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WHITE PAPER SERIES



# Enrollment management system implementation: Five ways to ensure success





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College and university admissions directors are feeling the pressure to remain competitive and fill classes. And because most higher education institutions depend on some combination of tuition revenue and enrollment-based state funding to meet target goals, finding and enrolling best-fit students are just the first steps in building relationships that deepen over the entire student lifecycle. For this reason, many are investing in new technologies, including the implementation of constituent relationship management (CRM) systems, to enhance their success.

But reaching recruiting nirvana doesn't come without challenges. A recent marketing report by Noel-Levitz indicates that while using a CRM application ranked as one of the top five operational practices for both private and public higher education institutions, more than 50 percent of users struggle with their CRM's capabilities as an effective solution for managing and tracking recruitment communications.<sup>1</sup> Why? Because it's not well understood that much of what drives a successful enrollment management program can be attributed to the implementation process.

The fact is, successful implementation can be an elusive animal to many institutions and is too often the cause of most enrollment management

system misfires. So when considering a new system, it's important to take the necessary time to plan and create a system built with your own parameters and unique processes in mind. This, and a thoughtful application of best practices that considers existing business processes, system limitations, and careful workflow planning, will ensure positive results and a healthy return on your technology investment.

Implementing a new enrollment management system can be a huge undertaking, and careful consideration must be given to ensure a successful rollout that considers technology, business strategies, budgets, operational processes, change management issues, training, and more. Consider the following key elements when implementing a well-planned enrollment management and recruiting CRM system:

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<sup>1</sup> 2013 Marketing and Student Recruitment Practices Benchmark Report for Four-Year and Two-Year Institutions, Noel-Levitz, LLC.

## 1 Begin with the end in mind

**Recruiting and admissions processes are a result of how work has evolved given the resources available. Evaluate business processes and capabilities to better define how you want them to be.**

When it comes to developing an improved enrollment management program, first decide where you want to be. Without a road map based on a set of clear objectives and goals, you lack a firm foundational springboard from which to design your new system. A clear CRM strategy should drive your use of technology—not the other way around.

While new technologies, communication tools, and data use are key factors in the improvement of recruiting and admissions performance, they're not the driving force. Success requires a clear vision, specific goals and objectives, and the proper selection of tools that support them. Determining now where you need to be in the future will ensure that your system is configured to meet your needs—today and tomorrow.

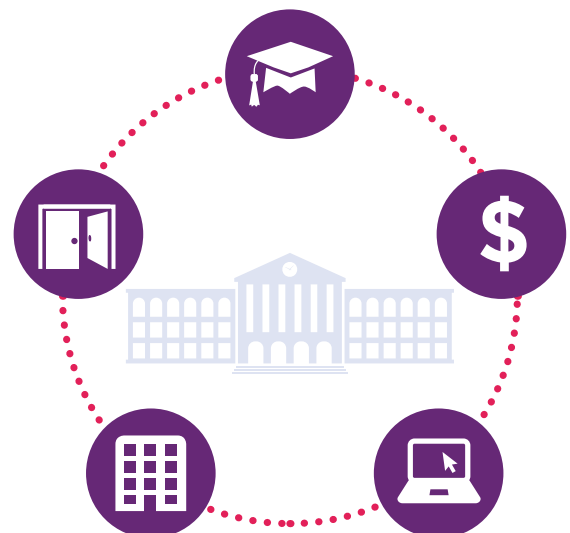
## 2 Break down the silos

**Considering the many departments engaged in the recruiting and admissions process, it's essential to align departments so everyone is communicating a consistent message that reflects your mission, purpose, and overall strategy.**

Recruiting, admissions, financial aid, registrar's office, housing... While each of these departments has its own requirements and goals, none should be operating in a silo. As a single entity, you need to align all departmental strategies with your management system. This allows for consistent communications across all departments and touch points, ensuring that students have the best possible experience with you.

Equally important is the immediate onboarding and system training for all departments, not just based on an institution-wide strategy, but also addressing each department's specific needs. Engaging all departments in system training early in the implementation process will give everyone the necessary time to gain a working understanding of the new system. This not only helps lessen

learning curve stress, but also allows everyone to experience the purpose, value, and benefits much sooner, maximizing user buy-in.



