



Project Startup Report

Project Name: Customer Relationship Management Implementation - TargetX

Agency: North Dakota University System Core Technology Services

Business Unit/Program Area: PeopleSoft/Campus Solutions

Project Sponsor: Thomas McNaughton

Project Manager: Betsy Watts

Project Description

This project will direct the planning and implementation of a new online admission application and customer relationship management system, TargetX, throughout nine NDUS institutions - Bismarck State College, Dakota College at Bottineau, Dickinson State University, Lake Region State College, Mayville State University, Minot State University, North Dakota State College of Science, Valley City State University, and Williston State College - in partnership with NDUS Core Technology Services. Included in this implementation is guided installation, training, and professional support for the following systems and related tools for each participating institution: an individual SaaS instance of the TargetX CRM Recruitment Suite built on a Salesforce platform, an online admission application, licensing, server setup and configuration for Informatica Cloud ETL, TargetX Insights, Application Review, Territory Assignments, Travel Planner, Email + Campaign Builder (unlimited sends), Texting (1:1 and bulk messaging), Online UChat, Form Builder, Print Mailings, Reporting and Dashboards, Student Portal, Events and Event Management, Appointment Scheduler and Workflow Automation. Implementation details will be identified and shared with the institutions prior to the planning stages of the project.

Business Needs and Problems

1. Campuses have a way to provide personalized relationship experiences for recruiting, connecting with, and communicating to prospective and newly enrolled students at the North Dakota University System.
2. Campuses have streamlined processes and access to online training, a knowledge base, and support to assist new and existing NDUS staff.

Key Metrics

Project Start Date	Project End Date	Original Baseline Budget
08/15/2022	10/04/2023	\$697,194.43

Objectives

Project Objectives	Measurement Description
Objective 1.1: Deploy the TargetX Customer Relationship Management System at all nine institutions.	Measurement 1.1.1: In a survey distributed three months after implementation, 6 of 9 campuses provide a success story around TargetX providing a personalized relationship experience on their campus.
Objective 1.2: Each campus creates their own customized CRM experience with unique objectives that define success for them.	Measurement 1.2.1: Within three months of Go-Live, 80% of campus staff using TargetX and responding to a survey give a 4 or 5 rating on a 5-point scale agreeing that the TargetX project was successful based on their campus' unique objectives defining success.
Objective 1.3: Students can complete numerous NDUS admissions applications using TargetX from multiple platforms and device types.	Measurement 1.3.1: All campuses report they can complete the entire application from a mobile device without any trouble during system testing prior to Go Live.

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	<p><u>Measurement 1.3.2:</u> In a survey sent out three months after Go Live, 85% of responding campus staff Agree or Strongly Agree with the statement, "I have received fewer calls from students who are having technical trouble with the CRM system."</p> <p><u>Measurement 1.3.3:</u> All campuses report they can complete and submit multiple applications for different terms during system testing prior to Go Live</p>
<p><u>Objective 1.4:</u> Prospective students can see their interactions with campuses, communicate via text or email, upload application artifacts, save an incomplete application and finish it later, and sign up for campus visits within TargetX.</p>	<p><u>Measurement 1.4.1:</u> In the six months after Go Live, monthly data will be compiled showing the volume of emails and texts sent out via TargetX as proof these two tools are being used. Nine of nine campuses will show email data and eight of nine campuses will show text data.</p> <p><u>Measurement 1.4.2:</u> In the six months after Go Live, we will sample the text data from the Mayville State University and Minot State University Twilio accounts to identify the usage of text communication.</p>
<p><u>Objective 2.1:</u> Automate manual tasks and simplify business processes being performed by NDUS Admission Offices and Recruiters.</p>	<p><u>Measurement 2.1.1:</u> The integrated data feed between TargetX and Campus Solutions runs 98% error-free and will import data on time during the first three months after Go Live.</p> <p><u>Measurement 2.1.2:</u> In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Agree or Strongly Agree to the statement, "TargetX helped simplify processes and decreased manual tasks on my campus."</p>
<p><u>Objective 2.2:</u> Campuses have access to online training, a knowledge base, and access to vendor support.</p>	<p><u>Measurement 2.2.1:</u> In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Not Applicable, Agree or Strongly Agree to the statement, "I have used the online training, knowledge base, and/or support and am able to get my questions answered satisfactorily."</p> <p><u>Measurement 2.2.2:</u> In a survey sent out three months after Go Live, 80% of campus staff respondents reply with Agree or Strongly Agree to the statement, "Onboarding new staff will be effective using the available training."</p> <p><u>Measurement 2.2.3:</u> One week prior to Go Live, 6 of 9 campuses have a customized training and process flow manual created for their campus.</p>

