

**ABOUT INDIANA UNIVERSITY**

Founded in Bloomington in 1820, Indiana University now has nine campuses and more than 114,000 students. Reuters ranked IU 27th on its list of the world's most innovative universities in 2017.

PRODUCTS

Lightning CRM, Marketing Cloud, Service Cloud

Indiana University enrolls Salesforce to connect with prospects, students, and staff

Competition for students has become fiercer for colleges. Seeking an advantage, Indiana University implemented an enterprise-wide constituent relationship management (CRM) system in 2009 to help undergraduate recruiters compile 360-degree views of prospects. But each campus kept its information to itself.

"If your goal is to build a 360 view of students' interactions and you can't bring all the players to the field, it's not a 360 view, and it's not effective," says Terry Brown, Associate Director of Admissions for Marketing and Recruitment Communications at the Indiana University-Purdue University Indianapolis (IUPUI) campus.

Furthermore, the technology was nascent when it was deployed, and advanced tools were never implemented. The system was complex and required IT staff to retrieve constituent lists and send mass emails.

"The CRM didn't provide holistic templates, consistent branding, or, more importantly, ease of use," says Cathy O'Bryan, Associate Vice President of Client Services and Support for University Information Technology Services. "A CRM needs to be simple, and it needs to be understandable, or people are going to ignore it."

Which they did. By 2014, most IU campuses had stopped using it.

"If people don't use the CRM, it's worthless," O'Bryan says.

MARKING A NEW COURSE WITH SALESFORCE

The university decided to try a new approach, this time with limited deployment of Salesforce. Because of the many issues the previous solution had presented, many at the university were reluctant to implement an enterprise CRM system.

This time, Client Services and Support, which serves all constituencies within the IU community, would lead the Lifetime Engagement Initiative in deploying Salesforce in individual areas. The deployment would help those areas personalize services, reduce redundant information gathering, and improve services and the customer experience. Those departments or campuses would sponsor the deployment, buy licenses, pay for consulting, and buy the annual license fee for third-party apps.

They started with a pilot project in partnership with IU Communications. Individually, units and schools across IU had been sending an unknown number of unbranded, inconsistent emails every day, using disparate email-blasting tools, O'Bryan says. They consolidated more than 400 separate email solution instances

into a single instance powered by Marketing Cloud.

Now messages can be sent to student, faculty, and staff lists that are updated daily, meaning dramatically improved targeting, O'Bryan says. About 70% of the 35 million emails sent university-wide in the first year with Salesforce were properly branded based on email templates.

"That has strengthened and unified the university's brand identity. Many units have moved from custom-coded e-mails to templates. And communications professionals can create and distribute messages without relying on IT, creating significant efficiencies."

RECRUITING SALESFORCE FOR RECRUITING

Next, Lifetime Engagement transitioned the regional campuses to Salesforce Lightning CRM and Marketing Cloud. Communication streams, interactions, and events were combined into a single database.

"Before, so much of the information on the recruitment process was hidden in core systems or departmental systems. There wasn't uniformity of information," Brown says. Now we have that holistic view of the recruitment process. That personal engagement information makes us a lot more effective."

Just in IUPUI's recruitment area, the CRM platform tracks approximately 430,000 undergraduate opportunity records used through the various recruitment funnel stages, and 35,500 individual case entries of interactions—such as questions, feedback or issues—with a student or agent. IUPUI admissions recruitment marketing sent 540 segmented messages to 520,000 students via Marketing Cloud during 2017, and 104 drip campaigns comprising 332,000 emails to potential prospects—triple the number from 2016.

The results? The conversion ratio of admission applicants to enrollees at IUPUI went up 7%, Brown says.

SALESFORCE AS A RESOURCE FOR HUMAN RESOURCES

Then, Lifetime Engagement helped establish a centralized, case-based service request system within Human Resources that included coordination of 10 HR centers of expertise and the main HR Customer Care Center. It also included adoption of Marketing Cloud for communications and service desk consoles.

In the first six months of deployment, more than 13,000 customer service cases were created. Salesforce provides management of all employee case records and associated service requests from a single dashboard, O'Bryan says.

CHALLENGES

The legacy CRM system IU deployed for recruiting was complex, not user friendly, and basic, so it didn't meet users' needs.

Faculty and staff had to enlist IT help to send mass emails.

Departments and campuses didn't share information or use the enterprise CRM system, leaving prospect information siloed and incomplete.

SOLUTIONS

IU deployed Salesforce instances within individual areas that sponsored the implementation.

IU Communications, Recruiting, and Human Resources deployed Salesforce to help them achieve a 360-degree view of IU constituencies to personalize services, reduce redundant information gathering, and improve services and customer experience.

Analytics allow HR reps to understand the common questions, seasonal trends, staff productivity, how many cases are open, and more.

"It's much easier to be efficient and effective in your operation if you have a sense of what's happening, what are people asking," O'Bryan says.

SEEING SUCCESS WITH THE NEW CRM SYSTEM

With each implementation, the Lifetime Engagement team had to prove the value of deploying Salesforce, says Chris Tompkins, who was the Lifetime Engagement Project Manager.

"We had to show we could deliver what was needed on time and under budget, that people wanted to use it, and that it gave value," he says. "Three years of intense success showed this is something that should be invested in."

Successful they were; users were so happy with the deployment that departments had to buy more licenses. Several graduate schools adopted the recruitment/admissions package used by undergraduate recruiters. Part of that Salesforce success is due to its flexibility to be what is needed by the sponsor and to grow with the future, Tompkins says.

And the university implemented the IU CRM initiative, which provides Salesforce enterprise licensing funding and a customer success agent or project architect to build enterprise CRM in other university areas. Tompkins is now IU CRM Initiative Director, and the IU CRM team will more than double in size.

"Within five years, IU will know as much about its individual constituents, their relationship and interactions with IU, as the constituent knows," O'Bryan says. "That rich constituent knowledge will provide us opportunities to grow, recruit, engage, serve, and retain relationships with IU's communities."

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Chris Tompkins
Lifetime Engagement Project Manager



RESULTS

Message targeting improved dramatically, and about 70% of the 35 million emails sent university-wide in the first year with Salesforce were properly branded.

The conversion ratio of admission applicants to enrollees at IUPUI went up 7%.

HR representatives have a better understanding of common questions and concerns, seasonal trends, staff productivity, and more, allowing them to better serve their constituents.

The university implemented an enterprise IU CRM Initiative that will bring Salesforce to many more departments.

PRODUCTS

Lightning CRM
Marketing Cloud
Service Cloud