THE HIGHER ED EXCHANGE

6 TIPS FOR ENGAGING
NONTRADITIONAL STUDENTS

TOOLS FOR STUDENT SUCCESS:
YOUR GUIDE TO STUDENT JOURNEY MAPPING

THE SKAGIT VALLEY COLLEGE STORY:
A FOCUS ON STUDENT SUCCESS

TARGETX

WELCOME
TO THE SPRING EDITION

When we set out to write what's now our second edition of the Higher Ed Exchange, we had one goal in mind — sharing as many best practices as we can to help schools recruit and retain nontraditional students.

Why nontraditional students? We strongly believe that what used to be considered nontraditional is now, well, traditional in higher ed. Over 74% of current college students have one of the characteristics that are typically considered "nontraditional" yet many schools are still focused on the typical 18-year-old student fresh out of high school.

We hope you'll enjoy (and share!) the content in this edition. To learn more about TargetX or to share this magazine with your colleagues, visit: **targetx.com/exchange**

YOUR NEW ADDICTION

FOR THE LATEST HIGHER ED INSIGHTS:
TARGETX.COM/EXCHANGE

"One problem for adults is the constant, competing tension between life obligations and educational obligations."

Jamie Merisotis
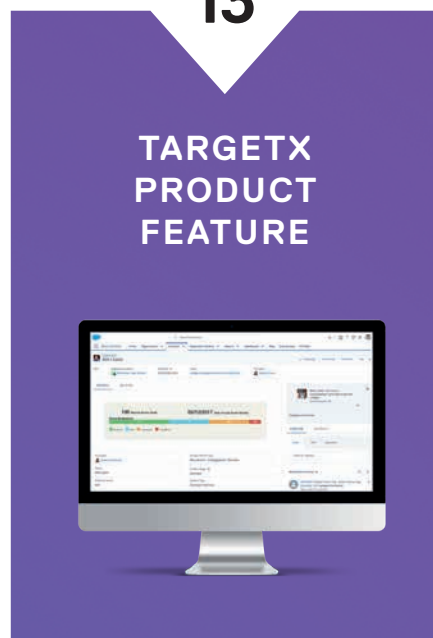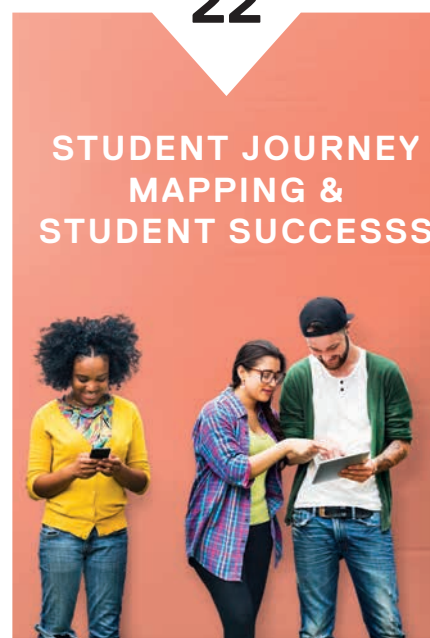Lumina Foundation for Education

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6 TIPS FOR ENGAGING NONTRADITIONAL STUDENTS

BY KATLIN HESS, TARGETX

When we think of college students we typically envision a bright-eyed, 18-year-old high school graduate who—with financial support from their parents—will enroll in a four-year college where they'll live full-time in an ivy-laden dormitory and graduate in four to five years.

But when 74 percent of students share at least one of the characteristics that are typically considered "nontraditional," institutions need to think differently about engaging these students.

So, what factors make a student nontraditional? Nontraditional students are those who are over the age of 24 and share one or more of the following characteristics:
- Wait after high school to enroll in post-secondary education
- Attend college part-time while working full-time
- Have dependents who are not their spouse or partner
- Are financially independent from their parents for purposes of financial aid
- Completed their high school degree through a certificate or GED program

Nontraditional students typically take longer to cultivate and can be less motivated towards enrollment, partly because they have more responsibilities at work or home, and financially.

And because of their unique characteristics, they may be more vulnerable to challenges that affect their health, stress levels, and ability to persist to enrollment or graduation. The choice to return to school is often a stressful and frightening one, meaning nontraditional students need more cultivation and support.

How can you better engage with your nontraditional prospects?

MAKE IT EASY FOR STUDENTS TO ENGAGE WITH YOU, ON THE DEVICES THEY USE MOST

Long or complicated information requests, applications, or financial aid forms may intimidate nontraditionals. Keep it simple, streamlined, and easy to access. Students shouldn't have to pinch and squeeze if they're accessing your website or filling out forms on their phones, and their work should be automatically saved.

I usually suggest people try it for themselves. When is the last time you filled out an inquiry form on your website or registered for one of your events from your phone? Is the experience an easy one, or is there work you can do to improve the student experience?

FOCUS ON YOUR "HIGH POTENTIAL" PROSPECTS

With so many students to keep engaged with over a long cultivation period, it can be unrealistic to maintain that high level of attention for every single prospect.

Use the information you have on prospects to narrow down those who are most likely to enroll with strong supports and who are the best fit for your institution. Then, focus on them.

MEASURE AND OPTIMIZE

Make sure that you are getting a return on your outreach and recruitment investments.

See which campaigns and strategies have had the most impact and optimize those, while scaling back on those that are wasting resources. There's no need to reinvent the wheel if something's working well.

KEEP ENGAGEMENTS ONGOING

Research indicates that once a prospect visits a college website, they'll stay in the consideration phase for an average of two months, and for as many 18 months. For non- traditional students, that phase can be even longer. Ensure you maintain personalized touch points with these prospects for as long as it takes to convert them.