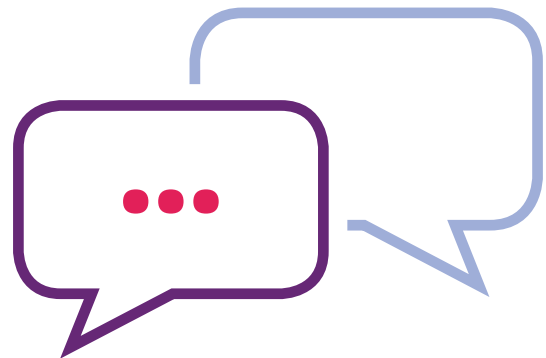
### 3 Communicate early and often

**Implementation of a new management system can instill fear in even the most tech-savvy of institutions. Ease the transition by developing a communication plan to help everyone experience the vision.**

Putting a new enrollment management program in motion takes a village. And for most, it can feel like a real cultural change. Too often, institutions commit to a software solution and begin to define objectives, goals, and ideas without fully communicating to staff how these new changes will affect their environment. The fact is, even with the ultimate mission of effectively serving students, people want to know how this system change is going to affect them: what it means for their job, how they are going to be evaluated, and what type of learning curve they are facing.

You can proactively alleviate many of these concerns by committing to a communication plan right out of the gate. Start by scheduling regular monthly meetings to engage teams and units so

they feel connected, confident, and knowledgeable about what's happening. Establish collaborative project teams to report back to the group on information such as critical system updates, project changes, and areas where additional technical support is needed. Lastly, make it easy for everyone to find the resources they need, when they need them.



### 4 Don't boil the ocean

**It's tempting to pull everything out of the box at once. Begin with the basics and make changes as you move forward.**

The adoption of a new enrollment management system can be both exciting and overwhelming. But putting too many plans into action at one time can sabotage efforts to gain traction in the changes you are looking to incorporate, making processes difficult to manage. Care should be taken when launching new initiatives and setting target goals so they're not overly ambitious.

Instead, incorporate the functionality of your new system through a series of small, manage-

able projects, and allow everyone to test drive things a bit before moving on to the next task. Working through the implementation process in stages gives your team the opportunity to master one aspect of the system at a time, and helps everyone make a smoother transition into new workflow processes that can otherwise feel overwhelming. This approach results in a series of quick wins that boost overall enthusiasm and morale, resulting in greater overall momentum and adoption among your staff.

## 5 Celebrate success

**Not every recruiting and admissions goal is going to be realized at once. As you roll out new processes, know where your “wins” are. Communicate and celebrate even small victories with your team.**

As new processes are adopted and programs put into action, you’re almost guaranteed a few challenges along the way. All too often, these minor hiccups become setbacks as people become too focused on the negative and forget to look at how far they’ve come. For this reason, try to keep everyone focused on positive accomplishments by celebrating the ups whenever you can.

Try to get everyone to view the incorporation of a new system as a journey—a process that will continue to gain momentum and realize rewards along the way. As key performance indicators identify wins, share them with everyone involved to keep teams engaged, motivated, and excited about taking on the next big project. Don’t allow defeat to dominate. Celebrate every accomplishment scored so when challenges occur, morale will have a better chance of rebounding in a positive way.



## Conclusion

The advances in CRM technologies over the past decade enable institutions to dramatically improve their recruiting and admissions processes by supporting meaningful communications with prospective and current students over the lifetime of each relationship. However, while most systems tout their effectiveness as end-to-end solutions, implementation process failures often prevent institutions from harnessing the full value of their investments, resulting in adoption stalls or all-out abandonment by the users.

The fact is, students today are making decisions based on the level of personalized attention and immediate service they receive, and institutions like yours need to refocus business strategies that can integrate people, processes, and technology to deliver effective communications that engage. The exciting news is that with a clear definition of goals, effective management practices, and the ability to push past divisional boundaries, you’ll be well-poised to successfully implement a solution that can increase the strategic focus of your recruitment efforts, and make the allocation of recruitment resources more efficient.

## About Ellucian

Ellucian helps education institutions thrive in an open and dynamic world. We deliver a broad portfolio of technology solutions, developed in collaboration with a global education community, and provide strategic guidance to help education institutions of all kinds navigate change, achieve greater transparency, and drive efficiencies. More than 2,400 institutions in 40 countries around the world look to Ellucian for the ideas and insights that will move education forward, helping people everywhere discover their futures through learning.

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