CRM Buyer's Guide for Higher Education

How to Evaluate CRM Options and
Find the Best-Fit Solution for Your School

LIAISON

The CRM Buyer's Guide offers an overview of considerations for colleges and universities interested in upgrading or purchasing a new system to support both the institution and its students. Whether you're a small institution or a state-wide system, this guide will help as you evaluate solutions to best meet your needs.

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Current State of Affairs in Higher Ed and How Technology Fits In

Many offices are being asked to do more with less while focusing on the uncertainties of demographic shifts. Student demographics are changing dramatically with an anticipated 15% drop in college-going students between 2025 and 2029, and with that comes unique needs and challenges that can affect your recruiting success and yield rates. With caseloads in the hundreds — or even thousands — facilitating and nurturing relationships with students can seem daunting or nearly impossible at times.

If your office is experiencing challenges associated with managing the state of higher education today, know that you are not alone. Today's generation of prospective students requires institutions to evolve their student recruitment and retention strategies. The focus today is to redesign the student experience to create a consistent, cohesive, and compelling journey throughout the entire student lifecycle — from first touchpoint through graduation. In the age of AI, the process of evaluating and exploring best-fit institutions — and finding "best-fit" students — is changing. Advanced analytics now augment admissions and enrollment processes and need to be considered in all that you do.

It's time to take a stand against the mundane, manual, and time-consuming administrative work that's getting in the way of helping students succeed. Implementing the right CRM solution can set your institution apart by embracing innovation to stay on top of trends — centralizing data, automating internal business processes, and most importantly, engaging students.

CRM and Why It's Important for Higher Education

CRM stands for Customer Relationship Management, and its application is no longer limited to the business and sales worlds. In fact, many higher education institutions have implemented a CRM on their campuses to manage recruitment, marketing communications, enrollment, retention, advancement, and more. A CRM system can support either a large university or be focused more centrally on smaller colleges, individual schools, or programs.

One of the main advantages associated with CRM adoption is the inherent breakdown of departmental silos. Being able to view student data in one centralized location allows for operational efficiencies in areas like:

- Routing prospective students to the appropriate team member
- Connecting students with the right department for seamless support
- Viewing student information more easily for enhanced engagement

If the thought of never-ending Excel spreadsheets or using a clipboard and highlighter to manage a campus event seems overwhelming and cumbersome, it's time to automate your processes with the help of a CRM. Similarly, if you already have a CRM but it is not accessible by students or staff on a mobile device, it's antiquated and no longer viable in the competitive higher ed marketplace. This means that it's probably time to revisit the market and evaluate new alternatives.

Ask yourself: Is the CRM we implemented years ago still meeting our changing needs? If the answer is 'yes,' you should evaluate the pros and cons of refreshing your current system. Your CRM vendor can always provide a "refresh" demo, highlighting any new features and functionality added since implementation. A refresh should have no cost associated with it and can provide add-ons that you may need.

A benefit of Software-as-a-Service (SaaS) is that it can grow and adapt to your evolving needs. Challenge yourself (and your team) to keep up with the latest technology in the market so that you can work more efficiently. SaaS solutions are innovative and respond to market needs based on client feedback, which in turn, helps you respond to the emerging needs of today's changing student population.

What type of solutions are available today?

- Single point SaaS (Software-as-a-Service) solutions that address the needs of a specific office or department within higher education
- SaaS solutions designed for higher education with scalability to cover multiple units or functional areas
- Larger enterprise platforms used in the commercial world without a higher ed focus

Five Critical Steps to Finding the Best-Fit CRM for Your Institution

Is this your first CRM solution or are you looking to replace an existing system? If you do not have experience with a CRM, start here. If you're ready to move to a new CRM, jump to page 9. Or take a short read because you might learn something you hadn't thought about before.

There are five key steps to take when beginning your CRM search:

STEP 1

Identify your stakeholders

- **Determine which departments or offices will benefit from implementing a CRM and should be part of this process.** These are your stakeholders who will eventually become end users.
    - Is this a strategic project for both undergraduate and graduate admissions?
    - Will other departments, like international admissions or extension programs, benefit from the technology?
    - Are satellite campuses part of the overall equation to create a truly uniform admissions experience?

