

Northern Arizona University



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- April Cook, Project Manager, Northern Arizona University

Northern Arizona University Uses Education CRM to Establish a Deeper Connection with Students

Universities sit on a treasure trove of data about their students—data that can be used to keep students enrolled, engaged, and on the right educational path. Unfortunately, this data is often spread across different departments and systems, making it difficult to obtain a holistic and timely view of students and their interactions with the university.

Innovative universities move beyond disparate, on-premises systems of record and adopt cloud-based systems of engagement to improve their connections with students. For example, Northern Arizona University (NAU), a public research university in Flagstaff, Arizona, uses education customer relationship management (CRM) to gain

a single, unified view of interactions with students, prospective students, and alumni.

Improve student experiences

Having a centralized source of information is particularly important to NAU’s Student Solution Center. Staffed by students, the call center answers questions about everything from admissions to class availability, scholarships, and student services.

Previously, NAU’s Student Solution Center was challenged to meet service levels. As the number of systems and amount of data grew, navigating between different screens and tools became increasingly difficult for students working in the center. As a result, training was onerous, wait times increased, and callers often had to be placed on hold even for simple requests.

“Our Student Solution Center is often the first experience students have



Business Needs:

- Offer students a seamless, connected experience across all university departments
- Improve Student Service Center and call center efficiency and responsiveness
- Enhance student academic consultations by giving advisors instant access to timely and relevant information

Data Challenges:

- Integrate on-premises system of student records with cloud CRM
- Unify student information across departments
- Load data faster for more informed decision-making

Solution:

- Informatica Cloud Data Integration connects with Salesforce to provide a unified view of students and near-real time data

Solution and Results:

- Gives staff and advisors the information they need for targeted, productive meetings with students
- Enables call center and Student Service Center to provide faster, more responsive service
- Allows the university to reach out proactively to students for better outcomes
- Supports efficient, paperless administrative processes

Inside the Solution:

- Informatica Cloud Data Integration
- Informatica Cloud Connector for Salesforce
- Informatica PowerCenter

with the university,” says April Cook, Project Manager at NAU. “Our goal is for students to have the best experience from the moment they contact us through application, enrollment, advisory and course selection, all the way through to graduation.”

Gathering information from multiple systems and departments was also a time-consuming, partially paper-based task for faculty in student advisor roles. On average, advisors needed 30 minutes to prepare for each consultation with a student. They needed to compile data from multiple sources, ensuring they did not miss information that was important in providing good advice to help guide each student’s academic journey. Depending on the season, advisors meet with four to eight students per day. With approximately 2,500 advisors working with 30,000 students, a more efficient, centralized approach was needed.

“To drive positive change, advisors needed to see the bigger picture of what’s happening with students across campus,” says Cook. “We saw an opportunity to use technology to evolve our processes, improve student services delivery, and enhance student satisfaction about how they interact with the university.”

Fast, efficient cloud integration

To meet this need, NAU launched a new walk-in Student Service Center to give students even more one-stop shop options for enrollment, financial aid, and tuition payments, using Salesforce as its system of engagement. The biggest challenge was efficiently moving student data from the university’s student information system, PeopleSoft Campus, into the cloud and integrating it properly with Salesforce for education CRM.

Already a user of Informatica PowerCenter as an ETL tool for its data warehouse, NAU decided to use the Informatica Cloud Connector for Salesforce to accelerate its migration to cloud CRM. Informatica’s simple and easy to use integration between PeopleSoft and Salesforce Higher Education Data Architecture (HEDA) allows users to quickly view all student information through a single screen.

By using Informatica to distinguish and load only the deltas—the data that has changed since the last full load—NAU can refresh its data warehouse every hour instead of once a day. This means data on admissions, prospects, financial aid, and student group affiliations is always fresh, helping call center staff and advisors provide better service.

“Informatica Cloud Data Integration makes it easy for us to bring our PeopleSoft data into Salesforce so we can be more strategic in meeting the expectations of 21st Century students,” says Cook. “Because of Informatica, we get the data in much faster, which helps us gain more value from our cloud CRM initiative.”

The university is also using Informatica Cloud Data Integration to bring data from Civitas Learning into Salesforce to better measure student success. “This allows us to use predictive analytics to help shape our conversations with students,” says Cook.

A more connected campus

NAU is now much more efficient and connected, with a unified view of students and near-real time data. By tracking how students are engaging with different departments on campus and through the call center, the

university gains a holistic view of every student, along with the ability to share student information across departments and utilize it in new ways.

“We can use Salesforce to send automated, relevant marketing announcements to help increase enrollment,” says Cook. “We’re also setting up early warning alerts that notify us if a student has dropped below certain thresholds or might be in danger of leaving school, allowing advisors to reach out proactively to boost student performance and retention.”

With all student information in one place, NAU’s call center can provide much faster, more responsive service, with only three to four minutes of wait time for each caller. Call durations have decreased with faster time to resolution. Training periods for call center staff have dropped from more than two weeks to just a few hours. “By providing consistently great service, we’re helping recruitment by giving prospective students a positive first impression,” says Cook.

Engage 21st Century students

The university has streamlined the student advisory process, giving advisors instant access to near-real time student information and supporting efficient, paperless administrative processes. Advisors no longer need to spend time collecting information that students already supplied to other departments, such as financial aid. Instead, they can focus on providing the best and most complete guidance to students. Collectively, NAU is saving thousands of hours per year, redirecting that time into education versus administration.

“With Informatica Cloud Data Integration behind our education CRM initiative, we engage with students in ways that make them want to enroll and come back,” says Cook. “Advisors have different, more student-centric conversations. Students see the collaboration we have across the university and how it helps us be responsive to their needs and concerns. And because we have the right tools in place, we can spend more time unlocking value from our data and less time getting it where it needs to be.”

About Northern Arizona University

Founded in 1899, Northern Arizona University is a public university centered on students. Its academic programs, research, public service, and creative endeavors enrich lives and create opportunities in Arizona and beyond. NAU develops solutions to challenges and drives innovation in a supportive, inclusive, and diverse environment.



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