



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023

# Why TargetX is the Right Choice for Salesforce Customers

Kevin Butts, Kristi Kooyman, Katie Himmelrick, Chris Dempsey  
February 16, 2023 - 2:45pm PT

---

experience: **LIAISON** 

---

SEATTLE | FEBRUARY 15-16, 2023

# Introductions



**Kevin Butts**

*VP of Product,  
Student Lifecycle*



**Kristi Kooyman**

*Client Success Manager*



**Katie Himmelrick**

*Client Support Specialist*



**Chris Dempsey**

*Director, Solutions  
Consultancy*





# Why TargetX?



- Build vs Buy Goldilocks
- Experience
- Full Student Lifecycle
- Implementation and Partnership
- Support
- Total Enrollment



# Understanding Build vs. Buy



- Custom Build
  - Longer Implementation
  - Unpredictable Cost
  - May Not Address Future Needs
- Pre-Built Solution
  - Accelerated Implementation
  - Defined Cost
  - May Have Limitations

# Our Mission



- We are a higher-ed company.
- We build enterprise software that will challenge colleges and universities to transform the way they support prospects, students, and alumni.
- We strive to be the premier solution for student lifecycle management, focused on student experience and outcomes.





# TargetX Experience

*We are a company of higher-ed experts providing CRM solutions for recruitment, admissions, and student success trusted by over 400 colleges and universities since 1997.*

## **We are the #1 admissions & higher-ed solution on Salesforce.**

TargetX's solutions are 100% built to work with EDA, and we're proud to be working with over 400 colleges and universities across the country.

## **We are committed to higher education.**

We care about student success. 90% of our employees come from higher ed & ed tech, and we, both as a company and as individuals, invest in thought leadership and giving back to higher ed.

## **We have been delivering scaled Salesforce implementations since 2008.**

We began delivering Salesforce CRM implementations in 2008, a year after the AppExchange launched. In that time we have developed deep expertise in building and maintaining Salesforce solutions.

# TargetX- The Best of Build vs Buy



- Managed package on the Salesforce platform
- Reviewed and approved by Salesforce to work with other platform products and system integrators/partners
- Provides all the benefits of a product, including support and a rich product roadmap
- You have full access to the benefits of the platform
  - AppExchange and its 2000+ apps
  - Security, stability, and extensibility of Salesforce.com
  - A full development platform





# Salesforce & TargetX



TargetX is proud to be the **#1** pre-built solution for admissions on the Salesforce platform.



