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Deloitte Foundry Services

An Agile approach to CRM supports an ambitious growth strategy with a positive experience for students and faculty

Deloitte Operate Foundry Services
A regional university's journey

The challenge

This private, nonprofit, accredited university offers dozens of programs, with fields of study ranging from business to liberal arts and technology. Although the university's leadership had laid out plans for growth, they—like many other institutions of higher learning—found themselves dealing with an unexpected surge of applications amid the COVID-19 crisis.

The admission and advising department remained determined to follow up every opportunity and provide a good experience for students and faculty. To do that effectively, however, the university would have to rethink their customer relationship management (CRM) infrastructure.

Modernizing admissions and advisory

The university maintained different CRM systems for each of its lines of business, along with other systems to support various parts of the student journey. This left gaps in automation that admission counselors and academic advisors had to close themselves. For instance, a staff member would have to upload a transcript or birth certificate to the appropriate CRM system, then upload it to the document management system, then tie these two systems together manually.

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The CRM technology at the heart of this configuration was nearing the end of its useful life. The university decided to replace it with a next-generation CRM from Salesforce that could integrate many of their current IT capabilities, offer enhanced capabilities for student engagement, and help their admission and advising team stay productive. The university engaged Deloitte to help them get these capabilities up and running.

The university and Deloitte decided to carry out a phased rollout. With this approach, there were two releases of Salesforce functionality. Release one provided basic capabilities to support the admission and advisory process for the large majority of the student population. Release two was a portal designed to accelerate the overall admissions process. Parallel to release two, Deloitte brought in a team to manage the ongoing operation of the Salesforce system.

Delivering enhancements with a scalable model

But there was a twist to this plan. Unlike traditional managed services, the Deloitte Operate team was a "digital foundry"—that is, a centralized group of people who followed Agile techniques to efficiently deliver user-designed solutions. The foundry not only supported the Salesforce system in production but also tackled enhancements to the basic capabilities of release one.

The university's digital foundry included onsite and offshore resources. The onsite team collaborated with product owners on technical enhancements, then sent the prioritized enhancements to the offshore team for deployment overnight. Half of the staff were veterans of release one, brought over to the foundry to help ease the transition from the old systems to the new one.

The blended team was organized into scrum teams assigned to advising, admissions, and other focus areas. All worked simultaneously in a scaled, agile fashion over three-week sprints. As the volume of work shifted, new scrum teams could be added or removed.

In addition to prioritized enhancements, the scrum teams handled research tickets to identify new solutions to requirements and problems encountered by admission counselors, advisors and IT operations. The teams carried out platform maintenance in parallel. This way, the foundry was able to promptly reduce the ticket volume following the go-live of release one and move on to deliver new features at a steady pace.

Creating an ecosystem of solutions

Within a year, the university had a cohesive CRM solution built on Salesforce's Sales Cloud, Service Cloud, and Marketing Cloud platforms. The solution includes omnichannel capabilities from Five9's cloud-based contact center and LiveAgent's live chat software. CRM capabilities are integrated with the university's existing student information, course information, learning management, document management, and financial aid platforms.

To connect Salesforce with the back-end mainframe hosting the university's student information system, Deloitte built an integration engine inside the CRM. Completed in three to four months in time for release one, the engine enables access between the two systems through more than 60 interfaces.

The digital foundry continues to deliver incremental features sprint over sprint. Notable ones include the ability to:

- Send bulk email to students in just a few clicks

- Chat with students online

- Use SMS text messaging in the advising process (soon to expand to admissions as well)

- Enable digital signatures via DocuSign

- Enable digital uploads via ImageNow

The system's effectiveness has sparked more ideas from the growing user base, creating a pipeline of projects for the foundry. Two recent examples are the implementation of Salesforce's knowledge management and data analytics modules. Next up: optimizaion to the university's admissions portal and an online community to serve as a one-stop shop of resources for admitted students. The digital foundry is also working with the university to move additional legacy applications onto the CRM platform so that other university functions can benefit from its productivity tools.

Results

Before implementing the admissions portal, the university had been able to process 41% of applications on the same day that prospective students first inquired. After a year of steady operation, the share rose to 61%.

The application rate has gone up as well because staff can respond to prospective students faster through the admissions portal. User adoption has gone up by a third, and the new ecosystem has provided a foundation for the university to scale effectively. As for the digital foundry, resources have more than doubled as they continue to manage the platform, deliver improvements, and keep the vendor applications up to date.

None of this would have been possible without effective leadership at the top. Throughout, the university's senior management supported the team with project management capabilities. Perhaps more importantly, they stayed relentlessly focused on business value, taking that perspective to every decision they made about the CRM and Unify initiative.

A reinvention of the student journey

In the midst of rapid growth, the university set out to transform the application and advisory experience for its students and faculty. It ended up with a next-generation ecosystem and a modern, cloud-based CRM solution to carry the client through years of change. Along the way, the university and Deloitte established a digital foundry that upended traditional notions of managed services by delivering multiple value streams in scaled Agile fashion—a model that other universities can replicate and customize.

Learn more about how Deloitte's Foundry Services capabilities and resources can make a difference for your business.

About Deloitte Foundry Services

Deloitte Foundry Services bring a flexible and fluid capacity model to the delivery of small technology projects and enhancements. These services provide the ability to scale project talent resources up and down with demand and allow an organization to react nimbly to key business needs while minimizing the impact on ongoing operations. Foundry Services are part of Deloitte's broader suite of Operate Services in which we advise, maintain, and enhance technologies while delivering insights across flexible economic models. Other Operate Services include Application Management Services, Advise-as-a-Service, Analytics-as-a-Service, and Industry and Process Solutions as-a-Service.

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