College of Southern Nevada

RFP # 188

Submitted in partnership by:

Reg Ogilvie
Vice President, Sales
Azorus Inc.

Pete Lindsey
Director, Business Development
SEM WORKS

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Cover Letter

April 20, 2009

Sally Seifert, Buyer III
College of Southern Nevada
3200 E. Cheyenne Avenue, J1C
North Las Vegas, Nevada 89030

Submittal # 188

Ms. Seifert,

We are pleased to provide you with our response to your tender document for improving online Student Services. Herein, we have addressed the questions you have asked and are confident that our capabilities align well with your expectations and goals.

I verify that the information presented in this response is accurate and true.

Because we understand of the complex challenges in building relationships and a sense of community to online audiences, we have recently been selected by one of the world's largest online and hybrid learning institutions to be their exclusive relationship management partner in recruitment and retention.

We look forward to hearing from you regarding our response and to the opportunity to work together in 2009.

Sincerely,

Reg Ogilvie
Vice President, Sales
AZORUS Inc.
1668 Barrington Street, Suite 600
Halifax, NS. B3J 2A2
Toll: 1.866.746.4500
Facsimile: 1.902.446.4510

Azorus Company Information

General Information

Azorus Vitals:

Years in Business:	6
Employees:	20
Main Office:	Halifax, NS. Canada
Other locations:	London, UK
	Bedford, NH

Financial Data

Azorus is a privately held company, with venture capital support, and does not release financial information.

Organizational Chart

Below are short bios of the staff members that will be allocated to this project;

Stephen MacDonald – CEO

Stephen has been involved in the education space since the early 90's. His first exposure to the education market was through his involvement with a publicly traded Post Graduate IT Training Institute in Canada and the USA. As VP Marketing, Stephen was instrumental in positioning this post graduate program as the standard in North America and created a number of strategic partnerships with employers who sought the programs graduates. Stephen has also recognized the role of the web in higher education and has acted in a consultative role for a number of large organizations who utilized the web to deliver content in ways never done before. Prior to his direct involvement within the education and software areas, Stephen's career began in Toronto where he held a senior brand management role with one of the world's preeminent consumer packaged goods companies.
As CEO of Azorus, Stephen's responsibilities include working to set the strategic direction for the corporation and managing the business development and marketing efforts to ensure that the Azorus suite of products is always relevant to the company's clients and more importantly, to their clients (students).

Bruce Roberts - President

Bruce has over fourteen years experience in the Telecommunications industry, principally as the owner of Networks Communications and two years as the Director of IT at one of the fastest growing telecoms; an HFC supplier of Entertainment, Internet, Telecommunications and Data products in Canada means he understands the need for custom software applications in the rapidly changing and dynamic IT world. A majority of the last five years have focused his efforts on building custom software applications designed to harness the information within an organization and to provide the tools to be able to manage this information more effectively yielding better business results at lower costs.
As President of Azorus, Bruce is responsible for the business operations of the company, including supporting the software engineering and code development efforts. Beyond overseeing the technical

development within the company, Bruce is also passionate about business process management and assists our clients with new and innovative ways to bring automation to tasks that are traditionally manual.

Cheryl Bell – Director of Customer Care

As the Director of Customer Care at Azorus Inc. Cheryl manages multiple software development projects and is also responsible for the management of the company's hosting network infrastructure. Cheryl directs the design and implementation of internal network hardware and software infrastructure for the company and is also responsible for the company's client support center.

Prior to her current position, Cheryl worked at a telecom and cable company as the IT Manager. During her seven-year tenure, this company experienced tremendous growth. EastLink was the first Cable Company in the country to deliver Local Telephone service over their own proprietary fiber-optic network. Cheryl was instrumental in building the IT team as well as spearheading the overall development of the network/computer infrastructure as the company embarked on their aggressive growth plans.

Phil Miles – CTO

Phil brings over twelve years experience in full life cycle software development, technical team leadership, and project management experience to Azorus. Starting his career as a software developer, and gradually moving to delivery and management level responsibilities, he has developed key leadership and management skills, and is a former VP of Solutions Delivery for a Canadian based software development and consulting firm.

As CTO, Phil is responsible for developing IT related plans, policies and objectives to promote growth within the organization. He leads the planning, development and implementation of IT systems and related technology-based product offerings, and provides input and advice on the evaluation, selection, implementation of information systems, ensuring appropriate investment in strategic and operational systems. Along with these responsibilities, he communicates strategic IT plans, policies and technology trends to management and professional staff.

Toby Keeping - Senior Accounts Director

As a Senior Accounts Director, Toby is tasked with approaching institutions that have a need for the kind of solutions we provide. In his role, his primary responsible responsibility is to gain a broad understanding of the challenges each school faces and to determine how our platform can help them achieve their goals.

Alan Vos – Client Services Specialist

At Azorus Alana works closely with the Director of Customer Care to help manage client accounts. Alana uses her skills as a writer and experience as a recent post secondary student to create fresh and relevant content for clients. She is also responsible for creating and managing our web-based training modules to better assist clients.

Mission Statement

Azorus' Executive Vision

To succeed in today's hyper competitive higher education market, universities and colleges must not just manage customer relationships, they must deepen them - with a thoughtful balance of information and insight delivering a rich and meaningful "customer experience". Relationships are the key to competitive differentiation particularly within the higher education market. A University seeks relationships that build confidence and inspire hope for those who seek this level of education. Other degree granting institutions seek to create demand by providing a life changing experience through both an academic and social context.

Because each student's journey is 100% unique, higher education institutions need a means to not only identify the differences in students, but to celebrate these differences. In this context, those universities that understand and embrace the differences of their students will flourish. The path to this "promised land" is based on an institution taking the time to understand the needs of their customers. Over the last decade North American universities in particular have had an abundance of students to select from and the notion of being customer centric was, and still is in many cases, a foreign concept. With the pendulum swinging heavily towards to the buyer (student), universities must change and change quickly to survive… let alone thrive.

Today's students are demanding of the higher education websites they visit. They expect 24/7 service and it must be instantaneous and it must be personalized. These "demands" of students demands a relationship. But what is a relationship in this context and what does it mean to the student? And the university?

As stated earlier, students want relevant and timely information on their terms. They want the truth… not marketing speak. They seek social networks to validate the brand messaging. They are naturally skeptical and will try and find alternative sources of information whether it be from currently enrolled students or even graduates… or other sources. They want to be treated as an individual and perhaps most importantly, they want to be completely comfortable with the decision they are making… because after all… it is one of the most profound decisions they will ever make in their lives. So the good news is we know what students want… and we engage students with content that is relevant, trusted and timely.

We provide the ability for the university or college to let students know that they understand the magnitude of their decision and that the first year of college is a "life changer"… we help our clients reassure students and their influencers and help them to make the right choice… to make the connection to the university that matches their needs. The "purchase decision" of an education is like no other and is an emotional roller coaster for the student and their parent. From the initial excitement upon being accepted… to the fear of belonging, to leaving home… to the ability for Mom and Dad to pay for this education… these are all critical stages of the purchase decision and each has its own rational and emotional needs. All of this provides the building blocks of a successful long term relationship – openness, trust, knowledge and care. This is the often overlooked aspect of a CRM Solution – emotional connectivity coupled with critical data at key times… appealing to both the heart and mind of the student… and their parents.

This then is our "sweet spot"… enabling the emotional and rational connection between the student and the institution… and we do this better than anyone else in the world.

History

Azorus is a 6 year old company that helps universities and colleges in the US, Canada and the UK build and maintain meaningful relationships. Our solutions help optimize the enrollment process by offering personalized and automated self service options to students while providing best of breed administrative tools to help drive data-driven decision making.

Some of the key elements of our solutions include;
Personalized web-portal for individual messaging based on unique interests and needs
Delivery of email communications which support institutional brand
Data repository of all constituent information with ability to segment on any criteria
Collection and processing of contact information through online and off-line sources
Synchronization with ERP solutions such as Banner, Peoplesoft, and others
Automating communications flow to optimize staff resources

This section details an overview of our company and philosophies, an overview of our solutions, and a summary of the benefits we provide to clients and students.

Company Overview

Azorus is a provider of purpose built CRM tools together with high value outsourced services designed to help universities and colleges achieve their enrollment objectives. We have and continue to stand between the customer (prospective student) and the institution where we have a profound impact on revenue for our clients. CRM is a method by which we enable our clients to communicate their brand promise; their uniqueness – the things that really make them stand out from their competition. These benefits include:

Increased student satisfaction throughout the recruiting cycle and beyond.
Enhancing our client's ability to efficiently compete for the best students.
Speed - minimizing the potential negative impact of what is perceived to be a slow business process, particularly the application process.
Delivering the right messaging to the varied constituents such as prospective students and their influencers in a timely and efficient manner allowing our clients the ability to differentiate themselves in a hyper competitive global marketplace.
The ability to focus the marketing effort, through segmentation, on recruiting the "right" students.
Satisfied students become satisfied alumni which then become marketing ambassadors for future recruiting activities and fund raising initiatives.

It is now a necessary core competency for universities and colleges to build an understanding of how their students (customers) behave and to continue to enhance this by learning how different service levels, communication methods and channels affect different students. This approach builds a depth of market and customer knowledge that will provide a springboard to institutional survival and market dominance.

The company is uniquely positioned to become our clients' transformational partner of choice for enrollment management. Azorus is able to transform a university's enrollment process by delivering measurable and lasting improvements in student recruitment, student retention, staff productivity and cost.

Azorus forms long-term client partnerships that enable us to better understand the higher education landscape and business challenges facing post secondary institutions and provide lasting value through our services. In this regard, Azorus professional services as delivered by our customer care team are the standard in the industry ensuring the efficient and effective use of the CRM platform we have established.

It is this operating model and superior client focus that sets Azorus apart and enables us to provide highly flexible customized solutions to deliver optimal cost and competitive benefits to our higher education clients.

"Azorus Campus Manager has done great things for us, particularly our recruitment staff. The one reason it has been so successful for us is the staff at Azorus. We are constantly updating and tweaking the fields, events and reports to better meet our needs. The support staff is very quick and efficient in their responses. The longest time we have waited on a response from them was 2 hours, seriously 2 hours."

Tammy Fowler
Arkansas State University

Azorus Philosophies

We are guided by some deep rooted philosophies that permeate both our approach to our customers as well as our solution development.

Student Focused

As we develop new applications, we always do so with the student in mind first. Only by providing value to your clients are we able to offer value to you.

Customer Focused

We endeavor to understand your situation before offering any suggestions whether or not we are potentially the partner for you. Only by understanding your unique challenges and goals can we make sound recommendations how we might be of service. All aspects of our company, from technical to customer care, have the client as the primary driver for all we do.

Clients are Partners

Our role in an enrollment strategy is very important and we assume great responsibility when working for our clients. We are viewed as a partner in achieving institutional success and as we work with clients to develop new solutions, they are also a key partner in helping us broaden our capabilities.

"What sold us [on Azorus] was their commitment to collaboration and innovation. They presented a very human element as a company as they were more than willing to engage in the art of the possible. We knew we were getting more than 'software in a box'. We weren't just going to be another client."

Susan Vercruysse
Ryerson University

Key Training Personnel

Cheryl Bell, our Director of Customer Care will be assigned to training your staff. Alana Voss will also be part of any ongoing training effort and support that your team might required. Both biographies are included in the previous section "Organization Chats"

SEM WORKS Company Overview

Number of Years in Business, Personnel, Organization and Location

Headquartered in Greensboro, North Carolina, the SEM WORKS staff is comprised of twenty-two individuals, primarily current or former practitioners in the field. Including Dr. Black, your lead consultant, there are nine SEM WORKS consultants—each with their unique specialty areas. In addition to the consulting group, SEM WORKS employs a director of technology services, a director of market research, a research analyst, a director of marketing and customer relations, a director of business development, a conference director, vice president of operations, two Web designers, two graphic designers, a copywriter, and an editor. A consulting team will be assigned to CSN based on your needs, campus type, and distinctive culture.

Company Mission, History, and Philosophy

Jim Black and Associates, Inc., converted to SEM WORKS in February of 2004 as an LLC. Prior to February 2004, Jim Black and Associates, Inc., had been working and performing services in the higher education consulting industry for ten years. SEM WORKS was founded by Dr. Jim Black and is grounded in a long history of higher education clients through consulting and professional development. The SEM WORKS team has over 400 years of combined experience in higher education and higher education consulting with more than 300 higher education clients from five countries. SEM WORKS staff has experience with community colleges, technical colleges, four-year public and private institutions, graduate and professional schools, proprietary schools, nonprofit and for-profit organizations, and college and university systems.

SEM WORKS provides consulting services to colleges and universities needing to assess existing operations and develop related plans. Areas of consulting include:

Enrollment Management
Branding
Student Retention
Student Services
Process Redesign
Organizational Change
Graphic Design/Publication Development
Marketing
Student Recruitment
Customer Service
Relationship Management
Organizational Structure
Web Development
Electronic Communications

Business Philosophy

Our business philosophy is simple. Our success is determined by the success of our clients. To ensure your satisfaction we will:

- Seek to understand your needs, your student services, objectives, and your institutional culture
- Prepare diligently for every meeting, every phase of the planning process, and every deliverable
- Serve you passionately
- Deliver more than you expect, and more than the contract requires
- Respond promptly to your requests
- Ensure the highest quality in everything we produce for the College of Southern Nevada.

Jim Black, Ph.D., SEM WORKS President and CEO

Project Responsibilities:
Communications audit/report, portal and one-stop content recommendations, internal promotion, key constituent satisfaction assessment, and staff training

The president and CEO of SEM WORKS, Dr. Jim Black, is the founder of the National Conference on Student Retention in Small Colleges and cofounder of the National Small College Admissions Conference and the National Small College Enrollment Conference. He formerly served as the director of AACRAO's Strategic Enrollment Management Conference. Dr. Black has published a monograph titled, *Navigating Change in the New Millennium: Strategies for Enrollment Leaders,* and three books, *The Strategic Enrollment Management Revolution,* considered to be a groundbreaking publication for the enrollment management profession, *Gen Xers Return to College*, and *Essentials of Enrollment Management: Cases in the Field*. Among his other published works are numerous articles and book chapters including a feature article in *College & University*, "Creating Customer Delight"*;* a chapter, "Creating a Student-Centered Culture," for a book on best practices in student services published by SCUP and sponsored by IBM; a chapter on enrollment management in a Jossey-Bass book on student academic services; as well as a bimonthly feature in *The Greentree Gazette*.

Black was honored as the recipient of the 2005 AACRAO Distinguished Service Award. He has been interviewed by publications such as *The Chronicle of Higher Education*, *Converge Magazine*, *The Enrollment Management Report*, *The Lawlor Review*, and was interviewed for AACRAO's *Data Dispenser*. Black also was featured in an international teleconference on enrollment management sponsored by The Center for the Freshman Year Experience at the University of South Carolina, and a PBS broadcast on "Blending High Tech and High Touch Student Services." Since 1999, Jim Black has been an IBM Best Practices Partner, one of only twenty-three in the world. He was invited by The College Board to Heidelberg, Germany, to evaluate the APIEL Exam and most recently was invited to lead conferences on enrollment management and student services in the United Kingdom and the Netherlands.

Dr. Black has served on the boards of several technology companies and has consulted with companies such as Microsoft, Blackboard, and the SAS Institute. Higher education clients have included two-year, four-year, public, and private institutions. Jim earned a B.A. in English education and M.A. in higher education administration from the University of South Carolina, as well as a Ph.D. in higher education curriculum and teaching from The University of North Carolina at Greensboro.

Partial Client List

Ithaca College	University of Maryland–Eastern Shore
Villanova University	Indiana University Purdue University Indianapolis
Meredith College	University of Regina (Canada)
South Texas College	Catawba College
University of Texas at Dallas	Winona State University
University of Texas El Paso	The College of Saint Rose
University of Victoria (Canada)	Clayton State University
Arkansas State University	Johnson State College
Fayetteville State University	University of Saskatchewan (Canada)
University of St. Francis	Ontario Institute of Technology (Canada)
Robert Morris College	Spalding University
Southern New Hampshire University	Seventh Day Adventist University
Ferris State University	Sunderland University (England)
University of California at Santa Cruz	University of Maine at Machias
Medical University of South Carolina	City University of New York
University of Wisconsin at Eau Claire	Paisley University (Scotland)
Southeast Missouri State University	Salem College
East Stroudsburg University	William Paterson University
North Carolina Central University	Belmont University
University of Missouri Kansas City	Slippery Rock University
University of Idaho	Adams State College
Winston-Salem State University	University of West Florida
Buffalo State College	Eastern Oregon State University
University of Vermont	Pacific Graduate School of Psychology
Mars Hill College	Lenoir-Rhyne College
Mount Saint Vincent University (Canada)	
University of Maine at Fort Kent	

Project Experience

Each partner institution has many years, and many clients, for whom relative project work has been accomplished. Specific examples of work are found in Appendix 1 – Case Studies. Both Azorus and SEM WORKS were involved in the Arkansas State University study, and to date, their school has posted a 27% increase in enrollment. For more information about Azorus and our platform, please see Appendix 2 – Azorus Documents.

Project Strategies and Scope

Develop a Web-based Student Services Portal that will provide the student a personalized, customized, and integrated service experience that contributes to a positive and long-term relationship with the College of Southern Nevada.

We provide a personalized portal to each student. The content that can be displayed to students is dependant upon your institution and the recommendations made by the SEM WORKS team. By understanding the unique preferences, or interests of each student, our system can automatically generate relevant messaging. This can be done based on date-sensitive fields or triggers that occur within the student information system.

Create a one-stop virtual service center that crosses organizational boundaries.

The development of this service center will be developed in conjunction with the recommendations of SEM WORKS. The platform can be tailored to your specific requirements to process workflow in the most streamlined manner possible. Each of these elements will require a consultative approach in developing a customized solution for CSN.

Provide training to the content experts in each service area on how to write for the web.

SEM WORKS and Azorus propose a joint training approach whereby CSN's users will receive training from SEM WORKS on how to write for the web. They will outline writing styles for blogs and social networks to properly engage students in an approved manner.

Following that training, Azorus will provide training to users on the CRM platform. This will enable the concepts learned from SEM WORKS to be applied and reinforced using the CRM system.

Improve CSN Student Services online as recommended by WICHE Online Services Audit.

Recommendations from the WICHE Online Services Audit will be combined with the audit performed by SEM WORKS. These recommendations will be applied within Azorus to improve the CSN Student Services available online.

We have added comments to some of the recommendations below;

Include information about how advising works, who the advisors are, how they are assigned, and when they are available.

