Case Study | Higher Education | Norwich University

Norwich University improves relationships with information management

NORWICH UNIVERSITY

Customer
Norwich University

Size
2,300 students
112 full-time faculty

Location
Northfield, Vermont

Solution
Case Management for Prospective Student Relationship and Information Management

OnBase Integrations
Banner® by Ellucian

The Challenge

For Norwich University, the applicant experience plays a key role in attracting the best students. However, the private military college was experiencing challenges with effectively tracking and managing thousands of those critical prospect relationships. Information silos, application hopping and manual data entry caused delays in contacting prospects, poor visibility into staff workloads and more than a few missed chances for effective communication.

"Before OnBase, it was difficult to keep information up-to-date," said Tim Reardon, director of admissions at Norwich. "It was a lost opportunity to stay relevant on prospective student activities."

To better manage applicant information, track outreach and support stronger early relationships, Norwich turned to a data-driven case management solution from OnBase by Hyland.

The Solution

Every summer, Norwich student callers and counselors contact between 9,000 and 13,000 prospective students, repeating the campaign two or three times. With OnBase, they have one place to access and manage prospective student and applicant relationships – including related data, documents, contact information, call attempts, notes and scheduling.

Before OnBase, Norwich pulled contact lists and printed paper call sheets, which staff used to track call notes. Administrative staff then manually entered all notes into the Banner® by Ellucian student information system (SIS), spending several weeks on each round of calls.

"It was becoming difficult to pull and manage that list every week, and we were always behind," Reardon said. "We saw an opportunity to better manage those prospective student relationships with OnBase."

Now, managers use OnBase to pull targeted call lists based on criteria like location or area of interest – automatically assigning work to counselors or student callers. Counselors easily log in to OnBase and view all their tasks, entering call notes and prospect data directly into the prospective student record.

OnBase® by Hyland

> **"We needed something that was on-the-spot, always updated and always prompting you for the next activity. OnBase provided that."**
>
> – Tim Reardon, director of admissions
> Norwich University

OnBase then automatically pushes that information to the SIS via a real-time data exchange – ensuring both systems are in sync. Staff only have to verify changes in interest or application status, reducing the time spent on data entry from weeks to hours.

When prospects apply to Norwich, their applications are imported into OnBase, automatically creating a record with all applicant information. Supervisors assign a counselor to that record to manage the relationship with the prospect. Counselors log calls in OnBase and receive automatic reminders of the next task to be completed, depending on whether they made contact with the applicant on each attempt. Just as with prospective students, OnBase automatically updates the SIS with new notes, comments and applicant information.

Applicant documents, such as financial aid letters, also trigger notifications for counselors to take action, keeping staff up-to-date and encouraging more relevant, timely communications. Counselors instantly access all documents associated with that applicant directly from their record in OnBase, including high school transcripts, merit financial aid letters and acceptance letters.

With a complete view of a prospective student, staff leverage all information to quickly answer inquiries, provide service and facilitate more effective conversations – ultimately supporting enhanced yield.

At the same time, OnBase offers supervisors visibility into call volume and caller workloads, allowing them to identify any bottlenecks and ensure staff are following an impactful communication plan.

The Difference

Facilitates better prospect relationships: "OnBase improved our ability to stay relevant with our prospective students," Reardon said. "We scan a financial aid letter and it queues a call that day. We can have a proactive conversation with an applicant right then, rather than a week later when financial aid sends us a list."

Enhances information management: Improved record keeping has led not only to better data integrity but fewer missteps. "We're now able to prevent some of those embarrassing moments caused by out-of-date information, like making a second call to a student who had withdrawn weeks before," Reardon said.

Increases productivity: "It used to take two people two weeks after calling campaigns to manually enter all the data from 12,000 paper sheets," Reardon said, adding that time savings is one of the most impactful benefits. The solution minimizes labor-intensive tasks – allowing staff to focus more on service.

Improves task management: With OnBase, counselors and callers log in and immediately see all impending work items – allowing them to better manage tasks and spend less time searching for information. "At a glance, counselors know exactly what their day has in store for them," said Reardon. "They have the power to re-adjust that day to make it work."

Enhances management visibility: "Before, we struggled because we couldn't determine the number of calls staff were making," Reardon said. "Now we have complete visibility into call volumes and workload." This transparency allowed Norwich to easily identify and close productivity gaps within the department.

Learn more at **OnBase.com »**

OnBase® by Hyland

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