



CASE STUDY

Focused communications, integrated processes, and easy online access

The University of North Alabama modernized and simplified its enrollment processes and services with Ellucian CRM Recruit

Founded in 1830, the University of North Alabama is the oldest four-year institution in the state—yet despite its historic legacy, UNA's focus stays trained on its future. In the previous two years alone, the university launched a new major in engineering technology, unveiled a brand- new \$40-million science and technology building, and moved to NCAA Division I in all its sports programs. To cap off its campus achievements, it also upgraded its recruitment and enrollment process to attract more best-fit students.

To keep pace with changes in demographics, student interests, and workforce trends, UNA continually develops new undergraduate and graduate degree programs. It also offers interdisciplinary and professional programs to meet the needs of adult learners. In keeping with its mission to meet the needs of today's students, the university decided to increase electronic communication to prospects while offering them a convenient self- service system for inquiries, event registration, and applications.



Enrollment

7,702

Challenge

Implement a comprehensive system to streamline and improve its recruitment, admissions, and enrollment management processes

Solution

Ellucian CRM Recruit

Results

Improved communication with prospects at every stage of the recruiting process

Ability to track prospects as they move through recruitment to application

Convenient, centralized, self-service access for prospects to inquire, apply, and register for events

In the spring of 2015, the University of North Alabama moved to upgrade its enrollment system with Ellucian CRM Recruit, just in time for its 2016–2017 fall recruitment cycle.

Designed for the specific needs of colleges and universities, Ellucian CRM Recruit offers superior configurability, functionality, and integration with Banner® by Ellucian, the university's existing ERP system. The solution's automated recruitment tools, prospect and funnel management capabilities, self-service options, and powerful workflows offered UNA the complete recruiting and enrollment-management solution it sought.

Choosing the right solution

When evaluating its options for CRM and enrollment solutions, the university weighed both “an immediate need and a long-term need,” says Nikki Michael, enrollment marketing manager at UNA.

“The immediate problem we had was that our previous CRM contract was expiring,” Michael explains. “And then long-term, we wanted to expand and improve the way we communicated with students, beyond just postal mail and telephone calls. We wanted to add electronic communication. And [Ellucian CRM] Recruit allows us to do that with the email and bulk email features.”

The solution's interactive, student-facing feature was another crucial element for UNA, thanks to its self-service capabilities for inquiring, applying, and registering for events. Integration with Banner was another top selling point, Michael adds, since “we wanted to keep those products all in the same family.”

Finally, the university wanted to simplify the enrollment department's various systems into a single solution. Says Julie Taylor, interim director of admissions at the university: “We were running our campus tours and events through a separate system, and now we're running all of our events through [Ellucian CRM] Recruit. That allows us to better track a student.”

Communications, tracking, student self-service—“we can do all of that through [Ellucian CRM] Recruit,” Taylor says.

Working together for a successful launch

Michael, who spearheaded the implementation and managed the project, emphasizes that timing, preparation, inclusiveness, and teamwork were instrumental in achieving their timely launch.

“The biggest consideration was the timing factor,” she says. “We made sure to start implementation during a slower time in our office to give it the full attention it needed. So we of course started in the spring to get the system configured, with time for training and learning, before our next recruitment cycle.”



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BRYAN RACHAL

Director of University Communications, University of North Alabama

The project team members also got a little help from their friends at a nearby university, who also use Ellucian CRM Recruit and were “very instrumental in providing us with some guidance and best practices for implementing and managing the product,” Michael says.

Internally, the project team held pre-implementation engagement sessions to gather input from all the staff members who would work with the system. “We included all the knowledge-holders within the office, such as our associate director and our application processors,” Michael explains, “just to make sure that we had all the bases covered on how to implement the system and set it up and configure it in the best way for us.”

The university’s IT staff were vital players as well, Michael says, and worked with the enrollment team to gain an in-depth understanding of the functional, as well as the technical, aspects of the system. “We had a very strong, involved, hands-on team,” she emphasizes.

Finally, she says, the university benefited significantly from its partnership with the Ellucian functional consultant who assisted UNA with its implementation. “She went very in-depth with helping us with configuration,” Michael says.