Cost/Benefit Analysis

- Streamlined, updated technology leading to enhanced student admissions interaction. TargetX will make it more efficient to track student engagement and touchpoints.
- Each campus has unique needs and goals for their CRM instance. Leaving the definition of success up to each campus allows for campus autonomy.
- Supporting an online application that's accessible across all platforms and device types allows students to go through the admissions and application process with ease. Increased accessibility enables campuses to reach a larger potential prospective student population.
- Prospective students feel connected with campus staff, which should lead to more commitments to attend. As campuses analyze this data, they can make adjustments on how best to reach their prospective students.
- Less staff time spent fixing errors. Data gets populated into TargetX in a timely manner. Increased staff efficiency.
- Easier to train new staff or update staff competencies using training.

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Key Constraints or Risks

- Anthology contract (current CRM vendor) will expire on 6/30/23.
- CTS loses key personnel.
- Campus Admissions and Recruiting Department loses key personnel.
- Campus resources not completing required tasks for implementation.
- The tight implementation timeline has little room for delays such as North Dakota weather or blackout weeks.

Major Information Technology Project Oversight Report

January 17, 2023

To: State Board of Higher Education
ND Legislative Information Technology Committee

Re: Concerns regarding the TargetX project

Ladies and Gentlemen,

As the assigned Large Project Oversight (LPO) Analyst, it is my responsibility to inform you of any significant concerns regarding projects that are classified as major technology projects as defined by N.D.C.C §54-35-15.2.

This project entered Execution in the fourth quarter of 2022 without having an approved Project Charter or Project Plan as mandated by NDUS Procedure 801.2. These documents define the success criteria of a project and ensure good project controls are in place. Without these documents, I am unable to effectively evaluate the status of the project, nor will the project be able to provide you appropriate Start-up or Close-out reports.

There are already signs of concern as some campuses are struggling to perform project activities on top of their daily tasks and additional costs have come up. Another example is that there has been confusion over what 3rd party product was required to be installed to make the system work. These are all signs of insufficient planning efforts.

While there would be significant costs incurred if the project is unable to be completed by June 30, there will also be significant costs including reputation impacts if the product doesn't deliver.

I am working closely with the Project Sponsor and Project Manager to address these issues as soon as possible and bring this project back under good project management control.

Sincerely,



Dirk Huggett

Large Project Oversight Analyst
Assistant CIO, Administration



Project Startup Report

Presented to the IT Committee February 7, 2023

Project Name: Telecom Modernization Project

Agency: University of North Dakota

Business Unit/Program Area: UND University IT

Project Sponsor: Madhavi Marasinghe

Project Manager: Djoana Wisner

Project Description

This project is aimed at supporting the UND modernization roadmap related to telephone solutions and entails several key objectives:

- Implementation of the new telephone solution and associated change management.
- Integration of existing system and applications to the new solution, and
- Process changes to impacted department/stakeholders and business process re-engineering

Moving the current phone system to a cloud-based solution involves two components:

- Unified Communication as a Service (UCaaS)
- Contact Center as a Service (CCaaS)

Upgrading the telecommunication system to a unified, public cloud-based communication system will allow the University of North Dakota to:

- Offer new features like text messaging, messaging system, call screening/blocking, call recording, desktop/mobile apps, etc.
- Improve existing functionalities such as voicemail, phone system (can offer soft phones), and audio/video meetings
- Offers smooth integration to other systems like integrating MS Teams with the new phone system.

