

# Enterprise Case Study: Increasing Operational Efficiencies and Student Engagement

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How Shawnee State University modernized its recruitment and business processes with Oracle Cloud

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## Summary

### Catalyst

In the increasingly competitive landscape of higher education, institutions must find ways to differentiate themselves and enhance operational efficiencies across all levels and systems. This challenge is made difficult by external pressures such as increasingly restrictive budgetary cuts from state and federal funding, while internally, many institutions are still reliant upon outdated legacy systems that are costly and difficult to maintain. Often, these systems can manage only manual, time-consuming processes and do not provide a comprehensive view of how and where funds are being allocated. With such problems in mind, institutions must consider how investing in modern, cloud-based systems can improve business operations and the overall stakeholder experience.

### Ovum view

Shawnee State University's selection of Oracle Cloud offerings enabled it to improve its operational productivity, manage the student experience, and reduce overall costs. The school also collaborated with an implementation/integration partner and a change management partner to get the best return on investment (ROI) from its new systems in the shortest amount of time. For example, constituents who receive strong customer service – targeted communications and timely responses – are more likely to enroll in and remain at an institution. These measures are crucial for institutional advancement: high enrollment and retention figures are key performance indicators that can affect an institution's allotment of public funds, and enabling student success is an important way in which an institution can enhance its reputation. Instead of focusing on mere maintenance, this strategy enables Shawnee State University (SSU) to achieve institutional transformation.

### Key messages

- Shawnee State wanted to modernize its business operations and improve its recruitment processes.
- After choosing selected modules from Oracle's ERP, HCM, and Student Cloud, SSU was able to improve its operational efficiency and student recruitment experience.
- Because of a tight timeline and limited staff, SSU also worked with implementation and change management partners to expedite the process in a strategic manner.
- The switch from its legacy HCM and ERP systems to Oracle's solutions enabled the institution to revitalize its business processes and achieve better, data-driven insights.

## Recommendations for the higher education industry

### Recommendations for institutions

Strategic recruitment and student lifecycle management are imperatives. That is, institutions should be not only trying to attract the best-fit candidates but also ensuring that recruitment occurs at the

optimal time for the strongest impact. While recruiting can be a difficult and inefficient process, a modern CRM/CX solution can fully manage the student lifecycle and yield a much higher return of student engagement.

To improve the overall institutional experience, it is important to be able to understand and track spending and ERP processes. Doing so will improve enterprise performance and maximize funds. Moreover, as employees are crucial stakeholders of an institution, it is important to meet their needs in a timely and effective manner.

Consider working with implementation partners to facilitate transformation and integration. A lot of barriers surrounding technological change are cultural, so it can be helpful to have change management experts in place to obtain maximum buy-in campus-wide. Expert partners with a breadth of industry experience can convert on-premises systems to the cloud, train IT staff to handle the management of systems, and provide targeted training for C-suite executives, administrators, faculty members, and students.

## Recommendations for vendors

Be communicative and clear about what changes are being implemented and why. Simply being transparent will ease the pain points and anxieties that institutions face while undergoing this process. Similarly, when multiple partners are involved, each organization should establish a clear line of communication with institutions. Implementing institutional change can be complex, and responsibilities are not always clearly delineated. Establishing the specifics of the role, expectations, and timeline of each partner can clear up opacity and enable a smoother transition.

Vendors must fully understand the institutional partner's culture and its organizational structure. They should be clear on how the institution views itself and its values, and ensure that those values are always foregrounded during this period of transformation.

## Using the Oracle Cloud suite to revamp business processes at Shawnee State

### Setting the business context

#### **Optimizing operational efficiencies and improving student experience requires modern solutions**

Shawnee State's starting point is indicative of many of the issues facing higher education institutions today. Legacy systems, particularly in the financial and human resources areas, are crippling institutions and hindering them from reaching maximum operational performance. Recruiting constituents can be a difficult process, especially as many recruiters report their frustration with old systems that are not mobile-friendly and do not give a comprehensive view of the constituent data and preferences. Moreover, the modern student expects educational technology to be as modern and intuitive as their consumer-facing technology, and universities with outdated systems run the risk of being regarded as similarly outdated.

