Admissions CRM Project Charter

Student enrollment among traditional undergraduate Freshmen has declined by about 10% over the last six years, a source of concern for institutional leadership. Contributing factors to this decline include declining high school enrollment in the state of Wisconsin, increased competition, increased options for students to consider before enrolling or transferring into a four-year institution.

The Chancellor has directed Admissions to redress the student enrollment trend starting in the Fall of 2015 to realize improvements in Fall of 2016. To improve the student enrollment trend, Admissions needs a tool to support and streamline student recruitment so they can more efficiently increase applications and yield.

Charge

The Admissions CRM project team is charged with:

1. Selecting and purchasing an appropriate CRM tool to streamline student recruitment.
2. Acquiring needed resources to install and deploy the tool, including but not limited to purchasing hardware, hiring staff, and contracting professional services.
3. Preparing Admissions staff to develop effective strategies for leveraging the tool's capability toward improved student applications and yield.
4. Configuring the tool to implement the recruiting strategies.
5. Redesigning business processes for best use of the tool's capabilities.
6. Training Admissions and IMC staff to use the configured tool.
7. Monitoring and managing risks to assure intended benefits are realized.

Scope

Inclusions: The scope of this project is delimited to implementation of a CRM tool for Admissions targeted at recruitment of traditional undergraduate students. It includes research of best practices, engagement of professional services as needed, strategy development, process redesign, communications, hiring and training.

Exclusions: This project excludes the above-mentioned implementation activities for any other department or purpose or for the institution as a whole, as well as the development of marketing or recruitment materials.

Strategic Alignment

Admissions CRM implementation is a project in support of the larger program of Enrollment Management. It is a tactic enabling the program goal of increased enrollment of new traditional first-time undergraduate enrollment, a high-priority objective of the institution and directive of the Chancellor.

Objectives and Key Performance Indicators

Successful Admissions CRM implementation will reduce manual activity in the Admissions office and increase value-add activity such that Admissions staff can implement recruitment strategies to better effect. Many variables outside the CRM implementation project will contribute to changes in enrollment as a result of changes in recruiting practices that were enabled by the CRM implementation.

Project performance will be measured by three Key Performance Indicators (KPIs):

1. Recruitment time and effort more targeted toward expanding the prospect funnel and increasing conversion rates of traditional first-time undergraduate enrollment.

   Measure: Increased quantity of communications; larger size of prospect pool; increased conversion rates at every step.
2. Refined recruitment practices are enabled by the tool's capability and use, for example better differentiation of student segments and support for diversity.

   Measure: Increased touchpoints with students; increased definition and use of analytics and performance metrics

3. Value add recruitment activity is increased in the Admissions offices through automation of non-value add activity.

   Measure: Number of manual or time-consuming processes automated.

Performance of the larger program of Enrollment Management is beyond the scope of this project.

High Level Deliverables

The Admissions CRM project will produce the following deliverables (tangible outputs):

- Product contract with maintenance agreement
- Installed, integrated, configured product
- Trained users
- Recruitment Strategy document summarizing new recruitment practices that have been enabled as a result of this tool.

Key Milestones

A project plan will be developed detailing the activity and schedule to meet the following milestones (a significant point of identifiable progress):

- Project plan
- Product selection
- Strategy development
- Process design
- Product installation
- Product integration
- Product configuration
- End user training

Critical Success Factors

Critical Success Factors (CSFs) are those things that MUST HAPPEN OR EXIST in order for the project to succeed. CSFs are frequently, but not necessarily, an inverse view of risks or a proactive prevention of risks. While risks are things that should be monitored and managed according to plan as they occur, CSFs must be proactively put in place in advance. Focusing on CSFs in addition to monitoring risks increases a project's probability of success.

CSFs for this project and for the larger Enrollment Management program are noted as:

1. An acceptable product must be acquired in time to install, configure, and train users.
2. A qualified CRM application analyst must be available at the time of configuration.
3. Admissions staff must be educated in leveraging the tool's capability and in best-practice recruitment strategies to:
   a. Expand the prospect funnel.
   b. Increase conversion rates of traditional first-time undergraduate enrollment.
   c. Differentiate student segments to support diversity and quality.

Risk Management

A formal risk register and management plan will be created. Following are high level summaries of probable risks and risk management strategies for the Admissions CRM project.

1. Scope creep could delay implementation. Scope creep is the slow erosion of project success due to incrementally small changes in purpose and activities that affect the schedule.

   Scope of the project will be delimited to Admissions CRM only as defined above. The project team will obtain confirmation of the project scope from the Executive Sponsor and communicate its delimitations to stakeholders and constituents. Any threats of scope creep will be escalated to the Executive Sponsor for approval of the required schedule change.

2. Difficulty hiring could delay implementation or effective use.

   The Project Sponsor will work with the Vice Chancellor of Administrative Services to establish this recruitment as a high priority in the Human Resources department. The Project Sponsor will facilitate development of the position description and vacancy announcement to expedite posting and will monitor the recruitment process

3. Unexpected costs or loss of funding could compromise the choice of tool or speed of implementation.

   The Project Sponsor will work with the Vice Chancellor of Administrative Services to monitor cost estimate revisions and funding availability. Funding threats will be escalated for resolution.

