

COLLEGIS SUMMIT 2025

# DISRUPTED

BREAKTHROUGH THINKING. BOLD RESULTS.



# AI-Ready or AI-Reckless?

Reality Check Your Institution's Data  
for Optimal AI Readiness

COLLEGIS SUMMIT 2025  
**DISRUPTED**  
BREAKTHROUGH THINKING. BOLD RESULTS.



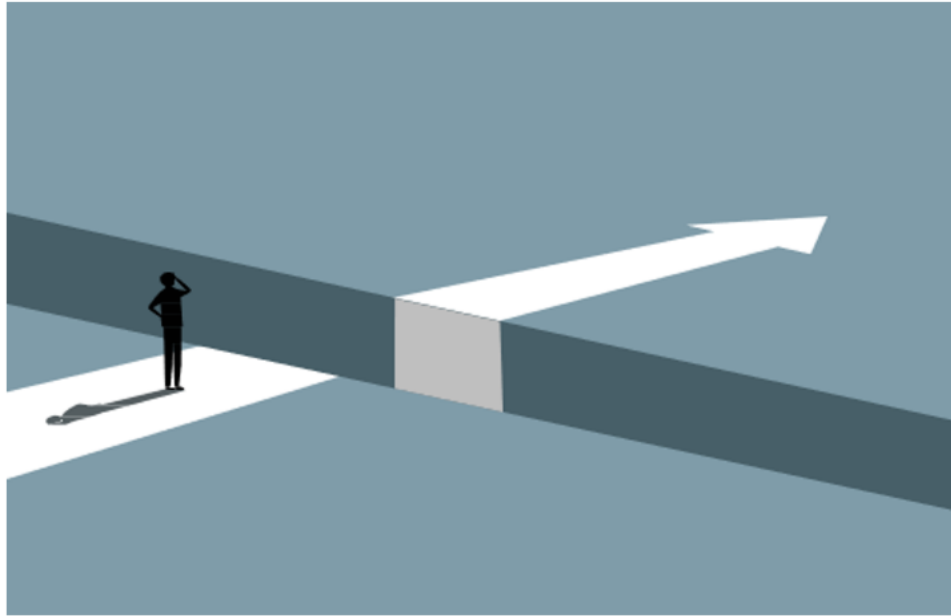
# What we're going to accomplish today

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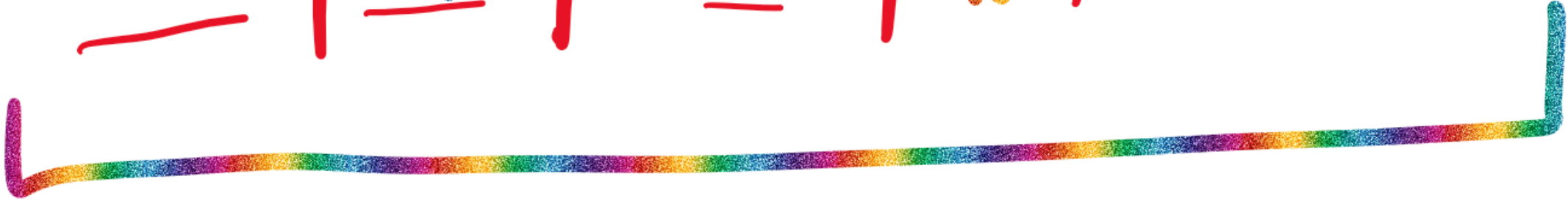
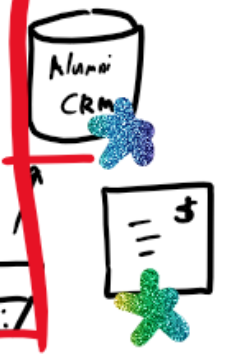
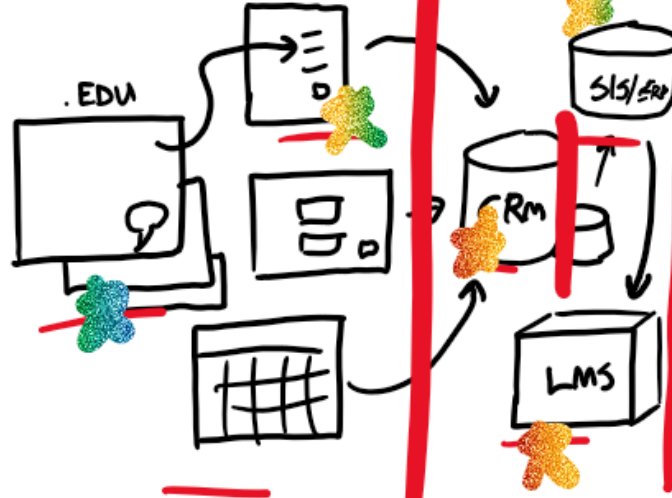
[PURPOSE]: Outline a Tool-Kit to help your leaders explore opportunities to layer DATA + AI into your Institution