2019 ISV Partner  
of the Year



EDA Certified



3X Winner

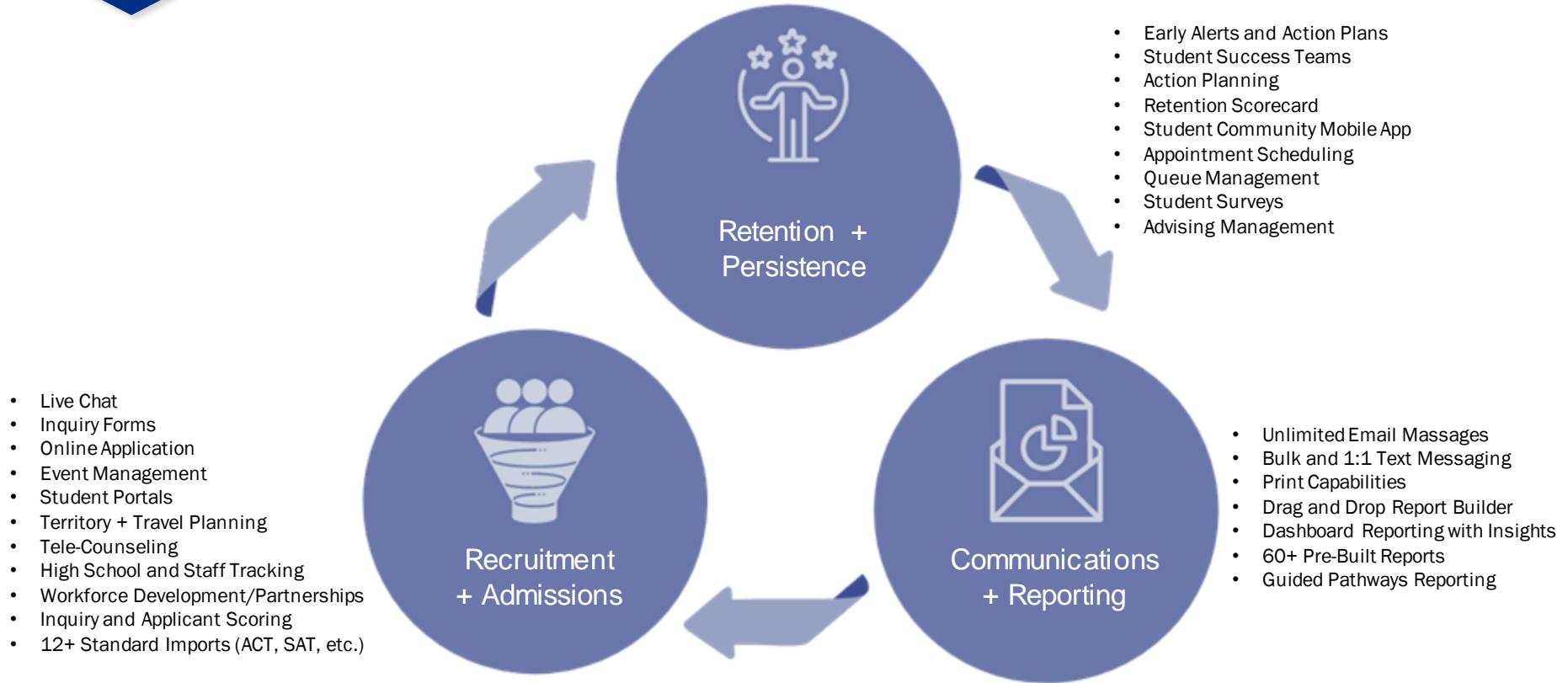
# Clients



~400 clients and going strong

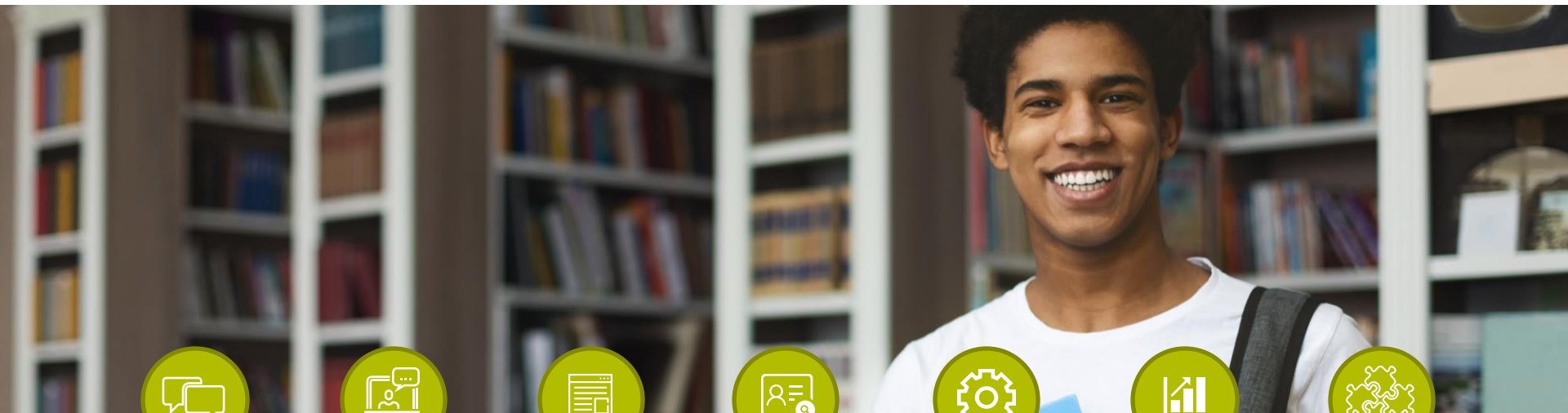


# Student Lifecycle Platform





# recruitment suite



Communicate



Engage



Apply



Review



Manage



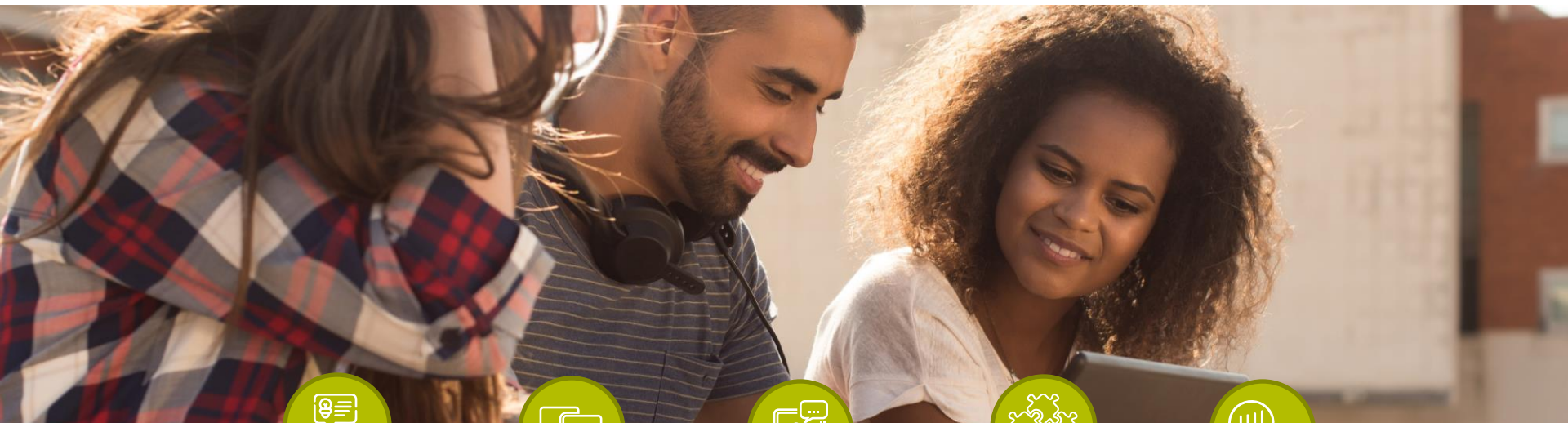
Analyze



Integrate



# retention suite



Advise



Communicate



Engage



Integrate



Predict



# Importance of Integration

.....



# True Partnership for Better Outcomes



# YOUR TARGETX JOURNEY



## ONBOARDING & KICKOFF

- Establish Goals & Priorities
- Establish project team
- Develop implementation project plan
- Complete foundational training



## CONFIGURATION & INTEGRATION

- Complete product training
- Document existing processes
- Configure products
- Build data integrations



## LAUNCH

- Document new business processes
- Train your trainers
- Train end users
- Roll out the CRM
- Use TargetX technical support



## ADOPTION & GROWTH

- Partner with CSM for strategic planning
- Optimize business process & configuration
- Maintain CRM and perform quarterly upgrades
- CRM Governance

# Implementation Overview



## Project Kickoff

- Confirm implementation goals & priorities
- Finalize project plan and team roster
- Initial system installation & configuration



## Milestone Based Approach

- Collaborative working sessions with implementation consultants
- 3-day onsite application build workshop
- Products going live every few months



## Ongoing Training & Enablement

- Comprehensive suite of interactive self-guided trainings
- Learning management system to track progress
- Train-the-trainer sessions with other/similar institutions



TargetX's team of Project Managers, Implementation Consultants, Support Specialists and Client Success Managers are **with you every step of the way.**



# Client success



- Throughout your CRM Journey, we are here for you!
- Team of very seasoned higher-ed professionals
- Your Client Success Manager is your advocate. We will:
  - Help your team prepare for launch and support adoption post-go-live
  - Ensure you're maximizing your CRM investment and getting value out of our partnership
  - Hold regular strategy meetings with your team to ensure the technology is aligned to support your goals





