to the statement, "I have used the online training, knowledge base, and/or support and am able to get my questions answered satisfactorily." Measurement 2.2.2: In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Agree or Strongly Agree to the statement, "Onboarding new staff will be effective using the available training." Measurement 2.2.3: One week prior to Go Live, 6 of 9 campuses have a customized training and process flow manual created for their campus.

Cost/Benefit Analysis
• Streamlined, updated technology leading to enhanced student admissions interaction. TargetX will make it more efficient to track student engagement and touchpoints. • Each campus has unique needs and goals for their CRM instance. Leaving the definition of success up to each campus allows for campus autonomy. • Supporting an online application that's accessible across all platforms and device types allows students to go through the admissions and application process with ease. Increased accessibility enables campuses to reach a larger potential prospective student population. • Prospective students feel connected with campus staff, which should lead to more commitments to attend. As campuses analyze this data, they can make adjustments on how best to reach their prospective students. • Less staff time spent fixing errors. Data gets populated into TargetX in a timely manner. Increased staff efficiency. • Easier to train new staff or update staff competencies using training.

Key Constraints or Risks
• Anthology contract (current CRM vendor) will expire on 6/30/23. • CTS loses key personnel. • Campus Admissions and Recruiting Department loses key personnel. • Campus resources not completing required tasks for implementation. • The tight implementation timeline has little room for delays such as North Dakota weather or blackout weeks.