[PROCESS]: Napkin Sketch + Discussion + Real-World Examples of AI in-action in Higher Ed.

[PAYOFF]: A Framework for getting Started with AI (wherever you are)



Why AI (and Data)  
is **hard** in Higher  
Education.



**GROW Enrollment**

- Marketing optimization
- Proactive, Strategic outreach

**Reach New Audiences**

- Expand reach & frequency
- Local → National

**Increase Yield**

- Enroll. Optimiz.
- Ina/APP Quality
- Conversion Optim.
- Reduce Melt

**Develop New Products (programs)**

- Workforce Develop.
- Online offerings

What is your **IMPACT** OBJECTIVE?

**Optimize Experience**

- Digital Transformation
- Refine Workflows

**CREATE & SUPPORT NEW MODALITIES**

- Scale online LMS
- 24/7 support model

**INCREASE PERSISTENCE**

- Student Success Coaching
- Early Alerts, Engagement

**Reduce Cost**

- Technology mgmt
- Marketing
- People, Process, etc.

Migneli: Match Prospects  
to right programs  
Portal w/ Recom. Major  
Time/Resource  
constraints. System  
+ DATA limitations

Grace: 2023 → 5 year plan.  
"Build Data practice" → AI Ready  
Managing Building + maintaining.  
Missing centralized  
DATA/TECHNOLOGY

