

# CASE WESTERN RESERVE REMAPS THE STUDENT EXPERIENCE WITH STUDENT SUCCESS HUB FOR HIGHER EDUCATION



All photos were taken prior to the COVID-19 pandemic and the university's policy requiring face coverings and physical distancing on campus.

## BUILDING A SENSE OF BELONGING

At Case Western Reserve University, one of the country's leading research institutions, students arrive on campus with ambitious goals and high expectations to be intellectually and academically challenged.

The university's student body is dynamic and increasingly diverse, with students representing all 50 states, nearly 90 countries and a wide range of degree choices and professional programs, from accounting to aerospace engineering, philosophy to physics, and more.

**“** *The core elements that bring everything together,”* said Tom Matthews PhD, Case Western Reserve's associate provost for Student Success, *“are the focus on academic rigor and the deeply held belief that the student experience here positively transforms lives”*

When the university launched a new strategic initiative aimed at increasing retention, satisfaction and graduation rates, student success became an all-in priority across campus.

The fundamental challenge was improving the student experience—boosting engagement and connecting students to experiences that would help them achieve their goals, whether in the classroom, lab, extracurricular activity or experiential learning opportunity.

**“** *Ultimately our goal is really to help each and every student achieve their greatest potential,”* said Miro Humer, associate vice president for client experience in Case Western Reserve's University Technology division. *“Part of student success, especially for our student experience advocates, is creating a sense of belonging that feels connected but also unique to each individual student.”*

To support their Student Success initiative and the work of their navigators, Case Western Reserve needed greater visibility into the student experience and new tools to enable a scalable and personalized approach to engagement. Realizing their existing systems couldn't achieve the transparency and universal connectivity they required, the university looked to Salesforce.org Education Cloud for a complete powerful customer relationship management (CRM) solution.

## THE HIGH-TOUCH / HIGH-TECH APPROACH

As part of their student success strategy, Case Western Reserve worked with [Accenture](#) to adopt a “high-touch / high-tech” approach for leveraging technology, to personalize the student experience and engage learners consistently across the touchpoints of their education journey.

Salesforce.org [Education Cloud](#) was an ideal fit for this strategic direction, and with Student Success Hub for Higher Education (formerly known as Advisor Link), Case Western Reserve found a platform that eliminated many of the barriers that previously made it difficult to access and share information.

Salesforce not only made it easier to access and manage data, but it also helped Case Western Reserve’s IT team achieve its goal of reducing the number of screens navigators needed to retrieve student information.

“*One of the primary objectives in going with Student Success Hub was that our navigators could operate in fewer systems with the eventual goal of operating within one system,*” said James Hrubik, Case Western Reserve’s application manager for CRM and Advancement Services.

With Student Success Hub, navigators also gained a unified 360-degree view of the student experience.

They now have a clear view of where students are as they move across various touchpoints with the university and with the increased visibility, navigators can communicate more efficiently, proactively address issues and better connect students to resources and opportunities.

Student Success Hub also provided new functionality to create reports and dashboards, develop student success plans, make referrals, schedule and track appointments and contact students who need follow-ups.

In addition to Student Success Hub, Case Western Reserve is using Marketing Cloud to centralize its [marketing and communications efforts](#) across campus business units and further enhance engagement.

## ONE SOURCE FOR CAMPUS-WIDE SUCCESS

Case Western Reserve had tight deadlines and ambitious implementation plans, which included very specific customizations. With guidance from a Customer Success Architect, they successfully transitioned to the new platform within six months and began to see positive results almost right away.

After a soft launch, students intuitively discovered the new tools and welcomed the convenience of being able to make multiple appointments from a single source. In response to the Student Success Hub launch, 86% of students reported that their navigators were easy to access for questions and guidance.



For navigators, the benefits of the new platform impacted their work immediately. Reducing the number of systems they worked with delivered huge efficiencies and made their jobs easier and more effective, especially when it came to engaging students via appointments or developing success plans.

Student Success Hub also connected career consultants, undergraduate research experts, academic resource staff and pre-professional advisors, creating the foundation for collaborative success teams that collectively advise, make referrals and support student success.

In the first year of launch, all undergraduate students were live in Student Success Hub and each student was assigned a success team:

- More than 10,000 appointments were created.
- 86% of all undergraduate students were engaged.
- 608 student success plans were developed within the first five months.
- 410 referrals were made in the first five months.

Case Western Reserve also saw progress in its retention, satisfaction and graduation goals, including an increase in first-to-second-year retention rates.

“*We really believe that we're challenging the campus culture by creating a space where all of these student success stakeholders are sharing information on behalf of students,*” said Matthews. *“I would say the system has exceeded our expectations.”*

With a successful implementation under its belt, Case Western Reserve is now working to continue scaling and maximizing its Education Cloud resource. They are developing additional success plan templates in Student Success Hub and developing a detailed assessment process. Case Western Reserve is also working to fully use Education Cloud’s operational and strategic dashboards and looking to explore how Einstein’s AI capabilities can help guide some of the work they do.

“*The partnership between Student Success and University Technology continues to grow,*” said Humer. *“Everybody brings their A-game and there's real curiosity and commitment around how we are improving the student experience.*”

Summing up the experience, Matthews said: *“Salesforce is a game changer. It has allowed us to disrupt the student experience in a positive way and make connections we weren't able to make before. Our guiding strategy of a high-touch, high-tech approach to the student experience has been made possible through the relationships we've established and the technology provided by Salesforce.”*

## REAL RESULTS WITHIN 1<sup>ST</sup> YEAR OF LAUNCH



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