



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023

# Why TargetX is the Right Choice for Salesforce Customers

Kevin Butts, Kristi Kooyman, Katie Himmelrick, Chris Dempsey  
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# Introductions



**Kevin Butts**

*VP of Product,  
Student Lifecycle*



**Kristi Kooyman**

*Client Success Manager*



**Katie Himmelrick**

*Client Support Specialist*



**Chris Dempsey**

*Director, Solutions  
Consultancy*



# Why TargetX?



- Build vs Buy Goldilocks
- Experience
- Full Student Lifecycle
- Implementation and Partnership
- Support
- Total Enrollment



# Understanding Build vs. Buy



- Custom Build
  - Longer Implementation
  - Unpredictable Cost
  - May Not Address Future Needs
- Pre-Built Solution
  - Accelerated Implementation
  - Defined Cost
  - May Have Limitations

# Our Mission



- We are a higher-ed company.
- We build enterprise software that will challenge colleges and universities to transform the way they support prospects, students, and alumni.
- We strive to be the premier solution for student lifecycle management, focused on student experience and outcomes.





# TargetX Experience

*We are a company of higher-ed experts providing CRM solutions for recruitment, admissions, and student success trusted by over 400 colleges and universities since 1997.*

## **We are the #1 admissions & higher-ed solution on Salesforce.**

TargetX's solutions are 100% built to work with EDA, and we're proud to be working with over 400 colleges and universities across the country.

## **We are committed to higher education.**

We care about student success. 90% of our employees come from higher ed & ed tech, and we, both as a company and as individuals, invest in thought leadership and giving back to higher ed.

## **We have been delivering scaled Salesforce implementations since 2008.**

We began delivering Salesforce CRM implementations in 2008, a year after the AppExchange launched. In that time we have developed deep expertise in building and maintaining Salesforce solutions.

# TargetX- The Best of Build vs Buy



- Managed package on the Salesforce platform
- Reviewed and approved by Salesforce to work with other platform products and system integrators/partners
- Provides all the benefits of a product, including support and a rich product roadmap
- You have full access to the benefits of the platform
  - AppExchange and its 2000+ apps
  - Security, stability, and extensibility of Salesforce.com
  - A full development platform



# Salesforce & TargetX



TargetX is proud to be the **#1** pre-built solution for admissions on the Salesforce platform.