Simplifying recruitment and enrollment for students and staff

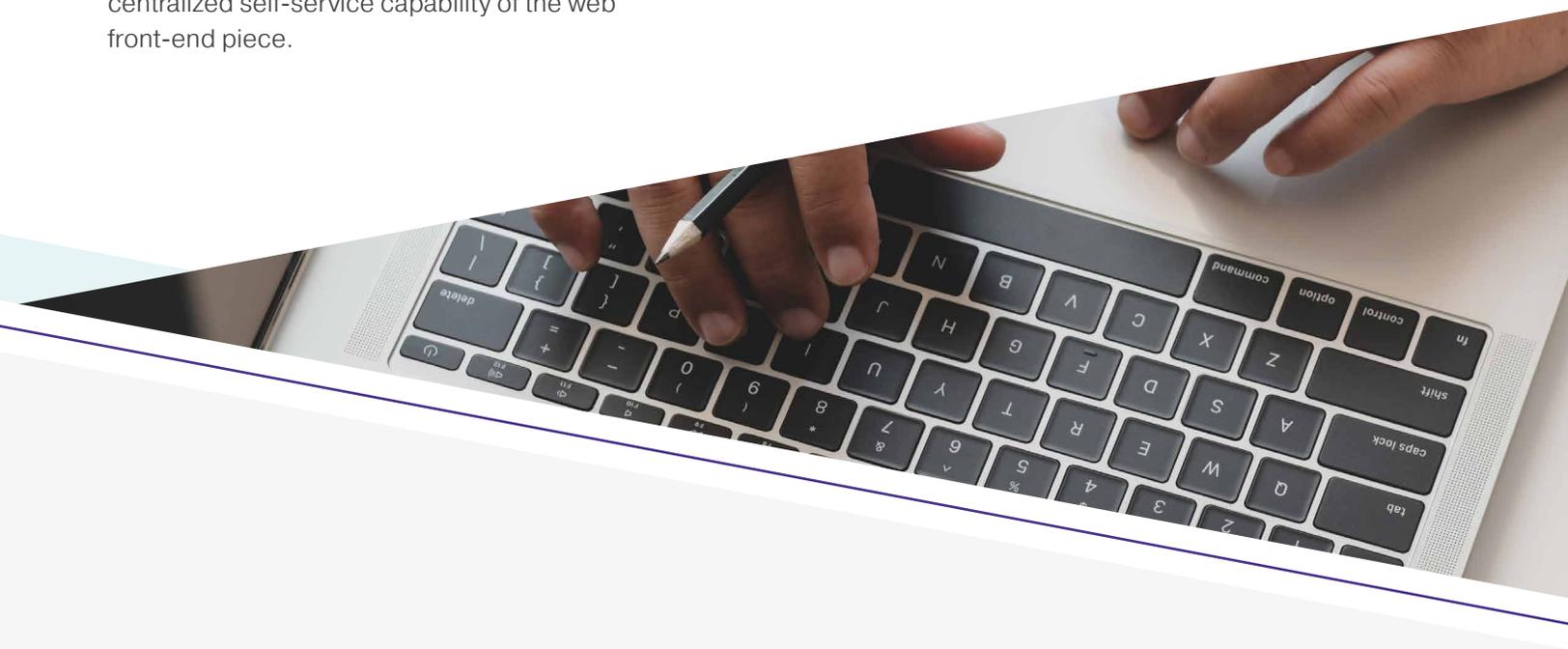
From the perspective of the enrollment team, the highlight of Ellucian CRM Recruit has been the centralized self-service capability of the web front-end piece.

“I think it’s absolutely the best thing about this system, that prospects can inquire in one place, they can apply in one place, they can register for an event in one place, they can check their missing supplemental items for their application in one place,” Michael says. “It helps with efficiency,” she adds, and allows the enrollment office to devote more resources to higher-level student services, while giving students more clarity and control over their event registration, application requirements, and document management.

Adds Bryan Rachal, director of university communications at UNA: “From a marketing standpoint, we do a lot of social media advertising and digital advertising, and it’s just an easy, logical transition for them to go from that to the login page of the product. I think that certainly helped” draw students from social media to UNA’s website, and then to help them move completely and successfully through the enrollment process.

“We call it the MyUNA Account,” Michael says, and “I think it’s absolutely the best thing about this system. It’s a one-stop shop—that self-service factor where students can do these things all by themselves, in this one area.”

Since implementing Ellucian CRM Recruit and increasing its regional outreach, the university’s total enrollment in fall 2016 was the largest in its 186-year history, reaching a record number of 7,492.





Setting the right goals and building the best team

Asked to share advice, the University of North Alabama emphasizes a realistic timeline, technical assistance, and gradual customization.

“Oftentimes when people say they’re bringing in a new CRM, they think it’s going to be instantaneous,” Rachal says. “But there’s a lot of work behind the scenes that goes into getting it to its full functioning capacity. So I think a realistic view of what it takes to get there,” and taking care to manage those expectations, are key.

“I would make sure that you have sufficient IT staff in place to assist,” Michael says. “We also reached out to [Ellucian’s] Action Line for assistance after we went live,” she adds, “and they were very helpful as well.”

Finally, Michael advises putting first things first. “I recommend getting the system up and running with the basics first,” she says, “then perfecting the system with additional configurations after going live and after becoming more familiar with how the system works. That worked best for us. Knowing you don’t have to have everything perfect and configured intricately right off the bat.”

“Just get comfortable with the basics, get it up and running, get it integrated with your ERP system, and then make it what you want it to be.”

The university’s total enrollment in fall 2019 was the largest in its 189-year history, reaching a record number of **7,702**.

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