

How Can We Augment Our Implementation Support Capacity?

Module 5.2

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Ideal State: What Does a Fully Supported Technology Implementation Look Like?

Pre-Implementation

Implementation

Post-Implementation



Business Process

- ✓ Leadership understands full “project lift,” and can define additional capacity needed to complete the project
- ✓ Team can easily research, identify, and invest in quality implementation support or supplemental internal capacity
- ✓ Dedicated technical and non-technical leads are identified for implementation activities

- ✓ Dedicated technical and non-technical leads help to shepherd project forward, consulting cross-section of key stakeholders (e.g., leadership, end-users, etc.) throughout implementation

- ✓ Unit/department-based project leads, along with technology steering committee, support ongoing project prioritization and end-user training and support



Data Support

- ✓ Added support provides bandwidth/expertise to audit source systems to ensure data assets are up-to-date, clean, stored in an accessible format
- ✓ Institution is able to clarify and align data definitions and sources across departments

- ✓ Team prioritizes and defines critical data points based on user needs
- ✓ Coordinated efforts for data conversion, migration, loading, etc.
- ✓ Team establishes processes and tools for maintaining data accuracy and updating data

- ✓ Data access and usage expand as new features are added
- ✓ More advanced data tools can be built and deployed (e.g., analytics)



Technical Support

- ✓ Dedicated IT capacity maps out and assesses approach for key integrations for the new product given existing source systems, tools

- ✓ End-users, IT, and IR map product use-cases, configure product UI, data fields, automated workflows, etc. accordingly
- ✓ Product is implemented in phases, rolling out and testing core functionality first before building out advanced features

- ✓ IT has the capacity to troubleshoot issues and contribute toward continued product evolution (e.g., new feature builds, adjusted product workflows as advising model/processes shift, etc.)

The Reality for Many: Capacity Issues Challenge Implementations

Pre-Implementation

Implementation

Post-Implementation



Business Process

- × Lacking the knowledge and resources to assess capacity needs, leadership under-resources project support
- × Facing a confusing, opaque, and expensive provider landscape, leadership hires subpar support, insufficient support, or forgoes support altogether



- × Workstream assigned to existing staff who are already operating at capacity; lack of project resourcing/prioritization further strain IT/IR bandwidth
- × Support providers offer only high-level guidance misaligned with higher education needs, realities



- × IT, IR, and other technology implementation staff face burnout and turnover
- × Insufficient user training reduces internal capacity to support product scaling, troubleshooting after support provider engagement concludes



Data Support

- × Data is left “as-is”; few, if any, efforts to improve data hygiene or data governance processes take place before implementation begins



- × Data gaps and inaccuracies impede feature implementation, create additional work for IT/IR staff and/or remain unaddressed



- × Data and configuration issues limit product reliability, efficacy, and overall usage and scale
- × Additional data tools and advanced capabilities (e.g., AI) are forgone as basic feature implementation stalls



Technical Support

- × IT team brought in late in the procurement process for basic evaluation of key source system integrations
- × Critical configuration planning is overlooked as vendors default to standard product design, workflows



- × Basic vendor-prescribed configuration misaligned to college processes;
- × New configuration, specialized integration, and customization asks lengthen implementation timeline and/or add additional support costs



- × Stalled project timelines drain IT resources, dampen project buy-in, impede momentum
- × End-users become frustrated as product experience does not align with user needs or workflow

Institutions and Vendors Agree IT and Data Capacity Gaps Impede Even “User-Friendly” Implementations



*“We have a small IT staff, and **we’re just trying to keep the lights on, honestly.** Our project list is over 60 items long. I’d love to get our data clean and Slate fully implemented – that one I’ve heard is relatively easy once we get our ducks in a row – but the fire drills and the turnover just keep pushing that down and down and down the list.”*

Provost, HBCU

64% Of CIOs in higher education institutions report that their IT departments are understaffed ⁽¹⁾

74% Of institutions believe they need more data expertise and management to use technology effectively ⁽²⁾

55% Of community college IT departments report difficulty in recruiting IT staff ⁽³⁾

62% Of HBCUs report difficulty in filling IT positions, and 61% report difficulty in retaining IT staff ⁽⁴⁾



*“I **can’t hire the people I need.** We’re competing with actual tech companies and...hey, I mean, I can’t pay even as much as [Private College] down the street or [Large State School] that’s what, 4-5 hours drive? But our students need us, too. They’re local. They can’t pay a ton in tuition.”*

CIO, Mid-Atlantic Community College



Multiple vendor surveys, interviews, and reports indicate that higher education vendors acknowledge that institutions need more IT and data support ⁽⁵⁾:

63% Of vendors believe that higher education institutions do not have the necessary resources and expertise to successfully implement their products.