  Taking these factors into consideration will help define requirements, and ultimately, help identify the right partner to accommodate the needs of all potential end users on campus.

- **Who will be responsible for maintaining the CRM?**

  As mentioned earlier, a SaaS CRM is never truly "implemented" since it's continuously updated to benefit customers. Enhancements result in system upgrades that should be the responsibility of a designated campus resource to facilitate user adoption. Having a dedicated resource on campus will be a huge part of your institution's success. Many campuses will create the role of a CRM Administrator as the point person to ensure the ongoing use and success of the solution.

- **Who makes the ultimate decision regarding the purchase and implementation?**

  Depending on which buyers will be involved in the process, the ultimate decision-maker(s) differs widely across higher ed. For instance, if this is a campuswide purchase for both undergraduate and graduate departments, oftentimes the decision-maker is the CIO. If this is a purchase for one department like undergraduate admissions, the decision-maker can range from the VP of Enrollment to the Dean of Admissions.

STEP
2

Identify and appoint your evaluation team

- **Once you've identified which offices and departments will leverage the CRM and those responsible for the purchasing decision, it's important to determine who will be involved in the overall evaluation and selection process.** Based on who your end users will be, make sure you involve all appropriate people. For instance, if your main campus and satellite campus' admissions teams will be the solution's end users, you should involve those who oversee the admissions process from both locations. Together, they can explore how their efforts can be enhanced by using a CRM and provide valuable feedback.

  While the input of functional users is critical to the ultimate decision, IT representation is just as important. For any CRM project to be truly successful, it must integrate with other systems on campus — most commonly, your Student Information System (SIS). Having IT representation early on allows for successful implementation and the long-term viability of the overall system.

  Finally, make sure you select an evaluation team that's lean enough to keep the process moving forward.

- **Once your team is selected, it's important to identify clear roles and responsibilities as early as possible.** Some best practices include ensuring adequate participation from subject matter experts across all teams and executive sponsorship for the project - in many cases, a CIO or VP of Enrollment. Whenever possible, help facilitate cross-departmental collaboration within the evaluation team to aid in decision making.

STEP 2

Identify and appoint your evaluation team

A RACI matrix might be a valuable tool to use at this stage. RACI stands for Responsible, Accountable, Consulted, and Informed and is an effective way to manage the evaluation process, helping to keep everyone up to date and on track.

R

Responsible

The individual(s) who is directly involved in doing the work and completing the task

A

Accountable

The Individuals who are ultimately responsible for making sure that the work is completed and meets all the project objectives

C

Consulted

The individuals who should be consulted and sought inputs and feedback from, before commencing a task or the project

I

Informed

The individuals who need to be informed about the progress of the project and what is happening in the project execution

STEP
3

Communicate value by demonstrating ROI to stakeholders and decision-makers and become the master of selling internally

- **It is important to communicate the value that a CRM can bring each office by demonstrating ROI beyond vendor pitches and demos.** Essentially, you will be responsible for aligning support internally from key decision-makers and the leadership team. Involving more than one office in the purchase can be highly beneficial because of the operational efficiencies that can be demonstrated and achieved, and implementing the same CRM for multiple departments saves time and money.

  A note on making the sale internally: Vendors will focus on the ROI that their clients have seen, but to persuade your decision-makers, the ROI needs to be specific to your institution. Do your research, read case studies, speak with peer institutions that have already implemented a CRM, and put together an internal justification document or slide deck that illustrates how specific departments will benefit from the new technology.

STEP
4

Determine a budget that supports your requirements

- **It's crucial to allocate appropriate financial resources to start the research and evaluation process.** When building your budget or allocating a grant, make sure you consider annual software costs as well as staff resources for proper implementation, user conferences, and post-launch needs. Be thorough in your evaluation. It's better to be prepared than surprised when unanticipated costs arise.