We can push this kind of content to students immediately upon providing their information to you, or can filter it to them based on interests they disclose and/or time they have been within the system. Moreover, with an FAQ synchronization from IntelliResponse, the content can automatically be pushed to students if a student asks a series of questions related to this. For more information about IntelliResponse, see Appendix 3 – IntelliResponse.

Eliminate inconsistency in language across the site – counseling & advising.

Each communication within our system requires approval prior to delivery. This process puts the control of language in the hands of a select few people who can effectively manage the message.

Include more information about classes, such as background of the instructor, syllabus, and evaluations by former students.

This is easily achieved by using filters in our CRM, which will allow you to deliver relevant content automatically.

Develop a searchable FAQ system with common questions about advising services. In possible, integrate questions into a smart FAQ system used through the site via an "Ask CSN" link.

Azorus is able to meet this requirement via its partner IntelliResponse. Azorus has a partnership with IntelliResponse (IR), the leader in natural language query web self-service tools for Higher Education. Via this partnership, Azorus and IR have integrated our solutions to allow for seamless tracking of inquiry questions asked in the IR system, providing your institution with an in depth understanding of student interest and behavior.

The IR system provides full control over the questions, responses, related responses, links, etc., presented to website visitors when natural language questions are asked. Additionally, the IR system provides for escalation via email and answer rating procedures.

Integrate links to pertinent information such as maps, driving directions, scheduling visits, etc.

We can add links to things such as 'Google Maps', or link to anything, from our communications (emails, portal pages, or even Facebook communications).

Help students apply to programs. Provide information in the 'getting started' section and link to the program application. State fees or requirements.

By registering with our system, you will be able to guide the student through all stages of the recruitment cylcle; including application. We typically setup 'tracks' of emails that serve to inform students on processes in a timely manner. We can start sending these communications based on timelines, or actions of the students. For example, we can start a series of 5 "Getting Started" communications 1 week after they registered for the system, and do each subsequent email each week. Or, you could inititate this sequence when a student has triggered it by signing up for an event, asked a question of the FAQ, or other business rule that you feel is appropriate. At any juncture, we can include any and all pricing elements as per your direction.

Integrate the information already existing for admissions and future students into a single strealined process from a student perspective. Take the view of a future student or parent and organize the information and tasks into a set of student-centered online services that provide a holistic view.

Azorus delivers content to students through email, a personalized portal, and Facebook. As part of these communications, our clients may send news, academic or extracurricular information to their audiences; all filtered automatically to deliver the right message to the right audience at the right time. Additionally, our platform provides a complete event management system.

When a student, or parent, signs up for a personalized experience, they also select options that are of interest to them. These interest can be academic, extracurricular, or administrative in nature. Selection of an interest will automatically provide a link to that specific section of your website for easy access. Additionally, it will provide the student with events and news pieces specific to those interests. Students will also be brought into the system by interfacing with your student information system.

The communications can be set to deliver to students via the portal, email or their Facebook page. Events have RSVP and follow up functionality. The news items can be anything about the school, or can be filtered to meet the specific interests of the student. Thus, you can automatically deliver faculty profiles, department news, and first year profiles to students interested in those courses.

The system can be pre-populated with your entire communications plan for the entire enrollment cycle to select audiences. In addition to being able to schedule your communications at a slower time in your office, our platform has an ability to remind you to edit the event next year if it is to occur again. So, rather than re-creating an "open house event" each year, you simply set a notification date and the system will send an email reminder to one or more people to change the dates and content.

In addition to setting up communications sequences as above, we employ what we call "Track based communications". Unlike academic events, these tracks are a sequence of emails that we can send to a broad or very granular segment of your audience. These can be set to deliver on a frequency that originates (for example) on the date the prospect was entered into the system. As such, the first email from this track might be sent 2 days after entering the system, the second 7 days after, the third 14 days, and so on. These tracks are completely customized both in content and schedule to your needs.

Develop, with the input of the career advisors, FAQ links that would allow students to find more information independantly.

As discussed in a previous question, along with our IntelliResponse partners, we can develop a dynamic and robust FAQ database that will provide increased customer satisfaction and automate responses.

Assessment and Measurement for Success.

Within our system we track everything. As such, we can create a report for almost anything that has occurred within the system. We create a library of most common reports during implementation but there is no limit for the number of reports that you can create. Knowing the management who use these reports may not be logging into the system often, we provide the reports in Excel format which can reside on their personal computer. When they want updated information in the report, they click a "Download New Data" button in the file and they will be verified automatically and the data will be downloaded to the Excel file for any manipulation they want to do.

There are Prospect Tracking and Communication Stats reports that track activity for every student and every communication. These allow for single views into the activity of a student as well as the interaction with your communications. We also provide year-over-year analytical review of your data.

Optional CRM Components

Facebook

With an increase in stealth applications, universities and colleges are quickly realizing that students are getting institutional information critical to their decision making process from sources other than the school website. Ceding control of the brand and message through social media has been worrisome to many marketing departments. The Azorus Facebook application bridges that void by delivering CRM content to students directly to their Facebook profile. Because students are pulling the content they want into a medium of their choice, schools can rest assured that their involvement in this medium is not viewed as the 'creepy treehouse' where students see them as invaders.

Digital Recruit (Campus Technology Innovator's Award Winner – 2006)

Initiating relationships with as many students as possible, colleges have long used inquiry cards as a tool to collect student information. Entering those cards into a system typically involves hundreds of hours which may take place weeks after meeting the student. Once complete, the delivery of information to students, which may not be personalized in any manner, could occur as much as a month after meeting the student; if at all! Digital Recruit empowers recruiters with two tools to instantly capture student information electronically at recruitment events, process all the data in minutes, and deliver personalized information to students hours after meeting; all without any data entry.

High School Visits Program

Campus recruiters each fall are sent to hundreds of high schools across the country, and internationally. Many show up to schools and meet students without any prior knowledge of students who might be interested in speaking with them. Azorus' High School Visits program allows a school to target students by high school and deliver a personalized greeting to each student with an invitation to meet on the specific date that you will be visiting their school. Students are given the opportunity to reply, thus giving the institution an expectation of whom they will meet at the event. Moreover, it allows the recruiter an opportunity to establish rapport with the student prior to meeting thereby making the personal introduction far more powerful and important.

Project Scope

Azorus will assign an overall project manager to CSN, this will be your single point of contact for any coordination. Azorus will be responsible for the overall project and for our Strategic Partners (SEM WORKS, Intelliresponse) completing their key deliverables within the negotiated timeframes.

In the Project Timeline section below, we have outlined an overview of the implementation plan. A more detailed Project Scope that outlines all key dates, deliverables and responsibilities from Azorus (our partners) and CSN which get signed off on and adhered to thereby ensuring a successful implementation is found in Appendix 5 – Implementation Plan. This is a template which will be modified based upon consultation and initial project meetings at the start of the project.

Legally Able to work with SunGard Higher Education

Yes. Please refer to Appendix 4 – SIS Synchronization.

Planning Process

Audit Preparation

The exploration process will begin with the development of a consulting agenda for The College of Southern Nevada. Dr. Black's one-day on-site communications audit will be preceded by an off-site review of the 2008 WICHE Online Services Audit, Student Affairs publications, structure, Web-based student services, graphic identity system, student satisfaction surveys, and related documents. Student Affairs communications materials and Web-based student services will be compared based on factors such as content, visual consistency, visual appeal, ease of navigation, integration, and information architecture.

Site Visit

The site visit will include interviews with Student Affairs staff who will be invited to share their perspectives on the division's online services, challenges and opportunities, and faculty/staff involvement in the presentation, organization of information, and delivery of student services. Of particular interest will be an assessment the division's vision of integrated student services and one-stop virtual service center, and related infrastructure, and staffing patterns, that support Web-based student services.

One-day Communications Audit Deliverables

At the end of the one-day audit, Dr. Black will provide an executive briefing of preliminary findings from his off-site review and individual meetings. Recommendations will include those that require CSN'S immediate attention, as well as long-term opportunities.

Within four to five weeks following the visit, Dr. Black will submit a report that will include proposed sitemap for the virtual one-stop and the portal.

Sample Agenda for the One-day Communications Audit

8:30–9:30 a.m.	VP for Student Affairs and Dean of Students
9:45–10:45 a.m.	Student Affairs Directors
11:00–12:00 Noon	Student Affairs Web Master
12:15–1:45 p.m.	Lunch with a Representative Group of Students
2:00–3:00 p.m.	A Representative Group of Student Affairs Staff
3:00-4:00 p.m.	Briefing Preparation (consultant only)
4:00–5:00 p.m.	Briefing Session with the Student Affairs Leadership Team and Invited Guests

Of course, the agenda will be developed in consultation with CSN.

Training Session (one day on-site)

- Welcome and Introductions
- The Purpose and Nature of Relationship Management
- Student Expectations
- The Student Lifecycle
- Building Institutional Loyalty
- Managing Expectations
- Effectively Using Multichannel Communications
- Email Strategies
- Web Strategies
- Portal Strategies
- Digital Media Strategies
- Social Media Strategies
- Delivering WOW Service
- The Power of a Service Philosophy
- Managing Moments of Truth
- Improving Web-based Services
- Leveraging a Virtual One-stop
- Knowledge Management Solutions
- Measuring Effectiveness and Perfecting Strategy
- Conclusion

Student Focus Groups and Information Scavenger Hunt (two days on site)

SEM WORKS will conduct focus groups with current students, faculty, and staff to gain their perceptions of the content, organization, and navigation of CSN's new virtual one-stop and student portal.

Process and Deliverables

Populations and Sample Size

Ideally, each focus group will consist of eight to twelve participants. SEM WORKS will collaborate with CSN to develop focus group questions and a summary of critical information that should be highly accessible to students and key constituents via the Web.

Each focus group will last approximately one hour. The following groups will be included:

- Current traditional students (1), balanced for class year, gender and ethnicity
- Current nontraditional students (1), balanced for class year, gender and ethnicity
- Representative group of faculty, balanced for school/program
- Representative group of staff from Student Affairs

Information Scavenger Hunt

In addition to the focus group discussions, SEM WORKS will engage representatives from each group to participate in an information scavenger hunt, noting the time and number of clicks required to access high-priority information. For this purpose, the College will need to secure access to computers and the Internet during the focus group sessions. Findings and related recommendations to improve content, organization, access, and navigation will be summarized in a key constituent satisfaction report.

Internal rollout plan and internal promotion campaign will include:

- objectives
- effectiveness measures
- necessary antecedents for a successful implementation: staff expertise, infrastructure, and supporting technology
- an internal communication campaign to create awareness and buy-in, etc.
- timelines
- persons responsible
- status of progress toward objectives

SEM WORKS will provide a roadmap for an internal promotional plan with multiple authors.
Promotional strategies will be recommended to announce the new web pages and portal and solicit participation in a web-based satisfaction survey and related contest drawing. Promotional techniques may include but not be limited to:

- Student Affairs publications and new web site
- College's web site
- Campus email blast
- Posters
- Electronic message boards and bulletin boards
- Campus radio
- Web, e-newsletters and paper newsletters for Student Affairs and other offices
- Campus newspaper
- Postcard/summary announcement sheet
- Kiosks
- Table tents
- Pennants and flags
- Electronic and social networking channels

Some factors considered in our recommendations will include:

- impact on target audiences
- projected return on investment
- low or no cost solutions

SEM WORKS will collaborate with the Student Affairs staff to develop, administer, and report on satisfaction of students and other key constituents.

Instrument:

- a web-based survey of approximately ten to fifteen questions, with space for open ended responses and feedback assessing the new site's:
- integration of visuals, text, and tools
- representation of the values and culture of the College and student affairs
- "sense of place"
- ease of use
- scanability
- delivery of features and services recommended in the 2008 WICHE Online Student Services Audit

Incentive(s): appropriate incentive(s) determined by CSN.

Report: SEM WORKS will provide a detailed written report that includes response data from each question, a summary of open ended responses, and related recommendations prioritized as mission critical (MC), Essential (E), and desirable (D).

Project Timeline

The following summary describes a suggested timeline for the completion of work. This timeline may be revised by mutual consent between SEM WORKS, Azorus and The College of Southern Nevada.

May, week 3, 2009
Estimated date of awarded contract (May 1, 2009).

May, week 3
Conference call and e-mail exchanges with CSN and Dr. Black and Mr. Toby Keeping to understand CSN's expectations for meeting the scope of the work; and establish a detailed project plan and consulting agenda.

May, week 4
Dr. Black will conduct a one-day communications audit and deliver an on-site communications audit briefing report.
IntelliResponse to begin FAQ implementation

July, week 2
Dr. Black will submit a written audit report and prioritized recommendations from the one-day communications audit.
IntelliResponse to have FAQ implementation complete (45 days after start)

July, weeks 3 thru mid-November
Azorus to develop and test the virtual one-stop and portal. This includes, but is not limited to;

Creative design of portal & emails
Setup of all database, templates, filters, etc. within the system
Implement communications plan elements
Copywriting for materials for prospective and currently enrolled students
Install a default library of reports
IntelliResponse to install FAQ system
Creation of administrative users
Synchronization with ERP and IntelliResponse platforms
Testing of all elements within the system
Customizations as required (e.g. custom reports, process flows, etc.)

November, week 4
SEM WORKS consultant conducts one-day staff training on relationship management techniques using social media (e.g., Facebook, MySpace, and blogs).
Azorus to provide training of CRM to administrative users.

December, week 2
SEM WORKS develops strategies for a successful rollout of the new virtual one-stop and portal.

January, week 1
SEM WORKS designs an internal promotion campaign for the new virtual one-stop and portal.

January, week 4
SEM WORKS develops, administers, and reports on satisfaction of students and other key constituents; and conducts four (4) focus groups and Web scavenger hunt (two-days on campus)

Ongoing
Azorus' work on development and testing.

June 30, 2010

Student Services online upgrades complete

Students with Disabilities

Azorus' student portal conforms to Section 508 of the Rehabilitation Act, the Americans with Disabilities Act (ADA), and meets or exceeds Priority Level 1 of W3C's "Web Content Accessibility Guidelines 1.0", available at http://www.w3.org/TR/1999/WAI-WEBCONTENT-19990505. All student portal pages have been examined with numerous pieces of accessibility validation software, and then manually checked for accessibility issues to make sure the tools we provide are accessible to your students.

Online Training

Yes. We can provide training both in person and online. This is the typical situation with most of our clients and is easily facilitated.

Compatibility with PeopleSoft

Yes. See Appendix 4 – SIS Synchronization.

Compatible with File Types

PNG	yes	A1 (Adobe Illustrator)	yes	JPEG yes
RPF	yes	PSI (Photoshop)	yes	
TGA	yes	FLA (Flash)	yes	
AVI	yes	DIR (Director)	yes	
MOV	yes	PDF	yes	
TIF	yes	GIF	yes	

While we do not utilize all of these formats, we can provide our work to you in formats that work in your environment.

References

Ryerson University	Toronto, Canada
Contact:	Susan Vercruysse – Undergraduate Admissions
Phone:	416-979-5000 Extension 4264
Email:	svercruy@gwemail.ryerson.ca
University of Warwick	Conventry, UK
Contact:	Richard Harrison – Events and Enquiries Manager
Email:	Richard.Harrison@warwick.ac.uk
Phone:	+44 (0) 24 7657 4050
Arkansas State University	Jonesboro, Arkansas
Contact:	Tammy Fowler - Director of Admissions
Phone:	870-972-3024
Email:	TLFOWLER@astate.edu
St. Francis Xavier University	Nova Scotia, Canada
Contact:	Robb Parker – Former Director of Admissions and Recruitment (left Feb. 2009)
Phone:	506-453-4884 (new)
Email:	rparker@unb.ca (new)
Current:	Kyler Bell – Director of Communications & Marketing
Phone:	902-870-5641
Email:	kbell@stfx.ca
Peninsula College	Washington State
Contact:	Jack Huls, VP Student Services
Phone:	360-417-6225
Email:	JackH@pcadmin.ctc.edu

SUBMITTAL CERTIFICATION
March 25, 2009
(Date)

Purchasing Department
College of Southern Nevada
3200 East Cheyenne Avenue
North Las Vegas, NV 89030

The undersigned certifies that to the best of his/her knowledge: **(check one)**

(X) There is no officer or employee of College of Southern Nevada who has, or whose relative has, a substantial interest in any contract award pursuant to this submittal.

( ) The names of any and all public officers or employees of College of Southern Nevada who have, or whose relative has, a substantial interest in any contract award pursuant to this submittal are identified by name as part of this submittal.

The undersigned further certifies that their firm **(check one)** _____IS or __X___ IS NOT currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agrees to notifiy the College of any change in this status, should one occur, until such time as an award has been made under this procurement action.

In compliance with Request for Proposal No. 188 for Creation of College of Southern Nevada Student Affairs Online and after carefully reviewing all the terms, conditions and requirements contained therein, the undersigned agrees to furnish such goods/services in accordance with the specifications/scope of work.

Azorus Inc.
(firm)

1668 Barrington Street, Halifax, NS. B3J 2A2, Canada
(address)

(signature required)

866-746-4500
(phone no.)

Reg Ogilvie
(print name)

902.446.4501
(fax no.)

VP Sales/Marketing
(title)

980584700
(fed tax id no.)

Community College Southern Nevada

CCSN PURCHASING DEPARTMENT
3200 E. CHEYENNE AVE.
N. LAS VEGAS, NV 89030
PHONE (702) 651-4320
FAX (702) 651-4348

Clear Form

E-Mail Form to Purchasing

VENDOR APPLICATION PROFILE

[X] Initial Application [ ] Revision Date _____

VENDOR INFORMATION

Employer Identification #/SSN #: 980584700 Contractor's License #: _____

Individual Taxpayer Identification Number (ITIN): _____
(only if you are a Permanent Resident Alien without a Social Security Account No.)

Individual or Company Name: Azorus Inc.

Legal Name: _____ President's Name: _____
(if different from above Individual/Company Name)

Address: 1668 Barrington Street

City: Halifax State: NS Zip: B3J 2A2

Phone: ( ) 902.446.4500 FAX: ( ) 902.446.4510 E-Mail Address: info@azorus.com

LEGAL STRUCTURE

[ ] Sole Proprietor [ ] Partnership [X] Corporation [ ] Limited Liability Company [ ] Non-Profit [ ] Other :_____

TYPE OF ORGANIZATION

[ ] **MINORITY OWNED BUSINESS -** An independent business which performs a commercially useful function and is at least 51% owned and controlled by one or more minority persons of (check one) [ ] African American, [ ] Hispanic American, [ ] Asian-Pacific American, or [ ] Native American ethnicity.