# Support

Knowledge  
Base &  
On-Demand  
Training  
Library

User  
Community  
& Idea  
Exchange

**Ongoing Client Support**  
from our team of  
Salesforce-certified  
experts & higher-ed  
professionals

24/7 Emergency  
Support

---

**Our experienced  
Support Team provides  
guidance, technical  
problem-solving, and  
best practices**

---

# Service Offerings

	Standard	Premier	PremierX
CRM Community	✕	✕	✕
Product Documentation	✕	✕	✕
Xpert Academy	✕	✕	✕
Webinar Trainings		✕	✕
Configuration Assist		✕	✕
Upgrade Assist		✕	✕
Xpert Trainings			✕
Xpert Sessions			✕
Xpert Consultation			✕



# TOTALENROLLMENT™

by LIAISON 



The Prospect-to-Alumni Ecosystem



# A Solution for Every Stage



SUSPECTS



PROSPECTS



APPLICANTS



STUDENTS



ALUMNI

CAS



TargetX CRM



Marketing Services



Othot





# The Complete Liaison Solution






Demo

.....

# Why TargetX



	Others	TARGET 
Requires Third-Party Apps/Contracts/Support	✓	X
Salesforce-Certified EDA Compatible	✓	✓
100% Salesforce-Certified Implementation & Client Support Team	X	✓
Mobile-First Design for Students & Staff	X	✓
400+ Higher Education Clients	X	✓
90% of Staff from Higher Ed & Ed Tech	X	✓
Higher Ed Thought Leadership & Philanthropy	X	✓
#1 Salesforce Solution for Admissions	X	✓

# What Our Clients Say

“

I would say that I am **VERY likely to recommend TargetX** to my colleagues who can take full advantage of all of the functionalities TargetX offers for communications, admissions processing, and student retention. I recommend going 'all in' with TargetX!" - NPS Score: 9/10

“

The product offers a lot of functionality which makes running a more efficient office possible. Also, the customer service is great and **the support team is always willing to help!**" - NPS Score: 9/10

“

TargetX has changed the way we recruit and retain students. They have been **a game-changer for our school.**" - NPS Score: 10/10

“

I appreciate TargetX client success managers and the technical support team. **Great support!**" - NPS Score: 10/10



# Q&A



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023



# Thank You



**Kevin Butts**

*VP of Product,  
Student Lifecycle*

**Kristi Kooyman**

*Client Success Manager*

**Katie Himmelrick**

*Client Support Specialist*

**Chris Dempsey**

*Director, Solutions  
Consultancy*



# Appendix

# Target X FY 24 Product Roadmap



February 2023



## TargetX 2023 Roadmap



2023  
Q1

Jan - Mar

2023  
Q2

Apr - Jun

2023  
Q3

Jul - Sept

2023  
Q4

Oct - Dec

### Recruit

Forms **Map to More Objects**  
Forms **Custom Matching Rules**

Stop SPAM applications  
Forms **Pre-fill URL**

Events **Multiple Campus Support**

Forms **Submission Retention**  
Forms **for Surveys**

### Message

Email **Conditional Operators & Advanced Expressions**  
SMS **Scheduled Send**

Print **Conditional Content**  
Integration **Templates for SIS & LMS**

Email **Dynamic Reusable Content**

### Retain

Engage **Meeting Notifications for Advisors**

New Student **Appointment UX**  
Faculty **Early Alerts via TX Forms**

Appointments **Unified Staff Experience**  
Cohort Success **Map to More Objects**

Student Success **Other Scoring**

# What customer problems are we looking to solve in 2024 and beyond?



## **Unified Communication Planning**

- We will deliver a way to integrate SMS, Email, and Print marketing campaigns in a single, Salesforce-compatible interface

## **Artificial Intelligence & Machine Learning**

- How can we leverage recent developments in AI and ML, as well as Liaison's Othot engine, to make Target X customers' lives easier?

## **Social Marketing Channels**

- We want to enable marketing campaigns in What'sApp, TikTok, Instagram, and related channels