

Case Study:

The Power of Transparency:

Enabling Easy Access to Higher Ed Analytics

Overview

Like many industries, higher education is experiencing aggressive digital transformation. Historically, outreach to previous, current and prospective students was conducted through in person or telephonic conversations. Today, communication from colleges and universities is mostly digital, through channels such as student online portals and social media. This is particularly important for prospective students, who demand online communication options.

A 30+ year old strategic enrollment management (SEM) company is a leading provider of solutions and services for enrollment, student success and fundraising for higher education and nonprofit communities across the globe. They are one of many organizations in the industry who has spent years planning and executing a digital transformation to adapt to changing industry needs. They committed to deliver a new, robust and highly efficient online portal for their client base of more than 1200 higher education institutions, providing them a 360-degree view of student data at any point in the student's journey.

The Challenge

After 3+ years of development, the infrastructure that had been implemented was costly, inefficient and still not meeting the customer's overall objective.

Following a renewed directive by the CEO, they embarked on an operational data transformation initiative to update their antiquated and costly operational data processes critical to their business of servicing higher education. Their key objective was to effectively create a data marketplace for higher ed. institutions, enabling them to easily view student data and easily access analytic results through intuitive, interactive dashboards. Deliverables to further this objective included:

- Implementing internal and external data glossary standards to enforce a common understanding and quality of information for both internal organizational definitions and for the higher education industry as a whole
- Consolidating multiple tools to reduce internal and external reporting costs
- Ensuring efficient end-to-end client file capture, data cleansing, transformation and data delivery (reporting) that enable:
 - Improvement of current data processing performance
 - Architecture support of ongoing data and advanced analytics growth
 - Accurate and more meaningful analytic insights

Client

Leading Strategic Enrollment Management Company

Industry

Higher Education

Challenges

- Multi-year project to build a customer marketplace with interactive dashboards for analytics results was stalled
- Data understanding was limited due to a lack of standard data definitions
- Multiple data tools for ETL and reporting were siloed, expensive and inefficient
- Data processes were costly and outdated, hindering meaningful, accurate business insights

Solution

Precisely Data360

Results

- Established an enterprise data governance program with a standardized, central business glossary
- Provided visibility into data asset location, usage and processes
- Implemented end-to-end data integration for data capture, conformity, reconciliation and data preparation for analytics
- Enabled analytics based on standardized and new student data
- Created standardized client dashboards to provide quick and ready visibility into analytics results

Precisely Data360 allowed clients to begin viewing their analytical results on demand, reducing the call center call volume of ad hoc requests for data statistics.

The Solution

The customer was looking for a solution that could help facilitate the data supply chain with a “data quality first” approach to managing data. This included centralizing standard definitions of all files, formats and fields exchanged, ensuring information sent by higher ed. institutions is accurate and meets published standards. They also needed automatic alerts when issues arise and automated, on demand views of analytical results.

Precisely Data360 provided a holistic solution centering on governance, end-to-end data integration and a standardized platform that enabled client-specific dashboards:

Data Governance

- Ingest Excel-based definitions and reference lists and organize them into a commonly understood glossary
- Link standardized data quality, cleansing and reference lookup rules to individual data elements
- Provide visibility into relationships across data asset types (applications, clients, processes)
- Provide a read-only version of their glossary for clients

End-to-End Data Integration

- Capture inbound student data in standardized file formats
- Validate client formats against defined standards in glossary
- Perform automated matches of updated records against originating source
- Prepare information for downstream analytics and client dashboards

Client Analytics and Dashboards

- Run analytics based on standardized existing and new student data
- Render key measurement dashboards (i.e. student engagement volume, application and communication statistics, client profile metrics)
- Expose analytical results to clients via standardized dashboards and secured data sets
- Enable online communication with client via dashboard collaboration

While the company wanted to immediately improve customer experience across their client base, they took a cautious, incremental approach to implementing the solution. They initially tested the interactive, on demand dashboards with a limited amount of data on a small subset of clients. This provided vital feedback to improve the end-user experience and ensure that analytics results were accurate, timely, and meaningful for customers.

Concurrently, the company began the process of ingesting the spreadsheet-based enterprise glossary into Precisely Data360 for further elaboration, workflow management and relationship-mapping with client dashboards.

The Results

Within two months of the implementation kickoff, five executive dashboards with drill down capabilities went live with a controlled client set. One month later, those same dashboards were launched to all 1200+ clients. This has allowed clients to begin viewing their analytical results on demand, thus reducing the call center call volume of ad hoc requests for data statistics. This also allowed for retirement of static reports generated by costly, legacy reporting tools.

With the dashboard structure in place, additional analytics and dashboards are being developed on existing data sets. The next priority is to extend the data management capabilities within Precisely Data360 to capture information further upstream, where client files are received. This will ensure data format, accuracy and reconciliation with existing data sources to eliminate duplicate or invalid data, before moving into the analytical environment. These standard data quality rules are documented in the glossary and mapped to the operational environment to ensure consistency of the thousands of files received daily across all clients.

With Precisely data supply chain management, the operational efficiencies are expected to continue to improve, as the company repurposes more than 100 analysts currently focused on manually validating inbound files to instead focus on analyzing analytical results to identify new business process improvements.