[ ] **WOMEN OWNED BUSINESS -** An independent business which performs a commercially useful function and is at least 51% owned and controlled by one or more women

[ ] **PHYSICALLY CHALLENGED BUSINESS** - An independent business which performs a commercially useful function and is at least 51% owned and controlled by one or more disabled individuals pursuant to the federal Americans with Disabilities Act

[ ] **VETERAN/DISABLED VETERAN -** An independent business which performs a commercially useful function and is at least 51% owned and controlled by one or more veterans/disabled veterans who have served in the active military and discharged under conditions other than dishonorable.

[ ] **SMALL BUSINESS ENTERPRISE** - An independent business which performs a commercially useful function, is not owned and controlled by individuals designated as minority, women, veterans, or physically-challenged, and where gross annual sales does not exceed $2,000,000.

If you have checked any of the above, have you been certified? [ ] **NO** [ ] **YES**
If yes, by what Agency? _____

PRODUCTS AND/OR SERVICES OFFERED

[ ] Advertising / Marketing	[X] Computer Software	[ ] Furniture	[ ] Medical
[ ] Arts & Crafts	[ ] Construction Contractors Class:	[ ] Gasses/Fuel	[ ] Musical
[ ] Athletic	[ ] Construction Materials Specify:	[ ] Glass	[ ] Office Supplies & Equip
[ ] Audio/Visual Equipment	[ ] Consulting Services Specify:	[ ] Hardware, Locks & Tools	[ ] Photography
[ ] Automobiles & Equipment	[ ] Custodial/Janitorial	[ ] Hazardous Materials/Chemicals	[ ] Printing
[ ] Books & Publications	[ ] Dental	[ ] HVAC	[ ] Security
[ ] Catering	[ ] Electrical	[ ] Laboratory/Science	[ ] Staffing, Temporary
[ ] Collections, Financial	[ ] Entertainment	[ ] Landscaping	[ ] Training Services Specify:
[X] Communications	[ ] Fire Prevention	[ ] Library	[ ] Travel
[ ] Computer Hardware	[ ] Food Service and Equipment	[ ] Mail/Delivery Service	[ ] Uniforms & Clothing
			[ ] Other Specify:

Form W-9 Taxpayer Identification Number Request Rev. Mar. 2003 • For payments other than interest, dividends, or Form 1099-B gross proceeds

Please complete the following information. We are required by law to obtain this information from you when making a reportable payment to you, and because the payment is reportable on an information return to the IRS, you are required by law to provide your correct Social Security Number or Employer Identification Number to us. If you do not provide us with this information, your payments may be subject to 30% federal income tax backup withholding (29% after December 31, 2003). Also, if you do not provide us with this information, you may be subject to a $50 penalty imposed by the Internal Revenue Service under section 6723.

Federal law on backup withholding preempts any state or local law remedies, such as any right to a mechanic's lien. If you do not furnish a valid TIN, or if you are subject to backup withholding, the payor is required to withhold 30% of its payment to you (29% after December 31, 2003). Backup withholding is not a failure to pay you. It is an advance tax payment. You should report all backup withholding as a credit for taxes paid on your federal income tax return.

Instructions: *1. Complete Part 1 by completing the one row of boxes that corresponds to your tax status.*
2. Complete Part 2 if you are exempt from Form 1099 reporting.
3. Complete Part 3 by filling in all lines
4. Return this completed form to us in the enclosed envelope.

Use this form only if you are a U.S. person (including U.S. resident alien).
If you are a foreign person, use the appropriate Form W-8.
If you were a nonresident alien and have now become a resident alien, read the note below and attach a statement, if necessary.

Note to U.S. Resident Aliens who formerly were Nonresident Aliens:
If there is a tax treaty between the U.S. and your country and it contains a "saving clause" to exempt certain types of income from U.S. tax even after you have become a Resident Alien, and you want to claim that exemption, fill out all of this form AND attach a page showing:

1. The treaty country
2. The treaty article about the income
3. The article number for the "saving clause"
4. The type and amount of income that qualifies for the saving clause
5. Facts that provide a sufficient explanation of why the saving clause applies.

Part 1 – Tax Status: *(complete only one row of boxes)*

Individuals: *(Fill out this row.)*

Individual Name: (First name, middle initial, last name)	Individual's Social Security Number

A sole proprietorship may have a "doing business as" trade name, but the legal name is the name of the business owner.

Sole Proprietor (or an LLC with one owner): *(Fill out this row.)*

Business Owner's Name: (REQUIRED)	Business Owner's Social Security Number	Business or Trade Name (OPTIONAL)
(First Name) (Middle initial) (Last name)	or Employer ID Number	

Partnership (or an LLC with multiple owners): *(Fill out this row.)*

Name of Partnership:	Partnership's Employer Identification Number	Partnership's Name on IRS records *(see IRS mailing label)*

A corporation may use an abbreviated name or its initials, but its legal name is the name on the articles of incorporation.

Corporation, or Tax-Exempt Entity: *(Fill out this row.)*

Name of Corporation or Entity:	Employer Identification Number
Azorus Inc.	98-0584700

Part 2 – Exemption: If exempt from Form 1099 reporting, check your qualifying exemption reason below:

- ☐ **Corporation** Note that there is no corporate exemption for medical and healthcare payments or payments for legal services.
- ☐ Tax Exempt Entity under 501(a) *(includes 501 (c)(3))*, or IRA
- ☐ The United States or any of its agencies or instrumentalities
- ☐ A state, the District of Columbia, a possession of the United States, or any of their political subdivisions or agencies
- ☐ A foreign government or any of its political subdivisions or an international organization in which the United States participates under a treaty or Act of Congress

Part 3 – Signature: I am a U.S. person (including a U.S. resident alien).

Person com: Reg Ogilvie Title: VP Sales

Signature: Date:

Tax correspondence address: 1668 Barrington Street, St. 600

If address for payments is different, please list payment remit address below:

City: Halifax State: NS ZIP: B3J 2A2

Phone: (_____) 902.446.4500 Fax (____) 902.446.4510

ADDENDUM 1
Request for Proposal #188

College of Southern Nevada
Purchasing Department
3200 E. Cheyenne Avenue - J1C
North Las Vegas, Nevada 89030-4296

NOTE: Please initial the Addendum page(s) in the lower left corner and make it a part of the RFP. Attach to submitted RFP. If RFP has already been returned, complete this addendum and return for attachment to RFP prior to date and hour of opening as shown in the space provided herein.

Opening Date

April 14, 2009 at 2:00 P.M.

Addendum No: 1 RFP No: 188
Date of Addendum: April 3, 2009
Date and Hour of Opening: **April 14, 2009 at 2:00 P.M.**

Sally Seifert, Buyer III
College of Southern Nevada

Creation of College of Southern Nevada Student Affairs Online

NOTICE TO SUBMITTERS

The intent of this addendum is to:

DELETE question 5 in the **Additional Requirements & Pricing** section on page 14 of 21 under paragraph: A. Scope.

This addendum consists of 1 page. ***Please attach this page to your Submittal.***

Thank you for your interest in the College of Southern Nevada.

ADDENDUM 2
Request for Proposal #188

College of Southern Nevada
Purchasing Department
3200 E. Cheyenne Avenue - J1C
North Las Vegas, Nevada 89030-4296

NOTE: Please initial the Addendum page(s) in the lower left corner and make it a part of the RFP. Attach to submitted RFP. If RFP has already been returned, complete this addendum and return for attachment to RFP prior to date and hour of opening as shown in the space provided herein.

Opening Date

April 24, 2009 at 2:00 P.M.

Addendum No: 2 RFP No: 188
Date of Addendum: April 7, 2009
Date and Hour of Opening: **April 24, 2009 at 2:00 P.M.**

Sally Seifert, Buyer III
College of Southern Nevada

Creation of College of Southern Nevada Student Affairs Online

NOTICE TO SUBMITTERS

The intent of this addendum is to:

Extend RFP opening date from April 14, 2009 at 2:00 P.M. to April 24, 2009, at 2:00 P.M.

This addendum consists of 1 page. ***Please attach this page to your Submittal.***

Thank you for your interest in the College of Southern Nevada.

Pricing

Azorus CRM & FAQ		SEM WORKS		Total Pricing	
Item	Investment	Item	Investment		
Setup	$42,500	1-Day Communications Audit	$5,000		
Platform	$51,000	Written Audit Report	$3,000		
Professional Services	$61,500 (360 hrs/yr)	Strategies for rollout of one-stop; design promotion campaign; report on satisfaction of students and other key constituents; conduct four (4) focus groups with key constituents and Web information scavenger hunt (two-days on campus).	$10,000		
Training	Included	Conduct 1-day staff training	$5,000		
1st Year Investment	$155,000		$23,000	Total Year 1	$178,000
2nd Year Investment	$112,500			Total Year 2	$112,500

Price above includes 1 SIS Synchronization. You have asked about Banner and PeopleSoft synchronizations and in this pricing we are including one.

Appendix 1 – Case Studies

azorus

CRM case study
Ryerson University

A profile in how a university changed the rules of the game in student recruitment.

the art of the possible:

how a university took on CRM and made its own golden moment

RYERSON UNIVERSITY

The CRM story of Ryerson University begins with the urgency of overtaxed resources. Susan Vercruysse, Assistant Registrar, Communications and Recruitment for Undergraduate Admissions explains: "As student expectations about service and access to information were becoming increasingly demanding, we weren't able to keep up on their terms. Working with Azorus has helped us to update and streamline our processes and improve our level of service to prospective students and applicants."

It's why admissions executives have seasonally-inspired fitful sleeps. In the past decade, Canadian universities have ratcheted up recruitment efforts. Competition is steep, and students are both sought-after and more self-determining and savvy than ever.

Susan Vercruysse, Assistant Registrar, Communications and Recruitment in Undergraduate Admissions at Ryerson University, remembers the beginning of this recruitment renaissance - when personalized updates via email hadn't reached novelty status, let alone the norm, and when websites weren't much beyond static contact pages.

"Our online presence was functional but not necessarily innovative," she recalls. "At just about every milestone and touchpoint from first point of contact to the start of classes, we weren't keeping up when it came to online services and resources. We wanted to leverage the web to work smarter, and of course we also wanted to be more sophisticated in how we came across to prospective students. We wanted to be more than serviceable. We wanted to be memorable."

Ryerson's admissions and recruitment team couldn't have chosen a more serendipitous moment to press the issue of smarter recruitment. The school was energized with a new president, and new resources and directives were being put in place across the board. The website had just been redesigned, new buildings were going up and campus branding was refreshed.

> ***"The momentum was palpable," she says. "Getting a green light for CRM was easy, especially once we learned how profoundly it would invigorate the way we attract students."***

the urgent mathematics of 25,000 emails

At the time of Ryerson's foray into CRM-powered recruitment, the team was inundated to the point of drowning with repetitive, low-value tasks.

"Our marketing strategy relied heavily on printed materials, which was already becoming a less relevant way to reach students," she explains. "The information we presented online was limited and often dated. We were inundated with web-based inquiries to the tune of 25,000 emails a year—which our very small team had to answer individually, cutting and pasting from a bank of responses when possible. We didn't offer online registration for on-campus events or tours, and students were unable to track the status of their application online. We'd solicit tens of thousands of requests for printed information, via hard copy cards, during school visits and fairs and then struggle with the resulting data entry and production of mailing labels required to ensure a quick turnaround."

Like many universities, Ryerson had goals—many of which pointed to automation of one kind or another—but not the means to achieve them all at once. The recruitment team started small, beginning with an in-house system to book and track over 700 annual school visits. Despite being a tactical fix with relatively limited scope, it freed up resources from repetitive, low-value and error-prone tasks—and illustrated the dramatic impact of even a small amount of automation.

> ***"We were eager to make these kinds of changes on a much broader scale," recalls Vercruysse, "and we knew we'd need a partner who would offer more than just the technology pieces. As more universities were targeting Toronto as a lucrative market for prospective students we needed to make an even greater impression."***

In this environment of change and competitive urgency, Vercruysse and the recruitment team sat down to inventory their current challenges and prioritize possible improvements.

achievable means to a visionary end

"We found Azorus and right from the very beginning, everyone from financial and IT leaders to the registrar and business systems strategists wanted to attend the planning meetings and demos," says Vercurysse.

> ***"Everyone had an interest in talking about what might be possible, and seeing it all come together."***

The team first worked with Azorus to develop and launch a new portal for prospective students, releasing it with minimal fanfare as a way to test and refine it in the real world.

"We relied on Azorus heavily to get the look and feel right, and to initially populate the portal with content," she explains. "We made the portal accessible without promoting it, so that people would find out about it and sign up on a small scale. We learned what students appreciated and ironed out the kinks without exposing ourselves too much with a huge userbase—it was a great way to begin."

Having banked the confidence of that first year, the Ryerson team dedicated a staff resources time to own the CRM portal and develop higher-value content for the following season. The next iteration was unveiled with great fanfare at the Ontario Universities' Fair (OUF) in Toronto—an annual event known to attract over 80,000 visitors and generate upwards of 10,000 handwritten request cards over three days.

"Even though a significant chunk of the data gathered at the OUF in the past was incomplete or inaccurate, it took a huge leap of faith to forgo the hard copy request card method in favour of the portal," she says. "There was good reason for the concern—in that first year at the OUF without the cards, we did see a big reduction in the number of contacts. But since the students inputted their data themselves, the yield from that data was dramatically higher and more lucrative. Now, though we generate fewer contacts, we have far greater accuracy in our data. Plus, with zero request cards we're able to redeploy staff time and resources. We're actually performing better—and measuring results more quickly—with lower recruitment costs. It's a huge vote of confidence that we're headed in the right direction."

the second half of what makes CRM work:
creative freedom

Beyond the technology of Azorus's CRM components, Vercurysse credits its people and style with making Ryerson's CRM journey both fruitful and enjoyable.

“The people at Azorus are all about the art of the possible—they listen to what you wish for, what restrains you. They’re innovative thinkers, and they helped us to work through obstacles to reach tactical goals and visionary ones. It took work, but they made it as easy as possible for us. They gave us confidence.”

In admissions at Ryerson, as Vercruysse explains, it’s all about generating a robust applicant pool over the course of the fall in order to meet specific program targets. We have come to rely on our Choose>Ryerson portal to help us communicate with prospective students about our programs, services and facilities and encourage them to consider Ryerson as one of their application choices. From timely and relevant e-mails, to dynamic content inside the portal and event registration, we’re able to tailor content to an individual student’s interests - to help them determine whether Ryerson would be a good fit for them.”

> ***“One of the best features, however, that the CRM offers us occurs after a student has made the decision to apply to Ryerson. Through our collaboration with Azorus, we’re able to offer students self-serve tracking of their application status via their Choose>Ryerson portal.***

Once a prospect decides to make Ryerson one of their application choices, it’s our job to inspire them to complete the application process, accept an Offer of Admission and ultimately register for classes in September,” she says. “We rely heavily on Azorus to help us keep students engaged throughout the entire cycle. ”

Every week, and frequently more often, the Ryerson portals are refreshed with personalized updates and news that shows would-be students what awaits them, and to get them excited to be a part of campus life. The school proactively reminds students of admission, application and registration deadlines, faculty updates, and invites them to on-campus events, campus tours and online chats.

“We can be so much more creative as to the kind of content we put in front of students thanks to Azorus,” says Vercurysse. “In the beginning, we had no resources to focus on mining the organization for the most relevant content, and put it together in an appealing way. Now, we have dedicated staff time so that once we get prospects’ attention enough to sign-up for Choose>Ryerson, we’re able to give them the kind of insight that keeps them coming back and help them make a informed decision.”

the good cheer of Azorus and the ultimate result

The Ryerson admissions team first chose Azorus for its compatibility with existing systems such as Oracle or Peoplesoft—and what began as a convenient choice in the interest of integration turned into a meeting of minds that made anything possible.

“The people at Azorus totally understand the resource constraints that so many schools face,” says Vercurysse.

> ***“Most other providers would build the shell of a portal and say ‘good luck’, but Azorus knows it’s more about good content than a blank gateway. They bring both creative and technical expertise to the table, in whatever mix makes the most sense for us and our goals.”***

Vercurysse describes Azorus as a company that hasn’t lost its humanity compared to bigger providers who may value their clients in a less personal way—especially post-deployment, when most are never heard from again without bottomless consulting fees.

“We’ve never felt so looked-after by a technology partner,” she says. “We ask ridiculous questions sometimes, and forget how to do things now and then when we’re in a crunch. They’re always cheerful no matter what.”

“What struck us about Azorus was how genuinely they listened to us,” she continues. “They deeply understand the rhythms of our university life. With every conversation, we felt this would be a partnership and not just a purchase. We were right.”

Asked of results, she continues: “Measuring success was easy. This wasn’t one of those technology investments that takes a lot of thinking to figure out if it paid off.

> ***The worth of CRM is obvious to us every single day—thanks to Azorus, we enjoy our work more because it’s high-value. We don’t have to work as hard to generate the same or better results - it’s as straightforward as that.”***

azorus

CRM case study
Arkansas State University

A profile in how a university effectively implemented CRM for student recruitment with a profound impact.

what to do when change catches up with business-as-usual:

break down resource barriers with creative, full-service recruitment CRM

Today we bring you the CRM story of Arkansas State University as told by Tammy Fowler, the school's Director of Admissions: "If you're looking at a downturn in enrollment and you know you need help but hesitate because of the work involved in change, you stagnate. Who wants to do that? Azorus takes on the resource burden of innovative CRM - they know how to make it happen, and with energy and creativity."

It's no coincidence that Arkansas State University suffered a marked downturn in enrollment just as the Internet was at its peak - as the web transitioned from being a trendy diversion to the business and profit gateway for both consumers and brands.

"Suddenly our students and prospects expected so much more of us," says Tammy Fowler, ASU's Admissions Director.

> ***They were living online - socializing, shopping, banking, browsing and making decisions - and they wanted us to meet them there.***
>
> *-Tammy Fowler, ASU's Admissions Director*

For Arkansas State, business-as-usual was marked by three shortfalls. First, the admissions team was generating applicants, buying names and dropping mailers as they'd always done. They had a big-list, high-frequency, one-way approach that didn't keep students informed, let alone in the manner they'd prefer.

Second, the university struggled to process applications - despite the luck of earning students' attention, and then being entrusted with their futures, the school would be slow to respond at best, or even radio silent. As Fowler describes, they'd been so busy trying to make the process internally efficient, they hadn't stopped to consider how it all must have felt from the student perspective.

