

TECHNOLOGY SOLUTIONS CASE STUDY



Crandall University Finds Comprehensive Student Solution in RIO Education

CRANDALL UNIVERSITY

Founded by the Canadian Baptists of Atlantic Canada in 1949, Crandall University is committed to its mission of transforming lives through quality education rooted in the Christian faith. The university is located in Moncton, New Brunswick, and serves approximately 1,100 students from more than 50 countries. While Crandall has experienced steady growth over the past few years, it maintains a tight-knit community and small class sizes, providing students with personalized support. Crandall offers bachelor's degrees in a variety of areas and master's degrees in education, management, and organizational management.

SELECTING WDCI GROUP'S RIO EDUCATION

Approximately 10 years ago, Crandall University chose its legacy student system because it was an integrated solution that supported the entire student lifecycle, from prospective student, through graduation, to alumni. The solution also provided integrated student financial administration functionality. When the university learned that its legacy student solution provider planned to retire the student product, Crandall stakeholders began assessing their options for a replacement system.

Peter Lutes, manager of Information Technology Services at Crandall, learned that many peer institutions in Eastern Canada leveraged Salesforce as an underlying platform for their student solutions. To investigate the Salesforce-based student systems available, Lutes reached out to Crandall's Salesforce account representative, who provided a few vendors to explore.

When Lutes and his team met with one of the recommended vendors, WDCi Group, the company proved that it understood Crandall's requirements and could meet them with the functionality and the Salesforce Education Data Architecture (EDA) framework of its RIO Education student system. When WDCi Group demonstrated the capabilities of RIO, it transparently met Crandall staff's requests on the spot. Crandall also saw potential in RIO's extensibility, allowing the college to integrate Salesforce Analytics, Salesforce Student Success Hub for Higher Education, and other Salesforce-native solutions. Crandall signed its contract with WDCi Group to deploy RIO at the end of January 2021. Soon after, the university purchased Accounting Seed, a Salesforce-native solution the college has integrated with RIO to provide the accounting capabilities required for a comprehensive student financial administration solution.

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RIO EDUCATION IMPLEMENTATION

Crandall University and WDCi Group began deploying RIO immediately after Crandall signed its contract in the spring of 2021. The university developed a streamlined implementation timeline that ensured it would transition to RIO before the legacy system reached end of life. Crandall's RIO implementation project team consisted of several university stakeholders, including the registrar, the director of admissions, the marketing director, a business analyst, and the vice president of finance (to assist with student billing).

WDCi Group provided a project manager to guide Crandall through the first few months of the implementation. Over time, Crandall worked with two more project managers who took over at transition points in the implementation. Crandall has worked with the same WDCi developer throughout the entire project. WDCi functional experts have also collaborated with the team on specific pieces of the implementation. Lutes reports that, overall, WDCi Group has provided a high level of support and worked long hours when required throughout the RIO implementation.

Crandall rolled out the majority of RIO's functionality in late August of 2021. It ran RIO in parallel with its legacy student system and began onboarding staff users. In fall 2021, faculty began accessing their class schedules and adding students' final grades in RIO while still using the legacy system for other tasks. Crandall rolled out RIO's housing module later, in early 2022.

In spring 2022, Crandall began leveraging RIO full time, and it brought on a few Salesforce consultants to support the project team in creating and refining workflows in the new system. Crandall implemented one-way integration from RIO to its Moodle LMS that allows RIO to update Moodle. The university has begun discussions with WDCi Group about enhancing the integration to enable grades from the Moodle gradebook to synch back to RIO.

Crandall is still refining and rolling out RIO functionality for faculty and students. Lutes and his team are testing an update to RIO's faculty components to ensure it works well with Crandall's configurations. The university will soon hold faculty training and onboarding. Crandall is also working out the licensing to begin using Salesforce Student Success Hub for Higher Education, which will provide students with a mobile student portal, enhanced appointment scheduling, conversational chatbots, and sentiment surveys.

LESSONS LEARNED AND BEST PRACTICES

Before an institution deploys RIO, Lutes recommends ensuring it has someone with Salesforce expertise devoted to the project. Looking back, Lutes also says it would have been better to expand the implementation timeline by several months, alleviating pressure on the project team so staff could focus more thoroughly on each functional area. He notes that it would

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have been ideal for the project team to run the legacy student system and RIO in parallel for a longer period, through the summer of 2022, and transition completely by fall. At the time, the university stuck to its original year-long timeline of transitioning by spring 2022 because it did not know how long its legacy system would remain supported.

RIO EDUCATION BENEFITS

While Crandall is still rolling out RIO functionality to faculty and students, staff have begun to experience benefits of the new platform. Lutes says RIO provided immediate value for the admissions office by streamlining the university application submission process for applicants and staff and effectively capturing and organizing data from applications. With less manual data entry, admissions staff have more time to work with prospective students one on one. Also, Crandall has worked with agents over the past four years to recruit international students, and since deploying RIO, the university is less reliant on them and pays fewer agent fees. Last year, Crandall's vice president of enrollment voiced plans to hire another international admissions counselor, but after experiencing the efficiencies RIO provides, Crandall decided not to hire another employee.

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Lutes notes that Crandall has grown by 400 to 500 students over the past three years and has onboarded more employees to support the university's growth. RIO provides much-needed functionality to meet the institution's increasing administrative and data requirements. Many processes in RIO leverage automation that saves IT staff time. Previously, Crandall's IT team was responsible for running reports to gather the data that student-facing departments needed to complete critical workflows. For example, when students were approved for scholarships, IT staff ran reports to provide information for student scholarship acceptance letters. Now financial aid staff can access the data in a self-service manner to generate and send acceptance letters.

Staff in the registrar's office have expressed that RIO's features save them time on class scheduling because the platform's timetables enable them to match instructors with optimal times and rooms for their course offerings. Digital class scheduling processes in RIO have now replaced the lengthy in-person meetings Crandall staff and faculty held in the past.

Crandall continues to identify new opportunities for improving processes using the RIO platform and its Salesforce EDA architecture. Currently, the IT team is setting up more email templates in Pardot, which will track new metrics for the university and inform more targeted recruitment and student outreach campaigns.

REFERENCES

For this research, Tambellini interviewed Peter Lutes, Crandall University Manager of Information Technology Services. Tambellini also used publicly available information.



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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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