79% Of vendors believe that higher education institutions have inadequate in-house data skills and expertise.

“If I could wave a magic wand, it’s IT and data capacity support. That’s what institutions need. More than anything.”

Managing Director, EAB

(1) Green, K. C., & Sabatini, J. P. (2020). The 2020 Campus Computing Survey: The Impact of Covid-19 on Campus Technology. Campus Computing Project. Retrieved from <https://www.campuscomputing.net/content/2020-campus-computing-survey-impact-covid-19-campus-technology>
(2) Instructure. (2019). The Impact of Technology on Higher Education: Exploring the challenges faced by institutions and students. Retrieved from <https://www.instructure.com/canvas/resources/impact-technology-higher-education> (3) American Association of Community Colleges (AACC). (2019). Reclaiming the American Dream: Community Colleges and the Nation’s Future (2nd ed.). Retrieved from <https://www.aacc.nche.edu/programs/21st-century-initiative/> (4) United Negro College Fund (UNCF). (2017). HBCUs Make America Strong: The Positive Economic Impact of Historically Black Colleges and Universities. Retrieved from <https://uncf.org/news/hbcus-make-america-strong> (5) EDUCAUSE Center for Analysis and Research. (2018). The 2018 Top 10 IT Issues: The Remaking of Higher Education. Retrieved from <https://www.educause.edu/research-and-publications/research/top-10-it-issues-technologies-and-trends/2018> (6) The Ada Center Interview and Research 2022

MSIs Turn to Implementation Support Services for Needed Capacity

Implementation Support Services refers to the assistance provided by consultants, software providers, or specialized organizations to help colleges and universities prepare for and carry out technology projects. The goal of these services is to help ensure that software systems are implemented effectively, efficiently, and with a high degree of fidelity to their intended design.

Below are the **three major service categories*** in the implementation support field:



Business Process Support

Providers tend to work most closely with institution leadership for higher-level strategy work and unit/department-based technology project managers for IT benchmarking. Support tends to focus on the processes that surround the organizational and human aspects of technology adoption.



Technical Support

Technical support involves activities directly related to building/configuring a technology tool for an institution. Providers typically work most closely with the frontline IT team. Many technology solution and software vendors bundle some degree of technical and business process support with product purchase.



Data Support

Data support assistance ranges from specific data science projects that require skilled data analysts (e.g., custom analytics build, data feed imports) to services that focus more on data management, usage, ethics, and strategy, which require a mix of data and business process expertise.

Considerations



Implementation Support Service Types Are Often Blended:

While this categorization helps to distill and clarify support types, services often span multiple categories. Technical support must often consider how data will flow through a given technology tool, and almost all supports require some degree of business process effort.



Tradeoffs: Procured Support vs. Internal Capacity-Building:

Vendors and institutions alike note that, while support services are a vital need at many institutions, outsourcing all implementation support risks that institutions will relinquish “technical ownership” of a technology, and will not have built the internal capacity to sustain, upgrade, and troubleshoot the product in the long-term.

*Although these descriptions are more detailed than the general term “implementation support,” they still leave room for varying interpretations of what each service specifically includes. This ambiguity, along with a host of other issues, often contributes to tension between institution teams (who expect high levels of expertise, engagement, and customization), and vendors who may expect institutions to take accountability for much of this work with internal teams.

What Is Implementation Support? Business Process Support Deep Dive



Business Process Support

Specific Service Activities Include:

- **Technology and Process Audit:** Providers examine the college's existing technology ecosystem and business processes to identify areas where the college may need to redesign workflows, eliminate redundant steps/tools, or otherwise optimize processes for maximum efficiency and effectiveness.
- **System/Tool Evaluation and Selection:** Providers assist institutions with technology product selection, typically after an assessment of the institution's current needs and existing tools. Some providers may also offer RFP writing and review, though the quality of these services varies.
- **Implementation Project Management*:** Providers support the systematic planning, organizing, and backbone coordination of tasks and stakeholders to successfully set up and scale a technology solution.
- **User Training & Adoption*:** To ensure successful adoption and usage of the technology, training programs are developed and delivered to faculty, staff, and administrators. Training may include in-person sessions, online tutorials, documentation, and ongoing support to address any questions or issues that arise. Technology solution and software vendors often provide this support to their clients upon request but rely on internal institution staff to sustain product onboarding/training long-term.

