

# Dietrich College Advancement

## Executive Summary

### **Community Partner**

Adam Causgrove

### **Student Consulting Team**

Andy Park

David Domalik

Sohan Kalva

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## **Background**

The Office of University Advancement in Carnegie Mellon's Dietrich College (hereafter referred to as DCA) serves over 1500 students by connecting external organizations to opportunities within the college. The mission of DCA is to increase Dietrich College's resources by establishing mutually-beneficial life-long relationships with alumni and organizational partners. Interested parties will reach out to our client Adam Causgrove, Associate Director of Corporate Relations, for guidance on the appropriate engagement program, such as a Capstone project, research, or recruitment.

As an office within Carnegie Mellon University, DCA has a well-developed organizational structure with access to Dietrich College's own Communications and IT & Operations departments. Technologies like the university CMS and Salesforce were already in use within college, giving us a clear path forward towards a sustainable solution.

## **Project Description**

### **Project Opportunity**

Unlike many peer advancement offices, DCA lacked a central resource for organizations to find information on how to engage with Dietrich College. Not only did this put Dietrich at a disadvantage when organizations search for partners in academia, but it left extra work for Adam to get new partners familiar with the college. Our team saw the opportunity to create this resource, put Dietrich on par with its peers, and offload work from Adam's role.

When Adam connected with an organization and wanted to save their information in Salesforce, it involved a lengthy process emailing across teams and manually entering data. Our team noted this inefficiency as an opportunity to create a more streamlined workflow.

### **Project Vision**

The vision for our project had two main goals. The first was to create an online resource that would be quickly found by interested organizations and easily understood by inexperienced users. The second was to connect a form in this resource directly to the university Salesforce database, cutting out the lossy manual steps of creating a new entity in Salesforce.

Naturally, our solution must satisfy our client in DCA as well as meet the needs of our diverse target audience, who could be approaching Dietrich College with a variety of inquiries. But our

project also considered Dietrich's Communications and IT & Operations departments and Carnegie Mellon's Career and Professional Development and Business Engagement centers as notable stakeholders and kept them involved throughout the development process.

## **Project Outcomes**

We wanted to set our work apart with well-defined user research and testing to guide the design of our website. Through two research interviews, models of our target users were developed to communicate our findings. Four user tests enhanced the usability of the site and affirmed the value we created for our users. This research proves that we have adequately met the needs of the different stakeholders in our project using best-practice methods.

The main summative outcome is the growth of DCA's public presence used to increase the number of interested organizational partners. This was achieved with the development of a website using the university CMS. Lastly, we executed a process improvement by integrating Salesforce's Web To Lead feature, making it automatic to create new entries in Salesforce.

## **Project Deliverables**

Our project deliverables include a stakeholder map, three personas, a journey map, the CMS website, SEO plan, publicity plan, a list of tasks to sustain the project, and a list of future improvements from user testing.

## **Recommendations**

There will be minimal maintenance to keep the website and Salesforce integration running, and Dietrich College has the staff in place to do so. But this maintenance is necessary and includes periodic content updates as event dates and success stories go out-of-date. Salesforce will also need to be checked regularly for the leads to make it into the main database.

We recommend future teams picking up our project continue user research and testing. While our team's initial research was promising, more is necessary to ensure that our findings are shared across DCA's diverse target audience. Included in the project deliverables is also a list of suggested improvements based on these initial findings. The research models would be updated accordingly and the website content adjusted to reflect the new findings.

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## **Student Consulting Team**

**Andy Park** served as project manager. He is a third-year student double-majoring in Information Systems and Statistics. He will be interning at Barclays this summer and is looking toward a career in trading.

**David Domalik** served as quality manager. He is a third-year student double-majoring in Information Systems and Human-Computer Interaction. He will be interning at Honeywell this summer and is looking toward a career in user experience design.

**Sohan Kalva** served as client relationship manager. He is a fourth-year student double-majoring in Information Systems and Business Administration. He will be starting a full-time position as a Software Engineer at Capital One this summer.