4. Poor configuration of the CRM tool could impede increase of value-add activity in Admissions.

   Configuration of a CRM tool is beyond the current expertise of staff. Higher-level expertise will be consulted from external sources such as contracted professional services or peer consulting.

5. Lack of user adoption could impede increase of value-add activity and process improvements.

   Admissions staff will be coached in the importance of the effective use of the tool as a Critical Success Factor. The project plan includes staff training; the project team will monitor the effectiveness of the training and the staff comfort level with the tool.

6. Lack of effective strategies to leverage the capability of the tool post implementation in order to target increased enrollment of new traditional first-time undergraduate enrollment is a risk to the Enrollment Management program, irrespective of the outcome of the Admissions CRM implementation project.

   As in all projects enabling larger programs, the Admissions CRM project could be successfully implemented while the program does not realize the intended benefits. This program risk factor must be managed by the Enrollment Management program team. The Admissions CRM project team will monitor this risk, report status to the Enrollment Management team, and advise the team on risk management tactics, through the life cycle of the implementation project is complete. As needed, the project team will support the program team in developing its own risk management practices.

Roles and Responsibilities

The project core planning team consists of the following individuals with defined roles and responsibilities. Additional work teams may be defined and tasked as needed.

Role	Individual	Responsibilities
Executive Sponsor	Chancellor Leavitt	Authorize investment and provide funding.
Project Sponsor	Anne Milkovich	Lead the project: direct activity, monitor execution, manage risks, resolve issues.
Project Manager	Mark Clements	Develop planning documents, coordinate the planning team, ensure follow-through on plan, act as technical Subject Matter Expert, prepare technical environment for integration.
Functional Lead	Jill Endries	Act as Subject Matter Expert on Admissions and recruiting functions, develop recruitment strategies to drive tool configuration and deployment, direct Admissions staff in tool adoption and process redesign, ensure staff commitment and availability.

Marketing Lead	Jamie Ceman	Act as Subject Matter Expert on marketing communications, develop communication strategies to drive tool configuration and deployment, ensure staff commitment and availability.

High-Level Budget Information

Rough Order of Magnitude (ROM) cost estimates, provided below, have been developed and submitted to the Executive Sponsor. As these are ROM estimates, they are subject to change on the scale of +/- 50%. Further discovery is required before a project budget can be developed. The budget and actuals will be tracked and reported as part of project management activity.

Actual project costs will vary depending on the type of solution, e.g. a self-hosted solution will required hardware investment where a hosted solution will not. Costs provided use the more conservative self-hosted solution as a basis.

Note on staffing: IT staffing is estimated as .02FTE Server Admin allocated to this product. IT does not have surge staffing to absorb this FTE load. A 1.0FTE Server Admin needs to be hired upfront to support the system, whether on-site or off-site hosted. Only 0.2FTY will be allocated to this project and the remaining FTE will be allocated to support of other systems soon to come online such the CMS, ImageNow, and so on. We have also estimated the 1.0FTE against the CMS proposal underway, not knowing which product will come online first. Only one 1.0FTE Server Admin needs to be hired at this time, of which 0.2 will be allocated against CRM, 0.2 will be allocated against the CMS, and 0.2 will be allocated against each subsequent project until the full 1.0 FTE capacity is reached. A single Server Admin can support multiple systems, but when existing Server Admin capacity is reached, the full budget amount of an additional Server Admin needs to be covered as new funds upfront.

CRM COSTS	Upfront Purchase	Ongoing Annual	Upfront Base	Upfront Benefits	Ongoing Base	Ongoing Benefits	TOTALS
Onsite Hardware	$ 60,000	$ 12,000					
Licensing	$ 188,000						
Maintenance		$ 36,000					
Support	$ 20,000	$ 20,000					
Server Admin 0.2 FTE			$ 60,000	$ 33,900	$ 12,000	$ 6,780	
Application Analyst 1.0 FTE			$ 55,000	$ 31,075	$ 55,000	$ 31,075	
SUBTOTAL YEAR 1	$ 268,000	$ 68,000	$ 115,000	$ 64,975	$ 67,000	$ 37,855	**$ 620,830**
SUBTOTAL ANNUAL		$ 68,000			$ 67,000	$ 37,855	**$ 172,855**
5 YEAR TOTAL							**$ 1,312,250**

NOTES
1.0 Server Admin hired Year 1 as part of upfront fixed costs.
0.2 Server Admin allocated to project ongoing as direct cost.

Revision Control

Revision	Date	Author	Reason	Released
20150120	01/26/15	Anne Milkovich	First Final Draft.	Sonnleitner to share with Chancellor.
20150127	01/27/15	Anne Milkovich	Updated benefits rate used to calculate costs. Corrected formula calculating 5 Year Total.	No release.