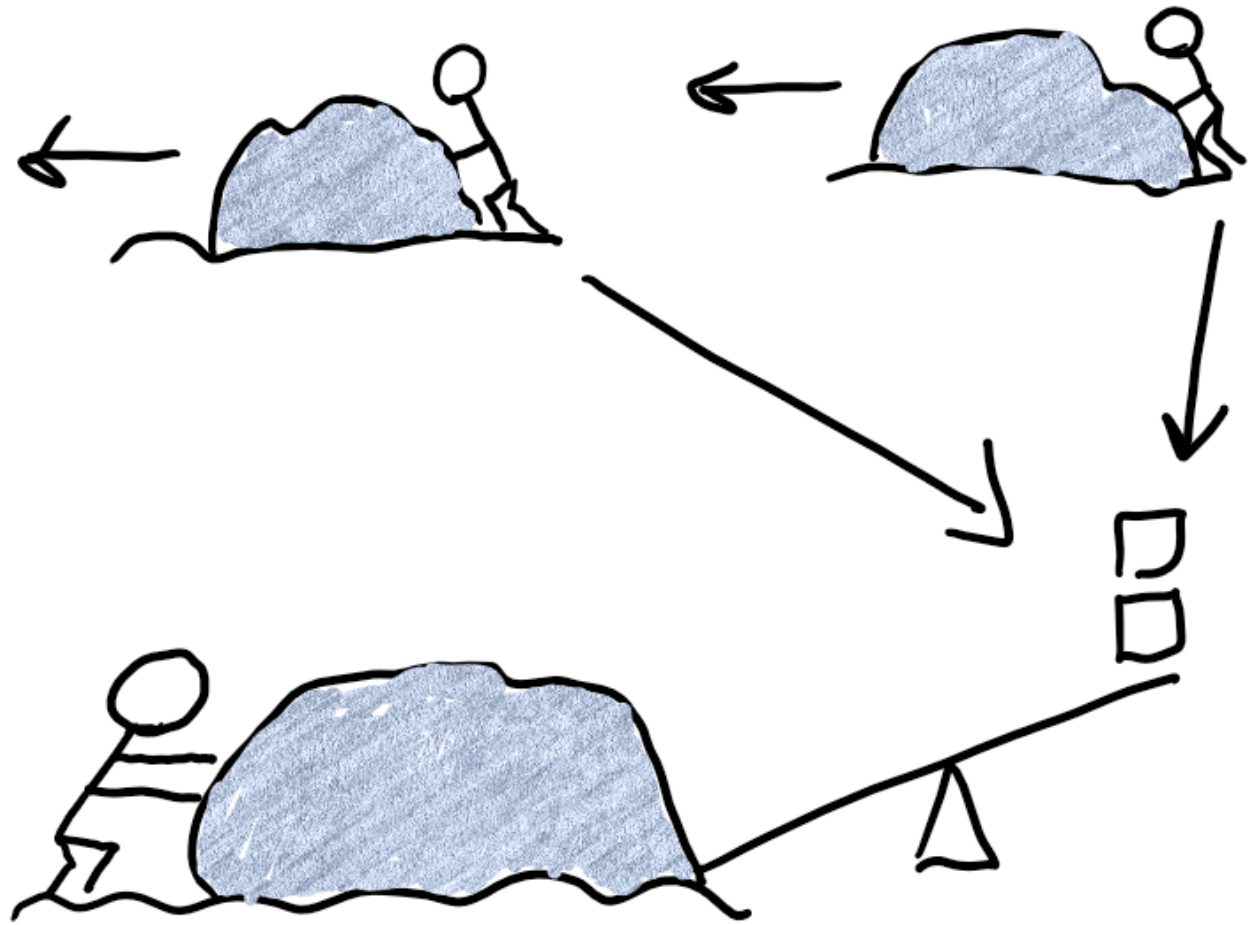
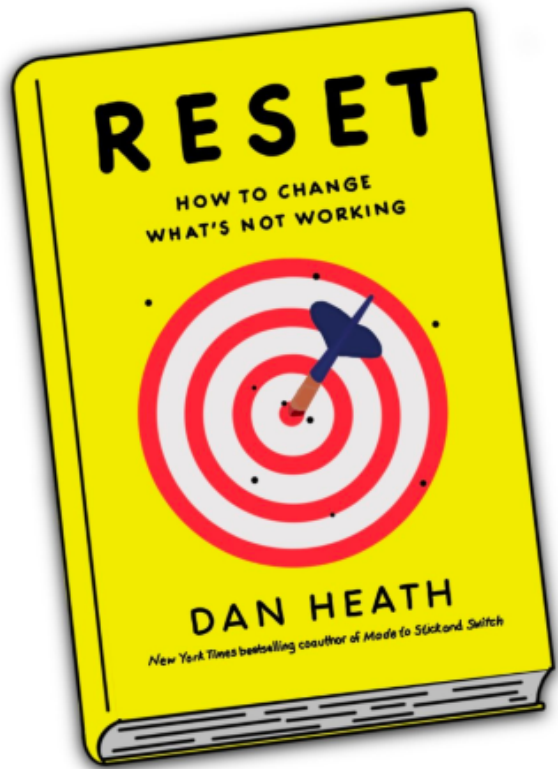
Michael: Grow Enrollment  
Tuition/Reven. ↑  
(connect, personal.  
Capitalize on AI.  
Meet Modern Digi.  
Experience Expectations)

Budget Constraints,  
haven't invested in  
DATA Management,  
No Strategy Tech. process

What is Your  
(specific) IMPACT  
OBJECTIVE?  
What's preventing  
progress?

