

## Implementation Partner RFQ Language for Student Experience project

### REQUIREMENTS:

#### Project Background:

The University of Michigan-Dearborn has established strategic goals to improve its student experience, communicate more effectively with students, grow its ability to retain and graduate students, and increase its efficiency and effectiveness. Implementing a common data platform and set of shared technology tools with a single version of student data is a foundational element toward reaching these goals.

#### Goals for the Student Experience

- Improve student retention and completion with enhanced communication and nudges, personalized attention, and reduced friction in interactions with the institution
- Create a personalized University experience by providing information in the right channel, at the right time, to the right group of students
- Give individualized support and outreach in a systematic way using many tools: portal, nudges, texts, emails, advisor and office outreach
- Reduce friction by providing consistent, fast, high-quality responses to student questions and concerns
- Use data and analytics to take action

UM-Dearborn plans to use Salesforce as this common data platform and set of tools, and is seeking implementation assistance with several different pieces of work:

#### 1. Tiered Service Model - “One Stop”

- “One Stop” for university business transactions: Students have one place to turn for questions and concerns, cases track all interactions and escalated as needed to ‘home’ offices (Some home offices already implemented)
  - The “One Stop” will include case deflection and a tiered service model.
- Continued enhancement of the live chat service (currently utilized by Grad and Undergrad admissions); including fully developed chatbot
- Workflows to convert existing paper processes to digital processes including updating the Banner system of record.
- Include workflows for Academic Code of Conduct / Non-Academic Code of Conduct issues, and Students of Concern. These are now housed in a legacy system.

#### 2. Multi-Channel Engagement for Student Experience

- Student portal including system links, announcements / communication, etc., and student app (portal would be developed dynamically as student changes cycles (admit/deposited/active (enrolled) student)
- Multi-channel, centralized student communication plans that reach students with appropriate and personalized communications throughout the life-cycle and optimize the use of Marketing Cloud functionality like automations, journeys and Mobile Connect

#### 3. Unified Advising and Student Success

- Implement Salesforce SAL module for graduate and undergraduate advising, as well as learning and support centers where student visits and notes should be recorded in the system (21 offices).
- Include advising links and information on student portal.
- Develop a common 360 degree view of students for Enrollment Management staff, advisors, and other care team members (tutoring, learning center, student life). Enrollment Management and other offices all use one system (Salesforce) to handle student inquiries, requests, petitions, and issues.
- All offices can use Salesforce live chat, and knowledge management to assist with case deflection and communication.

#### **4. Career Services / Internships / Co-ops / Field Placements**

- Conduct discovery and assessment on potential use of Salesforce for these departments. Career Services is a shared function between a centralized office and departments embedded in each of the four colleges.
- Collaborate with UM-Dearborn to write a high level strategy and recommendation for technology use in these areas, the eventual recommended scope, a high level list of tasks to complete this work, and cost estimates.

#### **Current State:**

UM-Dearborn has supported a single Salesforce org for several years, and also partners with both TargetX and Marketing Cloud for both graduate and undergraduate recruitment and admissions functions. The institution has integrated basic current student data into Salesforce, including contact information and program of study, and uses Salesforce case management for the Registrar's and Financial Aid office and Salesforce live chat functionality for both graduate and undergraduate admissions, as well as various custom-developed workflows utilized by Enrollment Management as well as advising staff.

The institution has a small, knowledgeable team of 3.3 FTE dedicated to Salesforce, which includes a project coordinator, a Salesforce architect, a Salesforce administrator, and a Marketing Cloud administrator, in addition to business unit partners who serve as subject matter experts, provide requirements, and test solutions. The Salesforce team does have the capability of creating and deploying Salesforce forms and workflows, integrating data using Informatica, and creating and deploying Marketing Cloud journeys, as well as installing and supporting live chat. A custom subscription center has been created and deployed, and Mobile Connect (texting functionality) implementation is nearly complete.

#### **Project Sponsors / Structure:**

Project sponsors include the provost, deans, CIO, and vice-chancellor for external relations. Core project team members include a vice provost, representatives from advising offices, the directors of enrollment management offices, leadership in external relations, and the dedicated Salesforce team members described above.

#### **Supplier Requirements:**

We are seeking a supplier who has experience implementing Salesforce Advisor Link (SAL), Salesforce case management, and Marketing Cloud, as well as working with Career Services and internship / co-op placements. The supplier should also have strong experience and capabilities to provide best practice advice.

Our desired supplier will have significant experience with implementing Salesforce within higher education. We will rely on the supplier to help us refine the scope / plan for the project, as well as providing us with best practices. The proposal should list the expected costs, spell out the projected external and internal resources that are recommended from similar projects completed, and commit to the schedule of completion.