  A CRM's price will fluctuate based on how robust the technology is and a variety of other vendor-specific factors. It's helpful to understand the current software contracts you may be able to consolidate with the purchase of a CRM to reduce overall costs.

  Additionally, it's likely that your institution will quickly reap the benefits of opportunity costs associated with intangibles like overall time saved with CRM automation and workflows.

STEP
5

Know your purchasing process and create a timeline

- **Every state and/or school has a different purchasing process, and it's good to be familiar with yours ahead of the CRM search so that you can anticipate an appropriate timeline to the final contract signature.** For instance, many state-funded institutions are required to go through an RFP process. Other schools must present their purchasing decisions to a board or committee for final sign-off. Avoid potential delays in your timeline by becoming familiar with your own individual purchasing process and setting key milestones internally. Having a clear understanding of the timeline could change what you're looking for or need from a CRM.

  A quick note on preparing to go to RFP: It can be helpful to have vendor demos prior to writing your RFP. This will give you a basic understanding of available CRM solutions and can help you craft your RFP to include deliverables critical to your institution. Talking with peer institutions or vendor references before issuing your RFP can also provide insights on issues you hadn't considered or questions that you would like to have answered.

  It may be possible to present a sole source document to purchasing and avoid an RFP altogether if you have seen a demo from a vendor with a unique offering.

- **Make sure your timeline includes purchasing, implementation, AND adoption.** Once you've charted your purchasing timeline, it's important to incorporate implementation and adoption to your overall timeline for acquiring a CRM. Implementation speeds vary greatly depending on the number of resources you have dedicated to the project leading up to go-live, so keep that in mind to help set realistic expectations for those involved. Creating a clear plan for adoption among your admissions team and those using the CRM is equally important to setting up the solution. It's important to create a plan to encourage adoption by ensuring they are properly trained and showing users how they benefit from the CRM's capabilities. Adoption can last anywhere from weeks to months and should be consistently evaluated to ensure users continue to recognize the value of the system.

CRM Replacement

Are you replacing an existing CRM solution? Here are a few things to remember as you re-enter the evaluation process.

1. **Timing is everything**
   - You've had experience with implementation, go-live, and user adoption. Make sure you prepare adequately and develop a timeline to sunset your old CRM — most likely based on a contract expiration date — and adopt your new one.

2. **Re-evaluating your requirements is essential**
   - Every CRM solution has unique features so make sure that your updated CRM list includes business requirements, not just feature requirements. Even the best upgrades will have your staff missing legacy features. While there is no such thing as a "perfect fit" when it comes to technology, your goal is to find the best fit.
   - An entirely new CRM might not be the solution you need. A refresh of your current system might be the best or most affordable solution at this time.

3. **Budget changes are inevitable**
   - You may be pleasantly surprised when re-evaluating vendors as feature-for-feature comparisons can result in a cost decrease between your current legacy system and the new CRM solutions on the market.
   - It's also important to be realistic regarding price and evolving institutional needs. For instance, if you are planning on going campuswide with a new CRM and want to scale the solution so that it serves multiple areas within your institution, there will be an inevitable cost increase.

4. **Implementation, even the second time around, requires preparation**
   - Keep in mind that data will need to be migrated from the old system directly to the new system, or from the old system to your SIS and then back into the new system. To help ensure a smooth transition, it's strongly recommended that you involve IT or other technical resources in your CRM search. IT knows this subject matter best, their input is valuable, and they will likely have data migration questions for vendors.

The Vendor Evaluation Process

Today, there are so many CRM solutions available that it's become more important than ever to do your due diligence on vendors. This will increase your confidence that the partnership you're entering and the solution you're purchasing will support your institution. It's best to work with a vendor who specializes in higher education, aligns with your values and vision, and views you as a partner, not a contract.

When it comes to evaluating CRMs, one size does not fit all. There are three general types of solutions available today:

Cloud-hosted, one-point SaaS solutions that address the needs of a specific office or department within an institution.

