

## CRM SELECTION WITH ACHIEVABLE EXPECTATIONS



### INSTITUTIONAL PROFILE

The University of Texas, Arlington (UTA) is large public research university that serves more than 48,000 students in Arlington, Texas. Over 3,500 freshmen and 5,700 transfers enrolled at UTA in fall 2018.

### BACKGROUND

In order to reach enrollment goals and improve student engagement, UTA wanted to acquire a Customer Relationship Management system (CRM) to improve enrollment and student success. The system also needed to collect analytical data about enrollment operations to inform recruitment campaigns. Currently, UTA utilizes various tools and platforms for general enrollment related inquiries. While making the best of what they have, the reality was their current methods needed transformation to improve their enrollment pipeline.

### SCOPE OF SERVICE

- SIG facilitated a series of business process analysis (BPA) workshops reviewing requirements with stakeholders, providing feedback, and organizing requirements
- SIG identified UTA's requirements and worked with the client to develop an ideal future state
- SIG created a scope of work (SOW) for potential vendors, which included functionality, technology, usability, cost, vendor services, and vendor viability
- Once the SOW was approved, SIG worked with UTA to procure bids. Out of eight proposals, four were chosen to conduct scripted demonstrations
- SIG served as a resource and subject-matter-expert for the evaluation team, and a selection was made in the spring 2020



## CRM ADOPTION WITH REALISTIC EXPECTATIONS

### BENEFIT/VALUE

- Expand the reach of recruiting efforts using modern media and sophisticated analytics.
- Improve the student's experience from initial contact through alumni status.
- Integrate CRM with campus-wide solutions to measure against ultimate yield of retention and graduation.
- Realized a new vision about how recruitment is coordinated across the campus

*"We appreciated all your help and services of getting us to this milestone. Your level of support and expertise were fantastic. We never could have done it without you." - University of Texas, Arlington*

### HOW SIG CAN HELP OTHER INSTITUTIONS

- SIG will always be transparent with a client and address the process work needed in advance of a procurement to gain the greatest benefit.
- SIG can help clients set realistic expectations and lay out a defined process to help reach goals.
- SIG helps institutions plan to a "future state" instead of a current state in order to realize the highest return on investment.
- SIG supports institution's change management to help involved stakeholders understand and embrace future goals which will lead to a more successful implementation.