As state funding becomes increasingly performance-based, retention becomes an even bigger concern. It is more crucial than ever for institutions to give their constituents the best experience

possible, from the recruiting process to their on-campus experience. Institutions want to make the best use of their resources, but often lack the high-tech systems and tools to enable them to do so in a proactive and productive way. The lack of reliable institutional data limits the ability to report on meeting affordability and efficiency goals mandated by the state and successful completion of performance criteria.

### **Shawnee State's goals: Streamline processes and target best-fit students**

Formerly a community/technical college, Shawnee State University, located in southern Ohio, became a public undergraduate university in 1986. It now offers 80 associate, baccalaureate, and master's degree programs for around 3,600 students. SSU's foundation as a community and technical college means it is firmly committed to an open-access mission: to provide educational opportunities for as many students as possible.

As the institution has continued to evolve, its staff has recognized the need for a better way to track constituents throughout their lifecycles. Shawnee State had no CRM suite in place – simply an admissions module in its SIS – and knew it needed a solution that could help maximize its recruitment process and the management of data. The institution wanted a less manual, more efficient system through which its recruitment staff would be able to access student records, interact more effectively with students, understand recruiting trends and needs, and make the most of student visits and communications.

In addition, improving overall business efficiencies was a major concern. The university's existing HR and financials solutions were still heavily reliant on manual processes, and many employees were having problems with entering and working with financial data. For example, it was difficult for employees to select and enroll in benefits plans or receive expense reimbursements in a timely fashion. Perhaps even more problematic was that the overall financial data of the institution – where its spend was going and how it could be better utilized – was opaque. Many processes were still manually tracked, leading to delays and oversights. SSU wanted a system that would help it be more effective in terms of tracking employee and enterprise data.

### **Optimizing processes required a strategic approach**

For several years, Shawnee State was ready to modernize its operations and move to the cloud. The institution knew that strategically leveraging modern technology would drive best practices and enable it to shift from focusing on transactions to a more constituent-centric approach. Improving recruitment was one of its top priorities; Shawnee wanted to identify demand for new programs and course offerings and improve communication between recruiters and potential constituents. Moreover, it wanted to enable all enrolled students to achieve success and progress to degree in a timely and productive manner. Shawnee also wanted to change its ERP systems to improve business operations and get a better, data-driven view of its financial lifecycle and processes.

To further drill down into what the institution's technological needs and overall strategy should be, the university created a project team made up of executive sponsors and core members of the admissions, finance, HR, and IT departments. The introduction of a new president, Rick Kurtz, in July 2015, was a pivotal step in pushing the initiative forward. President Kurtz recognized the need for new technologies to address the university's pain points, and his sponsorship was instrumental in obtaining buy-in across the institution's highest levels and the Board of Trustees. With this strong, visible executive leadership in place, the team was able to obtain the funding to move ahead with implementation.