Sometimes it seems like nontraditional students just wake up one day and decide to enroll. Which for a lot of these students, isn't far from the truth. They may have been thinking about enrolling for a long time but a major life obstacle was standing in their way. How can you make sure you're top of mind once that obstacle is removed? Nurture, nurture, nurture: keep those students engaged throughout the funnel. You never know what might inspire a student to enroll.

LEVERAGE YOUR TECHNOLOGY TO PERSONALIZE YOUR COMMUNICATIONS

All students are individuals with unique needs and desires. As much as possible, they should be treated as such. Generic bulk emails that are transactional don't work, nor do static websites that don't appeal to a wide diversity of interests and programs.

If a student has previously told you what their intended major is, or has attended an event on campus, use that in your communications! Giving students specific, personalized information in your communications helps build a sense of community and helps them envision themselves on your campus. Speaking of which…

HELP STUDENTS "SEE" THEMSELVES ON YOUR CAMPUS.

Regardless of age, all students ask themselves if they will "fit in" at a particular institution. You should approach your website, social media, and outreach with that question in mind.

Think through the engagement experience for your nontraditional students. For example, a single mother in her 40s is probably not going to see herself on a campus with a website that highlights residence life or doesn't easily provide the information important to her, like scheduling and cost. What can you do to make it easier for your nontraditional prospects to envision themselves on your campus?

FINDINGS FROM THE

2019 *Adult StudentsTalk™* Survey

TARGETX & STAMATS

ADULT STUDENT MARKETING
EXPECTATIONS VS. REALITY

54% OF GRADUATE SCHOOLS

are still purchasing lists of prospective students.

AND OF THOSE WHO DO…

less than 19%

are seeing success with this lead generation tactic.

WEBSITES ARE THE **MOST EFFECTIVE** RECRUITMENT TOOL FOR ADULT STUDENTS.

66% OF ADMISSIONS STAFF

find offering walk-ins for both adult undergraduate and graduate students effective.

BUT ONLY

17%

ARE HOSTING VIRTUAL INFO SESSIONS FOR THESE STUDENTS.

61%

ranked adult undergraduate student recruitment as **very important** to their institution.

BUT ONLY 45% HAVE A RECRUITMENT PLAN FOR ADULT UNDERGRADS.

AND ONLY

34%

HAVE A DEDICATED RECRUITMENT BUDGET FOR ADULT STUDENTS.

DATA COLLECTION, **DEPARTMENTAL SILOS**, AND **POOR REPORT STRUCTURES** ARE THE PRIMARY CHALLENGES TO ACCESSING THE DATA THAT MARKETERS AND RECRUITERS NEED.

A FOCUS ON EXCELLENCE AND STUDENT SUCCESS AT SKAGIT VALLEY COLLEGE

BY KRISTI KOOYMAN, TARGETX

With a focus on excellence and student success, Skagit Valley College set out to implement a new advising model in 2015. But advising turned out to be only one small piece of an initiative that would truly transform not only the student experience, but how the entire SVC community defined—and invested in—student success.

Skagit Valley College is a two-year community college in Mount Vernon, Washington, about an hour north of Seattle. Their student headcount is around 10,000 students, with full-time equivalents at just over 5,000. They're a multi-location college, with their main campus in Skagit County, where they have about two thirds of their population, and satellite campuses in more rural counties accounting for the remaining third of their population.

Their students are split fairly evenly between those planning to transfer to four-year institutions, and professional technical students. They also have a Basic Skills population, including English Language Acquisition students and students seeking high school credentialing, with a strong focus on transitioning those students into their transfer and professional technical pathways.

I've worked with Skagit Valley College for several years, as their TargetX project manager and then account manager. I recently had the opportunity to talk with Alison Fernandez, Director of Advising and Retention, and Jennifer Veltri, Title III Grant Activities Director, to learn more about how SVC implemented sweeping and meaningful changes around equity, achievement, retention, and success.

Prior to 2015, SVC had a faculty-based advising model, consisting of faculty counselors and disciplinary faculty members. The faculty counselors had case loads of up to 900 students and many of the disciplinary faculty were neither well-trained nor practiced in advising students. Needless to say, a fair

number of students didn't have access to high quality advising support. At the same time, SVC offered comprehensive advising in selected special population programs with lower advisor-to-student ratios and case management support.

In 2015, SVC secured a grant through the US Department of Education Title III Part A program. The grant enabled them to expand the case management model to all SVC students and institutionalize this higher degree of comprehensive advising. They added additional advising staff to support students at intake and through their first several quarters, primarily through the development of educational plans. This shift helped build more reasonably sized student case loads and enabled greater scaffolding of the advising support system for students. Professional advising staff, known as "navigators", coexist with faculty counselors and disciplinary faculty, and SVC approaches assigning advisees based on their needs, transitioning them to faculty advisors at the appropriate time.

SVC also organized their programs into eight different areas of study, with navigators and faculty counselors assigned to specific areas. Instead of having generalist advisors who need to know every degree, advisors are now able to become experts in their specific area of study. In addition, they're taking a "boutique" advising approach for students who are part of any number of special, minoritized, or traditionally under-served populations — this could include students who meet certain income qualifications, first-generation students served by the Federal TRiO programs, or members of SVC's Maestros Para el Pueblo, a program for up and coming teachers of color in partnership with local school districts and nearby four-year universities.

These special programs may have additional requirements that call for a more intensive case management approach, as well as additional clerical work.