Finally, ASU leadership, faculty and staff were unplugged from recruitment, with no defined role or way to contribute. Without any encouragement or ability to impact their own territory or programs, they had no ownership.

“If we had continued business as usual, it would have been catastrophic,” says Fowler. “I can’t even picture it. Our admissions were either flat or decreasing 5-10% a year, with no growth since 1998. From 1999-2003, admissions dropped 11% and then from 2003-2004 it dropped another 10%. That’s when it had finally caught up with us, and we had to do something.”

And so the school that ‘powers minds’ began their CRM journey from a place of quite desperate urgency - and what lay ahead for them on ASU’s CRM path not only brought new technology but a profound cultural change for the better.

one guide leads to another

Once it was clear that ASU had to take steps in a new direction, the first thing they did was find a navigator.

> ***We found a consultant who got to know us - how we work, where we need to be, what our students need and expect, ... What came of all that was a strategic plan, and a big piece of that plan was CRM.”***
>
> *-Tammy Fowler, ASU’s Admissions Director*

But without the manpower or budget to take it on, what Arkansas State needed even more than technology was expertise, creativity, content - all that would populate a CRM system for the long term.

“Any solutions provider can deliver technology, but the people at Azorus are so gifted at making it meaningful,” she says. “They’re experts at generating leads for schools like ours, and they send us beautiful, innovative pieces of communication that we know will appeal to students.”

Thanks to the enthusiasm of their consultant - who knew from past experience that the people at Azorus went beyond templated software - a match was made.

“We could see right away that Azorus was not a cookie cutter,” she says. “This would be a collaboration. They listened when we told them what we needed, and came back to us saying this is what we think would work best for you.”

non-template CRM:
a counter to the cookie cutter

"It's the best of both worlds," she says. "The people at Azorus give us the ability to succeed on our own terms, and they stand with us in this changing market. And we give them fresh perspective from the recruitment front lines."

"I can't recruit my students the way UCLA or Harvard recruits theirs," she says. "It's a completely different ball-game. We have our own unique messages, methods, and go-to marketing tactics. Big CRM providers didn't acknowledge these differences. Azorus celebrates them, comes prepared for them. For Azorus, adapting to fit exactly what we needed was a no-brainer - and I can't tell you how refreshing that was for us."

In the one-size-fits-all universe of typical higher education CRM, schools tend to have to adapt their goals and strategies to fit pieces of software - making the ease and openness of Azorus an anomaly.

"If we called any other provider asking to do something differently, they'd say Would you like to switch to template #2 or template #6?

> ***Azorus custom-designed our web portal to match our new website. It was as simple as that. They gave us exactly what we needed - no more and no less.***
>
> *-Tammy Fowler, ASU's Admissions Director*

As Fowler explains, admissions staff and management at ASU are continually invigorated by new ideas, always looking forward to the next new thing - and the validation of this enthusiasm is almost as potent as the quantifiable results they're seeing in enrollment.

"Success is addictive," she says. "We started with our student portal, and now we're doing one for parents, and another for high school counselors. We know that both of these people play huge roles in helping students make decisions, and we need to extend a welcome to them, too."

"Azorus keeps us hungry, and innovative," she continues. "As soon as we go to them with a new idea, they respond with a smile, and by rolling up their sleeves. That's not something we saw in other providers."

Never having gone more than two or three hours without a response from Azorus on the creative side - and faster on the technical side - Fowler says the 'not-just-another-client' tone of the relationship permeates everything they do together.

"It's the best of both worlds," she says. "The people at Azorus give us the ability to succeed on our own terms, and they stand with us in this changing market. And we give them fresh perspective from the recruitment front lines."

from downturn to record enrollment

From the very first fall season that Arkansas State deployed the Azorus CRM solution, enrollment took its first upswing in years.

> ***Right away, we had confidence that we were on the right path and with the right level of support, ... Everything we got back from Azorus was stunning - I felt so proud. If I were a student, I'd think I'd want to go there.***
>
> *Tammy Fowler, ASU's Admissions Director*

The people on the admissions team weren't the only ones who responded that way to the new handshake of Arkansas State. Fowler recalls their first post-CRM 'dog and pony show' with the deans and chairs - "…they all said wow, that's really cool…" - and quantifiable results reflected the very same sentiment year after year.

From 2004 until 2007, post-Azorus, ASU's freshman enrollment went back up 26%, far beyond our record high to date. They had a 13% increase in applicant-to-enrollment conversion, and campus visits - known to be critical among successful applicants - doubled. Fall 2007 brought the second-highest freshman enrollment in the history of the university, and fall 2008 brought the highest ever. In addition to all that, as Fowler adds, support for admissions & recruitment has been revived throughout the campus.

"Before, we suffered from a lack of credibility," she says. "Promises were made that we just couldn't keep. Now, when we seek out help or input from our academic partners on campus, they're eager to help.

> ***They want to be a part of this story we're telling - after all, it ends up attracting a higher number of higher quality students who value their time with us as much as we value them.***
>
> *-Tammy Fowler, ASU's Admissions Director*

Appendix 2 – Azorus Documents

Azorus Overview

Focusing on the relationship.

Azorus is a provider of purpose built CRM tools together with high value outsourced services designed to help universities and colleges achieve their enrollment objectives. We have and continue to stand between the student and the institution where we have a profound impact on both revenue and costs for our clients. CRM is a method by which we enable our clients to communicate their brand promise; their uniqueness – the things that make them stand out from their competition.

These benefits include:

- Increased student satisfaction throughout the recruiting cycle and beyond.
- Enhancing our client's ability to efficiently compete for the best students.
- Speed - minimizing the potential negative impact of what is perceived to be a slow business process, particularly the application process.
- Delivering the right messaging to the varied constituents such as prospective students and their influencers in a timely and efficient manner allowing our clients the ability to differentiate themselves in a hyper competitive global marketplace.
- The ability to focus the marketing effort, through segmentation, on recruiting the "right" students.
- Satisfied students become satisfied alumni which then become marketing ambassadors for future recruiting activities and fund raising initiatives.

We are completely single minded about higher education… it's not an "add-on" vertical market for us. We were born and bred in your landscape, and we understand the peaks and valleys along the push for quality students. We're big enough to have assembled a team of spirited innovators that can take care of every facet of your student life-cycle, but small enough that each client and every success makes us proud.

Our software-as-a-service (SaaS) approach makes for rapid implementation with a light footprint on budgets and IT resources. Transform your recruitment capabilities for meaningful results in a matter of weeks - with our highly collaborative innovators bringing the strategy, resources, capabilities, customer care, content and branding you need to resonate with your future students.

Some of the key elements of our solutions include;

- Personalized web-portals for individual messaging based on unique interests and needs
- Delivery of email communications which support institutional brand management objectives
- Database of all constituent information with ability to segment on any criteria
- Collection and processing of contact information through online and off-line sources
- Synchronization with ERP solutions such as Banner, Oracle, Peoplesoft, SITS
- Automating communications flow to optimize staff resources

The Azorus Difference

The Importance of Customer **Relationships**

To succeed in today's hyper competitive higher education market, universities and colleges must not just manage customer relationships, they must deepen them - with a thoughtful balance of information and insight delivering a rich and meaningful "customer experience". Relationships are the key to competitive differentiation particularly within the higher education market. A Community College seeks relationships that build confidence and inspire hope for those who seek this level of education. Other degree granting institutions seek to create demand by providing a life changing experience through both an academic and social context.

Because each student's journey is 100% unique, higher education institutions need a means to not only identify the differences in students, but to celebrate these differences. In this context, those universities that understand and embrace the differences of their students will flourish. The path to this "promised land" is based on an institution taking the time to understand the needs of their customers. Over the last decade North American universities in particular have had an abundance of students to select from and the notion of being customer centric was, and still is in many cases, a foreign concept. With the pendulum swinging heavily towards to the buyer (student), universities must change and change quickly to survive… let alone thrive.

Today's students are demanding of the higher education websites they visit. They expect 24/7 service and it must be instantaneous and it must be personalized. These "demands" of students demands a relationship. But what is a relationship in this context and what does it mean to the student? And the university?

As stated earlier, students want relevant and timely information on their terms. They want the truth… not marketing speak. They seek social networks to validate the brand messaging. They are naturally skeptical and will try and find alternative sources of information whether it be from currently enrolled students or even graduates… or other sources. They want to be treated as an individual and perhaps most importantly, they want to be completely comfortable with the decision they are making… because after all… it is one of the most profound decisions they will ever make in their lives. So the good news is we know what students want… and we engage students with content that is relevant, trusted and timely.

We provide the ability for the university or college to let students know that they understand the magnitude of their decision and that the first year of college is a "life changer"… we help our clients reassure students and their influencers and help them to make the right choice… to make the connection to the university that matches their needs. The "purchase decision" of an education is like no other and is an emotional roller coaster for the student and their parent. From the initial excitement upon being accepted… to the fear of belonging, to leaving home… to the ability for Mom and Dad to pay for this education… these are all critical stages of the purchase decision and each has its own rational and emotional needs. All of this provides the building blocks of a successful long term relationship – openness, trust, knowledge and care. This is the often overlooked aspect of a CRM Solution – emotional connectivity coupled with critical data at key times… appealing to both the heart and mind of the student… and their parents.

This then is our "sweet spot"… enabling the emotional and rational connection between the student and the institution… and we do this better than anyone else in the world.

Products & Services

Azorus Recruitment

azorus
Recruitment

Azorus Recruitment

The Azorus Customer Relationship Management solution (CRM) is the core element behind all solutions offered to our customers. The Azorus CRM recruitment solution encompasses a variety of functions for a number of users. The customization available makes each installation completely unique.

Communicate with Students Based on Their Interests

For the university, the CRM platform is a database that houses prospects information and delivers personalized communications to prospective students based on their unique interests and triggers within the system.

Detailed reports and administrative tools allow institutions to fully understand their potential student population, the interactions taking place, and the next steps to be taken.

Build and Maintain Meaningful Relationships

For students, the CRM platform means that they will receive a personalized web-portal which contains links, events, and news pieces specific to their interests. As well, students receive emails tailored to their unique interests and needs. The Azorus CRM platform effectively helps to build and maintain meaningful relationships with prospects throughout the entire enrollment process, optimizing your enrollment performance.

- Automatically delivers personalized communication to prospective students
- Administration receives detailed reports on prospects interaction with communication pieces within their portal.
- Optimize enrollment performance by building strong relationships
- Saves time, money and reduces costs through increasing the productivity of your staff

Products & Services

Azorus Recruitment - CRM Functionality

Personalized Web Portal

CRM provides students, parents & alumni with their own personalized web portal. This portal delivers content specific to their individual needs and interests. The flexible interface allows them to modify their interests at any time. It contains links to online resources on your institutional site, relevant news and events, and a calendar to store upcoming events which have identified they would like to attend.

Communications Management - Email

The delivery of personalized communications that responds to individual interests in an automated personalized manner; based on dates, demographics or changes in profile it allow institutions to build and execute robust communications without having to allocate that burden onto individual staff resources.

Event Management

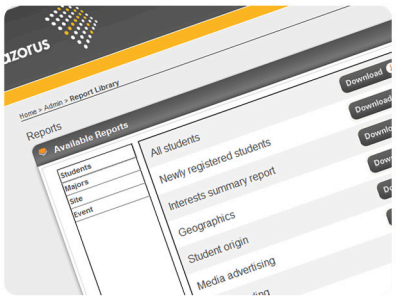
By offering events which people can sign up for electronically, institutions are able to retain these names and proactively market to them in the future. In the background, the solution notifies the manager of the event of registrants, executes a series of follow up communications and event reminders, and of course provides reporting tools to effectively manage the event.

Forms Management - Activity Tracking

Students engage with institutional websites in a variety of ways to express their interest in programs and events. In response to this, Azorus allows for fully-customized forms to be created and housed in various locations on the website. These forms pull all the data collected into a central location allowing institutions to understand which students are interacting with their site.

Reporting - Data Collection

With our reporting engine, users can easily create and run reports on anything in the system. We have a library of pre-populated reports upon implementation and can create custom ones without any IT assistance. These reports can be displayed graphically from within the system, as well as downloaded and viewed in Excel. Our filtering technology allows institutions to segment the information any way they would like.



Products & Services

Azorus Professional Services

azorus
Professional Services

Let us Take on Your Prospect Lifecycle

We understand the importance of effective communication with prospects, parents, admitted and enrolled students. Creating a strong web and email presence is vital to every organization. During any implementation of new software many of the items will be new to your institution, and you may not have the staff in place that can execute them well.

Our Professional Services team will collaborate with you to develop compelling messaging, crisp email design and a fresh take on your school's strengths. We are deeply experienced in helping schools stay current, and draw our inspiration from a host of proven best practices for higher response rates and credibility with every campaign.

Following are some of our most popular requests we perform under Professional Services, each backed by proven best practices that stem from a longstanding history of innovation in higher education to help achieve your institutional goals:

- Learn best practices from numerous implementations
- Strategic communication planning
- Develop compelling messaging
- Generate higher response rates from online communication

Enhanced Account Management

Access to a client services manager via telephone, email and IM.

Communication Planning

Successful enrollment management starts with a concrete strategic communication plan that is structured around your institution's recruitment objectives. A detailed review of your communications plan helps us fully maximize your recruitment efforts and give you the enrollment results you are looking for. We review such things as; current branding, print collateral, direct mail, promotional fairs and social networking.

Products & Services

Azorus Professional Services

Email “Reputation” Management

It has become increasingly important for the senders of emails to have a positive reputation with ISPs that host email for many of your prospective students.

Email Development

This includes such services as email design, email campaign design, copy writing, response monitoring and CANSPAM compliancy. We understand the importance of effective communication with prospects, parents, and influencers.

Testing

Traditional marketing collateral does not translate well to email. We can assist you in testing the impact of the emails being sent by your institution in order to refine the look and messaging of your emails.

Data Importing

Data from multiple sources often comes in to your system in huge volumes, all formatted differently and containing varying depths of information and permission types. Before a typically large email blast, we take steps to ensure you treat each segment of data properly while keeping your email reputation intact.

Products & Services

Azorus Facebook Application

Azorus CRM Meets Social Networking

In today's web savvy society it is no surprise that social networking has emerged as a powerful communication tool. Especially, with today's youth whom use social networking sites to gain information connect with friends, express opinions and to feel that they are part of an online community.

At Azorus we understand Higher Education institutions see the importance of embracing social networking sites, such as Facebook, but may face challenges on how to create a strategy, control the messaging or protect their brand. That is why we have developed a Facebook application that lets you interact with prospective, admitted or current students in a more controlled environment directly in Facebook.

- Build strong brand consistency within Facebook
- Track and Report on students interaction with the Facebook application
- Push content directly to students Facebook page

Azorus Facebook Application Functionality:

Control the Chatter

University and college Facebook groups are an excellent way to have prospective students connect with current students and learn more about the campus in a non invasive manner. However, it can be very time consuming for admissions and recruitment staff to monitor these groups and continually post current or accurate information.

Products & Services

Azorus Facebook Application

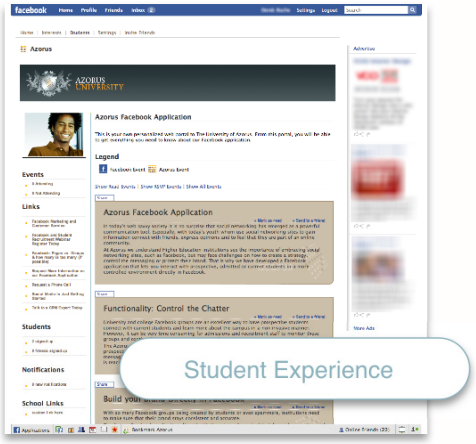
The Azorus Facebook application can automatically push relevant content directly into a prospective students Facebook page. This allows institutions to still have control over their messaging, but doing so in non invasive manner that ensures accurate and relevant information is reaching prospective and current students.

facebook+azorus

Build your Brand Directly in Facebook

With so many Facebook groups being created by students or even spammers, institutions need to make sure that their brand stays consistent and accurate.

The Azorus Facebook application allows institutions to easily control their brand logo, colors and imagery within the Facebook application. The application allows universities and colleges to have direct links off the Facebook application to various administrator groups as well as their homepage, which ensures that students go to the correct site.

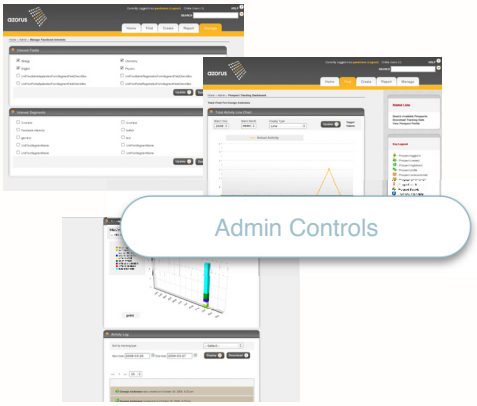


Track and Report on Student Interaction with Facebook Application

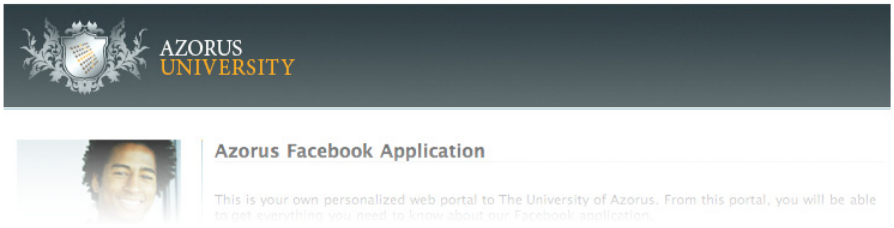
The Azorus Facebook application is designed to provide students with a safe and non invasive platform that allows them to interact and connect with each other knowing that the information they are receiving is coming directly from the institution.

From an administration side the application does have the ability to track and repot on students interaction within the Facebook application. Administration staff can monitor such things as:

- When a student adds the application
- When a student RSVPs to an event
- If the student sent the application to a friend
- When the student updates his account within the application



Brand Recognition Example using the Azorus Facebook Application



Products & Services

Azorus Digital Recruit

Eliminate Data Entry

Azorus' Digital Recruit solution expedites your recruiting practices by eliminating data entry and quickly delivering automated communications to your prospective students within hours of meeting them.

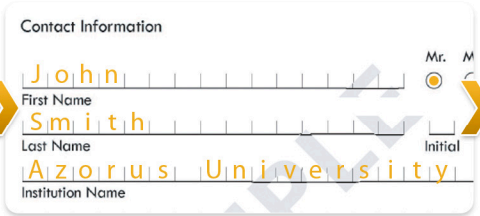
Enhance your Presence at Recruitment Fairs

Captivate tech savvy students with the digital ink pen and further impress them by sending out an automatic personalized email.

