Demystifying Digital Transformation - The Business Impact of Having a Unified Student Experience
Quick Introduction

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Salesforce.org
Agenda

1. Demystifying Digital Transformation
2. Aalto Insights
3. Selecting a partner, successfully
4. Reflections
Demystifying Digital Transformation
The Wave of Change

Demographics
Consumerism
Globalisation
Competition
Technology

Education Strategic Priorities

Market Diversification
Personalised Experiences
Digital-first Service
Continuous Innovation
Education is a Sector in Motion

Digital transformation is underway

- Hybrid Education
- Holistic Care
- Experiential Learning
- Unbundled Offering
- Connected Curriculum

Digitally transformed institutions delivering rich lifelong learning experiences

2025 Education
When Strategy Leads, Success Follows

Demographics
Consumerism
Globalisation
Competition
Technology

TRENDS

Unbundled Offering
Connected Curriculum
Experiential Learning
Holistic Care
Hybrid Education

STRATEGIC PRIORITIES

Market Diversification
Personalised Experiences
Digital-first Service
Continuous Innovation

Digitally transformed institutions delivering rich lifelong learning experiences

DIGITAL TRANSFORMATION STRATEGY
When Strategy Leads, Success Follows

**TRENDS**
- Demographics
- Consumerism
- Globalisation
- Competition
- Technology

**STRATEGIC PRIORITIES**
- Market Diversification
- Personalised Experiences
- Digital-first Service
- Continuous Innovation

Digitally transformed institutions delivering rich lifelong learning experiences

**Digitally Determined**

**Digitally Enabled**

**Digitally Transformed**
Success for Institutions of Every Type, Every Size, Everywhere

Supporting 6,000+ education institutions globally
Simplify Data Complexity Across Your Institution

Capture a unified view across the entire learner lifecycle
Simplify Data Complexity Across Your Institution

Capture a unified view across the entire learner lifecycle

- Biology Major
- TA/Work Study
- Scholarship Recipient
- Early Admit
- Campus Visit
- Web Inquiry
- Volleyball
- One Stop
- Resident Advisor
- Donor
- Alumni Events Organizer
- Corporate Partner
- Student Mentor
- Volunteer

Animation Note
This slide is animated in full presenter view. The first view shows the complexity of learner data being scattered across multiple systems. The slide then animates into a unified view of learner data using Education Cloud, one connected platform for lifelong learning.
Simplify Data Complexity Across Your Institution

Capture a unified view across the entire learner lifecycle

Education Cloud
Transforming Student Service Processes at Aalto University with Advisor Link

Patrik Maltusch | Head of IT Architecture, Aalto
Our Journey Towards a Unified Service Platform

Laser-focused to deliver a world-class student experience

**Identifying the Gap**
- Market Study
- Pilot planning

**Technology POC**
- Internal Commitment

**Redefining the Scope**
- Stakeholder Engagement

**Technology & Partner Procurement**
- Understanding
- NOTE! In Finland, selecting technology & partners is always bound to public procurement

**Setting Up the Service Platform Program**
- Contract

**Critical Student Services (incl. Advisor Link)**
- Launch of First Services

Digital transformation roadmap planning
SPARK
Release schedule
A Growth Opportunity for Our Student Advising Services

- Appointment booking over emails
- Laborious scheduling & rescheduling
- Reactive advising
- Poor tracking of our advising support
- Advising notes everywhere & nowhere
- Incomplete student view
- Disparate advising
Our Journey Towards a Unified Service Platform

Laser-focused to deliver a world-class student experience

- Identifying the Gap
- Initial Proposal
- Technology POC
- Redefining the Scope
- Technology & Partner Procurement
- Setting Up the Service Platform Program
- Critical Student Services (incl. Advisor Link)

**Timeline:**
- 2015: Digital transformation roadmap planning
- 2016: Market Study, Pilot planning
- 2017: Internal Commitment
- 2018: Stakeholder Engagement
- 2019: SPARK, Contract
- 2020: Release schedule
- 2021: Launch of First Services