Alison speaks with pride and passion as she explains, "We have made an effort for special population navigators to be reflective of the population they're serving. We know that it's important for students to have affinity to faculty and staff, so we've worked to create that in our staffing and hiring processes." Interestingly, Alison shares, "The majority of our navigators at this point are actually special population navigators, because we have funds through federal and state grants that are earmarked to serve specific populations."

As if turning their advising model on its head wasn't an ambitious enough undertaking, SVC also implemented a First Quarter Experience (FQE) course for students, based on their area of study. The advisor for that area of study is engaged in the course throughout the quarter, so students are able to begin building a relationship with their future advisors. The FQE course has specific outcomes, one of which is education planning conducted in one-on-one sessions between the advisor and the student. Their educational planning tool is also integrated with their TargetX CRM, which allows them to analyze the data to see how their students are progressing with their education plan.

What prompted this drive for change? Jenny acknowledges that retention numbers needed improvement, but there was also a presidential change in 2012 that initiated some meaningful dialogue at the college. Alison shares that Dr. Thomas Keegan "came in with a strong equity framework, looking at retention rates not only for the overall student body, but also looking at closing opportunity gaps."

SVC recognized that most of higher education was built and intended for the majority population, not minoritized populations, and they began evaluating the systems and structures on their own campuses. For Alison, "it's about changing practices to essentially change the feel, the face, the sense of belonging of the college, so that we

can support our minoritized populations, and increase our success in closing the opportunity gap."

When SVC applied for the Title III grant, the college was very specific in their plans for the funds. A commitment was made to a number of specific interventions and initiatives that would target retention, including the First Quarter Experience, and the navigational advising model. "We knew that this [advising model] had great returns in the past, so we wanted to build that out further," says Jenny. "We also researched other options, and the concept of a First Quarter Experience had shown great retention gains at other schools, so we modeled our program after those."

Another important piece of Title III is adding technology to track progress and evaluate the success of initiatives. It was through Title III that SVC was able to purchase the TargetX Recruitment and Retention Suites, and Jenny acknowledges these have been critical to their success. "We did not have a great way to report on specialized populations or to track how those students were doing. TargetX has really been pivotal in that work and in implementing our case management model, because we can so easily reach out to those students — and we can be very targeted with our interventions."

As we talk, I find myself thinking that what they describe is serious, holistic

institutional change — rewriting the entire philosophy of the college. It sounds like there's not a part of the institution that this initiative hasn't changed. Jenny agrees. "We call it our student achievement strategy, and we reference it as an institutional and cultural change that's grounded in equity, and supporting our students, faculty, and staff. It has been a big shift!"

I asked Alison and Jenny to share what these initiatives have meant for their students on an individual level. They noted their most interesting feedback comes from students who attended SVC several years ago and recently came back. According to Alison, "They return and say things like, 'I never got this level of assistance when I was here before. I didn't understand what I was doing. Now, I love coming to this office because you know me!' We're able to know students on an individual level now."

Are they seeing results? The average fall-to-fall retention rate for the Washington State Community and Technical College system is about 45%, a number that's close to community college retention numbers nationwide. For the SVC pilot group—the first class of students who participated in the FQE and the navigational advising model—the retention rate was 55.16%.

For the next class, it was 61.83%. Alison, who does some advising herself, acknowledges that increases in retention rates are a big win, but she's particularly

proud that equity gaps are also closing within those retention rates.

Skagit Valley College approached this initiative thoughtfully and executed it successfully. What advice do they have for other schools looking to undertake an initiative like this? Jenny and Alison anticipated this question and had a response ready: "Keep in mind that the student experience takes place in both the classroom and outside of it, so when implementing changes to increase student retention, both spaces must be addressed and the student voice must be centered within that process. Being data-informed and data-driven is a time consuming process, but invaluable to strategic, equity-minded decision making."

Alison expounded, with a charge for leadership: "Change management and project management play a strong role in the success of any initiative as it is implemented. People are often afraid of new technology. Change in general feels threatening; to go from something you've been doing for 20 to 30 years to feeling like the landscape in which you're operating is changing — that can make you feel invalidated in your life's work. Middle managers tend to do the majority of the work, but hierarchical support is symbolically important. We know the president or vice presidents aren't going to implement TargetX, for example, but it's incredibly supportive when they voice the importance of the work. And then empower the people that know what they're doing to go do it!"

I'm humbled and inspired by the way Jenny and Alison speak about student success — with passion, sincerity, clarity, and authority. If you find yourself at the TargetX Summit, or another conference or event where you can rub elbows with the Skagit Valley College team, I'd encourage you to buy them a cup of coffee or a glass of wine and pick their amazing brains. They have much to share, and they represent the very best of those who work in higher education.
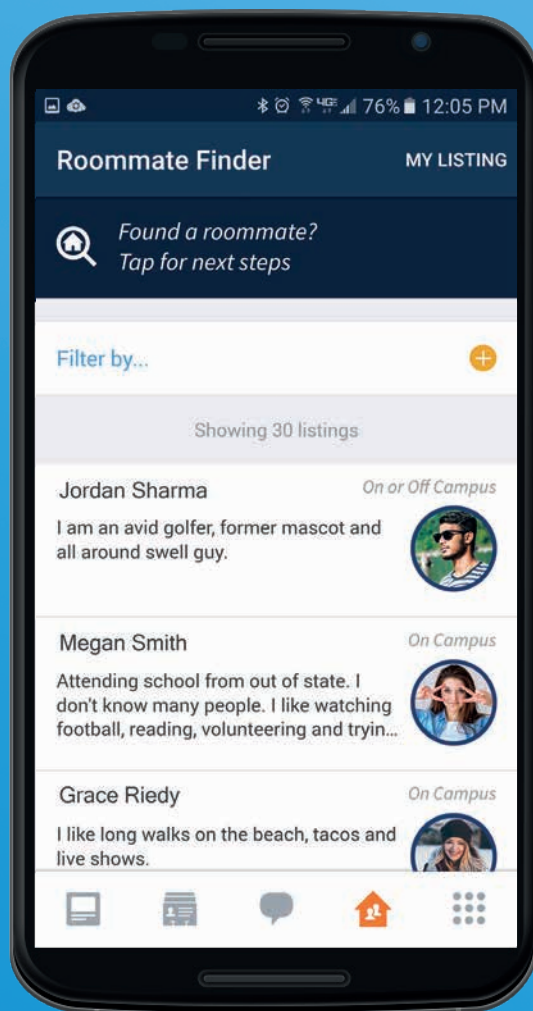
SCHOOLS APP