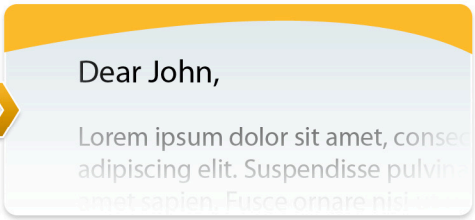
The Azorus Digital Recruit solution has the tools to ensure you make quality personalized connections with prospects. Not only can Azorus provide the tools to help you connect with students, we can even host and maintain the entire system for you!

- Eliminate data entry after recruiting events
- Speed - Initiate personal communications within hours of meeting prospects
- Deliver interest driven content to prospects - automatically

capture



upload



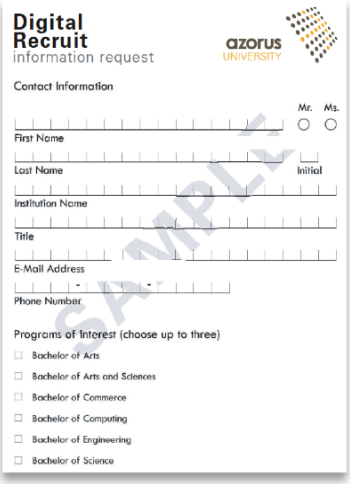
communicate

Products & Services

Azorus Digital Recruit

How Digital Recruit Works:

- Students fill out the inquiry form which can include areas of academic interest as well as other interests at your institution
- The pen captures all student information as the student writes!
- Recruiters then simply upload the data stored on the pen to the Azorus CRM system
- The Azorus CRM system then initiates a communications plan for each student; beginning with the first automatic welcome email minutes after data is uploaded!
- Subsequent personalized email messages are sent automatically based on timelines defined by your institution
- All content is relative to the area of interest(s) of each student
- Personalized email communications that reflect their interests in your institution.
- Ongoing communications that are timed to automatically "drip" to your admits keeping them informed of activities and events that match their profile.
- Show your admits that you care by providing resources to them on a timetable that ensures their attitude towards your institution remains positive.
- Provide a means for faculty or other advisors to get involved easily with those highly desirable admits and communicate with them throughout the summer when they are most vulnerable to change.


Digital Recruit
information request
azorus UNIVERSITY
Contact Information
Mr. Ms.
First Name
Last Name
Initial
Institution Name
Title
E-Mail Address
Phone Number
Programs of Interest (choose up to three)
Bachelor of Arts
Bachelor of Arts and Sciences
Bachelor of Commerce
Bachelor of Computing
Bachelor of Engineering
Bachelor of Science
SAMPLE

"The Digital Recruit system allows us to easily capture the student's information and then show true appreciation for their interest in us by delivering a well crafted and appropriate email to the student immediately following the event."

- Robb Parker, Director of Admissions at StFX University

Appendix 3 – IntelliResponse

IntelliResponse Functionality Overview for College of Southern Nevada

IntelliResponse was founded to deliver an improved online experience to higher education website visitors looking for precise, accurate, immediate/real-time answers to their questions. Studies consistently show that website search solutions deliver an inferior experience for site visitors by not providing precise answers to common queries in the shortest possible time. Visitors are often frustrated by having to “hunt and peck” through large numbers of possible answers buried somewhere in the detailed content of search results. The other pervasive alternative, FAQ systems, have clearly not delivered on the expectations of today’s website visitor either, as they only deal with a small subset of the questions people want answers to, and require visitors to “find a question”. IntelliResponse was developed with one key principal in mind – if a visitor has a question simply give them one accurate and explicit answer in the shortest period of time. The IntelliResponse “One Right Answer™” technology is our response to the problem.

The Patented IntelliResponse Answer Agent was developed to make it intuitively obvious and easy for website visitors to type in a question in natural language and get “One Right Answer™” no less than 80% of the time - guaranteed. IntelliResponse transforms the way public visitors, customers and staff or partners interact with you through your website or intranet. With over 200 live, customer facing website implementations at organizations throughout North America, IntelliResponse remains unique in delivering the “One Right Answer™” to millions of website self-service inquiries.

User Interface:

A user interface is an IntelliResponse *front end*, or *"portal"* that you add to your website to allow users to view and interact with your iR system.

The IntelliResponse User Interface provides the ultimate user experience by delivering the ***One Right Answer*** to a natural language question. Unlike a search engine that delivers pages of links to possible answers, IntelliResponse gives students immediate answers to their questions – simple, consistent, relevant and precise.

Our unique approach eliminates the issues associated with other self-service knowledge base solutions and provides the ultimate user experience by delivering the following:

- Ability to ask question in everyday language including spelling mistakes, acronyms, slang and terminology specific to CSN;
- Rich responses with hyperlinks for targeted navigation on the CSN website, or links to multimedia
- Response feedback for further customer interaction and quality assessment
- Related info based on the question asked and personal support escalation

The User Interface is defined by two major components – the **Question Box** and the **Results Page**. There are also several other standard elements in the form of user capabilities, which are illustrated and explained in more detail below.

Administrator Interface:

The Administrative User Interface is used to manage all of the content/responses for each established User Interface. It is composed of 6 main components, which are context (User Interface) sensitive components. Tabs are generally used to navigate through the knowledgebase.

1) The Knowledge tab provides a central location from which you can:

- Create, view and organize Responses and Canned Expressions
- Apply a set of changes ("search and replace") across your knowledge base
- Perform various tests on your knowledge base Responses
- Define and preview your user interface(s)

2) The Mail tab is a centralized location from which you can:

- Read, response to, forward and reassign incoming e-mails from your customers.
- Create *Internal Contacts* with e-mail addresses and personal information.
- View and/or filter e-mail by administrator (including those locked by admin), client, date, country, etc.
- Create and manage e-mail folders.
- View *sent* and *outgoing* messages.

3) The Reports tab provides a central location from which you can:

- Create & generate various types of reports on your IntelliResponse system data.
- Save report data to CSV or PDF format.
- E-mail reports directly from the web display
- Schedule reports to run automatically on daily, weekly or monthly basis
- View, download and delete saved report files.
- Set various reporting preferences.

4) The People tab is a centralized location from which you can:

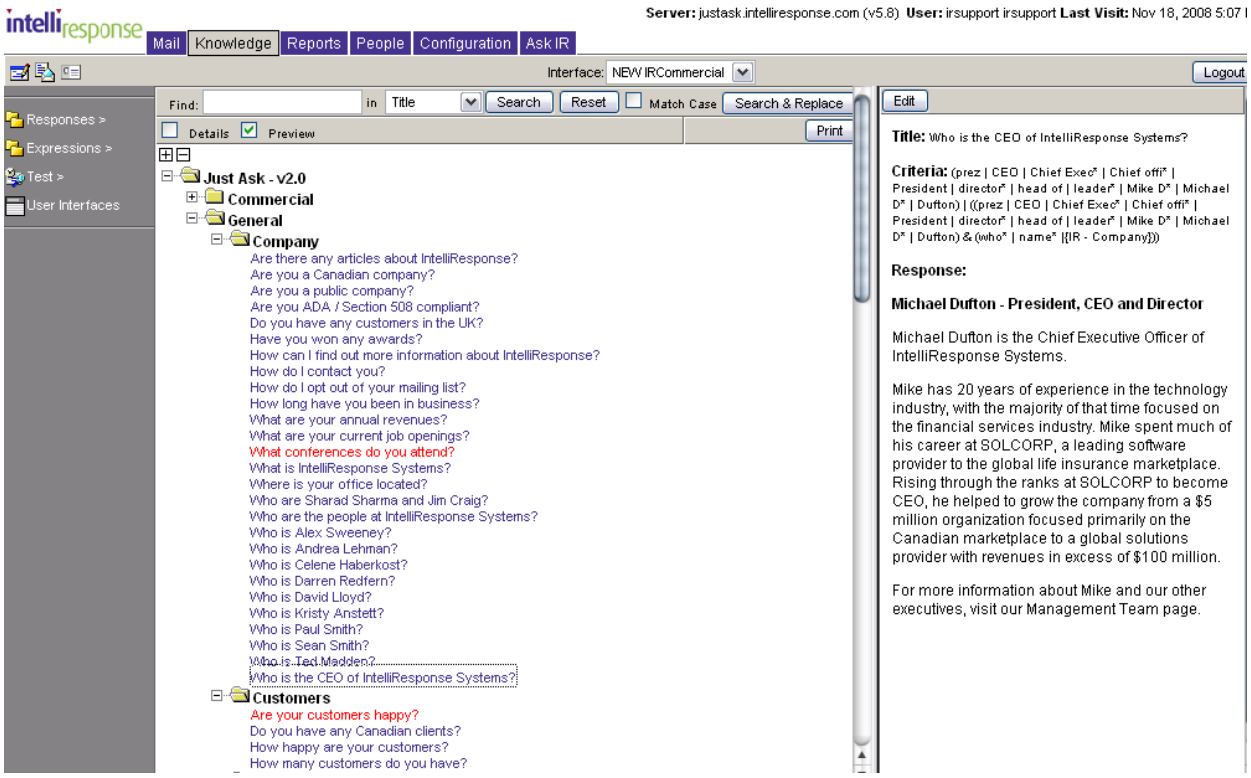
- Browse, and search for registered system users.
- View current information, and full inquiry histories for users of interest.
- Create & delete user groups, or add people to existing groups.
- Bulk e-mail groups of users.
- Set a date filter for user activity, so that only recently active users are displayed.

5) The Configuration tab is a centralized location from which you can:

- Create, delete, view and edit iR administrators.
- Create Access Control Limit (ACL) groups to control administrator access to iR admin application features.
- Configure your server (authorized admins only), and
- Set up Response Thresholds.

6) The Ask iR tab is a centralized location from which you can:

- Ask a question about IntelliResponse in the text box
- Browse the related and suggested drop-down lists for other Responses that might be of interest
- View the Top Questions for Ask iR
- Escalate a question using the web form, if you are not receiving adequate Response(s) from Ask iR.



The Azorus and IntelliResponse approach:
IntelliResponse is a web based inquiry and response system that allows students, staff and faculty to **ask questions via your website** and receive **'one right answer'** in return, 24/7.
IntelliResponse is an open platform that delivers a complete set of services that can be accessed by students and the Azorus application. The key service is the "Answer Agent" web service that allows a user to submit a text based question to the IntelliResponse Answer Agent, which in turn delivers the One Right Answer™ to the requesting application, or directly from the IntelliResponse application.
A simple, intuitive and highly effective method of getting answers to questions has always been of primary importance in servicing website visitors and contact center agents. Seeking such a tool to complement more traditional site and content search tools has been proven by our customers to be extremely effective in markedly improving overall customer satisfaction, and reducing early abandonment of unresolved customer service needs or potential new students who get frustrated and move to a competitor site.

With the direct involvement of our experience knowledge analysts, project managers and delivery teams, our customers in Higher Education have consistently achieved measureable success by introducing IntelliResponse at every point of interaction with their students, faculty, staff and parents to allow self service and to support live assist agents in increasing their First Contact Resolution rates dramatically for routine and commonly asked questions.

IntelliResponse represents not only advanced "third generation" knowledgebase technology but also an organization with campus wide deployment expertise and pre-built templates to accelerate implementation in almost any business or operating area of the campus.

IntelliResponse can confidently help CSN achieve its goals by delivering on the following:

- Delivering our patented "One Right Answer" capability to your website and contact centre, creating a superior student experience, 24/7
- Measurably reducing volumes of web site escalated email inquiries and telephone support calls, ultimately improving contact staff efficiency, reducing call center call and email volumes, and reducing overall operational and training costs
    - Avg. 20-35% Phone call reduction
    - Avg. 30-80% Email reduction
- Gaining critical new market insights and trends by capturing your customers interactions in real time and providing unequalled analysis and reporting to convert the information into actionable knowledge.
- Increase consistency and accuracy of information that is consistent and reusable across multiple communication channels over time.
- For Admissions, Recruitment, and Prospective Student groups…combining all of the above capabilities to create significant increases in marketing campaign effectiveness and conversion rates.

IntelliResponse is unlike any other self-service solution on the market; it is the de facto standard for self-service in Higher Education and is experiencing unprecedented adoption in the corporate enterprises as well.

IntelliResponse can be implemented standalone as a web-based channel for CSN's students to access via the CSN external website, inside of authenticated portals, or combined with other multi-interaction channel options, to create an extremely effective and high impact "First Point of Interaction" strategic alternative.

IntelliResponse is optimized to answer high-volume informational queries that are repetitive in nature. As such, a high performing site will be able to answer 80% - 90% of visitor questions. The 10%-20% of questions that do not have One Right Answer™ are typically comprised of unique "one off" questions and complex queries requiring agent intervention. When this occurs, the visitor can opt to escalate their query to an alternate channel of their choice (likely escalating to CSN's Call Center).

A large percentage of all interactions are "informational queries" where the customer wants answers to their questions and where there is one correct answer that will lead them to the next step or will satisfy their inquiry. It's that simple. And they want fast, easy access to clear, unambiguous answers. Today's "NET" generation and experienced online customers will judge your enterprise by how easy you are to do business with, and often at their first point of interaction by how easy you make it for them to get the correct answers they need.

The unique, patented technology from IntelliResponse has proven to be a compelling and innovative approach in the marketplace. The One Right Answer™ technology is a solution that can be truly leveraged enterprise-wide by providing informational answers to customer questions, regardless of the channel or technology used by the customer.

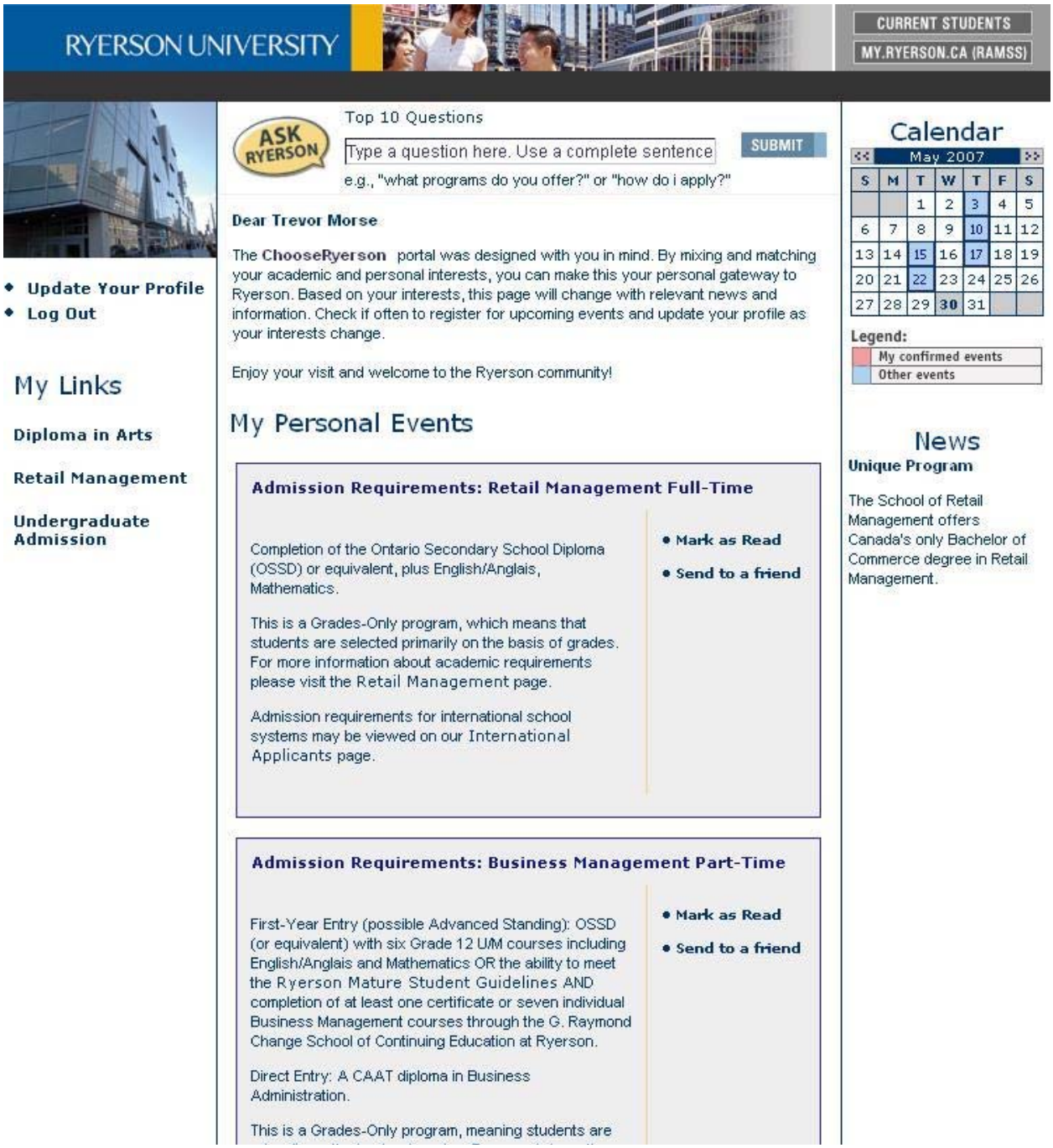
By opening up its architecture through an open web service, IntelliResponse is able to deliver the unique and powerful capabilities of the Enterprise Answer Agent to 3rd party and customer-developed applications that focus on Customer Interaction Management (CIM).

Any CIM application that answers high-volume questions of a repetitive nature will benefit from the Enterprise Answer Agent, and we look forward to working with CSN to help leverage the IntelliResponse Answer Agent for multiple audiences, and in multiple channels.