2019 ISV Partner  
of the Year



EDA Certified



3X Winner

# Clients

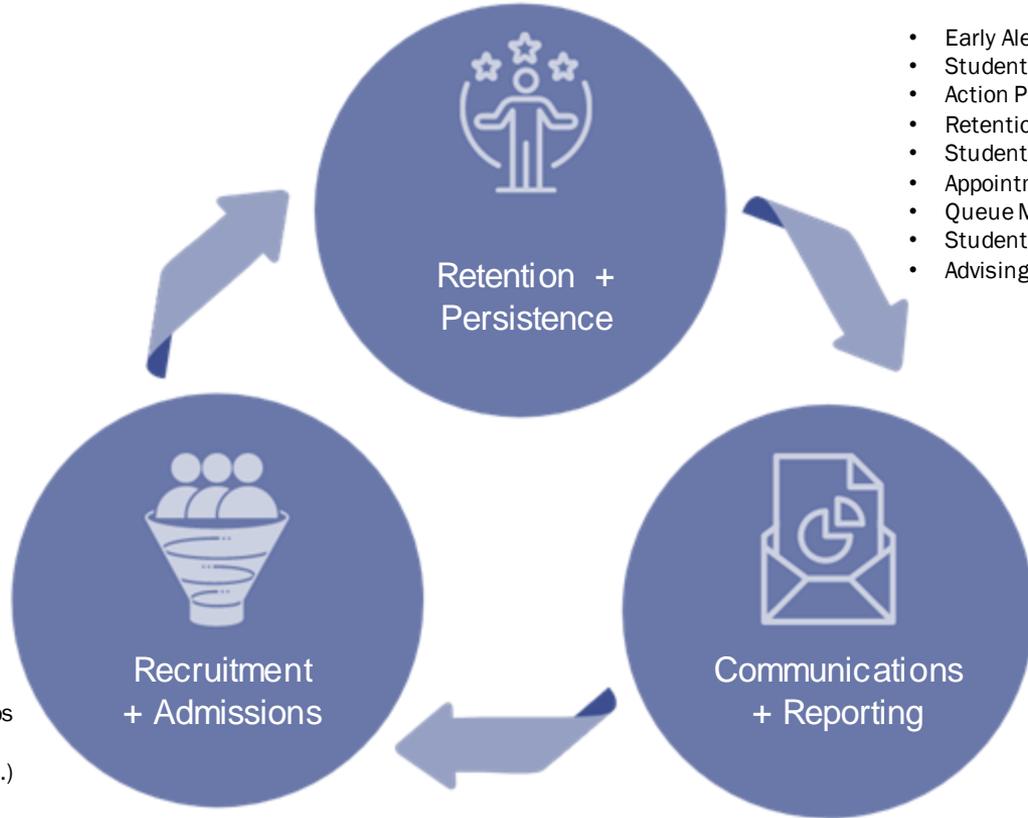


~400 clients and going strong





# Student Lifecycle Platform

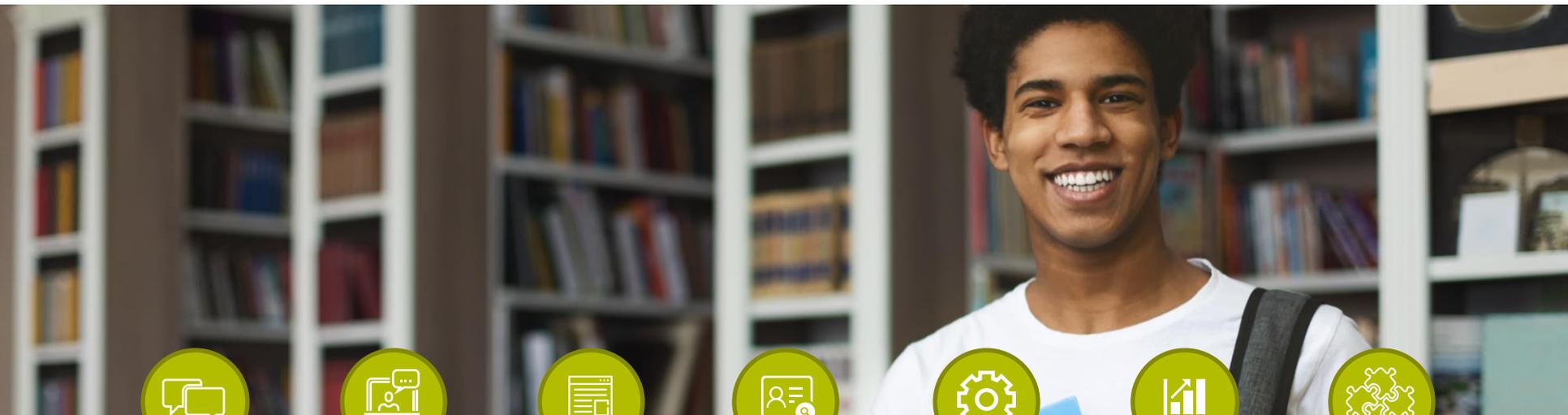




# TARGET

by LIAISON 

## recruitment suite



Communicate



Engage



Apply



Review



Manage



Analyze



Integrate



# TARGET

by LIAISON 

## retention suite



Advise



Communicate



Engage



Integrate



Predict

# Importance of Integration



REST API

DocuSign

ORACLE

amazon web services

zoom

ORACLE

Colleague

PayPal

Cisco webex

amazon web services

Outlook

HigherOne

+tableau

Gmail

touchnet

common app

SAT

ACT

cappex

Virtual Meetings

Data Connectors

Collaboration Tools

Student Information Systems

Payment Gateways

Pre-Built Imports



Informatica Cloud ETL Included

GoToMeeting

GoToWebinar

Microsoft Teams

ODBC

Microsoft SQL Server

sftp://

Office

Google Drive

box

Dropbox

PowerCampus™

workday.

UNIT4

TRIBAL

SITS:Vision

nelnet

OFFICIAL PAYMENTS

CyberSource

WPM EDUCATION

GRE

GMAT

TOEFL

AP

# True Partnership for Better Outcomes



- UNDERSTANDING 
- CONSULTATION 
- TRAINING 
- GUIDANCE 
- EMPOWERMENT 
- SUPPORT 



# YOUR TARGETX JOURNEY



## ONBOARDING & KICKOFF

- Establish Goals & Priorities
- Establish project team
- Develop implementation project plan
- Complete foundational training



## CONFIGURATION & INTEGRATION

- Complete product training
- Document existing processes
- Configure products
- Build data integrations



## LAUNCH

- Document new business processes
- Train your trainers
- Train end users
- Roll out the CRM
- Use TargetX technical support



## ADOPTION & GROWTH

- Partner with CSM for strategic planning
- Optimize business process & configuration
- Maintain CRM and perform quarterly upgrades
- CRM Governance

# Implementation Overview



## Project Kickoff

- Confirm implementation goals & priorities
- Finalize project plan and team roster
- Initial system installation & configuration



