

Project: Bb Consulting Project Start Date: 5/14/2012

Client: Linda Ferguson Program Manager: Mike Snyder Project Manager: Julie Cuffle

Thesis Statement: The purpose of the Bb Consulting Project is to provide the BI Specialist with consulting help on the Academic Dashboard, CC Data Dashboard, and Server/Database Upgrade projects. This builds on a previous request in FY12 for training and consultation hours. This proposal for this previous project is available upon request.

Introduction

ISU has hired a permanent, full-time Business Intelligence Specialist in part to continue work on the university's data warehouse. In order to provide this resource with a solid start and stable foundation in which to build a knowledge base, it is recommended that Bb Analytics be employed to provide consulting help on high priority projects. This proposal details the justification for, and requirements entailed in, this particular engagement.

Background

Bb Analytics, formerly known as iStrategy LLC, performed all previous implementation and enhancement work on ISU's data warehouse. iStrategy consultants also provided help to ISU resources tasked with dashboard and web site development. This included a knowledge transfer concerning development tools (PerformancePoint and ProClarity), as well as any technologies used to link the warehouse to these tools. This work was done as either part of the Student Analytics module install or as part of billable hours created against a 9 month long work order effective December 9, 2009 (ISU PO 0066654). Employees continue to do some dashboard development for their departments, but enhancements for the most part have ceased. In addition, the data warehouse has not been upgraded to the latest supported version.

Workplan

Upon their hiring, the BI Specialist will be charged with moving BI technologies, including the warehouse, forward. Ideally, this resource will remove the need to pay an external party a consulting fee in perpetuity, as well as provide expertise for division dashboard developers to rely on. In order to get this new resource up to speed, we would like to seek the assistance of Bb Analytics. This assistance would fill two current needs:

- 1) Short term data warehouse enhancements
- 2) Ongoing data warehouse projects
 - a. Academic Dashboard Project (Fall 2012)
 - b. Co-Curricular Data Dashboard Project (Summer 2012)

- c. Upgrades to the technical environment (Fall 2012)
 - i. Upgrade to latest Windows Server OS
 - ii. Upgrade to latest SQL Server database
 - iii. Move to university SharePoint farm

Budget

The project will require funds to for time and materials against an SOW. We are requesting 50 hours of additional consulting work at \$200 an hour. Total cost is \$10000.

Stakeholders

Name	Role	Contact Info
Julie Cuffle	Project Manager	8377
Karl Burgher	Chief Strategy Officer	8449
Lisa Spence	CIO	2100
Mike Snyder	Program Manager	9697
Linda Ferguson	Data SME	
Kevin Smith	Data SME	

Closing

With the hiring of the BI Specialist, ISU continues its commitment to building and sustaining a data driven culture. In order to give this resource the best chance to succeed from day one, we propose providing immediate and adequate training direct from the experts in these technologies. The university desires to move forward and increase the capabilities and user volume of its data warehouse. This will require an expense of some kind. We believe the best course of action is to use these funds investing in our own resource by bringing that individual up to speed as quickly as possible. The alternative is to spend money continuing to rely on external resources and knowledge.

Project: Lifetime Engagement CRM Project

Start Date: 5/14/2012

Client: Josh Powers

Program Manager: Mike Snyder

Project Manager: Julie Cuffle

Thesis Statement: The purpose of the Enterprise CRM Project will be a system that supports processes around the lifetime engagement of students at Indiana State University.

Introduction/Background

The project will develop a pilot implementation of a student engagement engine powered by Talisma CRM, an Alumni CRM implementation, and the implementation of the Twitter freshman engagement project. The pilots will leverage ISU data sources to create automated student engagement scenarios and an Alumni CRM workspace. The purpose is to begin the journey toward a robust and fully integrated system in which all student data is available and leveraged from the time a student is a prospect through their years as an alum and potential supporter of ongoing university activities and accomplishments. This is achieved through the following:

- Facilitate campus connections with personalized suggestions based on student profiles
- Flag student in-term activity patterns associated with at-risk students
- Initiate prioritized interventions from the most appropriate campus personnel
- Capture the professional judgment, as well as hallway observations of campus personnel
- Monitor intervention activity to ensure consistent engagement levels
- Increased engagement in early semester activities through CRM twitter communications
- Load alumni data into the CRM and leverage CRM capabilities for alumni department functions and activities.

The ultimate goal is to improve student success and retention, as listed in Goal 1 of the Pathways to Success, as well ultimately implementing a cradle to grave CRM.