The Azorus system provides two integration points for the IR question box…these are on the main Azorus portal login page (figure 1), and inside the portal itself, at the top of the main portal page (figure 2)

Figure 1

Figure 2


RYERSON UNIVERSITY
CURRENT STUDENTS
MY.RYERSON.CA (RAMSS)
Update Your Profile
Log Out
My Links
Diploma in Arts
Retail Management
Undergraduate Admission
ASK RYERSON
Top 10 Questions
Type a question here. Use a complete sentence
SUBMIT
e.g., "what programs do you offer?" or "how do i apply?"
Dear Trevor Morse
The ChooseRyerson portal was designed with you in mind. By mixing and matching your academic and personal interests, you can make this your personal gateway to Ryerson. Based on your interests, this page will change with relevant news and information. Check if often to register for upcoming events and update your profile as your interests change.
Enjoy your visit and welcome to the Ryerson community!
My Personal Events
Admission Requirements: Retail Management Full-Time
Completion of the Ontario Secondary School Diploma (OSSD) or equivalent, plus English/Anglais, Mathematics.
This is a Grades-Only program, which means that students are selected primarily on the basis of grades. For more information about academic requirements please visit the Retail Management page.
Admission requirements for international school systems may be viewed on our International Applicants page.
Mark as Read
Send to a friend
Admission Requirements: Business Management Part-Time
First-Year Entry (possible Advanced Standing): OSSD (or equivalent) with six Grade 12 U/M courses including English/Anglais and Mathematics OR the ability to meet the Ryerson Mature Student Guidelines AND completion of at least one certificate or seven individual Business Management courses through the G. Raymond Change School of Continuing Education at Ryerson.
Direct Entry: A CAAT diploma in Business Administration.
This is a Grades-Only program, meaning students are
Mark as Read
Send to a friend
Calendar
May 2007
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31
Legend:
My confirmed events
Other events
News
Unique Program
The School of Retail Management offers Canada's only Bachelor of Commerce degree in Retail Management.

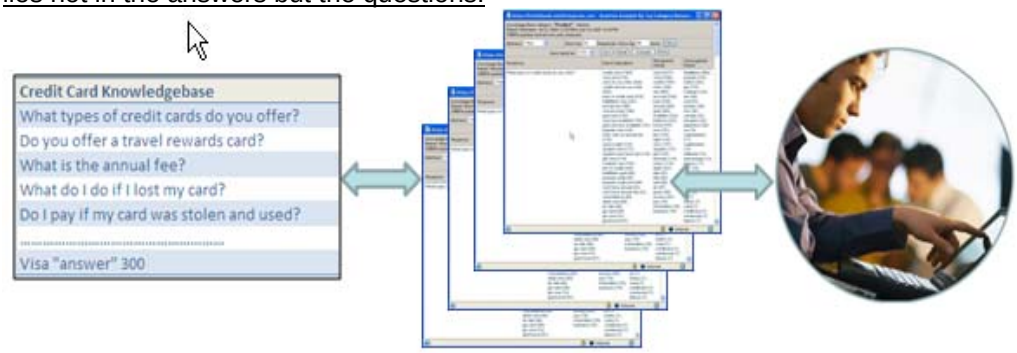
Queries may be executed by either **keyword search**, **or complete 'natural language' sentences**. Using our patented search and indexing method, IntelliResponse matches the specific questions asked via the natural language interface to the specific, one best response in the knowledge base. An answer is provided back to the user instantly and seamlessly via the CSN website.

The return of the best response to *a natural language question* is perhaps the most critical element of a successful knowledge base solution, and the foundation of effective self-service. Using our patented search and indexing method, we provide web users with the ability to ask their questions in everyday language. IntelliResponse matches the specific questions asked via the natural language interface to the specific, one best response in the knowledge base. An answer is provided back to the user instantly and seamlessly via the CSN website.

Our unique approach eliminates the issues associated with search engines and other self-service knowledge base solutions and provides the ultimate user experience by delivering the following:

- Ability to ask question in everyday language including spelling mistakes, acronyms, slang and terminology specific to CSN;
- Ability to set rules that allow users to ask more specific questions, and receive a more specific response;
- The exact one answer with a specific result; and
- Related info based on the question asked.

The power of IntelliResponse is the integral matching engine and knowledgebase architecture combination – our "Enterprise Answer Agent". This is a patented question to answer matching engine that allows visitors to input full questions in plain language - complete with spelling mistakes, grammatical errors and "text speak" - and matches those questions to the correct One Right Answer™.
IntelliResponse's advanced matching engine understands all the variations and combinations of questions and can match them to the single, correct and approved answer in the IntelliResponse knowledgebase.
The question "How much does tuition cost?" has hundreds of different ways that can be asked using a variety of recognized words and co-locations of words that the Answer Agent has determined have this meaning. Other examples could be, "How much does it cost?" "How expensive are courses?" to name a few. The complexity lies not in the answers but the questions.



300 approved Visa questions and answers ✖ 5,000 ways of asking each single question = 1.5 M possible Visa related questions

Our synonyms come in the form of "Canned Expressions". Canned Expressions are *distinct, self-contained, boolean logic segments* ("mini-criteria") that you can "plug into" the criteria of your Responses to save you time, improve the appearance & readability of your criteria, and make response maintenance much easier. Canned expressions follow the same rules, and use the same operators, as criteria contained directly within a response.

Canned expressions are generally used to encapsulate *common words or ideas* that tend to appear frequently in your criteria. For example, a university or college would find it useful to use a canned expression for *Grades* (included in base iR canned expression library), as many of its responses will concern grades in some way (For example, *Appealing Grades*, *Obtaining Grades*, *High school Average Requirements*, etc.). The final criteria string for *Grades* might look something like this:

(mark* | grad* | transcript* | scor*)

Canned Expressions, within the criteria of a Response, are blue with curly brackets. As an example:

{Grades}

If a common term you use is “apply”, we have pre-built canned expressions in the system that you can use out of the box, like “enrol”, “get into”, and “register” etc. In addition, you can add and modify these as you fit. You then piece these together to form “criteria”, usually concepts 2 or more that then allows the system to match one best response, instead of hundreds or thousands. We also have symbols we utilize that enables IR to catch common misspellings and typos.
IntelliResponse comes packaged with a standard, built-in library of canned expressions, including common nouns and verbs, and concepts which are specific to Higher Education.

- **Nouns and Verbs**
  - **Nouns**
    - **Education**
      - Assignments / Homework
      - Class / Course
      - Co-op
      - Distance Education
      - Exam
      - Grades
      - Grades - cutoff / requirements
      - Graduation
      - School
      - Tour or Visit
    - **Financial**
      - Account
      - ATM / Bank Machine
      - Balance
      - Banks
      - Credit Cards - Common
      - Currency - Money
      - Discounts / Savings
      - Funds/Currency
      - GIC
      - Mortgage
      - Overrun/Overdraft
      - Payment
      - RRSP
      - Term Loan
      - US Dollar
      - Withdraw
    - **Geographical**
      - Canada
      - International - Countries other than Canada

The foundation of all CRM applications is a “knowledgebase”. Some contain FAQ components with answers to common questions that is accessed by Agents or end users. These knowledgebases are implemented in many automated and non automated ways:

- Searchable knowledgebase – this is the most common approach and utilizes a search engine front end to index structured knowledgebases based on the keywords entered by the agent
- Knowledge Management (KM) applications – these are high end, sophisticated applications typically implemented only in the most sophisticated companies. These KM applications require extensive maintenance but allow organizations to catalogue, categorize and search for enterprise knowledge
- FAQs – these typically exist in a variety of forms – (i) lists on web sites sorted by topic area, (ii) EXCEL or WORD based lists, and of course (iii) “yellow sticky notes” created by each Agent as a result of their frustration finding answers

There are a number of commonly identified deficiencies with all these approaches:

- They don't work efficiently or effectively for Agents, and especially for customers. Users are forced to hunt and peck through an often overwhelming numbers of "possible answers" and determine the closest match. Possible responses are often inconsistent or ambiguous, so the user is forced to make judgments on which is accurate. For prospective or existing customers, this is a frustrating experience that negatively impacts the impression of the company, and chips away at customer loyalty
- Agent productivity is negatively impacted. Providing consistent, accurate responses to customer queries in the shortest elapsed time is a critical goal for all Call Center operations. This is particularly difficult for new Agents who don't have the familiarity of experienced staff
- Customer satisfaction is negatively impacted. Studies repeatedly show that customers don't like a search based experience. It frustrates them, wastes time, and often forces them to higher cost live channels the service is designed to replace
- Different knowledgebase applications are commonly deployed for each interaction channel. Each of these knowledgebases usually contains similar and often identical information, and each must be independently managed and maintained. This represents a significant organizational cost, and represents an organizational risk because different answers are being provided to the same questions
- Lack of control over the brand and messaging. Companies spend millions of dollars to create and manage messaging and the attributes of the brand. Search based approaches that force customers or agents to choose from multiple responses are by their very nature destructive to building brand and managing the message

The solution is the Enterprise Answer Agent from IntelliResponse that delivers accurate, consistent, instant answers to common questions, regardless of the interaction channel, or the way that a question is asked. Maintaining and evolving CSN's knowledgebase is critical to the long-term success of this initiative. Without this commitment the effectiveness of the solution will decline. The IntelliResponse solution comes equipped with an easy to use administrative interface that facilitates straightforward maintenance activities, and garnishes a wealth of strategic institutional information.

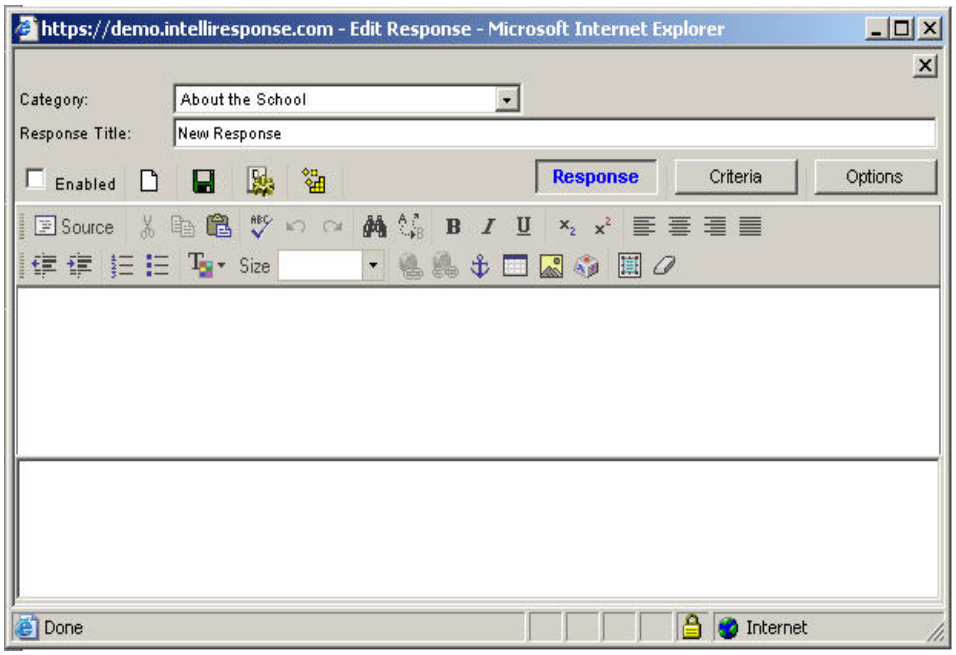
Editing responses in IntelliResponse is easy, and does require technical expertise.

The Edit Response window is the central palate from which you can:

- Create, edit, delete, format, lock/unlock, enable, and save responses.
- Develop response criteria.
- Establish inter-relationships (suggesting & linking) between responses.
- Set up response reminders.
- View user questions that have matched with a particular response.

The Edit Response window displays when you:

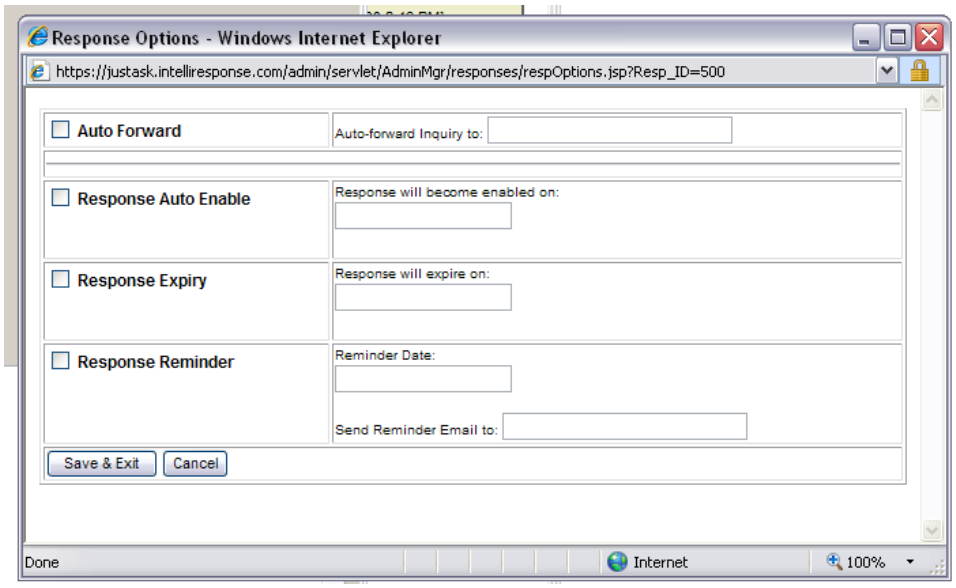
- Create a new response, OR
- Click the title of an existing response, somewhere within the iR admin application.



You can format your response content using the various editing icons on the **Edit Response** window toolbar as shown below:-

Ability to prompt review/expiry of questions

There are a variety of content maintenance functions within IntelliResponse. The response auto-enable & expiry features can be very useful for *time-sensitive responses*. For example, if your school is running a campaign which lasts for two weeks, you might use these features to automatically turn the response on a week, or a few days, before the start of the campaign, and turn the response back off at the end of the promotion. A response reminder will be send to the specified e-mail address, on the specified date.



Ability to track usage and produce statistics related to frequency of subject inquiries

System Performance Reports provide a comprehensive performance "snapshot" of your IntelliResponse system, for one or more periods of time, by displaying numerous *count*, *percentage*, *maximum* and *average* statistics. Various report data items also link to other reports, which allows you to perform performance *drill-down analysis*.

System Performance Reports can help answer the following types of questions:

- *How many people are using the system?*
- *Is the system receiving a high number of special inquiries?*
- *Does the system have an acceptable auto-response rate?*
- *What percentage of questions are from the manual entry textbox? From the Top Questions List? Etc...*

Ability to grant levels of security/access to various administrators and users in different departments

Access Control Limits, or "ACLs", are a set of system permissions that you can set up to control (*allow* or *restrict*) admin access to specific areas of the iR admin application.

How do ACLs work?

ACLs work by *revealing* or *concealing* specific iR admin application features for groups of administrators, based on whether these groups have these features *permitted* or *not permitted,* respectively. ACL permissions can be applied at a high level (for example, a group of administrators can be given access to ALL mail-related features), or at a lower level (for example, a group of administrators can be given access to view reports, but not download or delete saved report files).

Why use ACLs?

ACLs have two main benefits:

- Ensuring data integrity and security, allowing for effective change control, much like permissions on your network
- Aiding in the logical organization/splitting up of iR administrator tasks

An administrator, or "admin", is a person designated to set up and/or maintain the IntelliResponse knowledge base and/or associated features (e-mail, reporting, configuration, etc.) for your business/organization.

Administrators are the key to a *healthy*, *effective* IntelliResponse implementation. It is important that an administrator fully understands the importance of, and how to use, the subset of admin features that he/she is assigned to (via Access Control Limits/ACLs).

Every component in the system can be controlled by the ACL permissions.
Audit logs are kept for changes made to content contained in *responses* and administrator *email activity*.
The **E-mail Activity by Admin Report** reports at a high level, how special inquiry e-mails are being handled in your iR system, but it shows you a break-down of these e-mail-related statistics *by administrator.*

The Content Modification by Admin Report shows a break-down of knowledge base changes made, by administrator. More specifically, the report shows the following information for each administrator:

Total Content Changes - The total number of response & canned expression creation, modification and deletion operations performed by the corresponding administrator, during the specified timeframe.

Response Modifications - The total number of response modifications made by the corresponding administrator, during the specified timeframe. (A response is considered "modified" when an administrator clicks the save icon when he/she has the response locked.)

Responses Created - The total number of responses created by the corresponding administrator, during the specified timeframe.

Responses Deleted - The total number of responses deleted by the corresponding administrator, during the specified timeframe.

CE Modifications - The total number of canned expression modifications made by the corresponding administrator, during the specified timeframe. (A canned expression is considered "modified" when an administrator clicks the "Update" button in the canned expression editor.)

CEs Created - The total number of canned expressions created by the corresponding administrator, during the specified timeframe.

CEs Deleted - The total number of canned expressions deleted by the corresponding administrator, during the specified timeframe.

Report Timeframe: Apr 07, 2003 5:16 PM to Jun 15, 2005 5:16 PM

Interface: -- All --

Save report as: CSV Save Email Schedule Print

Admin Username	Total Content Changes	Response Modifications	Responses Created	Responses Deleted	CE Modifications	CEs Created	CEs Deleted
Jennifer	6171	5320	353	290	125	51	32
kristy	2896	2399	154	9	228	98	8
irsupport	412	332	33	23	20	4	0
carole	53	43	7	3	0	0	0
Farshad	3	3	0	0	0	0	0

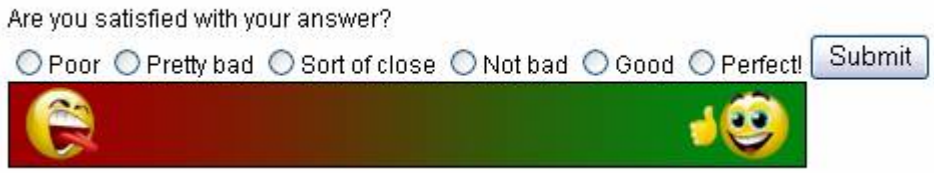
This report is useful for the product manager to monitor the productivity of the iR knowledge base administration team. It also shows how much, or how little, your knowledge base content has changed during a particular period of time.

All reports may be saved, scheduled and exported in CSV or PDF Form.

Visitor Ratings of FAQs

User feedback can be a valuable input into the content improvement process. That is why we deploy various mechanisms that allow web users to participate in rating content. User feedback reports are generally retrieved as a specific subset from the overall “System Performance” reporting umbrella.

The screenshot below illustrates an example:



intelliresponse™

Find the Tree. Ignore the Forest.

Increase student satisfaction. Optimize staff productivity.
Intelligent Web Self-Service Agent

Our Guarantee
IntelliResponse will help your team go live within 45 days with a performance commitment to answer at least 80% of questions with a single answer.