Key Considerations

- **Vendor pricing, implementation support approach varies widely:** Large consulting firms tend to be prohibitively expensive for many institutions, with engagements starting in the high six-figures. Individual contractors or small consultancies (often focused regionally or on a specific kind of service) may be less expensive, but also more limited in their depth/breadth of expertise and/or bandwidth for intensive projects.
- **Holistic business process support is needed, but rare:** This would cover all listed service activities and span the entire software ecosystem and product lifecycle (i.e., planning, implementation, scaling). It would require deep, contextual knowledge of an institution, a longer-term engagement model, and dedicated FTE (See Example 3 below). While highly recommended by vendors and IT leaders alike, this model is currently unaffordable for many institutions and not typically offered by service providers.

What Can This Look Like In Practice?

Example 1: External Evaluation & Recommendations Report

- \$20K - \$25K for targeted 1-2 month engagements (e.g., RFP review, focused process or tool evaluation) from small consultancies/contractors
- \$50K - \$500K+ for broader engagements (e.g., strategy consulting, external research), ranging from 3 months - 1+ year(s).

Example 2: Single Application Project Management Support and User Training

- \$30 - \$50K for partial FTE implementation consultant, supplied by application vendor; often built into first year implementation pricing

Example 3: Added Capacity for Project Manager FTE for Large-Scale Initiative

- \$100K - \$200K for 1-2 years of embedded project management FTE to oversee planning, implementation and initial scaling strategy (contractor or new hire); most highly recommended approach by both vendors and successful institutions

Technical Support



Data Support



* Note that technology vendors already include some degree of this support when an institution purchases their solution.

What Is Implementation Support? Technical Support Deep Dive

Business Process Support	Technical Support Specific Service Activities Include: Technical Implementation and Configuration*: Activities involved in initial product set-up, including SSO set-up; basic configuration to an institution's existing processes and needs, including tailored workflow creation; user interface adjustments; security/permissions, etc. Cloud Services: Assistance with moving legacy information to a cloud environment; common amongst Salesforce implementation service providers. Integration: Assistance connecting software applications and tools to one another and/or to source systems, including the LMS and SIS. Note that this support is limited to simply creating an integration solution; the quality of the integration is often variable and dependent on data hygiene and data governance at the institution. Key Considerations Source system type, particularly the Student Information System (SIS), significantly impacts the technical lift and implementation timeline for a new technology solution. Providers are often prepared to work with major SIS products (e.g., Ellucian Banner), but may not be equipped with staff/product modifications to work with older or more niche systems (e.g., Jenzabar). - Additionally, heavily altered or customized SIS (non-vanilla) often complicate the implementation process as data may be stored in non-traditional formats that are more difficult to access and integrate. - The efficacy of product configuration depends on if (1) the underlying processes are logical and consistently followed, and (2) the institution has considered and articulated their specific configuration needs. Institutions may overlook both steps, and support providers rarely offer intensive services to address them. Providers often note that this is beyond their scope because it requires decisions that should be made and reinforced by institution leadership rather than a third-party provider. What Can This Look Like In Practice? Example 1: Single Application Implementation and Configuration \$25K - \$75K one-time fee bundled into a \$150K+ multi-year licensing agreement for an App Package: configuration planning meetings, integration with key source systems, initial product set-up, end-user testing and validation Example 2: Full Implementation of Major System (e.g., SIS, complex multi-user applications) \$500K - \$3M+ depending on complexity and scale of existing ecosystem, leadership strength and consistency, and IT bandwidth; requires 2 - 4 years of support assuming best-case conditions, more if technical, data, leadership, or bandwidth challenges arise	Data Support
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* Note that technology vendors already include some degree of this support when an institution purchases their solution.

What Is Implementation Support? Data Support Deep Dive

Business Process Support 	Technical Support 	 Data Support Specific Service Activities Include: • Data Migration: Moving legacy information from one system to another (e.g., from one CRM to another CRM) or from a CRM to the Cloud • Data Literacy and Training: Training for executive-level sponsors or administrators and/or end-users on using data strategically and ethically (i.e., considering equity, privacy, evolving legal standards, etc.) • Data Cleaning: Assistance in deleting/rectifying duplicate data entries; modifying raw data into a “clean” format; identifying pipeline errors and issues; occasionally working with data warehouses and lakes. • Data Strategy and Governance: Assistance articulating what insights are most important for different institution users, which data points/feeds are needed for those insights, the tradeoffs between different data point/feed options, and what tasks and governance processes are needed to ensure the validity and utility of the data* 	Key Considerations • Data “Ownership” Tradeoffs Between In-House vs. Provider Supported: Vendors report data integration/import issues are one of the most common reasons technology projects stall. Onsite support from external partners can help ensure projects move forward, but risk institutions not building the internal capacity to own and support data imports long-term. • Data Hygiene, Governance Consulting Is High-Need, But Lacking in Supply: Addressing an institution's data challenges necessitates a profound understanding of source systems, contextual knowledge about the institution's specific data requirements, policies, and practices, as well as familiarity with data governance and change management best practices. Current service providers either lack certain elements of these requirements or find it prohibitively costly to deliver this support, despite it being crucially needed by institutions. What Can This Look Like in Practice? Example 1: Contracted Support for Targeted Effort (e.g., Data Migration, Minor Cleaning) • \$20K - \$50K for 2– 4 moths of support from individual contractors, often sourced through recommendations from application vendor and/or word-of-mouth Example 2: Holistic Data Support and Strategy FTE (Currently Not Widely Available) • \$100K+ for embedded FTE (contractor, new hire, or re-assigned internal FTE) for 1-2 years of support around data cleaning, governance, and change management support.
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Varied Strengths Among Providers: Choosing Implementation Support Vendor Comes with Trade-Offs Between Depth and Breadth