These features will help to support the needs of the organization, especially in the world that we live post-pandemic. University IT (UIT) continues to provide better service by offering different channels to communicate and collaborate with every individual on campus (student, faculty, and staff).

This is a highly cross-functional project and includes both internal and external partners. The Project Team will conduct a brainstorming/storyboard activity prior to the kickoff that will help to identify gaps and solidify the project timeline.

Business Needs and Problems

With the modern technology available to customers, having limited offering discourages the customer from using the service which results in frustration and customer dissatisfaction. As a result, departments opt to terminate phone lines due to low usage or not seeing the value of keeping certain phone lines. This is shown as Telecom Department continues to operate at an annual loss of approximately \$250,000.00.

Additionally, the current solution does not have the functionality to support texting or integrations with other collaborative solutions critical for business operations. UND also provides telephony services to Bismarck State College, Mayville University, and Minot University. UND will continue to provide the service after moving to the cloud solution.

The project aims to upgrade the current phone system by moving on the on-premise solution to the cloud which will allow the organization to create different communication channels to enhance collaboration efforts within the campus. The project will implement the following:

1. Move from the on-prem telephone solution to a cloud-based solution
2. Ability to provide current phone functions such as calling, faxing, and conference calls
3. Introduce new features such as text messaging and enhanced fax feature
4. Integrate telephone with Microsoft Teams, TeamDynamix, and other software
5. Provide softphones that can be accessed through computers and mobile phones
6. Advanced Call Center functionality



Project Startup Report

Presented to the IT Committee February 7, 2023

Key Metrics		
Project Start Date	Project End Date	Original Baseline Budget
01/16/2023	06/30/2023	\$1,200,859.81

Objectives	
Project Objectives	Measurement Description
To provide a new solution that meets the current needs of end users such as incoming/outgoing calls, fax capability, texting capability, receiving voicemail, and conferencing	<ul style="list-style-type: none"> Monitor the usage by department or groupings identified and compare it with current usage to gather baseline data Gather feedback from staff and faculty by releasing a survey to assess user experience from the first two months of using the new phone system Monitor the number of support tickets generated related to the new phone system to identify common issues and develop a necessary action plan
Integrate systems and applications identified to be in scope by June 2023.	<ul style="list-style-type: none"> Integrations to MS Teams and TeamDynamix are tested and implemented. After go-live, the project team will initiate a test to ensure integrations is working properly. Ensure other integrations identified as in scope for the project for the project during project planning are working smoothly. QA and UAT Testing will be performed. A monitoring plan during deployment will be put in place. Integrations discovered outside of planning will be reviewed with the Executive Steering Committee for approval. Change control will be put in place for every additional integration approved by the committee. Rejected integrations will be put into the backlog for items to be considered for future release/enhancement.

Cost/Benefit Analysis
<p>The following will be used as budgeting guidelines for the project implementation:</p> <ul style="list-style-type: none"> The total funds available for the project are estimated to be: \$1,200,859.81 The contingency fund outside of the estimated project cost is \$98,800. <p>The project benefits are:</p> <ul style="list-style-type: none"> Enhanced user experience Integrated tools providing smoother collaboration to end user

Key Constraints or Risks
<p>The project has the following constraints:</p> <ul style="list-style-type: none"> The project must be completed by June 30, 2023 to avoid renewing the current contract and maintaining two systems. Cost, schedule, scope, and quality are often in conflict during projects. The sponsor elected to prioritize as follows: <ol style="list-style-type: none"> Quality Schedule Scope Cost

DocuSigned by:

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3/1/2023