## Using modern CRM and ERP solutions to optimize operational efficiency

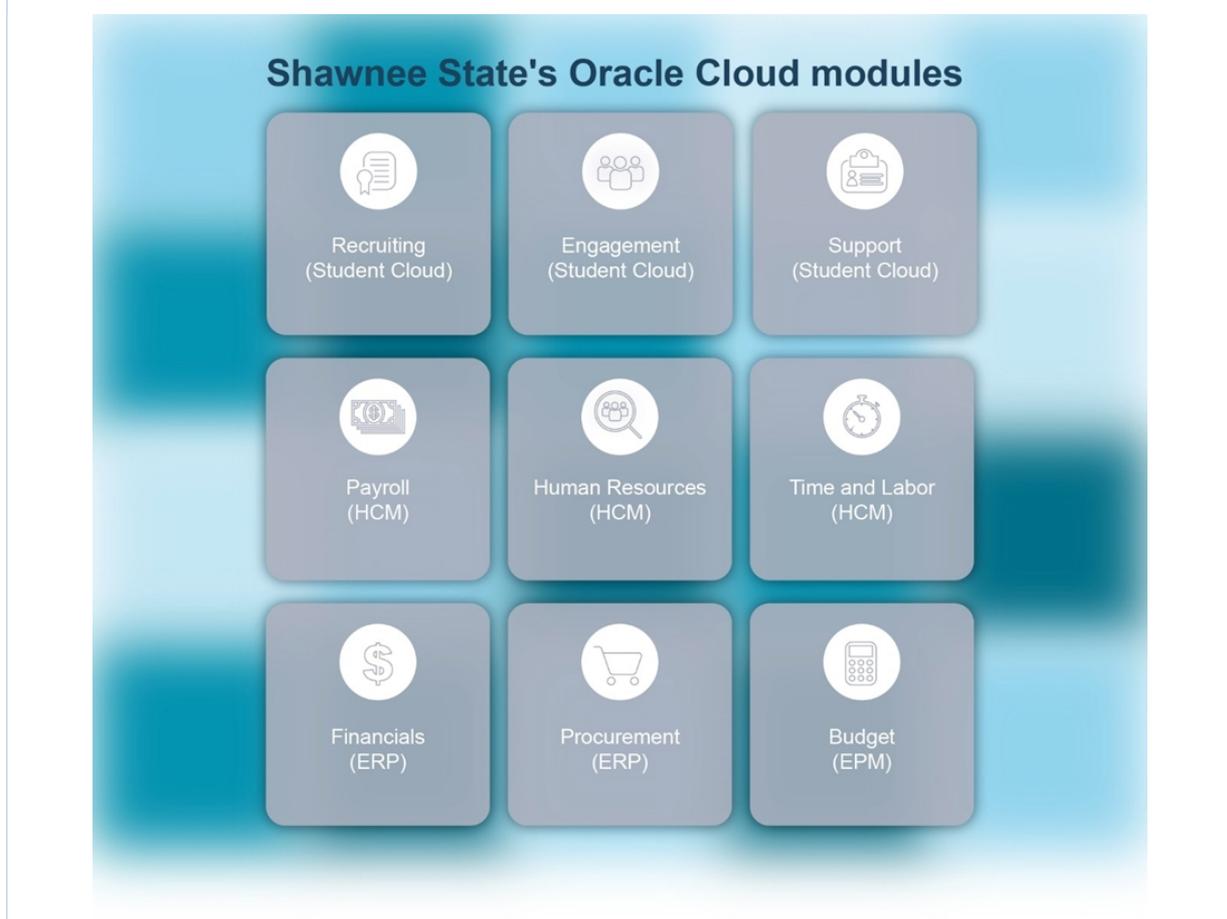
### Existing landscape and solution selection

Though it considered other vendors, Shawnee State chose Oracle, due to its ability to connect the entire enterprise with its modern cloud architecture, its out-of-the-box functionality, and its scalability. Oracle cloud solutions offered enhanced features such as easy mobile access and embedded analytics, while requiring little maintenance from IT staff. SSU chose modules from Oracle's HCM, ERP, EPM, and Student Cloud solutions, dubbing this systems overhaul BearTrax after Shawnee's mascot, a bear. The team decided to roll out the project in two parts: the CX-based modules of Student Cloud were introduced from June through September of 2016, while the migration of the ERP/HCM systems was a nine-month process that extended from September 2016 to July 2017.

Shawnee State could dedicate minimal IT and functional staff to this effort, so knew that it would require additional support and strategic partnerships to maximize its investment in Oracle Cloud. With a 90-day goal in mind, SSU worked with Oracle Consulting to help implement the CX-based modules of Student Cloud. For BearTrax's second phase of transition from the legacy ERP system to Oracle HCM, ERP, and EPM Cloud modules, the institution partnered with an implementation partner, Drivestream, and a change management partner, Navigator Management Partners. All pertinent parties saw the implementation of or the move to Oracle as key to SSU's mission of institutional transformation through technology.

