



Fox Valley Technical College Upgrades to Dynamics 365 to Improve Enrollment Processes

**Images Courtesy of Fox Valley Technical College*

THE SITUATION

Fox Valley Technical College had a CRM system in the past, but were having difficulty with some of the automated processes that were setup in their system. This realization pushed them to move from a different CRM to Microsoft Dynamics 365.

“We were having difficulty with reporting and how we were pulling data from our student registration system,” says Eric Drews, CRM Enrollment/Retention Analyst at Fox Valley Technical College.

“We wanted to grow the business uses of our CRM and incorporate more staff, but our prior tool was preventing that growth. We wanted something more scalable and easier to use.”

During the evaluation phase of their CRM project, Fox Valley Technical College evaluated Salesforce and Microsoft Dynamics. With the nature of CRM’s scalability, Drews and his team considered different plug-ins, tools, and add-ons for the future state of their project.

“We wanted one of the bigger players in the marketplace, so we really only evaluated these two,” Drews says.

Lisa Schmid, Director of Enrollment Management at Fox Valley Technical College, says several groups at Fox Valley Technical College use Microsoft Dynamics, which helped them as they compared solutions – they had more users to add input.

“Our developers already knew how to work with Microsoft Dynamics, so the institutional knowledge that existed provided a leg up,” Drews says.

“When we evaluated Salesforce, we gave them the opportunity to show us if they offered more opportunities. It was pretty close, but the cost savings, integrations with other Microsoft products, and our staff’s existing knowledge ultimately led us to decide on Microsoft Dynamics.”

After putting out an RFP (request for proposal) to businesses

in the area, Schmid and Drews evaluated multiple groups to support their project. Ledgeview presented at Fox Valley Technical College’s Bordini Center and won them over by highlighting best practices for a successful project while providing the clearest path for their business sector, higher education.

THE SOLUTION

Fox Valley Technical College upgraded from their previous CRM to Microsoft Dynamics 365 to replace their former processes, correct their five biggest pain points, and integrate their ERP software, PeopleSoft.

“Ledgeview helped keep us on track,” Schmid says. “They identified what was in scope, what we could parking lot, and what we could bring back into conversation at a later date. This helped us tremendously.”

Due to their tight project implementation window of four weeks, Drews says they had to stay very close to that with Ledgeview, and expectations were exceeded.

“We joked with our project manager at Ledgeview that we thought we were missing something because it just went that seamlessly,” Schmid says. “In all seriousness, the folks at Ledgeview were amazing. I can’t think of a single complaint or opportunity for improvement.”

Meetings always had an agenda, best practices were provided, and tasks were continually upheld.

“There is nothing negative I can possibly identify about our experience with Ledgeview,” Schmid says.

Drews adds that Ledgeview’s transparency set them apart from other experiences they’ve had working with outside firms.

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“**L**edgeview is not only good at keeping us on track, but they were honest with us, helped us brainstorm, and offered solutions, which really helped us.”

ERIC DREWS

“They didn’t always just try and meet our requests. If our requests didn’t make sense, they would bring it up and talk us through until we connected on these revelations.”

Ledgeview helped prevent Fox Valley Technical College from chasing functionality with wide eyes, and focusing on what mattered with their CRM development, Schmid says Fox Valley Technical College aspired to upgrade to a system that slightly mirrored their old one but in a refreshed way. They saw this vision come to life as they moved from Microsoft Dynamics CRM to 365.

THE BENEFITS

“The way that Ledgeview helped all of us understand how the entities function with each other in CRM really helped us as we moved from CRM to 365,” Drews says. “When we first started, the concept of entities felt foreign, but the way Ledgeview explained it helped it click for us. Ledgeview helped us build a bunch of things that will benefit our reporting processes.”

Instead of storing information on a lead, now everything is a separate entity. Everything from programs of interest to campuses of interest to applications and more lived on a lead. This new process helps Drews see relations that enhance their reporting processes as a team.

“This helps us break out of our blinders from our old system, and build the new one to store information better,” Drews says.

“With Ledgeview, there was always ‘next step’ thinking,” Schmid says. “That mindset was definitely of help!”

Schmid says integrating PeopleSoft with Microsoft Dynamics 365 has helped them move applicants more efficiently through the enrollment funnel, which is a high priority for higher education program success ...

BENEFITS CONTINUED

... Drews says his favorite part about the project is the little efficiency enhancements he notices in his daily work, while Schmid attests to the visibility into reporting and ease of navigation the new solution has provided her team.

“Ledgeview has been a great partner, and I stress the word ‘great,’” Schmid says. “We tagged-team this effort, and we work with a lot of vendors – some are great and others not. Ledgeview is definitely great.”

Drews echoes Schmid’s sentiment.

“In addition to giving us a really good product, not to be cliché, but it was a really fun project,” Drews says. “All of the people we worked with at Ledgeview were fantastic!”

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