Ottawa University Migrates from TargetX to Salesforce, resulting in Record Enrollment

SOLUTIONS/RESULTS

With the help of SIG, OU implemented Salesforce to manage their financial clearance processes and integrate their Document Management System and SIS. This resulted in record enrollment that they attribute to increased efficiency with financial clearance turnaround times.

TOOLS USED

- Pardot
- Jenzabar (SIS)
- Feith (document management)
- SMS Magic
- Education Data Architecture
- Mass Update Tasks
- Activities Tab
- Fonteva
- Adobe Sign
- Mitel

INSTITUTIONAL PROFILE

Ottawa University has grown from a single building in 1865 into a comprehensive educational institution that serves more than 4,000 students through its two residential campuses in Kansas and Arizona as well as adult and graduate studies campuses in Kansas, Wisconsin, Phoenix, and online.

CHALLENGE

Ottawa University (OU) was struggling to manage the financial clearance information for incoming students in three separate systems and manually using excel spreadsheets to manage their status.

" … an excellent partner. They were so knowledgeable, prompt, and professional. I think they went above and beyond on our behalf many times. They really took the time to understand our needs and desires, when we were off base or limited in understanding, they explained why an alternative way of achieving our goal would be better...I felt like I didn't really have to "drive the bus" hard like I had in a previous integration at another institution, I was regularly informed and consulted, but they made the project happen. "

~Alan Reger, Finance Advisor Manager

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