Proposal/Purpose/Justification

Indiana State University has an initial goal to improve student success of their first-time, full time bachelor's degree seeking students. This goal can be broken down into two facets. First, ISU would like to provide its students with positive feedback and reinforcement to engage in a multitude of co-curricular activities on and off campus. Rewards and incentives can be generated based on profile content, as well as student behavior and involvement. Second, ISU is concerned, as most schools are, about the retention rate for its freshmen. The university has a need to identify students in this cohort who are determined to be "at risk", and engage these students before a decision to leave is made. This means intervening within the first 2-3 weeks of the semester in many cases. The warning signs often occur very early. Missing class, not eating properly, receiving poor test results, and study and social habits are all examples that indicate a student's level of engagement, and there are dozens more. With

both facets involved, the overall purpose is to shorten the time between analytics and proper engagement.

Work Plan

Activity	Status	Responsible Resource	Due Date
Planning	In Progress	Snyder, Cuffle	6/20/2012
Student Success Work	Not Started	Snyder or Edwardson/Powers	
• Build process for each scenario		Snyder or Edwardson	
• Build content for each scenario		Snyder or Edwardson	
Student Affairs Work			
• Plan RecFest Twitter Event			
<ul style="list-style-type: none"> ○ Swiping IDs ○ Twitter Sign Up ○ Load Data into CRM ○ Build Tweet Content ○ Tweets ○ Tailgate Party 	In Progress	Leslie, Lentz, Perone, Santhana, Cuffle	
Configure application	In Progress	Cuffle	
• Build Student Success Team and Roles	Complete	Cuffle	6/11/2012
• Build Student Success Workspaces	In Progress	Cuffle	6/25/2012
• Build Web Forms/Clickable URLs	??		
• Data identification – missing fields	In Progress	Cuffle	6/22/2012
• Get Email alias for Student Success		TIS, Snyder	6/25/2012
• Install and configure texting module*		Talisma or Kevin??	
Data Integrations			
• Talisma	In Progress	Cuffle	07/27/2012
• Banner SIS	In Progress	Cuffle	06/29/2012
• Bb	In Progress	Cuffle	07/06/2012
• CBORD	In Progress	Cuffle	07/13/2012
Rules			
• Build Filters	In Progress	Cuffle	07/06/2012
• Build Mailers for Email Content		Cuffle	07/13/2012
• Build Texting Content??		Cuffle	07/20/2012
• Build Campaigns		Cuffle	08/03/2012
Testing			08/17/2012
Release			08/31/2012
Execution of scenarios			Aug – Sept
Fall Tactical - See Spring WBS			Sept - Oct

Reporting and Deliverable Schedule

There will be two methods for project status reporting delivery.

- Weekly status meetings with the PM and the BI Specialist
- Weekly project status emails to the Project Team

Milestone Name	Date Scheduled
Project Begins	May 14
Planning Complete	June 20
CRM Configuration Complete	July 11
Data Integrations Complete	July 27
Rule Workflows Built	August 3
Testing Complete	August 17
War Room Exercises Begin (Live Data)	August 20
Fall Tactical Retention Project Begins	October 1
War Room Exercises Complete	October 16
Evaluation/Analysis Begins	October 16
End of Pilot	November 30

Budget

The project will require funds to upgrade and add to ISU's existing Talisma CRM implementation.

The Higher Education (HE) Pack add on will allow a more normalized data structure facilitating student success, alumni, and communication data storage needs. The texting module is needed to fulfill the requirement of implementing robust texting campaigns during retention efforts. And lastly, should the Admission department not purchase and implement the latest scheduled upgrade, funds for that upgrade will be needed as well. This upgrade solves current incompatibilities with Windows 7.

HE Pack Module and Consulting - \$100,000

Texting Module - \$10,000

Version 8.6 Upgrade – \$20,000

Stakeholders and Management Plan

Name	Role	Contact Info
Julie Cuffle	Project Manager	8377
Karl Burgher	Chief Strategy Officer	8449
Lisa Spence	Steering Member	2100
Mike Snyder	Program Manager, Steering Member	9697
Rich Toomey	Steering Member	
Josh Powers	Steering Lead	
Kevin Smith	Banner SME	
Diana McCleary	Blackboard SME	
Lauraly Dubois	CBORD SME	
Doug Weatherston	Admissions Talisma Analyst	

Emily	Talisma Subject Matter Expert	
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Steering Team

- A steering team will be formed to plot out future phases and projects involving lifetime engagement via the CRM.

Change Management Plan

- Submit any scope proposals in writing to the CSO, Student Success AVP, CIO, and Assistant Director, Enterprise Services

Closing

This is a complicated project with an aggressive timeline. The technology within the applications, while innovative and complex, is just a first step. Legitimately effecting student success will take not only sophisticated technology, but intelligently detailed business implementation and management plans that require considerable social thought and management, as well as stakeholder buy-in and acceptance. We believe this campus-wide buy-in paired with highly integrated technology provided by our strategic vendor partners can lead to a solid impact on student success.

The formation of the steering team will allow for measuring the success of different facets of the project including volume and accuracy of data gathered, and the effectiveness of a variety of communication campaigns.