

## TargetX and HERS (Higher Education Resource Services)

With recent plans for expansion, HERS required a robust and scalable CRM that could grow with them

**Challenges: A Recruitment Suite and Online Application that seamlessly support a growing organization scaling its programming and events**

HERS is a leadership development and research organization that is dedicated to creating and sustaining a diverse network of women leaders in higher education. For the past 46 years, HERS has been largely known for its signature leadership development program, the HERS Institute. Recently, HERS has expanded its work, offering more program services, activities, and events while simultaneously engaging in more research.

“Many times, when people think of HERS, they only think of the HERS Institute. We are much more than that and we needed to be in a position to better express that,” says Janet Ash, Director of Finance and Operations.

HERS underwent a restructure in 2016 and began thinking deeply about how to better communicate their programs, research, and brand more effectively. In order to spread the word about the diversity of HERS’ offerings, the organization needed an improved CRM. Their existing system was not applicant-friendly, lacked an intuitive user interface, didn’t allow for much customization or scaling, and did not merge information into one streamlined location — which left staff scrambling to put disparate pieces together into one coherent puzzle.

“Instead of having various platforms all over the place, housing all different types of information, we needed one centralized home,” Ash explains.

With the expansion of HERS’ offerings, the organization also required a CRM that could handle the level of events they were hosting with an easy-to-use, attractive attendee interface; simple RSVP functions; automated email confirmations and reminders; and the ability to pay online.



### HERS at a Glance

Founded in 1972

Headquartered at the University of Denver in Colorado

Focuses on leadership development of, and research on, women in higher education

Committed to achieving equity, inclusivity, and excellence in higher education

### TargetX Solutions

Recruitment Suite

Online Application

Application Review

### Goals

HERS needed a CRM that:

would help them better spread the word about their growing diversity of programs, events, and research;

is user-friendly and scalable;

is built on Salesforce to consolidate existing data and platforms;

has a robust events function that serves attendees from invitation to follow-up; and

offers a customizable online application.

## **Solutions: The TargetX Recruitment Suite with Online Application and Application Review**

With the adoption of the TargetX Recruitment Suite, including the Online Application and Application Review tool in June of 2016, HERS checked every box on their list and then some. Ash explains the crux of that transformation: “Now, I can see the whole history of our organization: all of the information and data on our applicants, communications, programs, workshops, and events — all in one place.”

The TargetX Recruitment Suite is built on Salesforce, which allows HERS to consolidate and maintain data and historical information on touchpoints with sponsors, applicants, and attendees that can be accessed with the click of a button. Now, HERS knows exactly where its applicants are coming from and has a “much more functional recruiting process,” says Ash. “For example, it’s great recruiting the presidents of institutions directly from the TargetX Email module, and then, having a historical record right there in Salesforce.”

Leveraging TargetX’s Online Application and Application Review tool allows Ash and her team to provide applicants with a clean, mobile-first, and easy-to-follow application that generates a sleek dashboard of actionable checklist items and application status history. With three application review rounds for the HERS Institute each year, and the addition of many more with the expansion of program services and activities, the accessibility of the new application process makes it easy for staff to manage organizational growth.

With the additional programming and enhanced offerings comes the hosting of more events. The TargetX Events tool means that staff can seamlessly advertise, enroll attendees, collect payment, and trigger automated event-related emails. Ash explains in more detail: “We particularly love the ability to send out a simple registration link, collect money for paid events, keep track of how many people are

coming, and send automated emails to registrants to confirm a reservation or remind them about an upcoming program or event. We simply couldn’t do that before.”

## **Results: The TargetX difference is “night and day.”**

Since launching the TargetX Recruitment Suite and receiving grant funding to provide scholarships to applicants for the first time application numbers have undoubtedly increased. Ash says that the “improved interface is a big hit and the difference between the TargetX Recruitment Suite and HERS’ previous CRM is like night and day.” Now, HERS has all the tools they need to support their ongoing expansion thanks to the scalability of TargetX and the Salesforce platform.

“This platform allows a level of customization that was unimaginable with our old CRM and the ability to take advantage of other partners on the Salesforce AppExchange to help streamline other processes is unparalleled,” adds Ash. It’s clear that HERS staff feels empowered by technology to continue strengthening their unique brand positioning and ensure industry recognition beyond their signature HERS Institute.