Andrew: Drip → Hyper  
person  
Personalize Marketing  
Better ☑ + ☐  
o Lack of DATA,  
Expertise, Tech  
TALENT

Colleen: Holy Grail: Understand  
the full Student Exp.  
predict 'What's Next' ML  
Tell story with DATA  
for more resources/budgets  
to drive IMPACT



• Brady: Making things easier for students (Reducing barriers)  
Making things clear to students

• Anthony: Reduce time between hand-off's in Exp.  
# of systems

• Jose + 1 Brady Michael Drake  
Consistent view of prospect. student  
SYNC DATA Across systems.

• Michael C: Yield. Increase ↑  
◦ understand class to inform Retention, Shaping class  
Missing Connection w/ DATA. A → B.  
(Early Identifiers)

- Attrib.
- Behaviors

• Michael D.: ↑ Int'l Enrollm.  
Lots of systems, immigration process + tracking.

• Erin: First year Admits  
Challenges with holistic view of student

• Malcolm: Transfer focus  
◦ Difficultly w/ Transf. Agreements.  
◦ Flexible options limited.

• Lindsey: Better Targeting  
Faster INSIGHTS into (Self Apply./Admit serve)

• Lupe: Effective + Engaging w/ students + parents  
Staying Relevant

• Javida: App. Complete  
Better Maximiz. of Tech for better efficiently

• Peter: First-Year Admissions (+1 Brady, Michael D.)  
DATA Informed outreach.

What is Your (specific) IMPACT OBJECTIVE?  
What's preventing progress?



# MAGIC MARKER Exercise



## [Step 1: Highlight AN OPPORTUNITY]

Point to OPP. on napkin Sketch Already →

[-OR-]

Add an OPP. to the SKETCH!  
(No OPP. is too Big)  
OR SMALL

## [Step 2: Assign Stars]

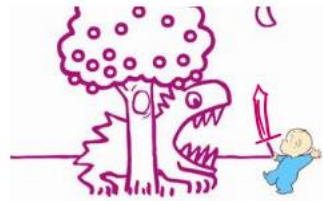
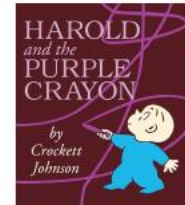
Option #1 ★ (Huge Opportunity)  
★ (Honorable mention Opp.)

[-OR-]

Option #2 ★ (MEGA OPP. AKA. Super STAR) combined

## [MAGIC MARKER RULES!]

- No Splitting Stars (★ ← No!)
- No Star Conversions (★ ≠ ★★)
- No Selling or Trading Your Stars (★ ≠ \$)
- No Withholding Stars (you MUST place your Stars)



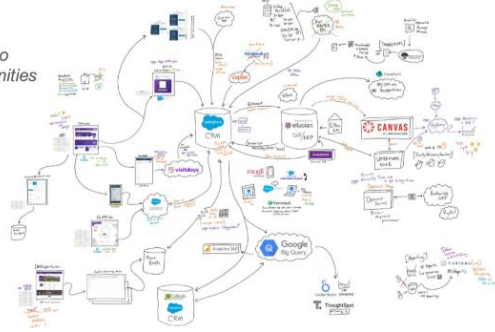
# DataEDU

## Data, Tech, Enrollment Process Map Findings

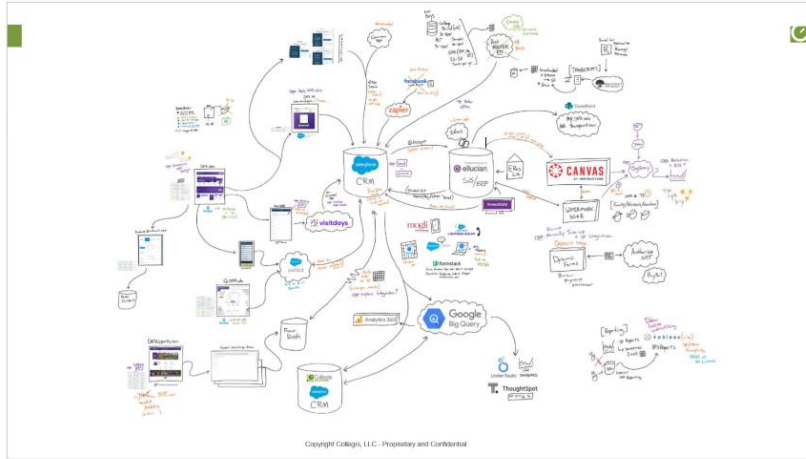
Using design thinking principles to identify & deliver Impact Opportunities