## Project Deliverables

Overall project deliverables:

- **Tiered Service Model - “One Stop”**
  - Integrate current student data in Salesforce as needed
  - Onboard Enrollment Management offices to Case Management (currently Registrar / Financial Aid only)
  - Create workflows to convert existing paper processes to digital processes including updating the Banner system of record.
  - Move the following case/workflow processes from a legacy system into Salesforce
    - Academic Code of Conduct / Non-Academic Code of Conduct issues, Ombuds, and Students of Concern
- **Multi-Channel Engagement for Student Experience**
  - Install portal and develop portal content
  - Assist with setup and deployment of the mobile application
  - Assist with development of current student data structure in Marketing Cloud including recommendations regarding best approach, creation of additional Marketing Cloud business unit(s) for current student communication and ensuring necessary data is integrated from Salesforce into Marketing Cloud
  - Assist with any troubleshooting of Mobile Connect, the development of communications streams incorporating SMS, and our custom Subscription Center
  - Support the development and deployment of the current student communication plan
    - Documentation of current communication approach and needs / plan is already underway
    - Develop recommendations regarding admin and user structure for current student communications
    - UM-Dearborn to develop specific content, automations and journeys once the appropriate data is in MC and tools such as Mobile Connect are prepped for use with assistance from the implementation partner
- **Unified Student Advising**

- Install Salesforce Advisor Link (SAL) to replace current legacy advising system
- Integrate additional current student data into Salesforce (currently only basic contact information & program of study)
- Convert old Advising Notes from Banner (legacy advising system)
- Create and deploy key advising reports in Salesforce
- Install & incorporate 21 card swipes to record student visits in the SAL system (eg, learning centers, supplemental instruction, etc.)
- **Career Services / Internships / Co-ops / Field Placements**
  - Collaborate with UM-Dearborn to write a high level strategy and recommendation for technology use in these areas, the eventual recommended scope, a high level list of tasks to complete this work, and cost estimates.

Where we need specific consulting assistance:

- Meet with defined key members from the UM-Dearborn Salesforce team and user offices to learn about the use cases and requirements, draft the project plan, and finalize the detailed scope of the project.
  - Specific expertise and assistance is required for Marketing Cloud, including advising on what communication should be conducted in Marketing Cloud vs Banner Communication Management or other tools, licenses/setup needed, and a framework for policy-making.
- Provide guidance on student interactions and functionality with the Salesforce portal vs. Banner; when do we leverage Salesforce vs. Banner functionality
- Define product vision and decision points for the portal, identifying key student needs/validating concepts through research and testing, and advise on best UX practices.
- Assist with integrating business processes across Salesforce and other student information systems
- Provide advice on project and ongoing governance processes
- In partnership with the UM-Dearborn CRM team, conduct discovery meetings with stakeholders and document findings.
- In partnership with the UM-Dearborn CRM team, document requirements after meeting with impacted stakeholders.
  - While some business processes may need to vary between colleges, assist with moving toward standardized processes whenever possible to reduce the complexity of administration and help simplify the student experience.
- Assist with data integration / validation, SAL configuration and implementation, data conversion of advising notes, security role setup, and any customization
- Assist with workflow and automation development
- Partner with UM-Dearborn on testing; provide testing approach and scripts
- Provide go-live support for a defined time period post-go live
- Provide change management / training resources and conduct “train the trainer” training.
- Project management partnership
- Help as requested to configure custom reports and set up dashboards.
- Provide consulting, strategic direction and support as requested throughout the project.

- Describe the staffing/organization needed for long-term product sustainability.
- Collaborate with UM-Dearborn on discovery for Career Services needs and write a high level strategy and recommendation for technology use in these areas, the eventual recommended scope, a high level list of tasks to complete this work, and cost estimates.

#### Project Timeline

Salesforce Advisor Link will be implemented by September, 2021, including graduate and undergraduate advising offices, as well as the ~21 other offices, such as tutoring and learning centers, that currently use our legacy system for adding notes and card swipes. This includes the integration of data and creation of needed reports/dashboards and communications to support these processes.

The case management / tiered service model rollout should be complete by August, 2021, including data integration, queue setup, security, etc.

The multi-channel communication rollout should run in parallel with the campus effort to define a communication plan, responsibilities, and tools. The timeline for the tools and data platform will be collaboratively developed with the implementation partner and content will be created on an ongoing basis.

The Career Services strategic recommendation / report should be complete by spring 2021.