## Bringing the strategy to life

**Figure 1: The Oracle Cloud suite at Shawnee State**



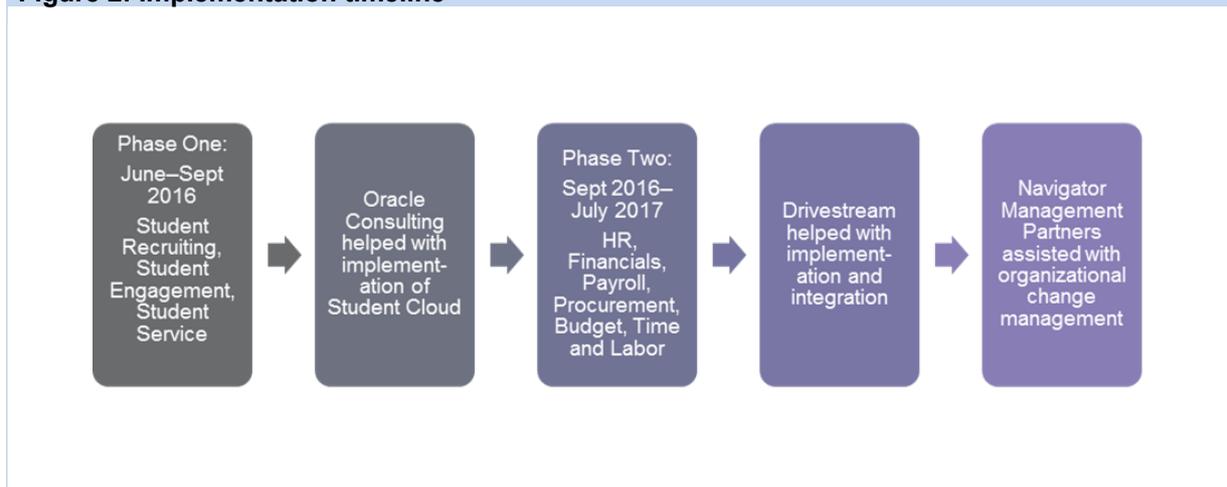
Source: Ovum

In its first stage, which began in July 2016, Shawnee State selected three different modules of Student Cloud – Student Engagement, Student Recruiting, and Student Support – to enhance the way it communicated with its current and prospective students. Student Recruiting allows recruiters to easily access student information on any of their devices, and provides data-driven insight into recruitment trends and figures, thus transforming leads into prospective students. The Student Engagement module automates marketing activities and delivers targeted campaigns across different platforms; it also monitors SSU's various social media channels to track trends, messages, and conversation around and about the campus. Finally, the Student Support module makes it easier for all staff – from Admissions to Financial Aid – to connect and respond to constituent queries. The Student Cloud's ability to connect with the school's current SIS, Jenzabar CX, guarantees that data and information is no longer being siloed and can be shared across systems to gain a 360-degree view of a student.

In the second phase, Shawnee State switched from its legacy ERP system to Oracle Cloud's Financials, Human Resources, Procurement, Budget, Time and Labor, and Payroll with the help of its integration partner, Drivestream. Doing so helped the institution modernize its ERP practices and dramatically improve its business processes. For example, Oracle Financials and Budget's advanced analytics enable Shawnee State to analyze its overall spend and thus optimize its use of funds in the future. The procurement module helps its staff understand purchasing behavior, while its automated

workflows enable a much faster reimbursement process. Oracle's HR module enables SSU to go the self-service, paperless route, which makes it easier for employees to access materials and manage their deductions and benefits. Moreover, many of Shawnee's employees transfer between departments within the institution, or change their status from student to part- or full-time worker; this process is much faster, and data is no longer siloed. Payroll was one of the most dramatic improvements; with Time and Labor, employees are now able to submit electronic time sheets (instead of being burdened by manual processing). Users appreciated the modern, consumer-like interface that made the systems much more intuitive and easy to use.