June 2025

Dan Antonson – Associate VP, Analytics & Technology Solutions



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## Collegis Perspective — Prioritizing for IMPACT

Collegis did not directly participate in the Magic Marker Exercise; the purpose of the exercise is to create a framework for the team to communicate their perspective in the room. The team is the talent and they own the data, tech and process and they're in the trenches every day. However, if Collegis were to have participated in the exercise, here's where our stars would have been placed.

### 01 - Dan

#### Application Tracking and Activation

"There wasn't a big discussion on the plan to implement tracking on the application and it would be a massive missed opportunity if it wasn't implemented. The insights that can be obtained with that tracking could highlight problems not thought of yet."



#### Dan's recommendation

Application tracking will give you more insight on how far along in the process potential students are going. It will also give you the ability to reach out to these potential students to encourage completion of their application.

### 02 - Kyle

#### Deeper Process Mapping for Student's Post-Start

"It would have been great to have more time to get into the student journey after students start their program. This would help us find where there are gaps in the support experience and find out how to increase persistence."



#### Kyle's recommendation

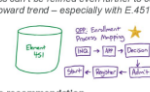
Conduct a full process mapping of student's journey post-start. There is no information on when and why students are leaving the process.

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### 03 - Kirk

#### Enrollment Process Mapping for Prospective Students

"Taking a deeper dive into the enrollment process of prospective students would provide valuable insight to any potential shortcomings or areas of improvement that have gone under the rug. Enrollment is already up but that doesn't mean its process can't be refined even further to continue that upward trend — especially with E.451 coming"



#### Kirk's recommendation

Full Student Journey Mapping that's laser focused on enrollment (new and continuing). This provides the opportunity to identify automation and personalization opportunities in addition to finding gaps to be optimized.

## Session Snapshot Understanding the opportunity for IMPACT

### Session Overview

This session was designed to help participants understand the current state and where there might be opportunities to improve. We always start any session like this with defining IMPACT, what are we trying to achieve. In the case of DataEDU, there seemed to be consensus that understanding the student lifecycle and optimizing it to match students with the right information to maximize enrollment.

#### 1. IMPACT Focus Area:

Conversation on what the opportunity is for DataEDU.



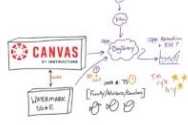
#### 2. Current State Mapping

Provided stakeholders with a 'napkin sketch' diagram of DataEDU. Data, tech, enrollment ecosystem noting areas of integrations and their nuances and the complexities they can create.



#### 3. Visualize the Vote (Magic Marker)

Created a framework for identifying and prioritizing opportunities. With the current state in mind, we asked participants to identify the areas where impact could be made.



#### A note about next steps

Mapping sessions like this are about perspective. We focused on how data, tech and talent are enabled (or blocked) by the marketing & enrollment systems and the process a prospective student enrolls. Collegis did not map any technology or processes related to student learning, student success or retention systems.

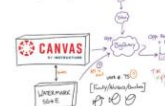
Collegis often conducts Design Thinking Sessions across the entire student lifecycle. As DataEDU and Collegis explore solutions around enrollment and retention, it is important not to lose sight of opportunities around the entire student journey.

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## Priority Findings

### 01

**Implementation of a Data Warehouse for optimized reporting**  
There was an acknowledgement that a lack of a centralized data warehouse will allow for better reporting on all aspects of the prospective student journey.



