

Project Closeout Report

Project Name: TargetX CRM

Institutions: BSC, DCB, DSU, LRSC, MaSU, MiSU, NDSCS, VCSU, WSC

Business Unit/Program Area: Campus Solutions

Project Sponsor: Thomas McNaughton

Project Manager: Betsy Watts

Objectives		
Project Objectives	Measurements	
	Met/ Not Met	Description
Objective 1.1: Deploy the TargetX Customer Relationship Management System at all nine institutions.	Met	Measurement 1.1.1: 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. PM Comment –6 out of 9 responses were agree, 2 were split agree/neutral, 1 was neutral.
Objective 1.2: Each campus creates their own customized CRM experience with unique objectives that define success for them.	Not Met	Measurement 1.2.1: 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. PM Comment –77% (10 responses out of 13 Agreed).
Objective 1.3: Students can complete numerous NDUS admissions applications using TargetX from multiple platforms and device types.	Met	Measurement 1.3.1: All campuses report they can complete the entire application from a mobile device without any trouble during system testing prior to Go Live.
	Not Met	Measurement 1.3.2: In a survey sent out three months after Go Live, 75% 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.” PM Comment – 5 responses out of 13 or 38% responded with Agree or Strongly Agree. It’s unclear why this is. We didn’t have actual before-TargetX implementation data to objectively measure this. Students have called with trouble creating a log-in to the system.
	Met	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 email and text, and sign up for campus visits within TargetX.	Not Met	Measurement 1.4.1: In the six months after Go Live, monthly data will be compiled showing the volume of emails sent out via TargetX. All nine campuses will have email data in the report. Six of nine campuses will have campus visit data in the report. PM Comment – Only received responses from 2 of 9 campuses as confirmation.
	Met	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.

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Objective 2.1: Automate manual tasks and simplify business processes being performed by NDUS Admission Offices and Recruiters.	Met	Measurement 2.1.1: The integrated data feed between TargetX and Campus Connection runs 98% error-free and will import data on time during the first three months after Go Live. PM Comment - 99.6% success – only 11 out of 2,605 apps had issues This is a significant improvement because one error doesn't completely stop the process at all campuses until the error is found.
	Not Met	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." PM Comment – 7 responses out of 16 or 44%.
Objective 2.2: Campuses have access to online training, a knowledge base, and access to vendor support.	Not Met	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." PM Comment – 16 responses out of 24 or 66%
	Not Met	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." PM Comment – 6 responses out of 16 or 38%.
	Not Met	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. PM Comment – 4 of 9 campuses Agreed.

Schedule Objectives					
Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
Not Met	9.5 Months	12.4 Months	12.4 Months	30.5% behind	0.0%

- The primary TargetX modules went live **on schedule** on Thursday, June 15th for 8 of the 9 campuses with the final campus going live on Monday, June 19th.
- Instead of implementing TargetX Student Portal and TargetX Insights Dashboard immediately after the June Go-Live date, campuses agreed to delay implementation; tasks were completed as planned between November 2023 and February 8, 2024.

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Budget Objectives					
Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Not Met	\$697,194.43	\$1,172,274.81	\$1,163,965.23	66.92% Over	0.7% Under

- Since the project didn't close within the projected 9 months, the expected cost budgeted for yearly renewals needed to be included in the project. The extra budget paid for the following:
 - \$29,744.91 - Conga Composer and Batch Licenses, Support, and Implementation for all 9 campuses
 - \$272,400.00 - TargetX Yearly Renewal 9/30/23-9/29/24 (included a \$30,000 credit to compensate for Conga)
 - \$96,880.38 - Carahsoft Salesforce Yearly Renewal 9/30/23-9/29/24
 - \$105,800 - TargetX Yearly Premier Support for 7 of 9 campuses & NDUS (Participating campus cost sharing)

Major Scope Changes
No major scope changes.

Lessons Learned for Future Projects

Lessons Learned	Recommendations
<ul style="list-style-type: none"> • Did not go well: Consideration of data integration timing when CRM went live. • Data Integration Testing should happen earlier in the process. • It felt like CTS may not have known all of what was being offered as surprises came up through implementation. 	<ul style="list-style-type: none"> • If possible, assign additional resources and conduct a dry run of data integration. Put a freeze on changes until after go-live.
<ul style="list-style-type: none"> • I wish we would have had better information going into the project about how much IT support and background and skill would be needed. It was very challenging to us as admissions and recruiters to do the technical requirements with our very busy schedules. I feel like we really didn't know going into the implementation the skill sets needed and the role of IT needed. (2 comments) 	<ul style="list-style-type: none"> • Continue to offer CTS technical support resources to assist campuses.
<ul style="list-style-type: none"> • My team wished we had access to what the platform would look like sooner. 	<ul style="list-style-type: none"> • Include more time at project inception to provide additional application demonstrations/big picture.
<ul style="list-style-type: none"> • Many of the trainings didn't match what we would see, making a confusing transition even harder. 	<ul style="list-style-type: none"> • Spend more time in the planning phase of the project to work with vendor on a logical implementation of steps.
<ul style="list-style-type: none"> • The implementation timeline was very aggressive. My campus didn't plan well for the amount of time implementation would require. I always felt divided between implementation duties and normal job requirements. 	<ul style="list-style-type: none"> • Start the RFP process earlier for contracts that are expiring to allow for a longer planning and implementation. Plan for a longer implementation timeline to spread out the workload.

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Success Stories

Success Stories
<ul style="list-style-type: none"> • We have moved our entire visit process to TX including daily visits, group tours and open houses, orientation, and other registration events. Our comm flows for these events have been easily managed using their reports and email functionality. Also Premier has been wonderful and provides basically an extra "employee" to help complete larger tasks or projects. They've provided some elegant solutions and are great with assisting with upgrades.
<ul style="list-style-type: none"> • We use Target X for campus events, inquiries, and group assignments have expanded data-driven dashboards to support recruiter territory outreach and communication; The tool has also allowed for expansion in robust prospective student communication plan. We can customize communication plans more easily.
<ul style="list-style-type: none"> • Between self-building the app, creating emails, and the other features provided, our office is more self-sufficient than before and more confident. Knowing that we built it and can fix it is empowering.
<ul style="list-style-type: none"> • Having the ability to create our own applications and campus visits and not put in request has been great. The outlook and SMS integration on the contact is great. Much better email communication through campaigns with the student.
<ul style="list-style-type: none"> • We are tracking prospective student engagement in ways we never have before and that will only improve with more familiarity with the system and data imports.
<ul style="list-style-type: none"> • We were able to successfully bring on texting through TargetX which has been a great help in reaching students. It was a seamless and easy process thanks to the help of everyone involved.
<ul style="list-style-type: none"> • I would say one of the things that I have found to be a great success is separate applications for different types of students. This has allowed us to use leading questions to determine what type of applicant they will be thus allowing us to set up date restrictions on applications such as international applicants. They are one of the only type of applications that require deadlines. So we have been able to stop our applicants from applying after deadline.
<ul style="list-style-type: none"> • The application-I was satisfied with the build and extremely happy that we are able to conditional format what programs/start terms and programs/location available.