» These CRM solutions allow specific offices to operate independently of other departments on campus. What they add in simplicity, they often lack in scalability as they are designed with a single office in mind. With the right resource allocation, these systems can be implemented relatively quickly.

Cloud-hosted, campuswide SaaS solutions designed for higher education with scalability to cover multiple units or functional areas

» These solutions allow for the customization and management of either a securely-hosted, third-party vendor application or an entirely custom application that is built to your school's exact requirements. You generally have two options when considering this type of solution. *See Build vs. Buy chart on page 13 for more details.*

> Many institutions choose to phase their implementations, starting small with a third-party vendor application on the same platform and growing toward a connected enterprise model. This allows schools to break down departmental silos over time and view student data from a full lifecycle perspective campuswide.

Larger enterprise platforms used in the commercial world without a higher ed focus

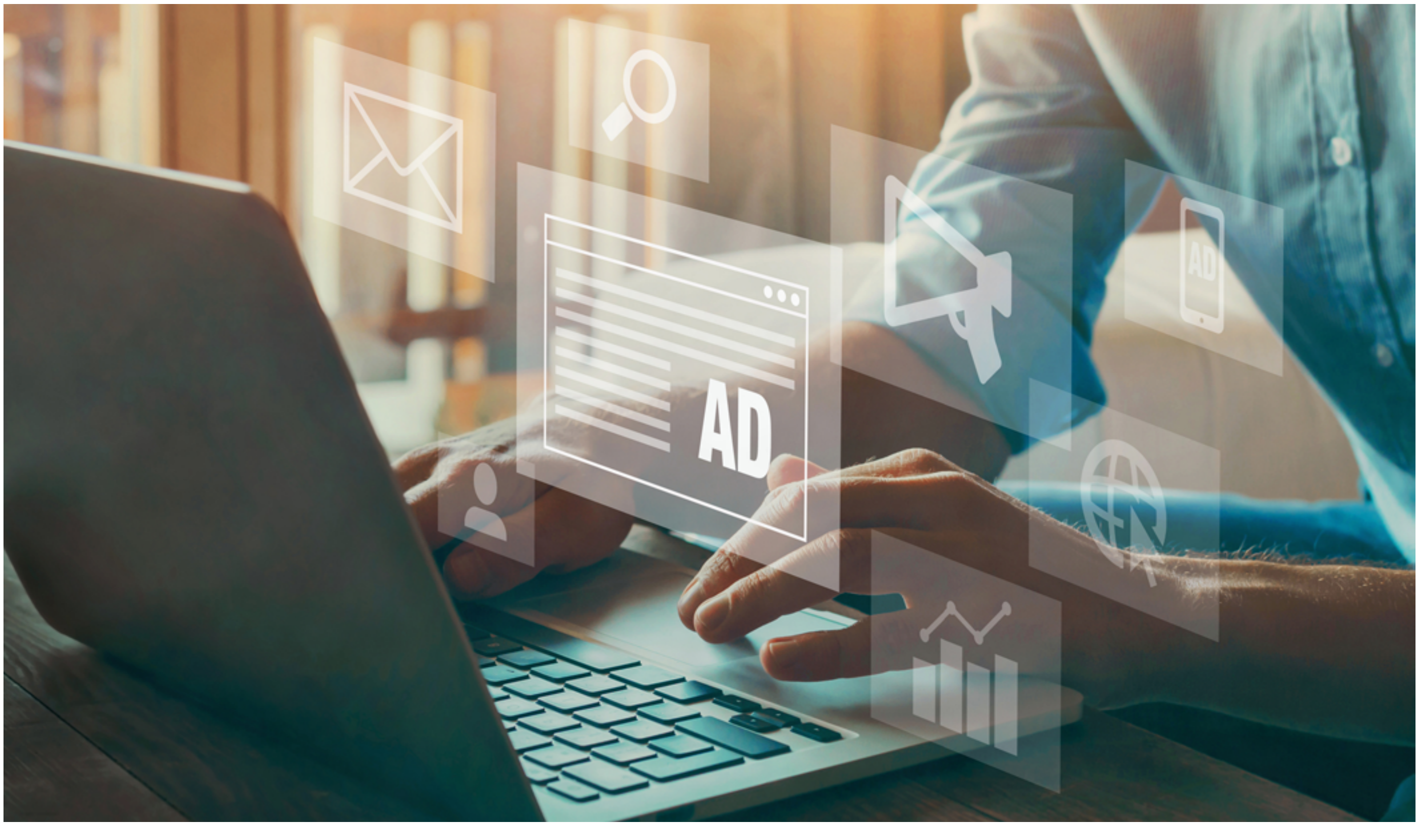
» These platforms are commonly used by businesses, both large and small, across a variety of industries. However, you will not find higher ed-specific features, functionality, or naming conventions within these CRM solutions.