Business Problems

- Students and other constituents want immediate self service access to information 24x7, and are frustrated by having to search web sites or wait in call center queues
- Staff are responding to thousands of repetitive emails and calls that don't allow them to focus on personal contact and other high value activities
- Thousands of years of institutional knowledge is being lost forever when staff retire
- Prospective and enrolled students have a poor image of the school when their basic informational needs are not easily satisfied
- Recruitment costs are too high because staff is tied up responding to repetitive queries
- Student retention is poor further aggravating the cost of recruitment

Solution

The IntelliResponse Self-Service Agent delights web visitors by providing a high touch experience that delivers the precise information they need 24x7. Over 87% of all questions are provided with 1 right answer.

IntelliResponse has answered well over 20 million questions at over 125 customer implementations.

How It Works

- "Ask Us" dialogue box is located prominently on the school web site
- Web visitors ask questions in natural language - that may include spelling and grammatical errors
- Precise and exact "one right answer" is provided to the visitor
- Based on the intent of the visitor's question, other relevant information is presented – including related questions and personalized targeted offers

Key Features

- Customize "Ask Us" self-service interface to reflect brand attributes
- Patented "one right answer" solution understands precisely what the visitor wants, regardless of the hundreds of ways a specific question can be asked
- Relevant information links and related questions are displayed with the answer
- Every question and answer is captured in a 24x7 Research Agent that supports comprehensive reporting and analysis of top questions, key trends, and insights about existing or new offerings or services
- Knowledge management tools monitor the quality of responses and unanswered questions to improve the performance and quality of the Knowledge Base
- 100% hosted solution requiring minimal involvement by IT staff

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95 King Street East, Suite 200,
Toronto, ON, Canada M5C 1G4
1.866.454.0084

The IntelliResponse Web Self-Service Agent is delivering significant value to Higher Education institutions today.
Here are 4 case study summaries:

Athabasca University
Canada's Open University

Athabasca University (AU) is Canada's leading distance-education and online university with over 37,000 students per year.

- $5 saved for every $1 invested in IntelliResponse – 500% ROI
- Over 1 million questions asked since go-live in 2003
- 20,000 queries per month with over 95% answered with One Right Answer
- Total queries has risen 52% in last 4 years, but staffing has increased by only 13% due to IntelliResponse
- Emails virtually eliminated
- Quality of staff interactions with students increased due to elimination of repetitive questions – average call time has increased by 31%

Cincinnati State
TECHNICAL AND COMMUNITY COLLEGE

Cincinnati State Technical and Community College offers programs to nearly 14,000 students from the Tri-State and 49 countries.

- 98% of questions successfully answered
- Savings of 204 hours of work per month for the already busy staff.
- Guaranteed consistency of the responses and tone, something almost impossible to achieve over the telephone

TEMPLE
UNIVERSITY

Temple University is a comprehensive public research university with more than 34,000 students, and is the 6th largest provider of professional education in the United States.

- Answered nearly a quarter of a million questions since implementation two years ago
- Saved almost 20,000 hours of work for admissions staff - equates to about 6 full-time staff
- Capturing every question asked allows Temple University's various departments to offer optimal service and satisfaction

UBC

Ranked among the 40 best universities in the world, The University of British Columbia (UBC) has over 45,000 students enrolled.

- 84% of all student questions answered with 1 right answer 24x7
- Over 2 million questions asked
- 85% reduction in email volumes, facilitating dramatic improvements in level and quality of live interactions by student services staff
- 25 headcount savings in future staff needs

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intelliresponse™

Find the Tree. Ignore the Forest.

Go live with web self-service in 45 days

QuikStart Services

Our Guarantee

IntelliResponse will help your team go live within 45 days with a performance commitment to answer at least 80% of questions with a single answer.

Business Problems

- Universities and colleges typically have limited internal resources to allocate to new projects. This problem is exacerbated during the annual recruitment cycle when staff struggle to handle the high workloads of the academic year
- For many schools, the implementation of a web self-service solution is a new initiative. Valuable resources must be dedicated to the project who need to be trained, and will then go through the typical learning curve for a new system
- Timeline becomes the issue – How can a school quickly achieve the benefits of IntelliResponse when resources are already pushed to their limits

Solution

QuikStart Services from IntelliResponse provides a compelling alternative to schools facing resource crunches.

Qualified IntelliResponse consultants will manage, develop, test and implement the school's system with minimal use of the institution's resource – and will have the school ready to launch in 45 days!

IntelliResponse is a recognized expert in implementing these systems. We have been involved in 125 implementations, and our consultants have access to an extensive library of best practices, department specific knowledge bases, branding ideas, and much more.

How It Works

- The starting point is to understand key institutional objectives for the project – we map out the existing process, how it needs to be optimized and improved, and what metrics must be collected to determine if the objectives are achieved
- An IntelliResponse consultant will develop the project plan with key staff
- The university or college personnel will collect and/or develop constituent response content for the knowledgebase, make decisions on the question box location and response page look & feel for the school's website, and organize a focus group for testing
- All other project deliverables will be the responsibility of IntelliResponse – including the design, build and test of the critical knowledgebase

Key Features

- Standard project plans, tested in over 125 implementations, map out the steps and dependencies needed for a quality, on time implementation
- Sample knowledgebases developed with leading schools provide the foundation for the constituent knowledgebase – these include admissions/recruitment, registrars, student services and IT helpdesk.
- Templates facilitate the customization of standard questions to the unique requirements of the institution, and the addition of content unique to the institution
- Best practices for website integration are reviewed with the institution, making web decisions very straight forward
- IntelliResponse knowledgebase consultants design, develop and test the knowledgebase – available for a university focus group test
- After additional fine tuning – the system is ready to launch in just 45 days

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intelliresponse™

Find the Tree. Ignore the Forest.

Delegate maintenance headaches to IntelliResponse

SmartSource Services

Our Guarantee
SmartSource Services from IntelliResponse will guarantee that the self-service system will answer at least 80% of constituent questions accurately, month after month.

Business Problems

- Maintaining and evolving the institutional knowledgebase is critical to the long-term success and acceptance of self-service – and the foundation to be able to optimize the productivity of support staff. Without this commitment the effectiveness will decline
- Key institutional resources who would be required to maintain the knowledgebase are focused on day to day priorities
- Staff turnover and retirement is exacerbating the problem, rendering the institution vulnerable and without trained resources
- One of the biggest benefits to a web self-service implementation is capturing and leveraging institutional learning – without adequate staffing these key learnings are lost and not leveraged
- Together, these problems accumulate and lead to the same result – a system that no longer meets the needs of the school's most important constituent!

Solution

SmartSource Services from IntelliResponse is a compelling solution for institutions that ensures the full short and long term value is driven out of its investment.

IntelliResponse will assume responsibility for the monthly monitoring and maintenance of the system, and report to you on a monthly basis on the performance of your system – with limited involvement of internal staff.

How It Works

- On a monthly basis, IntelliResponse's sophisticated Response Quality software, supplemented by standard reports, identifies gaps and poor quality responses that require action
- Trained knowledgebase consultants will review these gaps on a monthly basis
- Following a well documented content management process, unanswered (and low quality responses) questions will be identified as requiring action
- The institution provides approved content – IntelliResponse does the rest

Key Features

- The consultants will fine-tune the knowledgebase criteria on an ongoing basis to ensure that constituent questions are answered accurately and precisely
- Standard and customized monthly reports are provided to management that identify the performance of the system, and summarize changes that have been implemented to the knowledgebase
- Monthly teleconference calls are held to review this information with management, and to discuss key actions that are to be taken
- Experienced higher education consultants will review the system on a quarterly basis to understand and highlight key trends and information that may drive institutional learnings and actions. These learnings will be reviewed with management and appropriate actions taken

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95 King Street East, Suite 200,
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1.866.454.0084

Appendix 4 – SIS Integration Document

A Technical Overview of the Azorus SIS Integration Module

www.azorus.com

AZORUS and Student Information Systems (SIS) Integration

The Azorus software suite is able to integrate with most SIS systems available. The level of integration will depend on the SIS system and the institution's IT infrastructure.

There are three main levels of integration between Azorus and an SIS system:

Level 1: consists of flat file generation containing updated data being "pushed" to the Azorus system from the SIS system. Azorus will then import this data automatically which can be displayed to end users. This level of integration does not require access to the SIS system's database. Alternatively, Azorus can "push" a flat file to the SIS system for import.

Level 2: consists of a similar flat file based data exchange in Level 1, but it is a two way communication process instead of unidirectional. Both systems will need to import and process data into their databases.

Level 3: consists of creating a middleware layer between the SIS and Azorus systems in which both systems exchange updated information. This allows for scheduled or real time data synchronization between the two systems.

This document will discuss in detail the operation of Level 3 integration as it encompasses both Level 1 and 2 integrations.

AZORUS SIS Integration

As part of the students personal web portal, the Azorus system provides information on a students SIS status via an SIS Information Page and presents links and personalized interest driven content to appropriate information based on that status i.e. different links and communications based on incomplete or completed sections.

Based on the status, staggered emails would automatically go out to the students prompting them to complete the deficient information. In other words, using the Azorus communications tools together with the unique attributes that exist within the SIS System, we are able to automate activities directed at prospective students. Moreover, an institution is able to focus its marketing communications efforts at those students who best meet your enrollment profile objective to ensure your entering class is fully optimized.

Based on status, emails are able to be queued to students with personalized information based on completed sections of the application requirements i.e. a thank you or, with additional information that they require after completing sections of their application. You are able to queue email communications from a variety of template driven HTML emails (pre-populated by Azorus).

Email based communications are automated and can be delivered to students based on their actions or inactions i.e. send an email to every student 14 days after requesting information, send a reminder email 3 days prior to an on-campus event etc. These individual workflows are easily set up and are fully automated for your staff.

Interface with the SIS System

The interface has been designed in a manner that mitigates potential harm to the SIS system or its table and record structures. By using two new data exchange tables to handle the creation of, as well as the synchronization of, data update and delete operations, there is very little impact on the existing SIS system.

The first of these data exchange tables (Exchange_ID_Map) keeps a concrete link between Azorus User IDs and the SIS system User ID once a match is confirmed. The second table (Exchange) leverages the link from the first table to track changes originating from either system and flag these items for action in the opposite system. These exchange tables can live inside the Azorus system, the SIS system, or in a 3rd external database.

The core interface between Azorus and the SIS System is maintained by using database triggers to track updates in both the SIS System and Azorus (the MySQL version of the Azorus database uses code driven tracking).

Day to Day Operations:

Handling new record creation in Azorus:

- A circular set of data, compromised of tombstone information for a student is populated in Azorus via the web portal or admin interface. On a predetermined interval this data is to be pushed to the two middleware tables created.
- The SIS system then must load this record into the SIS database.
- The data sent can include any piece of data collected within the Azorus system. An example data set is listed below:

  First Name
  Last Name
  Middle Initial
  Gender
  Birth Month
  Birth Day
  Birth Year
  Ethnic Code
  E-Mail Address
  Area Code
  Phone Number
  Address 1
  Address 2
  City
  State/Province
  Nation Code
  Citizenship
  High School CEEB code
  High School Grad Year
  Prior College CEEB code
  Major Code

SAT Scores
Academic Interest Codes
Level Code
Term Code
Azorus ID

- New processes/tables required for integration:
  An Azorus ID/SIS ID field translation table (Exchange_ID_Map).
  An Azorus/SIS Exchange table (Exchange).
  Azorus/SIS database connectivity scripts (using roles or grants in the case of Oracle/Banner integrations)
  SIS process to scan Exchange table for updates and write to SIS database
  SIS database triggers to react to specific updates and write to Exchange table

Handling updates to Azorus content:

- Using triggers, Azorus reacts to modifications to the circular dataset and creates records for all changes within the Azorus/SIS Exchange table. Records created by Azorus are marked to indicate they need to be acted upon by the SIS system.

Handling updates to SIS content:

- Modifications made to circular set data in the SIS system results in these records being written to the Azorus/SIS Exchange table by "On Update" triggers, or the like, for the specific tables and fields. Records created by the SIS system are marked to indicate they need to be acted upon by Azorus.

- Azorus and the SIS system both require a custom process to scan the Exchange table, update records in each system, and mark the Exchange table record as having been processed with a date stamp.

Deletions and merges of student records:

- Only admin users may trigger deletions of records within the Azorus system. This causes the Exchange_ID_Map table to be updated to remove the Azorus_ID from the row and add a "deleted" flag.

- The SIS system, in the rare case of a deletion, removes the SIS_ID from the Exchange_ID_Map table and adds a deleted flag.

- Both systems, as part of their Exchange table scanning processes', look for rows in which the deleted flag appears, and the remaining ID still exists within the respective system. If the ID exists, a report will be emailed to an assigned person to clean up the records. If the ID no longer exists, the row will be cleared from the Exchange_ID_Map table and from the Exchange table.

- The process described above is exactly the same for records that have been merged in each system.

- In the case of a merged record, the updates applied to the "correct" record will also flow through the Exchange table like any other updates to the system would, retaining the integrity of the data.

Azorus Specific Processes (Outbound):

Creations in the Azorus database:

- Creation fires a trigger to enter a record in the Azorus database table Data_Exchange_Pending.
- Scheduled Azorus Exchange Update Script (SAEUS / synchonizer.php) connects to the Exchange database and creates an entry in the Exchange_ID_Map with the Azorus ID, no SIS ID and a flag indicating the user is a new user.
- SAUES will then write all applicable data from the circular dataset to the Exchange table for the SIS system to use in order to match the newly created Azorus user to an SIS user, or to create that user within the SIS System.

Updates in the Azorus database:

- Updates fire a trigger to enter record in the Azorus database table Data_Exchange_Pending.
- SAEUS connects to the Exchange_ID_Map table and checks for the SIS ID of Azorus user (as well as checking the inactive status). If a SIS ID is not found, SAEUS will create a record in the Exchange_ID_Map and Exchange tables indicating the user exists in Azorus and should be matched or created within the SIS system.
- SAEUS will then create a record within the Exchange table for this SIS ID indicating what has been updated, when, and the updated value.

e.g.
(assuming that Exchange_ID is updated via trigger)

```
INSERT INTO Exchange (
        Azorus_ID,
        SIS_ID,
        Sequence_Number,
        Item_Name,
        Item_Value,
        Azorus_DTS)
VALUES (
        9999,
        1234,
        4,
        'First_Name',
        'Joe',
        NOW()
);
```

Deletions in the Azorus database:

- Fires trigger as above, with the delete flag set versus an Azorus ID
- The SAEUS connects as above and tries to find the SIS ID. If no SIS ID is found, this process ends here.
- SAEUS will take the SIS ID and update the Exchange_ID_Map table (Data_Exchange_ID_Map).

  e.g.

  ```
  UPDATE DATA_Exchange_ID_Map
      SET Action = 'D', Azorus_ID = NULL
      WHERE Azorus_ID = <RETRIEVED ID>
  ```

- SAEUS will delete all update records from the Exchange table for the deleted Azorus_ID, and also all records from the Azorus Data_Exchange_Pending table.

Mergers in the Azorus database:

- Fires trigger as above, merged flag set versus an old Azorus ID, new ID also captured.
- The SAEUS connects as above and finds the SIS_ID. If no SIS_ID is found, this process ends here.
- SAEUS will take the SIS_ID and update the Azorus ID/SIS ID table (Exchange_ID_Map).

  e.g.

  ```
  UPDATE Exchange_ID_Map
      SET Action = 'M'
      WHERE Azorus_ID = <RETRIEVED ID>
  ```

- SAEUS will delete all update records from the Exchange table for the merged Azorus_ID, and also all records from the Azorus Data_Exchange_Pending table.

Azorus Specific Processes (Inbound):

Additions in the SIS database:

- SAUES will examine the Azorus ID / SIS ID table for records without Azorus_IDs and an Action = 'N', and assume these are new entries.

- SAUES will then create a new user in the Azorus system based on the updates associated with that SIS ID that exist in the Exchange table, but only if sufficient data is available for a complete prospect record.

- SAUES will go back and update the Azorus ID / SIS ID table with the correct Azorus_ID and flag the Exchange records with an appropriate ACTION_DTS (date time stamp).

Updates in the SIS database:

- SAEUS will examine the Exchange table and look for records newer then the date stamp of the last time the table was scanned.

- SAEUS will take any updates from the Exchange table and apply them to the user data tables within the Azorus system. Then flag the Exchange records with an ACTION_DTS.

Deletions & Mergers in the SIS database:

- SAEUS will examine the Exchange_ID_Map table for records with an Azorus_ID and an Action = 'D' or 'M', and assume these are deleted entries.

- SAEUS will generate a report detailing which Azorus users require intervention.

SIS Interface - Testing Plan:

Azorus Testing Responsibilities:

synchronizer.php

The updater takes all updates in the Pending_Updates table and if applicable, it will put them into the Exchange tables for processing.

Required Tests:

1. Create, update & delete users in Azorus and verify data written to Azorus.Data_Exchange_Pending.
2. Insert updated fields listed in Azorus.Data_Exchange_Pending into the Exchange table.
3. Special characters in data tests after transfer to the Exchange table.
4. Data integrity tests after transfer to the Exchange table.
5. Apply user deletions listed in Azorus.Data_Exchange_Pending to the data exchange ID map table.
6. Insert updated fields listed in the Exchange table into Azorus user data tables.
7. Special characters in data tests after transfer to Azorus user data tables.
8. Data integrity tests after transfer to Azorus user data tables.
9. Report user deletions listed in the Exchange ID map table.
10. Ensure any table clean up is completed by the scripts
11. Ensure any reports are compiled and sent by the scripts

Azorus SIS Configuration:

The Azorus synchronization script can connect to the SIS database through any normal connection methodology and in the case of Banner/Oracle using grants or roles if required. The database connection information will be required for Azorus to configure the synchronization script to connect to the SIS system database, if direct SIS database connectivity is a requirement for the particular implementation of the SIS integration module.

Azorus Database Tables:

This table stores the resulting update values from the system triggers:

Data_Exchange_Pending	
Data_Exchange_Pending_ID	int
Field_Updated	varchar2(32)
Field_Value	varchar2(255)
Date_Updated	datetime
User_ID	int
Action_Ind	varchar2(5)
Field_ID	int

This table stores details of users exported from Azorus to the SIS System:

Data_Exchange_Exported_Users	
Data_Exchange_Exported_User_ID	int
Azorus_ID	int
SIS_ID	Int
Date_Exported	datetime

This table stores details of users imported into Azorus from the SIS System:

Data_Exchange_Imported_Users	
Data_Exchange_Imported_User_ID	int
SIS_ID	int
Azorus_ID	int
Date_Imported	datetime

This table stores the details of how Azorus fields are converted to/from the middleware tables:

Data_Exchange_Sync_Item	
Data_Exchange_Sync_Item_ID	int
Item_Name	varchar2(32)
Created_Date	datetime
Modified_Date	datetime
File_Data	mediumtext
Form_Extra_Field_ID	int
Default_Field_ID	int
Segment_ID	int
SIS_Item_Name	varchar2(45)

Middleware Database Tables:

This table stores the user link between Azorus and the SIS System:

Exchange_ID_Map	
SIS_ID	int
Azorus_ID	int
Action	varchar(1)
Action_DTS	datetime

This table stores the information being exchanged between the Azorus and SIS System:

Exchange	
Azorus_ID	int
SIS_ID	int
Sequence_Number	int
Item_Name	varchar2(32)
Item_Value	varchar2(255)
Extended_Value	varchar2(60)
Action	varchar2(5)
SIS_DTS	datetime
Azorus_DTS	datetime

Azorus SIS Web Portal:

Azorus would present, as part of the students personal web page, information based on a students SIS statuses and could present web links to appropriate information based on that status i.e. if the student is on the wait list, a link to the university/college website wait list information section.

