

TargetX and Concordia University Irvine

TargetX Recruitment CRM offers Concordia University Irvine more reliability and better customer service

Challenges: CUI's existing CRM was being phased out and they were not receiving customer support

The team at Concordia University Irvine (CUI) had been using their existing CRM for years, but it was becoming increasingly clear that the company was phasing out the system to replace it with an updated version. Yet, Justin Wiebe, CRM manager, says that he and Tim Hardin, CRM administrator, were left in a holding pattern. "It was clear that the company didn't care about our product anymore, but we weren't getting any real information. We were never told a specific date for transition, but we weren't being supported either."

In addition, Hardin and Wiebe were struggling with the CRM's lack of customization, third-party connections, and robust field capabilities. "We had maxed out all the fields we could use in the product," explains Wiebe. Additionally, students applying to multiple programs were left frustrated because unless Hardin or Wiebe manually deleted the old record, a new application could not be accepted. Certainly, not ideal for a university that wanted to encourage applicants. These challenges left CUI reluctant to switch to the next iteration of the system.

"The end of life was coming quickly for our CRM. We knew it was time to see what else was out there beyond the company we had been working with," adds Hardin. CUI was not the only university who saw the writing on the wall. An email chain started between a group of institutions who were researching new solutions.

"Two solutions kept rising to the top as alternatives. TargetX was one of them," Hardin says.



CONCORDIA
UNIVERSITY IRVINE

Concordia University Irvine at a Glance

Founded in 1976

Located in Irvine, CA

Private, Lutheran university

4,299 undergraduate and graduate students

Home of the Eagles

TargetX Solutions

Recruitment Suite

Goals

Concordia University Irvine needed a CRM that:

allows for customization and robust field capabilities;

is built on a relational database;

is stable and reliable; and

has excellent customer service attached.

Solutions: The switch to TargetX leads to reliability, expandability, and interconnectivity

The CUI team ultimately chose TargetX because of the quality of the features, the level of customer service, and the fact that the solution is built on Salesforce.

“Salesforce is not going anywhere; it’s a very stable platform compared to some other CRM providers and what they use,” Hardin says. “And Salesforce allows for third-party apps. We use those a lot and that expandability is incredibly valuable to us. We love that TargetX is built on a relational database, which is also expandable. We can have multiple child records per parent, for instance.”

In addition to being built on the powerful Salesforce platform, the TargetX CRM is specifically configured to meet the needs of higher education with a centralized data system interconnected with reporting, strategic communications, and event management tools. With TargetX, institutions manage their prospects, schools, campaigns, events, and student engagement from anywhere, at any time — all in one place.

“We’ve been especially happy with how easy it is to use the Events management system and the quality of the communications we now have with students and prospects through our email campaigns; streamlining we just couldn’t do in our previous system,” says Wiebe. “The ability to drip email campaigns in TargetX makes a big difference and allows us to do a lot more with our email marketing.”

CUI is particularly pleased with the support and extras they receive as customers of TargetX. “The level of customer service is great,” says Wiebe. “Also,

things like the TargetX online forum where you can get info about products and new releases, submit support cases, talk to other people using TargetX, is a nice little resource that we did not have before.”

Results: TargetX CRM improves student communications, increasing student enrollment

Since converting to the TargetX CRM, CUI has improved student communications and as a result, increased student enrollment.

“After our first full year using the TargetX CRM, we’ve had a roughly 10 percent increase in our undergraduate population. I feel comfortable saying that the CRM had a positive impact on those numbers,” says Hardin. “Our experience with TargetX has been extremely positive. I would definitely do it all over again.”