### 02

**Optimization of the prospective student experience**  
The current setup of DataEDU's site is not fully optimized to drive conversions. The DataEDU team identified this as an area that needs attention.



Ashley and Chad flagged the lack of optimization on the current site. They identified that the current site lacks the ease for prospective students to convert, whether that is fill out RFI or Visit forms, or even apply to the school. An overhaul to optimize the ease of conversions will help reduce the amount of prospective students that have fallen off during the process.

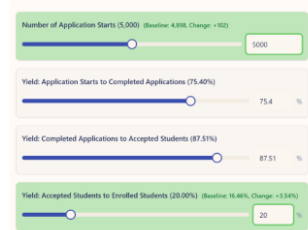
Ultimately, the DataEDU group had no issues identifying barriers and opportunities to improve the process.

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## ROI Scenario Small changes to the enrollment funnel could create significant value

### Funnel Adjustments

Adjust the input to your tracked funnel or the yield between actively tracked stages defined in Step 1. Sections changing from baseline are highlighted.



	Baseline	Modeled	Change
Enrolled Students	532	660	+128
Total Revenue	\$16,490,709	\$20,454,587	+\$3,963,878

#### The impact & ROI (assumptions)

- Modest increases to application starts and a slightly improved yields creating a significant opportunity for the school.
- Assumption: average annual tuition of \$31,000. Does not include any assumptions on retention rate or operational costs.

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# ROI Scenario

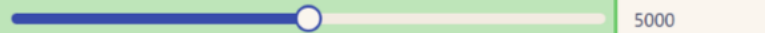
## Small changes to the enrollment funnel could create significant value



### Funnel Adjustments

Adjust the input to your tracked funnel or the yield between actively tracked stages defined in Step 1. Sections changing from baseline are highlighted.

Number of Application Starts (5,000) (Baseline: 4,898, Change: +102)



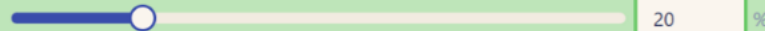
Yield: Application Starts to Completed Applications (75.40%)



Yield: Completed Applications to Accepted Students (87.51%)



Yield: Accepted Students to Enrolled Students (20.00%) (Baseline: 16.46%, Change: +3.54%)



	Baseline	Modeled	Change
Enrolled Students <small>Prospects not tracked or set in baseline</small>	Baseline <b>532</b>	Modeled <b>660</b>	Change <b>++128</b>
Total Revenue	Baseline <b>\$16,490,709</b>	Modeled <b>\$20,454,587</b>	Change <b>++\$3,963,878</b>

### The impact & ROI (assumptions)

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# [ Student Success ] with AI

Bri: Improve Student Retention  
Decentralized model creates  
separate processes

Rosa: +1 Retention  
Improvement  
Missing reliable  
Reporting

Alex: Optimize  
Advisor workload  
No prioritization  
Mechanism  
currently

What is Your  
(specific) **IMPACT**  
OBJECTIVE?  
What's preventing  
progress?

Kyle: Leverage  
Technology within  
Student success  
Missing DATA  
Informed view of  
Student

Key  
Takeaway: AI is just a  
Function + DATA  
Makes or Breaks it's  
Usefulness.

OneStop  
F.Aid  
SF  
Registrar  
Billing

SLATE

DAN  


"New Student"

Banner® by  
ellucian

LMS  
 **CANVAS**  
BY INSTRUCTURE

  
NAVIGATE

Students  
ASSIGNED  
by College, A-Z  
(varies by each  
school)

No  
Primary  
Advisor  
(consider  
scores)

Pilot?  
Opp: Narrow  
to specific  
school



Bri: ★  
Opp:  
Automation  
Approach

"Each  
School has  
separate  
approach to  
Success

Lots of Manual process

Example:  
1st CLASS = Predict  
Completion = GRAD %  
RATE

AI  
Workflow

+500 users  
Success/  
Academic Coaches,  
Study Abroad, etc.  
Admins

Opp:  
Nightly score

Alex: ★  
Kyle: ★

Reporting  
via  
Tableau  
- Banner  
CRM

Opp: Centralize  
DATA to  
Power  
INSIGHTS

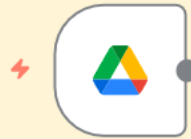
Rosa: ★

Opp: not leveraging  
CANVAS Integration  
Havent defined use-case

## AT&T Bill Allocator

Upload a PDF of the Bill to this Google Drive folder and get a clean output delivered to your Gmail.