Now that you have a high-level understanding of the different types of CRM solutions available in the industry, you should also know which features are standard for these systems.

A snapshot of common features in modern CRM systems for higher education includes:

- Email
- Text messaging
- Reporting, analytics, and dashboards
- Mobile device support
- Ability to integrate easily with other systems
- Consolidated/relational data model (e.g., contact relationship management)
- Chat support
- Applicant/student portal

It is also critical to evaluate available resources when considering the implementation of the system. Does your team have the knowledge and bandwidth to complete the implementation single-handedly or will you require vendor support via a dedicated project management team throughout the process? Note upfront if you are seeking a CRM solution and implementation partner, as they might not be the same vendor. There are instances when vendors depend on third parties for the actual implementation of the system.



Build vs. Buy

When it comes to enterprise solutions, there's a natural fork in the road. Once you decide you want to be on an enterprise platform, you then need to determine which path to take based on institutional needs. You can build a custom solution or you can buy a third-party platform.

Path A | BUILD: Building a custom solution that is completely unique to your institution or department's business needs, either on your own using internal resources or, more likely, hiring an external technology consulting firm

The main benefit is that you are customizing a solution that fits your unique needs and business processes from the ground up, giving you full ownership of the final product. However, any time you want upgrades or changes made, you will likely have to go back to the technology consultant for additional work to be done. It makes sense to account for these situations in your overall CRM project budget and plan for an ongoing service package.

Path B | BUY: Buying a third-party vendor application or "managed package" solution designed for higher ed that leverages a cloud-based platform with out-of-the-box features and functionality

If you're interested in expanding your CRM solution to multiple areas on campus, or even satellite campuses, a cloud-based enterprise platform is a great option. Unlike custom-built solutions, third-party applications continuously innovate and release new features and enhancements on a regular basis based on client feedback and market trends. Taking this route means that you begin with a predefined solution. However, it's important to remember that because this managed package sits on an enterprise platform, you can always expand when you're ready and, quite literally, think outside of the box.

> ***Note:*** *It's possible to use a managed package solution as the backbone for your campus' CRM initiative while simultaneously partnering with a technology consulting firm to build some custom features according to needs.*

The "Build vs. Buy" chart below can help you evaluate which path is best for your institution by considering the benefits and risks associated with each.

	Build - Custom Development	Buy - Managed Package
Benefits	• Tailored to your current requirements • Full ownership of solution • Potential competitive advantage since others are not sharing your best practices • Ability to control roadmap • Long-term cost savings if initial requirements do not change	• Faster to market • Predictable long-term budget • Roadmap that includes ongoing enhancements and upgrades • Customer community • Lower initial cost • Ongoing support including documentation and training materials • Potential competitive advantage since best practices are often baked into the product • Minimal resource requirements from your end; easier to hire and onboard support staff
Risks	• Business practices may change • Support for end users can be expensive • Documentation and training materials are critical • Further customizations and enhancements require skilled staff or re-engagement with outside vendor to avoid technology becoming obsolete • Knowledge distribution is more challenging • Difficult to switch products once implemented and adopted	• Technology can become obsolete • Product roadmap may not meet your future requirements • Longer-term financial commitment • Difficult to switch products once implemented and adopted

Vendor Product Demos

After deciding on a solution type that best suits your needs, it's only natural to begin exploring vendors' websites for a deeper dive into their products. You will never find all the answers to your features and functionality questions on a website, so the best next step is to request a demonstration. Keep in mind, a vendor should be able to articulate and demonstrate their ability to meet your predetermined requirements. No two solutions are the same in terms of business processes, so the demo should feel anything but cookie-cutter. Across the industry, demos range from a couple of hours to a full day, depending on the vendor's approach.

