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■ Roberta Oberpriller,
Director of Business
Technologies

The College of St. Scholastica (CSS), with eight physical campuses, including its main campus in Duluth, Minnesota, provides a community of learning to 4,200 students in both traditional on-campus settings and online programs.

CHALLENGE

The College of St. Scholastica (CSS) has a student population of about 4,200 students including undergraduate, graduate, on-campus, online, and accelerated programs. CSS wanted to increase "student success by maximizing retention...through quality student services and effective student engagement." The school had already implemented Salesforce with TargetX as its enrollment management CRM solution, but there was no CRM solution for its advisory services. CSS needed a way to determine whether its advisory programs were efficient and effective for their diverse student body.

SOLUTION

After a thorough RFP process, CSS selected Attain (formerly ACF Solutions) to extend their Salesforce instance. The objective of the project was to provide advising staff the tools needed to effectively and efficiently engage with students as well as provide insight into the programs' effectiveness and identifying areas for improvement. Over the course of the 14-week project, including requirements gathering and detailed road-mapping, our team created a student engagement solution customized to the needs of the school's OneStop and Online Advisors. The delivered solution allows for future growth and can easily be expanded to other departments and student service providers. Some components of this solution included:

- Implemented Salesforce Case Management on top of the college's existing TargetX acquisition system, allowing the school to track and respond pro-actively to trending issues and to easily onboard seasonal advisory staff.
- Integrated with external data sources, providing a 360-degree view of CSS students.
- Customized the student's Contact page in Salesforce to provide the advisor a quick snapshot of the student, including the student's photo and a simple chart of his/her enrollment history, with links to more detailed information that answer most academic and account-related questions.
- Configured Salesforce's solution approval functionality to capture resolutions to student cases to a library of answers to commonly-asked student questions.
- Created and integrated email messaging from Cases to request information from other student services departments who are not yet Salesforce users, e.g., Financial Aid, Academic Affairs and Housing, and implemented escalation rules to ensure service levels are maintained.
- Setup email-to-case functionality allowing advisors to respond to student requests directly from a case.
- Created management dashboards to track trends in caseloads, such as length of time to close cases, cycles to resolution, and trending issue areas.

RESULTS

The Salesforce-based solution we implemented now enables counselors and advisors to service the student population with timely resolution of registrar, financial aid, student account, and other related issues throughout program completion. In addition, the delivered solution provides the ability to facilitate the many hand-offs and touch points between the online advisors and OneStop Counselors, while the SIS integration allows access to student data required to deliver timely information.

Director of Business Technologies at The College of St. Scholastica Roberta Oberpriller reports "OneStop is particularly appreciative of the ability to see activity history for students who contact them. They are now able to resolve issues and answer questions much more efficiently when they can see what sort of interactions the student has already had with other counselors or departments."

The implementation project also provides the necessary foundation for Communities, Self-Service, and Knowledge solutions envisioned in future phases. CSS has made a strategic investment in its Salesforce-based case management solution, one that it expects will continue to pay dividends in improved services for students, more efficient processes for staff, and overall increases in student satisfaction and retention.

About Attain

Based in McLean, Va., Attain is a leading management, technology and strategy consulting firm comprised of innovative problem solvers who deliver tangible results to address today's complex challenges. Our transformative business and IT solutions and services deliver market-leading results to our customers in the government, education, healthcare, and nonprofit sectors.

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