<https://drive.google.com/drive/folders/1uQHkY3fgT3D1ppOBwTEjUWnLmJERhERj>



Google Drive Trigger  
fileCreated



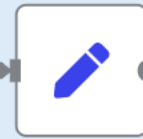
Google Drive  
download: file

## Convert the file to something useful...

for the agent, puts the Google document into a standard format.



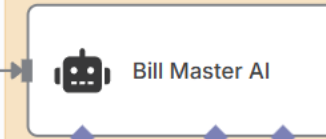
Extract from File  
Extract From PDF



Edit Fields  
manual

## AI Agent to parse the AT&T bill itself

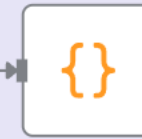
Customize Prompt to determine output to be sent the next node tune the agent and the output here.



Bill Master AI  
Chat Model\* Memory Tool

## Convert the output to HTML

\*\* vibe coded with Gemini Chat



HTML-ify'er

## Email me the stuff!

Destination could be anything (MS Teams, Slack, Google Chat, CRM, etc. etc.)



Gmail  
send: message



Google Gemini Chat  
Model2  
N8N BPM Project

## AI/LLM Models that could be switched out.

Leverage or change models to power each individual agent. Add new models as they become available. Each provider offers MANY models.



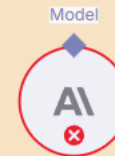
OpenAI Chat Model



AWS Bedrock Chat Model



Google Vertex Chat Model



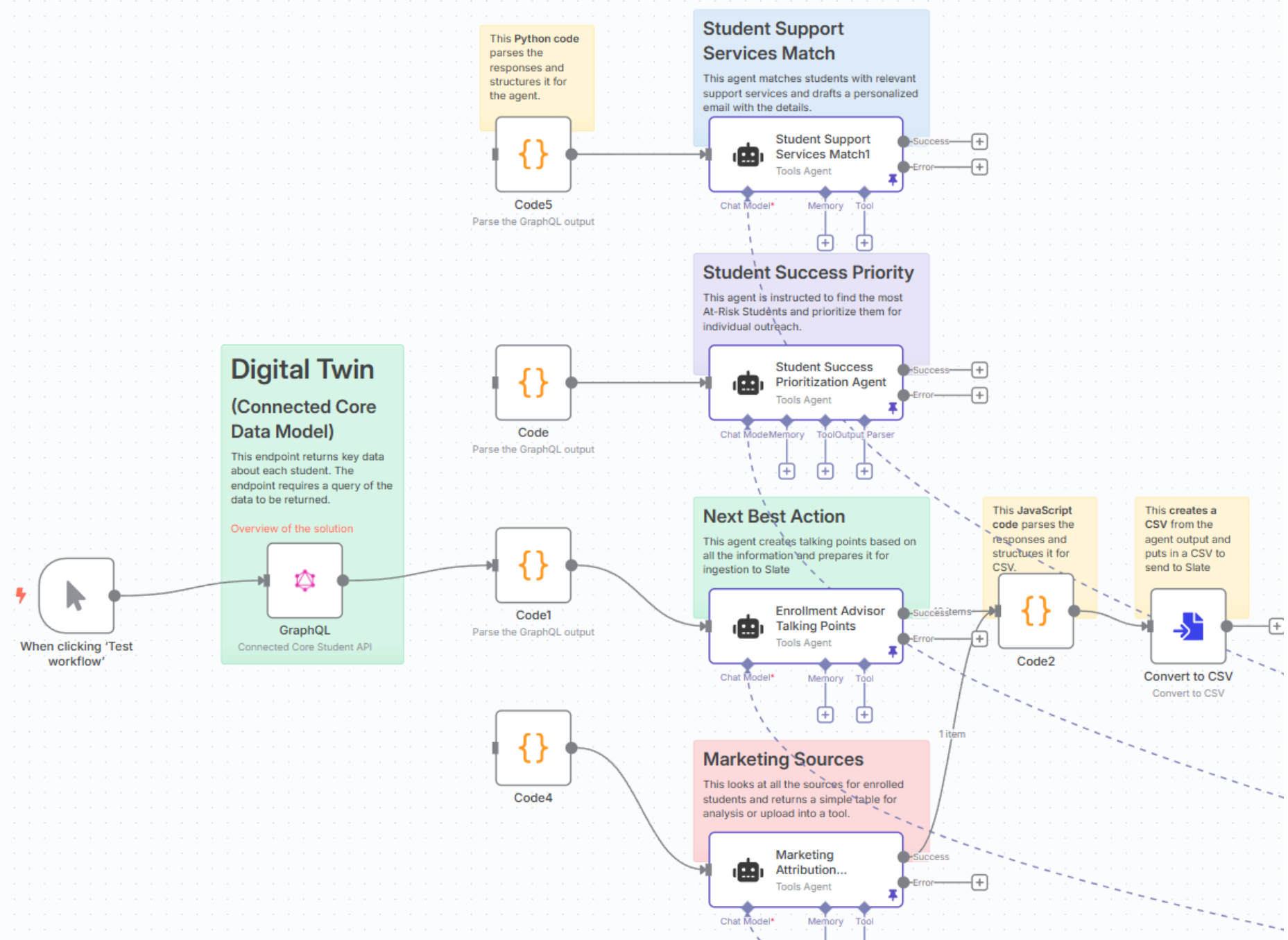
Anthropic Chat Model



Azure OpenAI Chat Model



Google Gemini Chat Model



When clicking 'Test workflow'

### Digital Twin (Connected Core Data Model)

This endpoint returns key data about each student. The endpoint requires a query of the data to be returned.

Overview of the solution

**GraphQL**  
Connected Core Student API

This Python code parses the responses and structures it for the agent.

**Code5**  
Parse the GraphQL output

**Code**  
Parse the GraphQL output

**Code1**  
Parse the GraphQL output