## Milestone Based Approach

- Collaborative working sessions with implementation consultants
- 3-day onsite application build workshop
- Products going live every few months



## Ongoing Training & Enablement

- Comprehensive suite of interactive self-guided trainings
- Learning management system to track progress
- Train-the-trainer sessions with other/similar institutions



TargetX's team of Project Managers, Implementation Consultants, Support Specialists and Client Success Managers are **with you every step of the way.**



# Client success



- Throughout your CRM Journey, we are here for you!
- Team of very seasoned higher-ed professionals
- Your Client Success Manager is your advocate. We will:
  - Help your team prepare for launch and support adoption post-go-live
  - Ensure you're maximizing your CRM investment and getting value out of our partnership
  - Hold regular strategy meetings with your team to ensure the technology is aligned to support your goals



# Support

Knowledge  
Base &  
On-Demand  
Training  
Library

User  
Community  
& Idea  
Exchange

**Ongoing Client Support**  
from our team of  
Salesforce-certified  
experts & higher-ed  
professionals

24/7 Emergency  
Support

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**Our experienced  
Support Team provides  
guidance, technical  
problem-solving, and  
best practices**

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# Service Offerings

	Standard	Premier	PremierX
CRM Community	X	X	X
Product Documentation	X	X	X
Xpert Academy	X	X	X
Webinar Trainings		X	X
Configuration Assist		X	X
Upgrade Assist		X	X
Xpert Trainings			X
Xpert Sessions			X
Xpert Consultation			X



# TOTAL ENROLLMENT™

by LIAISON 



The Prospect-to-Alumni Ecosystem



# A Solution for Every Stage



SUSPECTS



PROSPECTS



APPLICANTS



STUDENTS



ALUMNI

CAS		✓	✓		
TargetX CRM		✓	✓	✓	
Marketing Services	✓	✓	✓	✓	
Othot		✓	✓	✓	✓

# The Complete Liaison Solution





Demo

.....

# Why TargetX



	Others	TARGET 
Requires Third-Party Apps/Contracts/Support	✓	X
Salesforce-Certified EDA Compatible	✓	✓
100% Salesforce-Certified Implementation & Client Support Team	X	✓
Mobile-First Design for Students & Staff	X	✓
400+ Higher Education Clients	X	✓
90% of Staff from Higher Ed & Ed Tech	X	✓
Higher Ed Thought Leadership & Philanthropy	X	✓
#1 Salesforce Solution for Admissions	X	✓

# What Our Clients Say

“

I would say that I am **VERY likely to recommend TargetX** to my colleagues who can take full advantage of all of the functionalities TargetX offers for communications, admissions processing, and student retention. I recommend going ‘all in’ with TargetX!” - NPS Score: 9/10

“

The product offers a lot of functionality which makes running a more efficient office possible. Also, the customer service is great and **the support team is always willing to help!**” - NPS Score: 9/10

“

TargetX has changed the way we recruit and retain students. They have been **a game-changer for our school.**” - NPS Score: 10/10

“

I appreciate TargetX client success managers and the technical support team. **Great support!**” - NPS Score: 10/10





# Q&A



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# Thank You



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# Appendix

# Target X FY 24 Product Roadmap



February 2023



# TargetX 2023 Roadmap



2023 Q1

Jan - Mar

2023 Q2

Apr - Jun

2023 Q3

Jul - Sept

2023 Q4

Oct - Dec

## Recruit

- Forms **Map to More Objects**
- Forms **Custom Matching Rules**

- Stop **SPAM applications**
- Forms **Pre-fill URL**

Events **Multiple Campus Support**

Forms **Submission Retention Forms for Surveys**

## Message

- Email **Conditional Operators & Advanced Expressions**
- SMS **Scheduled Send**

- Print **Conditional Content**
- Integration **Templates for SIS & LMS**

Email **Dynamic Reusable Content**

## Retain

- Engage **Meeting Notifications for Advisors**

- New Student **Appointment UX**
- Faculty **Early Alerts via TX Forms**

- Appointments **Unified Staff Experience**
- Cohort Success **Map to More Objects**

Student Success **Other Scoring**

# What customer problems are we looking to solve in 2024 and beyond?



## Unified Communication Planning

- We will deliver a way to integrate SMS, Email, and Print marketing campaigns in a single, Salesforce-compatible interface

## Artificial Intelligence & Machine Learning

- How can we leverage recent developments in AI and ML, as well as Liaison's Othot engine, to make Target X customers' lives easier?

## Social Marketing Channels

- We want to enable marketing campaigns in What'sApp, TikTok, Instagram, and related channels