**Notes:**
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What Our Experience Taught Us

1. It’s important to manage expectations

2. Working in sprints does not always fit the university’ annual clock

3. Deployment takes time

4. It’s critical to communicate to different target groups
Our Journey Towards a Unified Service Platform

Laser-focused to deliver a world-class student experience

Identifying the Gap

- Market Study
- Pilot planning

Technology POC
- Internal Commitment

Redefining the Scope
- Stakeholder Engagement

Technology & Partner Procurement
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Setting Up the Service Platform Program
- SPARK
- Contract

Critical Student Services (incl. Advisor Link)
- Launch of First Services
- Release schedule

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Digital transformation roadmap planning
Our Journey Towards a Unified Service Platform

Laser-focused to deliver a world-class student experience

Identifying the Gap
- Market Study

2015

Initial Proposal
- Pilot planning

2016

Technology POC
- Internal Commitment

2017

Redefining the Scope
- Stakeholder Engagement

2018

Technology & Partner Procurement
- SPARK

2019

Setting Up the Service Platform Program
- Contract

2020

Critical Student Services (incl. Advisor Link)
- Release schedule

2021

NOTE! In Finland, selecting technology & partners is always bound to public procurement

Digital transformation roadmap planning

SPARK

Decision maker

Digital transformation consultant
Salesforce Role

Marcelle has been working with Salesforce for over 13 years and was one of the first 500 globally to become Salesforce certified. As Customer Success Director, she is heavily involved in the EMEA Higher Education Council and looks after our Education customers in EMEA. Outside of work she is a mom, a trustee of two charities, and a prolific knitter. This year Marcelle was awarded the Salesforce Golden Hoodie for her work in her local community.

Career Highlights

- Industry Advisor, IBM
- UKI Regional Director, FinDock
- CEO, crmSOS

Industry Experience

Education, Non Profit, Media and Communications

Giving Back

Trustee of Big Community Sew, Sew Marvellous Charity Makes and Colmore PTA

Education

MBA Aston Business School

Personal

I am from Birmingham UK, and outside of work I am heavily involved in volunteering with several charities and community groups. I love to sew, and last year led a group of 250 volunteers to make 29,000 items for the NHS PPE shortage.
### Partner Involvement

<table>
<thead>
<tr>
<th>Pre-Sales &amp; Discovery</th>
<th>Project Planning &amp; SOW</th>
<th>Project Execution</th>
<th>Post Go-Live &amp; Ongoing Support</th>
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</thead>
<tbody>
<tr>
<td><strong>Preparation</strong></td>
<td><strong>Project Execution</strong></td>
<td><strong>Operate &amp; Run</strong></td>
<td></td>
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<tr>
<td>Identify primary pain points</td>
<td>Identify skills and resources needed</td>
<td>Architectural blueprint / roadmap</td>
<td>Assess current priorities</td>
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<tr>
<td>What problem(s) are we trying to solve?</td>
<td>Establish foundational framework (Data Governance, Center of Excellence, Org Strategy)</td>
<td>Business process analysis</td>
<td>Operate &amp; Run</td>
</tr>
<tr>
<td>How will we know if we’ve achieved our goals / objectives?</td>
<td>Resource selection</td>
<td>User stories</td>
<td>Begin next phase</td>
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<td>Change management</td>
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- **Where are we going?**
- **Prepare for the journey**
- **Follow the map**
- **Arrive at destination**
- **Plan next trip**
Partner Selection Considerations

Key Points to Research / Review

- Cultural Fit
- Team Members
  - Certifications
  - Salesforce Partner Program
- Development and Delivery approach
  - Change Management
  - Risk Identification
- Industry Knowledge and References
- Salesforce Partner Program

Training and Enablement

Search on Trailhead for Best Practices in Partner Selection

Find a Partner

Search online for AppExchange Salesforce Partners
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to hear stories from trailblazers institutions across the globe

6,000+ members
of the salesforce.org community representing universities & schools across the world.

35+ sessions
focused on bold visions for the future of education.

6 awards
recognizing innovative trailblazers in the salesforce.org education community.
"we will only achieve stability and balance by moving, by moving forward and by pedalling"
“we will only achieve stability and balance by moving, by moving forward and by pedalling”