"Students who join Schools App are about four times more likely to enroll at George Mason than students who don't use the application."

Matthew Boyce
Director of Enrollment Management, George Mason University

Institutions that facilitate private, digital communities via mobile apps are gaining a competitive advantage and seeing increased enrollment conversions as a result. These apps allow students to connect with one another as well as staff, form cohorts based on shared interests, and send messages all in one dedicated place. "Something we've found is that students don't want to just find someone who is in their college and has their major. They want to find someone who is in their college, has their major, is from where they are from, and likes the same music and movies. They are really trying to find their best friend before they even come to campus," says Casey Thomas, Assistant Director of Digital Engagement at Arizona State University. The more engaged students are with your university, the more likely they are to enroll, and university-sponsored mobile communities are continuing to move the needle—a fact that Matthew Boyce, Director of Enrollment Management at George Mason University, can attest to.

"Students who join Schools App are about four times more likely to enroll at George Mason than students who don't use the application," says Boyce. "For example, 60% of students from outside of Virginia (who we yield at a much lower rate) who joined Schools App enrolled at Mason. Only 4% of students who didn't join the app did so. We think that speaks volumes," says Boyce.

TARGETX RECRUITMENT SUITE

Empower your institution to improve the recruitment process and increase enrollment with our comprehensive CRM solution. Transform enrollment management and drive admissions productivity with intuitive, higher ed-focused functionality.
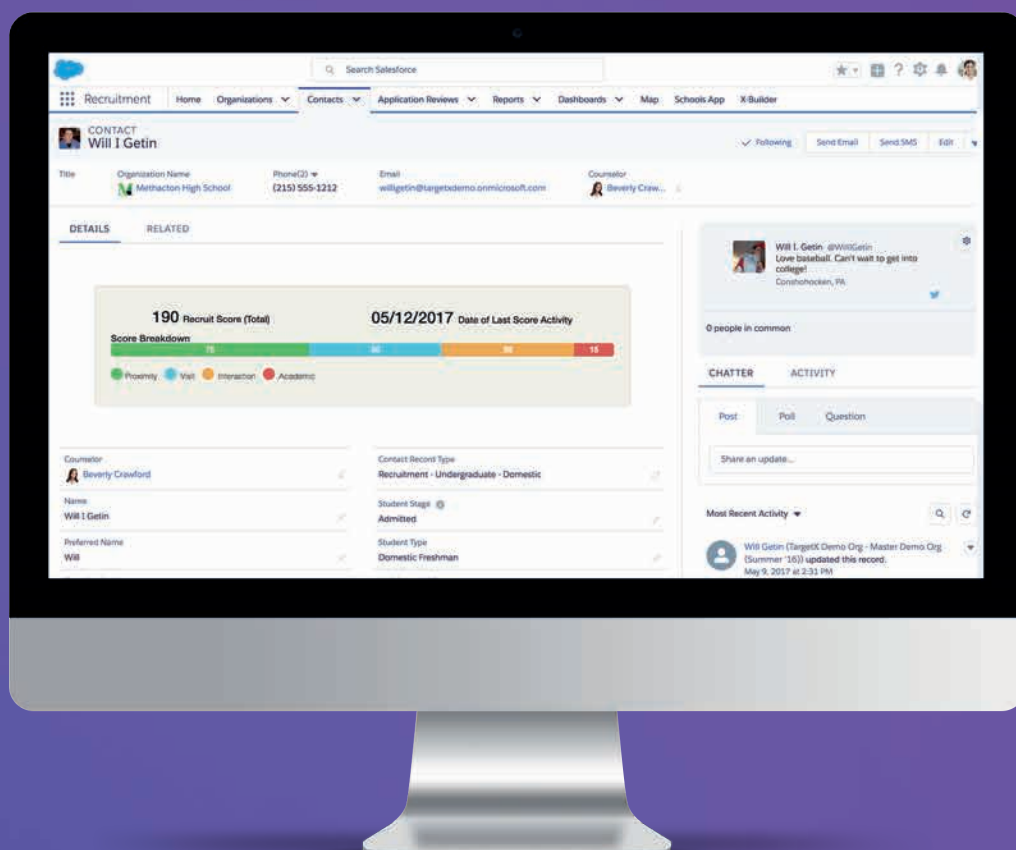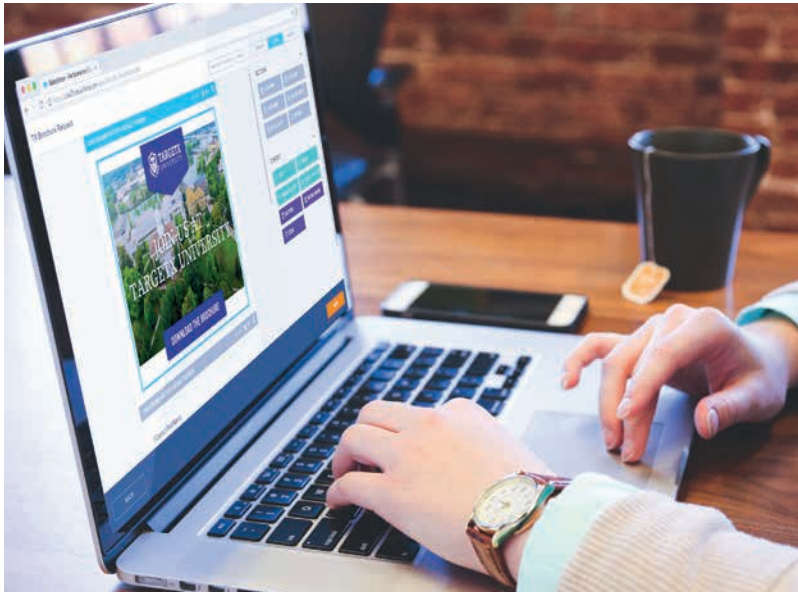
RECRUIT YOUR BEST-FIT STUDENTS