Common Demo Formats: Live virtual demo and live product demo on campus

General Questions to Ask During a Demo:

- How does this solution relate to my school type (large, small, public, private, community)?
- Here are the current processes that we need to keep. Does your technology do this? This is what we want to change and do differently — can your technology do this?
- What is the UI like for staff? Is it easily teachable? Turnover is high in higher ed, so it's important for us to adopt a tool that can be easily taught and understood.
- How can our current student workers be involved with the solution?
- How is this solution going to connect and interface with our SIS?
- We need to track historical data. How does that integrate with your CRM solution?
- What is a typical implementation timeline?
- What does the work of your team versus the work needed from our team look like during implementation?
- Is there a dedicated implementation team or is it self-service?
- What support do you provide post-implementation?
- How can this solution be helpful for other departments on campus? How would it integrate with other processes on campus?
- Can this technology be scaled campuswide?

A General Best Practice for Evaluating Demos Is to Invite the Vendor on Campus to Demonstrate the Solution. This Gives You:

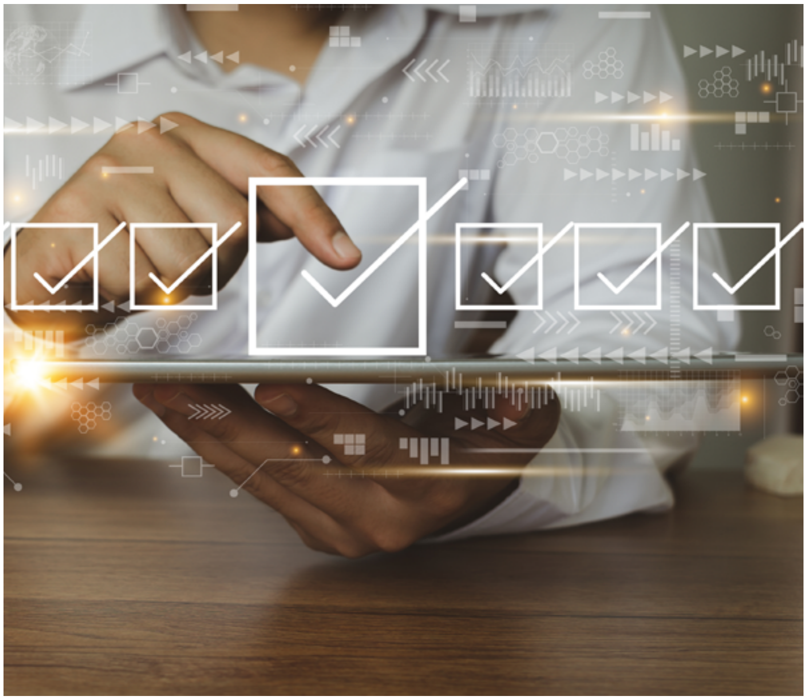
- A better feel for the company by helping to form relationships beyond email correspondence
- The benefit of asking more technical, functional, or even process-driven questions that typically arise in a face-to-face format

Final Selection

Now that you've identified your stakeholders, outlined your requirements, determined a budget, created a timeline, completed industry research, and seen vendor demos, it's time to evaluate the pros and cons of each system and determine the vendor and solution that's right for you.

Some Questions to Consider When Evaluating Vendors Post-Demo:

- Based on your requirements, was the demo truly customized for your institution? (e.g., CRM features called out specific to predetermined requirements)
- Did you see the solutions on mobile? Could you tell if they were designed mobile-first or if mobile was more of an afterthought?
- Were you able to ask questions easily and receive thoughtful answers comfortably?
- Did the vendor's solution offer a mobile app so that your staff can access the CRM on-the-go?
- Did the vendor take a consultative approach to address your requirements and offer best practices in the demo, or did it feel like a standard sales pitch?
- Does the vendor offer ongoing support that's tailored to your unique needs?
- Were all your implementation questions answered completely?



