TargetX and Worcester Polytechnic Institute

Worcester Polytechnic Institute Calls Adoption of TargetX Recruitment Suite a "No-Brainer"

Challenges: A "glorified document management system" that couldn't support WPI's vision or deliver a best-in-class experience to prospects and students

Worcester Polytechnic Institute (WPI) is a highly selective, nationally ranked STEM institution in Worcester, MA. It's a place known for its innovative curriculum, with many of its graduates going on to become changemakers in their fields. As a result, WPI has been very successful in attracting top students with an interest in a collaborative, project-based STEM education. The high demand for WPI makes enrollment headcount goals less daunting and provides the opportunity for service-focused priorities. The university has set its sights on continually redesigning the student experience to provide cohesion, simplicity, and delight — all while offering best-in-class technology.

Andrew B. Palumbo, Dean of Admissions and Financial Aid, believes that WPI's main competitors in providing excellent customer service are not other universities, but instead, leading companies like Amazon — where customers have come to expect a high level of innovation, responsiveness, and seamlessness. Palumbo says, "There are very few schools really pushing the envelope on maximizing technology and innovating admissions practices. I see WPI as an institution that others will be able to look to for best practices in the future."

WPI admissions had gone paperless a few years before Palumbo's arrival, which was exciting for the team. Since this time, WPI's peers began adopting CRMs while WPI, as an early adopter, had a tool that was a glorified document management system. "It was not a CRM and there were some serious weaknesses," says Palumbo.

The biggest issue was that the existing system was a managed platform. WPI didn't own it and couldn't customize it. All customizations needed to be requested and the company only allowed a short window each year in which to do so. Ultimately, Palumbo says, "three-quarters of requests wouldn't be delivered

Worcester Polytechnic Institute (WPI) at a Glance

Founded in 1865

Located in Worcester, MA

Serves 6,428 total students

14 academic departments with 50+ degree programs

45+ global project centers on six continents

TargetX Solutions

Recruitment Suite

Goals

WPI needed a scalable CRM solution that:

allows WPI to control its own destiny and innovate through customization options;

provides a streamlined portal that works across admissions and financial aid; and

ensures WPI maintains its reputation as a center for innovation.

and WPI couldn't get its existing tools to do what was required." This was less than ideal for an institution known for its inventiveness and being on the cutting edge.

Another challenge was the disconnect between the admissions and financial aid departments. "I think it's an industry-wide weakness that—almost without exception—admissions and financial aid offices are using different technologies and platforms," explains Palumbo. "At most, there's typically one person who has a foot in both worlds that then communicates information. At worst, you've got spreadsheets or weekly printouts on financial aid."

As a leading STEM school lauded for innovation, Palumbo knew WPI needed the security and control to implement its vision, as well as the technology to deliver the best possible student experience.

Solutions: The flexibility, scalability, and customizability of the TargetX Recruitment Suite

Palumbo did his due diligence, exploring all CRM options on the market. While some colleagues recommended the leading competitor, implementing another managed platform would not meet the standards of his vision for WPI.

In contrast, TargetX CRM solutions are designed by TargetX and powered by Salesforce — the worldwide leader in on-demand Customer Relationship Management and cloud computing. This means that institutions have sizeable control and easy access to add-ons, customizations, and edits, along with dedicated TargetX customer success and support teams.

Since WPI adopted the comprehensive TargetX Recruitment Suite, it enjoys regularly refreshed admissions dashboards that combine information from their SIS and deliver data from across admissions and financial aid for a seamless student experience. Staff can easily view past conversations and touchpoint history on each prospect and

student. Then, once students are admitted, admissions professionals can understand what the financial aid picture looks like at the click of a button, with no guesswork.

"From a student and family perspective, they're calling WPI — not the admissions office or the financial aid office. By getting both teams' information in one system, they are able to provide the highest quality customer service experience. It's a huge win," says Palumbo.

Ultimately, other CRM solutions available for higher education weren't a good fit because, Palumbo says, "we weren't looking to tread water." He adds, "We had exciting things planned and we needed a platform that would truly enable us to do them. The TargetX Recruitment Suite combined with the power of Salesforce was that platform."

Results: A powerful CRM with best-in-class tools that empower users to control their future and promotes innovation, all for significantly less money

Initially, the WPI admissions team—seeing their peers using a competitor's system—were surprised that the school was going with TargetX. Today, Palumbo says everyone seems very happy with WPI's CRM.

"Now that they see the quick solutions, flexibility, and customization, and how it has empowered us to control our own future and craft our innovative strategy, we'd never choose differently. Hands down, the TargetX Recruitment Suite with Salesforce delivers WPI best-in class-tools. We wouldn't have it any other way."

Not only is WPI using what it deems a "best-in-class tool," it's doing so while paying significantly less than with their prior vendor!

Palumbo concludes, "We feel like TargetX with Salesforce is a no-brainer."

TARGET X