The TargetX Recruitment Suite gives you the ability to build relationships with prospects, track engagement and manage your recruitment efforts — all in one place. Send targeted email campaigns and SMS messages, organize, execute and evaluate all of your events, and manage walk-in appointments. The best part is, you can automate and track those engagement touchpoints and interactions seamlessly in the CRM.

GET STUDENTS ADMITTED AND ENROLLED

Streamline the admissions process with our mobile-first Online Application, which allows students to easily track their progress, complete and submit their application anywhere, from any device. Then easily review applications, share notes and notify students of their application decision using our Application Review tool and Student Portal. Once students are admitted, continue engagement in our branded mobile community, Schools App.
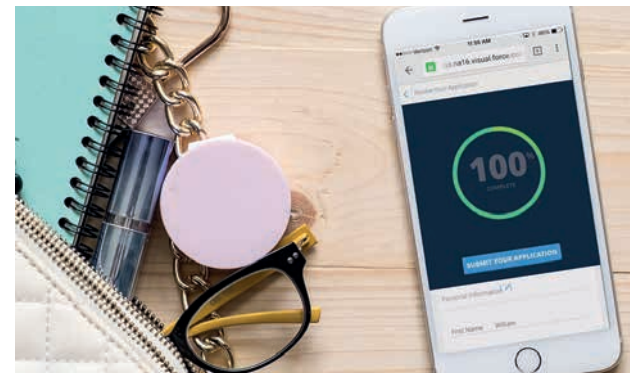
MANAGE YOUR DATA, ALL IN ONE PLACE

The TargetX Recruitment Suite allows you to track every touchpoint your staff has with students, from emails and events to applications and enrollment deposits. The CRM also integrates with your Student Information System and other data sources, giving you a true 360-degree view of your prospects.

TARGETX ENGAGE

TargetX Engage allows you to manage your walk-in appointments while helping your advisors partner with students to achieve their goals and aspirations.

TargetX Engage provides a multi-faceted platform for advisors and students. On the student side, it allows students to sign up for meetings with their advisor and provides a dynamic, real-time display view of the waiting queue so students can track their place in line. It even triggers SMS notifications when a student reaches the top of the queue or has been called in by an advisor so they can arrive on time and make the most of their session.

For advisors, it provides the ability to view the current waiting queue, re-prioritize that queue, and select students from the queue to conduct a timed meeting. This ensures that your team can facilitate high impact conversations with as many students as possible. Best of all, advisors can take notes from each session that are automatically uploaded to the student record in the TargetX CRM.

Waiting List

1. **Tom J.**
   Advisor: First Available
   Jul 27, 2018, 3:42:25 PM

2. **Tyra J.**
   Advisor: First Available
   Jul 27, 2018, 3:43:29 PM

3. **Barry T.**
   Advisor: First Available
   Jul 27, 2018, 3:43:51 PM

4. **John S.**
   Advisor: First Available
   Jul 27, 2018, 3:44:27 PM
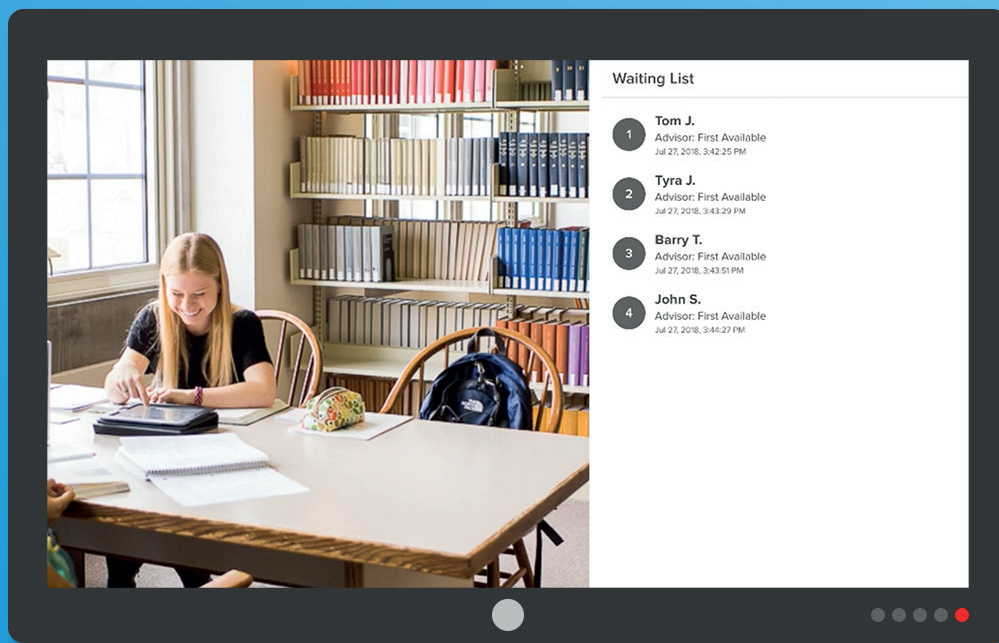
TARGETX INSIGHTS

TargetX Insights makes your data actionable—helping your team make more informed decisions using out-of-the-box dashboards designed specifically for higher education.