**Code4**

### Student Support Services Match

This agent matches students with relevant support services and drafts a personalized email with the details.

**Student Support Services Match1**  
Tools Agent

Chat Model\* Memory Tool

Success Error

### Student Success Priority

This agent is instructed to find the most At-Risk Students and prioritize them for individual outreach.

**Student Success Prioritization Agent**  
Tools Agent

Chat Model\* Memory Tool Output Parser

Success Error

### Next Best Action

This agent creates talking points based on all the information and prepares it for ingestion to Slate

**Enrollment Advisor Talking Points**  
Tools Agent

Chat Model\* Memory Tool

Success: items Error

### Marketing Sources

This looks at all the sources for enrolled students and returns a simple table for analysis or upload into a tool.

**Marketing Attribution...**  
Tools Agent

Chat Model\* Memory Tool

Success Error

This JavaScript code parses the responses and structures it for CSV.

**Code2**

This creates a CSV from the agent output and puts in a CSV to send to Slate

**Convert to CSV**  
Convert to CSV

# The Takeaways

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## Ground on IMPACT

### **And be specific about it.**

Getting tight on goals and focus areas will help you focus your efforts (and your AI use-cases).

## Data is the magic

### **Bad data kills AI potential.**

All AI use-cases will need data to function. Investments in data today will pay dividends later.

## Map it out

### **AI is in the process (not a vacuum).**

Look closely at how it works today so you can help your teams define where AI can fit tomorrow.

## AI compounds itself

### **Build on platforms, not standalones.**

Think in systems and recognize that AI use-cases will expand and transform. Technology interoperability is a requirement.



Let's TALK.  
Questions?