Based on status items returned from the SIS system, scheduled emails can be sent to prospective students prompting them to provide more information required to complete their applications, make decisions on wait list offers, or even to give them with additional information on classes, housing, etc. These emails could include embedded links back to the appropriate areas and documents to make it easy for the student to complete the activity.

Example SIS Presentation Fields:

Application status

C - Application complete being reviewed
D - Decision has been made
H - Hold on application
I - Application Incomplete at this time
M - More information is needed

Application date

Is the date of the last change.

Computer Account

If the account exists Azorus would display the students' user name and institution extension.

Students email user name

Student Immunization Record

IC - Immunization Cleared
IM - Immunization Exempt
IR - Immunization Exempt
IX - Immunization Exempt

If no record exists the student has not completed the Immunization requirements and must provide medical information.

Orientation Schedule

Session Number
Session Name
Session Date

A link to the Banner Orientation sign up would be shown here if no session has been selected.

Housing Application

If no record exists the student display to sign up for housing on Azorus may be appropriate.

Financial Aid Required

If the proper documentation has not been received a link to the documentation could be show in Azorus, as well as an email sent to the student to reminding them to send in the proper information.

Customer Support Toll Free North America: 1-866-746-4500

United States

AZORUS Inc.

80 Palomino Lane, Suite 101
Bedford, NH 03110
USA

Canada

AZORUS Inc.

1668 Barrington Street, Suite 600
Halifax, NS B3J 2A2
Canada

Email Inquiries: info@azorus.com
Website: http://www.azorus.com

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Appendix 5 – Implementation Plan

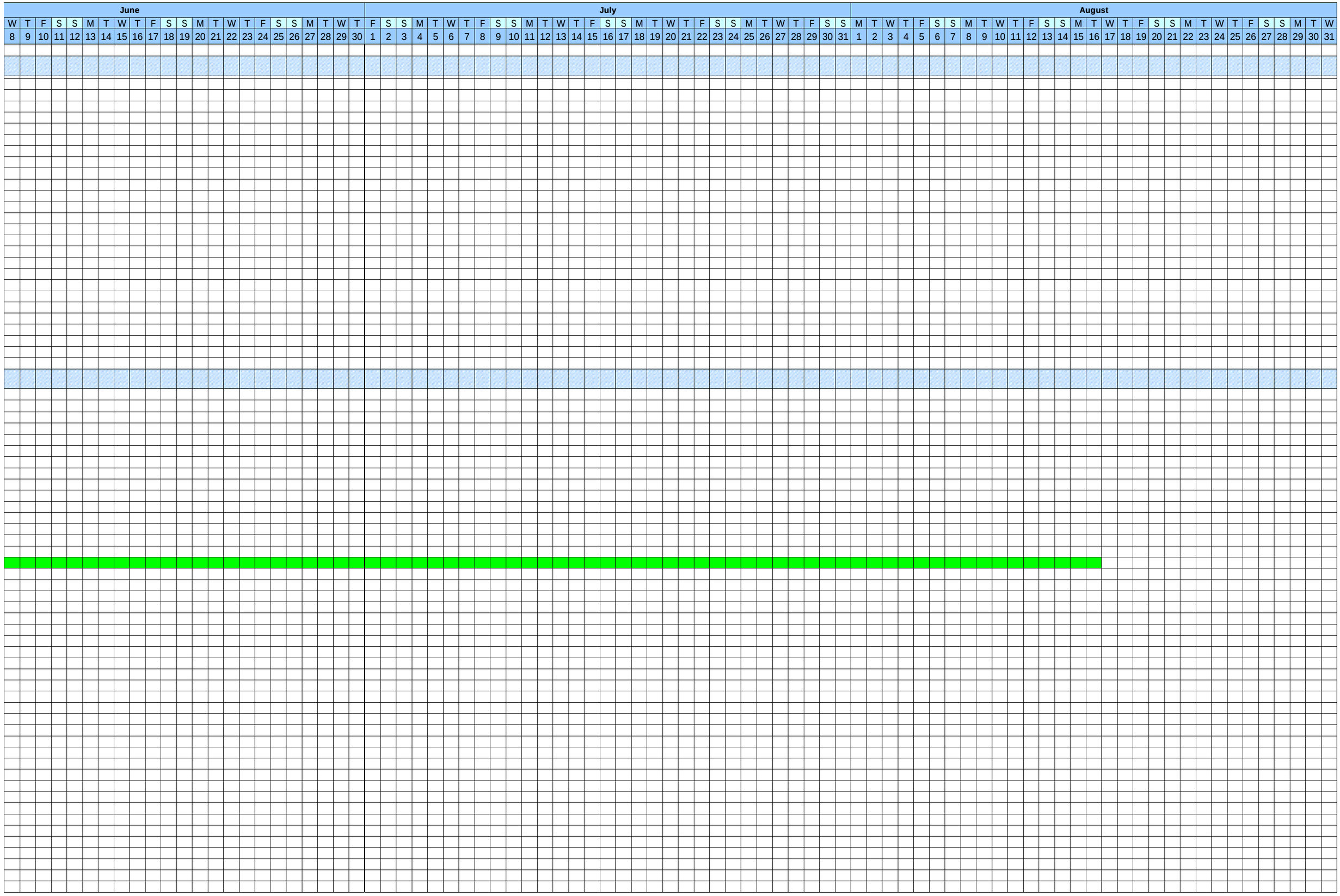
Azorus / College of Southern Nevada Project Plan

DAY	F	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
DATE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7

May

Legend: deadline | range | in progress | completed | today

	OWNER		Completed by
Kick-off Meeting	**Azorus Project Team**	**Client Project Team**	
Kick-off meeting - General			
SEM WORKS to conduct 1 day Audit and on-site briefing report			
SEM WORKS to provide written report (6 weeks following on-site)			
Kick-off meeting - Azorus CRM General			
Introductions	Azorus Project team	Client Project Team	Day 1
Expectation discussion	Azorus Project team	Client Project Team	Day 1
Key Dates / Milestones identified	Azorus Project team	Client Project Team	Day 1
Checkpoint Meetings scheduled	Azorus Project team	Client Project Team	Day 1
Branding/Creative Briefing/Design Review	Azorus Project team	Client Project Team	Day 1
Implementation requirements discussion	Azorus Project team	Client Project Team	Day 1
Website / URL Idea discussion	Azorus Project team	Client Project Team	Day 1
Communications Plan Discussion and Requirements	Azorus Project team	Client Project Team	Day 1
Kick-off Meeting - Technical			
Introductions			Day 1
Expectation discussion			Day 1
Key Dates / Milestones identified			Day 1
Checkpoint Meetings scheduled			Day 1
Discuss field list to bring in to Azorus			Day 1
Discuss field list to bring out of Azorus			Day 1
Finalize process for integration			Day 1
Detail expected load on servers			Day 1
Design			
Creative Briefing			
Font / Graphics (students, campus) / Logos / Colors / Graphic Standards / Mastheads			Day 1
Sample marketing materials (catalogues / brochures / viewbook, etc) - electronic & print material			Day 1
Create URLs for My/Your/Choose/?			
Define URL & Tag line			Day 2
Create site			Day 3
SSL Certificates			Day 3
Safe-sender.html - requires style/formatting			Day 3
Email Template (Standard)			
Azorus to translate design of standard email template			Day 9
Azorus designs for HTML email templates			Day 18
Approve design of standard email templates			Day 22
List Management (ongoing review/adjustment)			
Site icon			
Azorus to translate design of sign up button			Day 8
Approve design of sign up button			Day 9
Login Page Design			
Azorus to translate design of login page design			Day 9
Azorus designs for HTML login page design			Day 18
Approve design of login portal			Day 22
Portal Page Design			
Azorus to translate design of portal page design			Day 9
Azorus designs for HTML portal page design			Day 18
Approve design of portal page design			Day 22
Email Template (Additional)			
Azorus to translate design of standard email template			Day 12
Azorus designs for HTML email templates			Day 18
Approve design of standard email templatesl			Day 22
Initial Registration Form design - RFI			
Provide current RFI form(s)			Day 1
List of Academics offered with appropriate links			Day 5
List of student interest with appropriate links (i.e. Financial Aid, Arts & Entertainmet & Athletics, etc)			Day 5
Create RFI within Admin tool			Day 10
Mockup of current RFI form			Day 26
Approval of RFI mockup			Day 29
Approve layout and content of form			Day 34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Azorus / College of Southern Nevada Project Plan

				May																																											
			DAY	F	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
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Secondary Registration Form design - RFI																																															
Provide current RFI form(s)			Day 1																																												
List of Academics offered with appropriate links			Day 5																																												
List of student interest with appropriate links (i.e. Financial Aid, Arts & Entertainmet & Athletics, etc)			Day 5																																												
Create RFI within Admin tool			Day 10																																												
Mockup of current RFI form			Day 26																																												
Approval of RFI mockup			Day 29																																												
Approve layout and content of form			Day 29																																												
Internal Administration Registration Form design - RFI																																															
Provide current RFI form(s)			Day 1																																												
List of Academics offered with appropriate links			Day 5																																												
List of student interest with appropriate links (i.e. Financial Aid, Arts & Entertainmet & Athletics, etc)			Day 5																																												
Create RFI within Admin tool			Day 10																																												
Mockup of current RFI form																																															
Approval of RFI mockup			Day 29																																												
Approve layout and content of form			Day 29																																												
Internal Administration Registration Form design - RFI (Secondary)																																															
Provide current RFI form(s)			Day 1																																												
List of Academics offered with appropriate links			Day 5																																												
List of student interest with appropriate links (i.e. Financial Aid, Arts & Entertainmet & Athletics, etc)			Day 5																																												
Create RFI within Admin tool			Day 10																																												
Mockup of current RFI form			Day 10																																												
Approval of RFI mockup			Day 29																																												
Approve layout and content of form			Day 29																																												
Approval of all design elements																																															
Content approval (RFI questions, Academics, Interests)			Day 31																																												
Design approval (Layout, Branding, Content ordering)			Day 31																																												
Implementation Requirements																																															
Communications Plan																																															
Portal content			Day 3																																												
Email content			Day 3																																												
Timeline for communication deliverables			Day 3																																												
Audience segmentation for communications			Day 3																																												
Communications - Portal Content																																															
Creation of event content within admin tool			Day 21																																												
Creation of news content (student/faculty profiles) within admin tool			Day 21																																												
Apply appropriate filters to communications			Day 21																																												
Testing of fitered communications			Day 22																																												
Communications - Email																																															
Write verfication email			Day 18																																												
Creation of email using agreed upon email template			Day 26																																												
Approval of initial email			Day 20																																												
Write initial contact email (Welcome)			Day 3																																												
Creation of email using agreed upon email template			Day 9																																												
Approval of inital email			Day 10																																												
Creation of additional emails according to communications plan			Day 21																																												
Creation of additional emails using agreed upon email template			Day 21																																												
Approval of additional emails			Day 22																																												
Management of overall email delivery according to communication plan timeline			Day 17-ongoing																																												
Filters																																															
Creation of standard filters based on academics and interests			Day 12																																												
Creation of custom filters (based on communication timeline)			Day 17																																												
Apply created filters to communications			Day 17																																												
Test filters applied to communications			Day 17																																												
Links																																															
Creation of links based on academics and interests			Day 12																																												
Apply created filters to links			Day 17																																												
Testing of links			Day 17																																												
Reports																																															
Provide required reports (daily, weekly, monthly, yearly)			TBD																																												
Creation of master files that supply report information			TBD																																												
Creation of reports within the admin tool			TBD																																												
Testing of reports			TBD																																												
Knowledgebase (FAQ)																																															

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Azorus / College of Southern Nevada Project Plan

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			DAY	F	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
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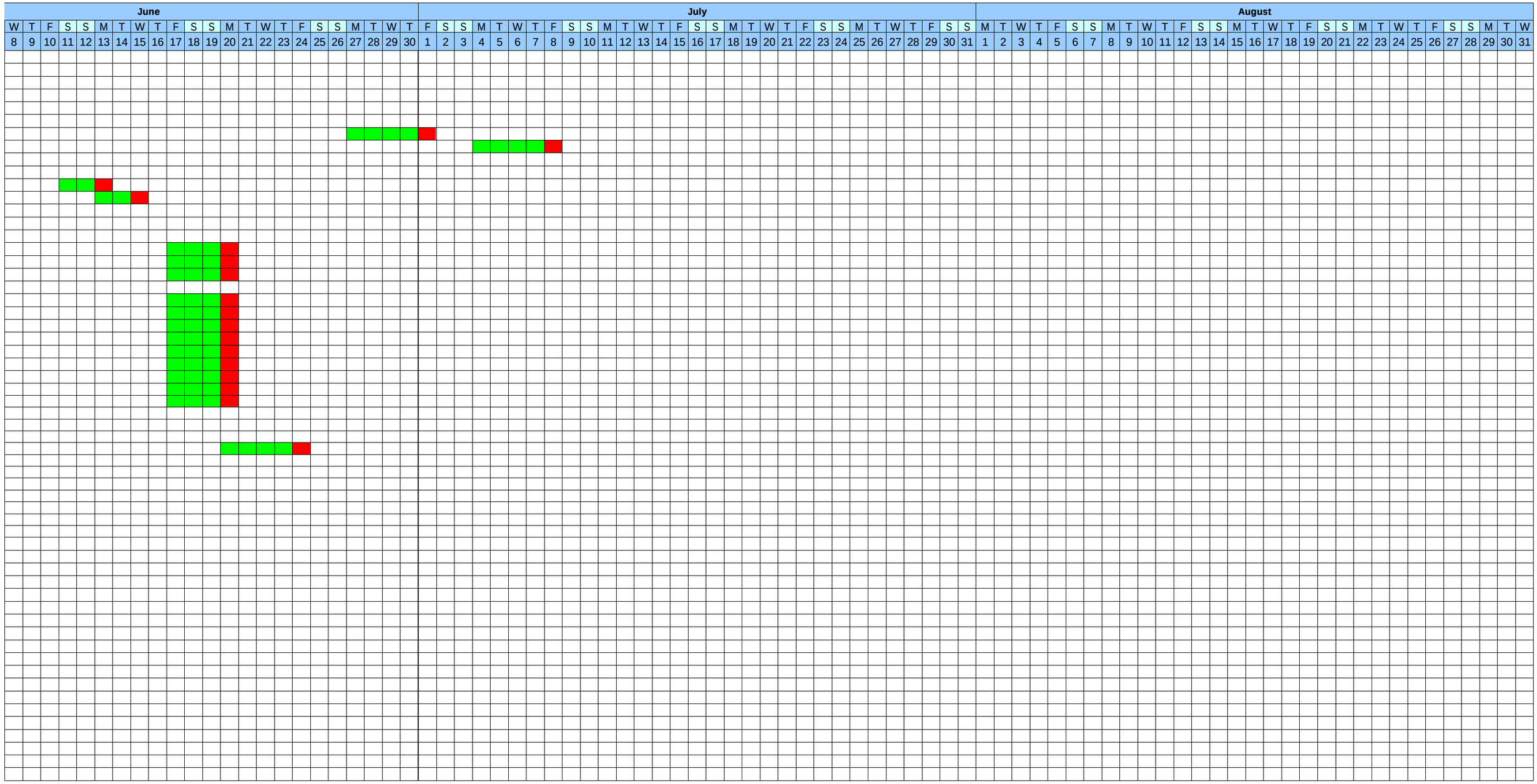
Azorus design for Ask_____ (Intelliresponse)			TBD																																										
Implementation based on Intelliresponse schedule			TBD																																										
Integration of Azorus/Intelliresponse			TBD																																										
Facebook																																													
Use Portal layout/design/content for form																																													
Testing																																													
Admin Users																																													
List of Admin users (first name, last name, email address, title, role privileges)			Day 45																																										
Creation of Admin users within admin tool			Day 47																																										
Testing																																													
Student Experience testing - Azorus																																													
Testing of registration process			Day 52																																										
Usability testing of portal processes (i.e. update profiles, send to a friend, mark as read etc)			Day 52																																										
Testing Email communications plan (verification email, welcome email, etc)			Day 52																																										
Adminstrative tools testing - Azorus			Day 52																																										
Testing the creation of communications			Day 52																																										
Test filters			Day 52																																										
Test Duplicate recruit			Day 52																																										
Test creating prospects			Day 52																																										
Test creating links			Day 52																																										
Trest creating filters			Day 52																																										
Testing of reports within Azorus			Day 52																																										
Testing SIS integration			Day 52																																										
Student Experience testing - CSN																																													
Testing of registration process		Client Project Team	Day 56																																										
Usability testing of portal processes (i.e. update profiles, send to a friend, mark as read etc)		Client Project Team	Day 56																																										
Testing Email communications plan (verification email, welcome email, etc)		Client Project Team	Day 56																																										
Adminstrative tools testing - CSN																																													
Test creating prospects		Client Project Team	Day 56																																										
Testing of reports within Azorus		Client Project Team	Day 56																																										
Training																																													
Plan Onsite training session																																													
Create training outline/timeline			TBD																																										
Create hands-on training exercises			TBD																																										
Schedule training date/location availability			TBD																																										
Provide a list of trainees (first name, last name, email, role)			TBD																																										
Ensure trainee list have appropriate admin priveleges for hands on exercises			TBD																																										
			TBD																																										
Onsite training			TBD																																										
Provide Virtual Learning Library			TBD																																										
Provide Training Manuals (print / cd)			TBD																																										
			TBD																																										
Deliver training			TBD																																										
Launch																																													
Launch																																													
Staff Live Date		Client Project Team	Day 78																																										
Soft Launch Date		Client Project Team	Day 80																																										
Live launch		Client Project Team	Day 84																																										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