We know that many offices struggle with challenges like year-over-year and complex reporting when it comes to visualizing existing data today. We built TargetX Insights to provide higher ed institutions with robust dashboards and analytics based on real-time data from multiple data sources (like your SIS and CRM) to help departments make data-driven decisions.

Since the privacy of your prospects and the security of your information is a top priority for us, TargetX Insights will only be pulling anonymized or aggregated data. It's built on top of Amazon Web Services' infrastructure, which is known for its encryption and stability. This infrastructure also allows you to receive updates automatically as new dashboards

and analytics are vetted by our data science team, without package installations or hassle.

As Insights evolves, it will bring together the data you collect every day using the CRM, third-party data like higher-ed specific roll-ups and research, as well as general census and regional statistics. These additional pieces of information will be layered together in order to paint a better picture of what the landscape looks like and what you need to do to effectively recruit your future classes.

From interactive, YoY enrollment funnel visualizations to historical campus visit registration comparisons, your team will be empowered to draw conclusions from your data and take action accordingly—all thanks to TargetX Insights.

TARGETX RETENTION SUITE

Renew your school's focus on student success by providing a more personalized student experience with our all-in-one Retention CRM solution. Motivate lifelong success and delight students with robust tools to support your retention efforts.
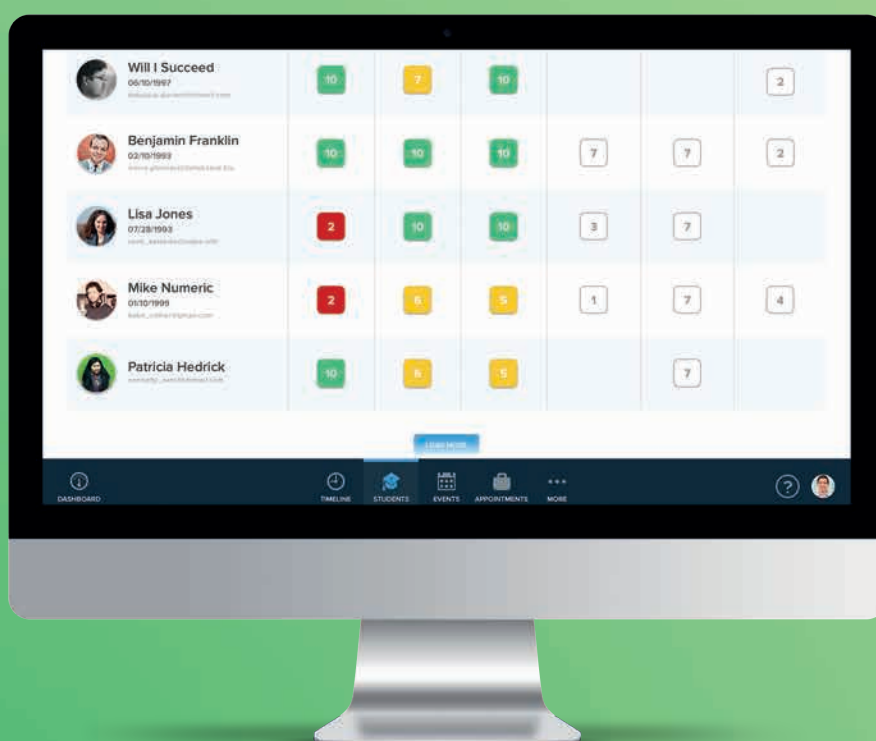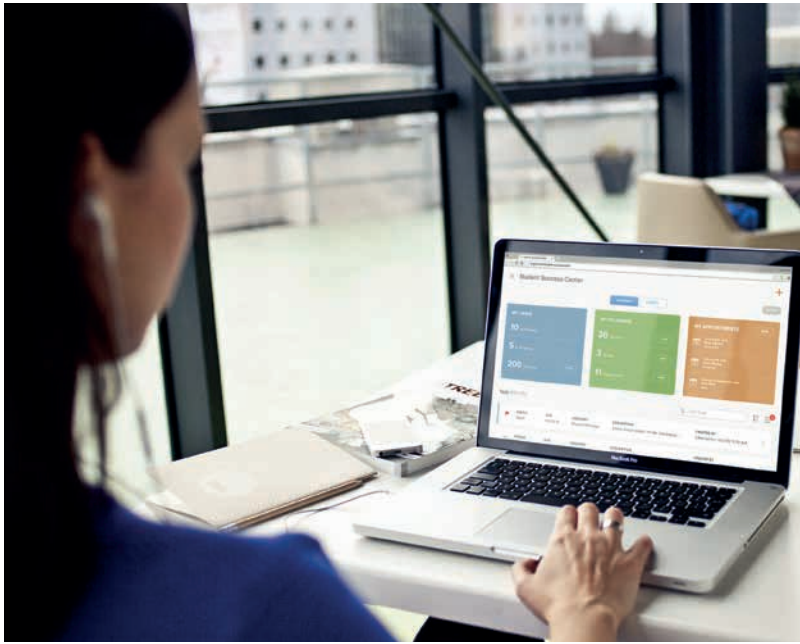
PROACTIVE STUDENT ENGAGEMENT

Many institutions face a retention problem with an average of 1 in 3 students not returning for their sophomore year. The TargetX Student Success Center compiles critical student data so that advisors and faculty can take a proactive approach, anticipate student needs, and easily identify who might be at risk.