**Figure 2: Implementation timeline**



Source: Ovum

## Outcome assessment

Though the final go-live was merely a few months ago, in July 2017, the new features have been well received by stakeholders across the institution. SSU credits the guidance of its integration and change management partners for the broad and rapid user adoption of the new capabilities.

Shawnee State chose Drivestream, an Oracle Platinum Partner, to serve as its implementation and integration partner. While Shawnee was especially drawn to its expertise in HCM operations, Drivestream has managed over 100 Oracle cloud migration projects for large and midsize enterprises across all major verticals. Drivestream migrated Shawnee State's ERP and HCM to the cloud with its cloud implementation approach, Drive Method, which collects, identifies, and converts data before moving it to the cloud. It was also instrumental in helping integrate Oracle solutions with Shawnee's existing on-premises and third-party applications. The institution is still working with Drivestream through the maintenance and management phase, which will end in December 2017. A more limited support agreement will begin in January 2018.

Cultural change was achieved with the help of Navigator. From the beginning, Navigator helped Shawnee State with its goals of maximizing user awareness and adoption so that these new systems are utilized most effectively. For instance, Navigator helped the school select the new name, BearTrax, which was voted upon by all stakeholders; this vote helped create a sense of cross-campus ownership and excitement. Navigator took a strategic approach to change management, partnering with the Shawnee marketing and communications department and the C-suite to ensure awareness and buy-in across the campus. It identified and communicated what the training needs of users were,

but also how those abilities could be maximized, from creating selective user groups across departments to identifying department point people to provide additional aid.

As a result of its investment in Oracle cloud solutions, Shawnee State is now a more innovative, data-driven institution with increased operational efficiency. Though it has been working with the Oracle suite for a short amount of time, many promising results have already been generated. Thanks to Student Cloud's insight into student trends, Shawnee State is now better able to direct its scholarship funds and recruiting budget to target best-fit students. For example, it learned that student athletics could be a strong area of expansion, and was subsequently able to recruit full rosters for the new men's and women's bowling teams within one year. In terms of its financial processes, Shawnee State is moving to a monthly close from its previous practice of an annual close. This change saves weeks of staff time and provides faster and greater institutional insight into how funds are allocated and how they could be more effectively utilized. SSU anticipates further use of data analytics and forecasting to understand how to optimize efficiency and engagement across the entire enterprise.

The fact that SSU has its own fully integrated, single data instance in the Oracle cloud that will continuously update with the latest features and best practices in higher education means it is in an agile position to offer an optimized student experience for years to come.

## Lessons learned

### Use implementation partners strategically – but do not rely on them

Make sure to leverage the industry knowledge and horizontal expertise of partners in a strategic way, while learning how to maintain systems and control them after the partners decamp.

### Understand the architecture

Understanding your cloud architecture early in the implementation discussions will maximize the unified data model and framework tools available to you, simplifying the management of data integrations between Oracle cloud services and third-party applications.

### IT staff will have new roles to play

The role of IT is changing rapidly; many long-time staff members will need to be retrained in using new solutions and systems and will need a strategic understanding of how their role can not only maintain and address current issues but also facilitate institutional innovation.

### Work towards 100% buy-in

Be creative and strategic in branding and awareness so that all end users recognize the value of and are excited about this change, rather than being wary or skeptical.

## Appendix

### Methodology

Ovum Enterprise Case Studies leverage in-depth interviews with key enterprise stakeholders as well as a review of any available documentation such as strategic planning, RFP, implementation, and program evaluation documents.

### Further reading

"Institution-wide CRM is the way forward to transform the student experience and enable success," IT0008-000308 (March 2017)

"It is time to break through the glass and tackle more transformational approaches to CRM in higher education," IT0008-000312 (April 2017)

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