

# CRM TRANSFORMATION IN HIGHER EDUCATION WITH SALESFORCE

## MAKE IT EASY

Adopting a cloud-based customer relationship management (CRM) software application such as Salesforce is great for your users as well as IT.

For the various schools and departments, Salesforce provides an intuitive, easy-to-use tool that can break down operational silos and provide a 360° view of university constituents throughout the tenure of their relationship with the HE institution, in addition to providing powerful process functionality. For the technology team, web-based CRM software-as-a service (SaaS) addresses many frustrations – no need to buy hardware, perform routine maintenance and upgrades, or manage hosting.

While some universities may be intimidated by the effort required to switch from existing systems to a cloud-based CRM software application, in reality it's often not as hard as it looks. After committing to a CRM SaaS solution, the key is working to make the transition as seamless as possible.

## HAVE A SOLID STRATEGY

The work and planning required to make the switch to a cloud-based CRM solution such as Salesforce can be worth it – if you do it right.

- Implement Salesforce in a way that makes it a strategic resource, not just a tactical tool.
- Communicate and collaborate with key stakeholders and end users early on in the process to get buy-in and make your stakeholders feel that they are part of the decision process.
- Gain a thorough understanding of the legacy environment that you are replacing. Understand existing processes, pain points, data and integration needs.
- Challenge organizational myths of why things are the way they are. The digital era is here. Redesign from the outside in, and deliver a solution to your users and constituents that is engaging, responsive, and agile.
- Don't forget Change Management. Change can be scary. Identify a champion and have a plan in place to onboard users in a way that excites them about the product and the new possibilities.

## MAKE IT MATTER

Implementing Salesforce is as much a business issue as a technological one - and that's where Deloitte excels.

As the leader in transformational CRM projects and with our deep experience serving Higher Education clients, we help you develop a Salesforce transition strategy that delivers measurable business benefits and accounts for the surrounding business issues that will determine whether the implementation succeeds or fails in the long term, helping your organization squeeze every bit of value out of your investment.

Just as importantly, we know our way around the intricate details that make up the technical side of the implementation, from the application itself to the legacy systems that it typically replaces and the surrounding operational systems integration. We enable seamless digital experiences. And with 1000+ Salesforce certified professionals and 900+ completed projects, we bring a depth and breadth of experience that is second to none.

Here are some of the areas where we can help:



Planning and Risk Assessment



Roadmap Development



Readiness Assessment and Change Management



Strategic Assessment & Architecture Services for Cloud Computing



Implementation Services, Including:

- Sales Cloud and Service Cloud
- Marketing Cloud
- Wave Analytics Cloud
- Chatter Collaboration Cloud
- Force.com Development Platform
- Global Process Alignment

Below are some sample use cases where Salesforce can have a strong positive impact to support different business units at the university:

- Recruiting
- Admissions
- Advising
- Student Services
- Career Services
- University Communications
- Service Operations
- Advancement
- Corporate Relations
- Event Management
- Technology Transfer
- Grant Management
- Volunteers
- Portals

## THE DELOITTE DIFFERENCE

Higher education institutions continue to face critical business and technology challenges.

Our clients select Deloitte because of the depth and breadth of resources and experiences we bring to assist our higher education clients in addressing these challenges. Collaboration is in our DNA – with a keen focus on results.

Deloitte has been working with colleges and universities for over 9 decades and has served more than 200 institutions of higher education, including:

09 

out of the top  
10 universities

19 

out of the top  
25 universities

35 

out of the top  
50 universities

\*As ranked by US News & World Report Best College Rankings, 2013-2015\*

We understand the business and culture of higher education, and our clients can benefit from a network of over 500 seasoned professionals in North America.

## CONTACTS

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