SET YOUR STRATEGY, SEE IT THROUGH

The TargetX Retention Suite gives advisors, faculty, and other campus members who support student success the tools they need to engage students earlier and quickly identify areas of concern like financial or academic issues. Our tools allow you to build relationships with students through targeted email campaigns and 1:1 text messages, easily schedule appointments with our mobile-first Appointment Scheduler, and build a virtual community in Schools App to foster student success on your campus.
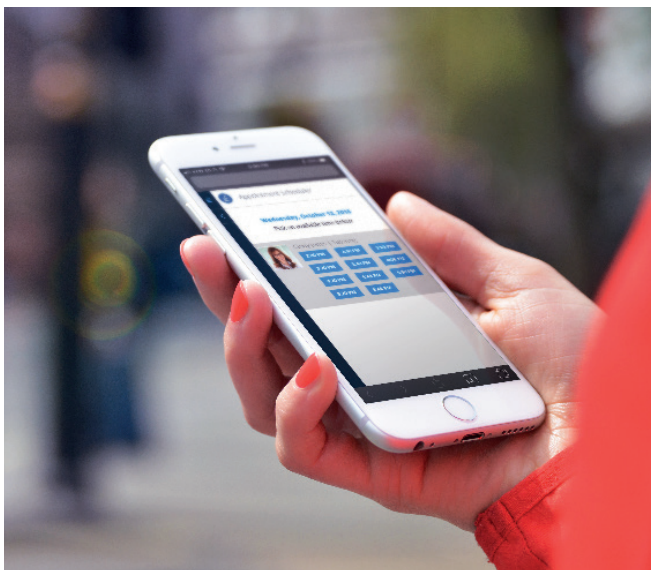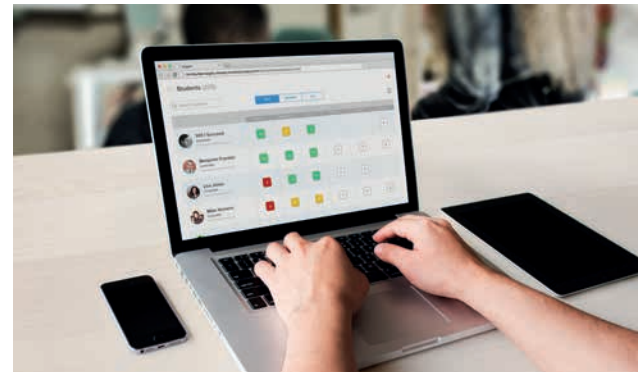
MOBILE-CENTRIC SOLUTIONS

Students today expect a mobile experience in all aspects of their life. Impact your persistence and retention rates and connect with students by leveraging the tools they use most. Meet them where they are with solutions built to be viewed from a mobile device.

"Retention has become a national issue because most campuses are unable to see the signs that a student is struggling. It's time for institutions to identify and truly understand their students' needs in order to get them back on the right path. With the holistic view of a student's record our CRM provides, we can be proactive rather than reactive."

Hamid Etesamnia
Chief Information Officer
Brandman University

STUDENT JOURNEYS & STUDENT SUCCESS

Assessing Your Engagement Practices Across the Student Lifecycle

BY MEAGAN WOOD, TARGETX

Sometimes, as student services professionals, we can get so caught up in day-to-day work that we forget to pay attention to the ways we are, well, serving students. This came into high relief for me when I was working in enrollment services at a small graduate school. I was tasked with evaluating our admitted student onboarding process — how we transitioned our admitted students to enrolled students at the start of their program.

For a long time, our institution had operated under the assumption that because we were a small school, that pre-enrollment time period was the perfect time for incoming students to start interacting directly with various offices on campus. Each student-facing department —student billing, registration, student life, financial aid, academics, library services

—was individually responsible for their own communication to incoming students. We loved the idea that students would be getting accurate information and building relationships with the staff members they'd interact with once they were enrolled. While this idea was well-intended, we noticed that our students were increasingly feeling overwhelmed when classes started.

They were frustrated, and seemed poorly prepared for some of the basic tasks they needed to accomplish.

I started investigating this problem by gathering representatives from all those campus departments, and compiling a master communication list — what information was each office sending out, and what did it feel like as a student to receive these communications? As the

master list took shape, it became very clear why our students were struggling. Multiple technological systems, different required activities, different deadlines, a wide variation of detail in explaining processes...it was no wonder our students were frustrated!

Based on what we learned from this process, we reconfigured our incoming student communication plan focusing on the experience of the student, as opposed to approaching the problem from the perspective of each individual department. Our next incoming class started courses with a much better sense of preparation —and lower frustration level —than previous years.

Supporting the success of students requires knowing them well — but sometimes our knowledge gets siloed.

When silos get constructed on campus, students are the ones who bear the burden of navigating between them. At TargetX we're committed to making every student a graduate and every graduate a success, so our Product team developed a framework to analyze and organize information about the student experience across silos — the groups they fall into, their educational journeys, and what factors influence them on the road to their success.

This framework —we call it "student journey mapping"—provides a clearer picture of what it's like to be a student engaging with their higher education institution, which we are using at TargetX as we continue to develop our solutions.

As helpful as this framework has been for us, its utility isn't limited to product development. It's also a practical tool to use on campus as a starting point for gathering information and framing student services in terms of the experience of students themselves. We are hoping that by sharing our student journey mapping framework with you, you'll be able to use it as a different kind of window into your campus.