Deep Higher Ed Knowledge, Narrow Service Focus

Providers in this area have deep higher education experience and strong implementation skills, but they typically only focus on a single or narrow set of products. Examples include edtech vendors, such as EAB, or specialists that only focus on discrete issues such as academic data hygiene. Most lack incentives to provide services outside of their stated scope.

"Our student success technology vendor initially set up a comprehensive set of trainings for staff, but, a few years later, when we wanted to expand our prospective student outreach, we found out that those services not within their capabilities." – VP/SA, HBCU



Industry Agnostic, Narrow Service Focus

These service providers are typically specially trained CRM consultants who focus on set up and implementation across all industries. Most are trained in Salesforce and only a few provide services in more than one CRM. These vendors typically cannot help institutions with underlying data hygiene/process issues and rely on others for this work instead.

"We hired someone who advertised deep experience with our CRM across many different industries – healthcare, online marketplaces, etc. – and thought we were getting a vendor with many different strengths. We later found out we were their first community college client, making it difficult for them to understand where our records were and how they should be integrated into our new CRM." – Provost, MSI



Deep Higher Ed Knowledge, Broad Service Ability

Our experience has been that few, if any, providers exist in this space. Instead, most institutions hire an internal staff position or contractor to augment the work of an implementation service provider and shepherd utilization and optimization by end-users, in areas such as data hygiene, technical implementation, and process management.

"After implementation and our 'go live' date, we took our service provider's advice and hired one of their former employees as an in-house contractor. Thank goodness we did – that hire is now in charge of connecting the dots across campus and making sure our investment pays off each year." – CIO, HSI



Industry Agnostic, Broad Service Ability

Vendors in this category are typically change management/process consulting teams that have broad but shallow knowledge of both higher ed and technology. These groups often lack the deep technical and/or higher ed.-specific knowledge to guide a highly complex implementation and come with a high price tag.

"We brought in a specialized team to develop an IT assessment and strategic plan for our college. It was an excellent (and costly) service that provided a roadmap for future success. The plan does highlight the need to bring in specialized data hygiene consultants to finish the job, though." – Registrar, HBCU

Reflect and Follow-up

Given our needs, institution culture, and most pressing project/s at hand, what type of expertise would be most helpful to our institution?



Getting Started: Implementation Services Providers Used by MSIs 2023

- [360 Degree Cloud](#)
- [A.M. Simpkins & Associates](#)
- [AcademyOne](#)
- [Advanced Communities](#)
- [Agile Cloud Consulting](#)
- [Apex IT](#)
- [Aplusify](#)
- [Appirio](#)
- [Attain Partners](#)
- [Axiom Elite](#)
- [Cloud for Good](#)
- [Coastal Cloud](#)
- [Creation Technology Solutions](#)
- [Deloitte](#)
- [Diabsolut](#)
- [Dynamic Campus](#)
- [EAB](#)
- [Education Dynamics](#)
- [Elevation Solutions](#)
- [Engage2Serve](#)
- [Enrollment Fuel](#)
- [Ferrilli](#)
- [Gilfus Education Group](#)
- [Heller Consulting](#)

Getting Started: Implementation Services Providers Used by MSIs 2023

- [Human Capital Research Corporation](#)
- [Huron Consulting Group](#)
- [ImagineCRM Consulting](#)
- [Jenzabar](#)
- [Lingk](#)
- [Moran Technology Consultants](#)
- [Plante Moran](#)
- [Redpath Consulting Group](#)
- [RNL](#)
- [Servio Consulting](#)
- [Spark.Orange.](#)
- [Strata Information Group](#)
- [Summit Technologies](#)
- [TargetX](#)
- [Tondro Consulting](#)
- [Urgensee](#)
- [Violet Consulting](#)
- [Watermark Insights \(Watermark Engage \ Aviso Retention\)](#)
- [WayBetter](#)
- [Yellow Brick Systems](#)