Think about your interactions with each vendor and even reflect on their demos. For instance, in learning about their implementation and support approach, did you receive a sample project plan that addressed everything from staff resource allocation to the implementation and ongoing adoption?

Taking these factors into consideration will help you decide which vendor is right for your department or institution based on your timeline and available resources. Your implementation strategy and the partner you select are key to developing successful methodologies for change management on your campus.

Conclusion

No matter how big or small your school is, adopting a CRM solution for your recruitment, admissions, and retention needs will provide considerable institutional value. With the current shift from transactional to consultative relationships, it's critical to share information across the various departments on campus that are contacting the same students to ensure a seamless student and staff experience. CRM solutions help campuses like yours get back to the business of putting students first by simplifying your processes, managing and centralizing your data, cultivating meaningful relationships, and fostering student engagement — from initial inquiry through graduation.

The partner you select at the end of the buying process is just as important as the actual technology. You should feel confident that your CRM vendor sees you as a partner and will complement and extend your available resources to ensure the long-term success of the system post-implementation.

Staying connected with your vendor, as well as fellow institutions in the vendor's CRM community, will also lead to a successful overall experience. Stay engaged with schools that also leverage your CRM partner via online user communities, conferences, and events. This type of communication will allow you to share your unique goals, challenges, and successes with one another and learn from each other's strategies and experiences.

Here Are Your Next Steps

There are so many ways for you and your team to move forward. Where should you start?

The best place to begin is with a basic evaluation of your existing tech stack and a thorough review of your specific needs. Liaison can help get the process started. From our Total Enrollment Workshops to some basic worksheets, we have resources and tools you can use to find the best CRM for your campus.

Bring a Total Enrollment Workshop to Your Campus

Are you still in the process of evaluating your CRM needs within the context of your overall institutional tech stack? Liaison's complimentary and interactive Total Enrollment Workshop will help you identify and prioritize opportunities to improve prospect engagement, increase enrollment, and drive operational efficiency — providing you with an integrated strategic enrollment roadmap.

Our team will evaluate your current CRM system and help you identify specific ways to:

- Increase applications
- Transform enrollment management
- Power admissions productivity with intuitive, mobile-first functionality designed for your school

Liaison offers two CRM Solutions:

LIAISON outcomes

Liaison Outcomes: A standalone CRM built for ease of use and speed, which allows admissions professionals more time to engage with prospective students. This solution leverages the benefits of a standalone CRM system designed specifically for admissions and enrollment management teams supported by Liaison's Total Enrollment approach.

TARGET X by LIAISON

TargetX by Liaison: A comprehensive CRM built on the Salesforce platform enabling long-term growth and development. TargetX leverages the robust history of higher education CRM experience and connects admissions and student success teams.

RACI Matrix

Instructions:

1. Enter the tasks of your project with a description of each task.
2. Enter the name and title of your stakeholders.
3. Define the roles of each of your stakeholders for each task of the project by selecting R, A, C, or I. You can find a definition of the four categories below.
4. Once completed, pay attention to individuals who take responsibility or accountability for too many different tasks.

Task / Stakeholders	Project Lead	Stakeholder 1	Stakeholder 2	Stakeholder 3	Stakeholder 4	Stakeholder 5
Task 1: Description	A	A	R	I	R	A
Task 2: Description	A	R	I	C	I	A
Task 3: Description	C	A	C	A	C	C
Task 4: Description	C	R	I	R	I	C
Task 5: Description	C	A	I	R	I	C
Task 6: Description	I	A	R	C	R	I
Task 7: Description	A	I	R	I	R	A

Responsible

The individual(s) who is directly involved in doing the work and completing the task

Accountable

The Individuals who are ultimately responsible for making sure that the work is completed and meets all the project objectives

Consulted

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Informed

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