Student journey mapping starts with building a set of questions about the student experience:

- What kinds of things do they do, and how often do they do them?
- What are their big questions? What values are shaping those questions?
- What is their primary goal?
- Who is influencing them in their personal lives?
- Who from the school are they in contact with? Departments, individuals?
- What technological systems do they interact with?

These questions then get applied in two directions — defining student types, and fleshing out detailed information about student types over time. Student types are groups of students who share similar answers to those questions, like "first-generation students" or "students living in campus housing." These types are not necessarily all mutually exclusive, and one individual student may match with several different student types. Each type is designed to capture a specific set of student experiences. As student services professionals, you may be able to start listing the most common student types present on your campus just off the top of your head — that's a great place to start!

The next piece of the student journey mapping framework involves focusing on one particular student type, and filling in answers to the major questions for different time periods in the student lifecycle. For our purposes, we have broken down the time periods as follows:

- Pre-Application
- Application
- Admitted, Not Yet Enrolled
- Currently Enrolled
- Graduate

We created a matrix with the major questions along one axis and the time periods on the other, allowing us to fill in the narrative for a particular student type in a grid (see above).

Examining the student journey for a particular student type over their entire relationship with the school paints a vivid picture of the student's educational path. It's easy to see how each time period influences the next, and what threads are carried through the journey as a whole.

While this big picture is certainly helpful, the student journey framework can also be used to examine specific areas. If your focus is on one particular time period, like mine was when I was examining our incoming student onboarding process, you can zoom in and get more granular. This framework can highlight problem areas, gaps in service, or particular needs in ways that wouldn't be as visible otherwise. As much as developing a campus-wide enrollment initiative or retention initiative would be helpful, small changes can still have a big impact.

By applying the lens of student journeys to student services, we're prioritizing the holistic student experience. As silos of knowledge get broken down, we get better at serving our students. When my previous colleagues and I committed to prioritize our incoming students' experience as a whole, we were far more successful at serving students in our various departmental capacities.

It's our hope that this student journey framework aids you in your efforts to serve students as well.

For more information and to download an example of the matrix featured above, visit: **targetx.com/student-journey**

TARGETX AND SALESFORCE
HEDA

BY ABE GRUBER, TARGETX

In January 2018, TargetX was announced as one of the first Salesforce HEDA Core Compatible Partners. At TargetX, we've been proudly building higher ed focused solutions on Salesforce for nearly a decade— embracing the power of the Salesforce platform while adapting and innovating for the evolving needs of higher education.

TargetX is known for our student-focused and mobile-first technology, allowing tomorrow's college students to progress through the entire enrollment funnel from the palm of their hands. We're eliminating silos on campus and allowing departments to collaborate better, while simultaneously centralizing processes in order to make it easier for people to do their jobs.

At the core of all of this, however, is a topic most people stay far, far away from… data architecture.

To most people data architecture isn't fun, but, for CRM admins and techies, it's the addicting puzzle that never ends. Data architecture is the underpinning to every CRM solution, and despite how good your functionality and tools are, your data—and how it's organized— makes all of the difference.

So, what is HEDA?

HEDA is the Higher Education Data Architecture—a community-driven data architecture and set of best practices designed to configure Salesforce out of the box for colleges and universities.

salesforce.org
HEDA CORE
COMPATIBLE
2018

It's been developed in collaboration with Salesforce partners (such as TargetX), and colleges/universities from around the country.

What does HEDA do?

HEDA provides objects and fields to capture data most commonly used in higher ed, prioritizes students and other campus constituents, and provides deep connections and relationships with other people and organizations. Also, HEDA allows for scalable management of course enrollments and encourages data consistency across and within institutions.

Think of a CRM like a giant filing cabinet; when you first get one, it's essentially a huge box to store things, but it's up to you in how you organize it. HEDA provides an initial framework for organizing and managing your data—specifically around people, relationships, and courses. It allows for complex connections between people and organizations. Being recognized as

HEDA Core Compatible by Salesforce emphasizes this.

How does TargetX work with HEDA?

At TargetX, we're focused on ensuring that our clients, both new and existing, can combine the full benefits of TargetX products with the advantages of HEDA (which is why we're HEDA Core Compatible). Our products have the flexibility to allow institutions to utilize the TargetX data model alone or combine it with HEDA.

To ensure that institutions can take advantage of HEDA with minimal effort, we introduced the TargetX HEDA Toolkit, a software package that mirrors like-data between the TargetX and HEDA data models. This allows institutions to take advantage of HEDA without having to do a full data migration or extensively update existing workflows and data import processes.

SO, SHOULD I USE HEDA?

While no two schools are exactly alike, below are our high-level recommendations around utilizing Salesforce HEDA:

1
MY SCHOOL IS EVALUATING TARGETX/SALESFORCE

We encourage all new TargetX clients to take advantage of our HEDA Core Compatible status by using this data architecture, and it can be easily installed during your implementation. We now install HEDA as a default.

2
MY SCHOOL IS IMPLEMENTING TARGETX/SALESFORCE

Most schools currently implementing TargetX should already have HEDA installed. For those who don't, you should consult with your project manager to determine what, if any, impact this could have on your project timeline and the best way to proceed.

3
MY SCHOOL IS LIVE WITH TARGETX/ SALESFORCE

Since TargetX's data architecture has many of the same data fundamentals as HEDA, there may not be a need for HEDA based on how your school uses your CRM. Installing HEDA after being live for a while can be a project of notable size and may not be appropriate for all schools. We recommend a conversation with our team to determine what's right for you.

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