

COLLEGIS SUMMIT 2025

DISRUPTED

BREAKTHROUGH THINKING. BOLD RESULTS.



Reflections and Action

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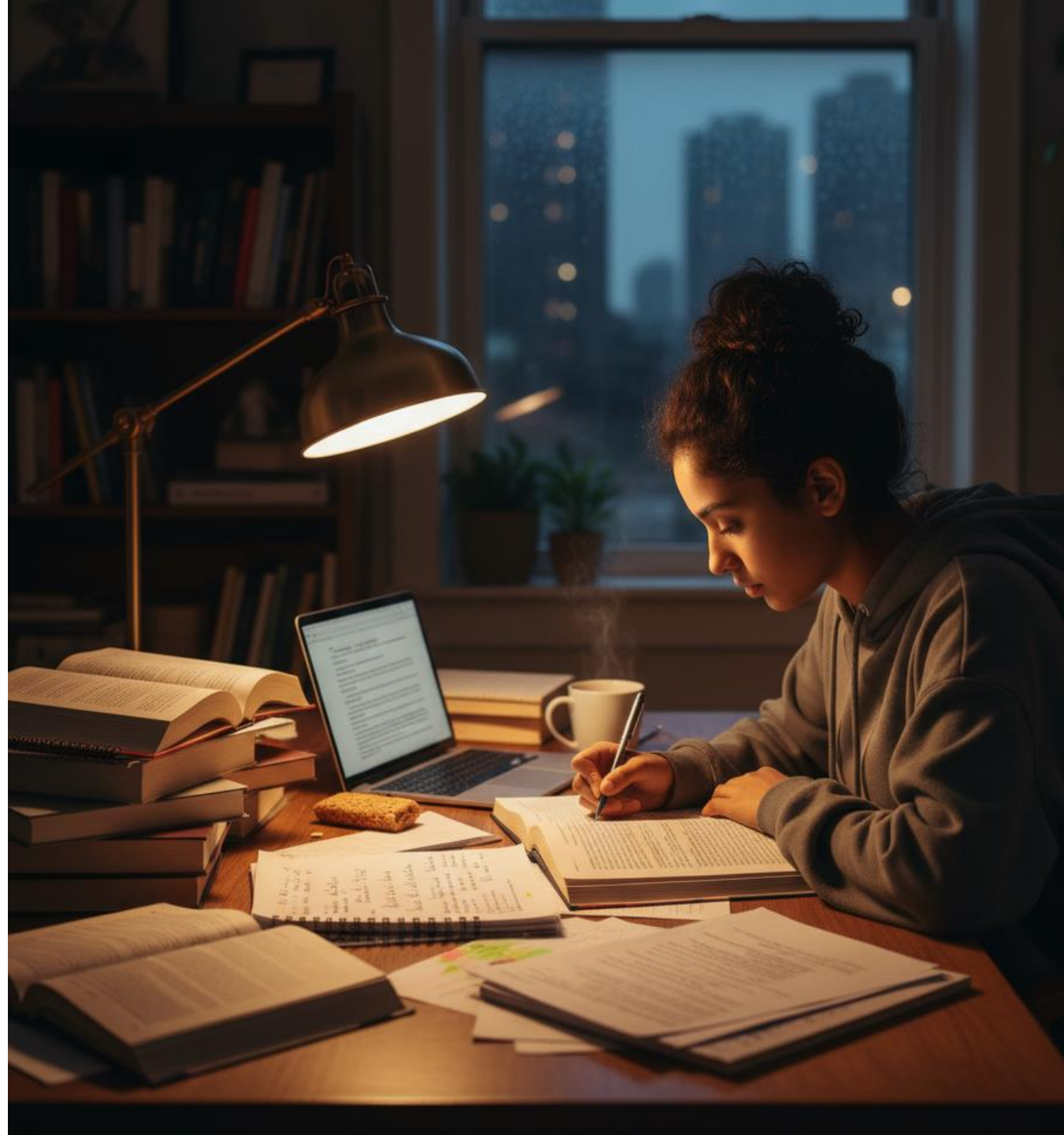
The Rules Have Changed...

- **And the pace of change is increasing.**
 - 2025 regulatory shifts (OBBBA, DEI challenges, loan reforms) are rewriting the operating context for higher ed.
 - Even core models like online program strategy must adapt –but you must own your future.
 - “Universities must evolve to become digitally immersive, cost-efficient, and infinitely scalable, or they will risk irrelevance – in higher education today, it truly is evolve or die.” *



Students at the Center – The Journey, Not Just the Milestones

- **Students don't live in "milestones"** (app, enrollment, graduation); they live in the journey.
- **Data and AI are accelerators**, but students stay when they feel both seen *by data* and *supported by people*.
- **Institutions often misread what students value** (umbrellas vs. walkways) – retention requires listening to the real needs.



Adaptation Creates Lasting Advantage

- Institutions must **embrace the emerging tech and AI**, make bold decisions, and **push through uncertainty**.
- **There will be haves and have nots.** Those who can modernize and adapt with speed will be at a competitive advantage.
- Rethink **“buy vs. build”** approaches, but with an **eye toward ownership, transparency,** and sustainable economics.



But Where to Start?

1. Align on Key Impact Areas

Today's higher ed leaders must solve for transformative impact in an unpredictable market.

Revenue

- **Increased inquiry volume**
- Improved funnel conversion
- Improved retention
- Increased donor revenue
- **New program development**

Cost Control

- Technology to drive labor efficiency
- Maximize resource utilization + return on talent
- Optimize academic portfolio + products
- Fractional/Shared resources to drive effectiveness

Future-Proofing

- Centralized data to drive effective decisions
- Secure tech systems + prevent cyber threats
- Elevated student experiences with tech
- Getting AI ready

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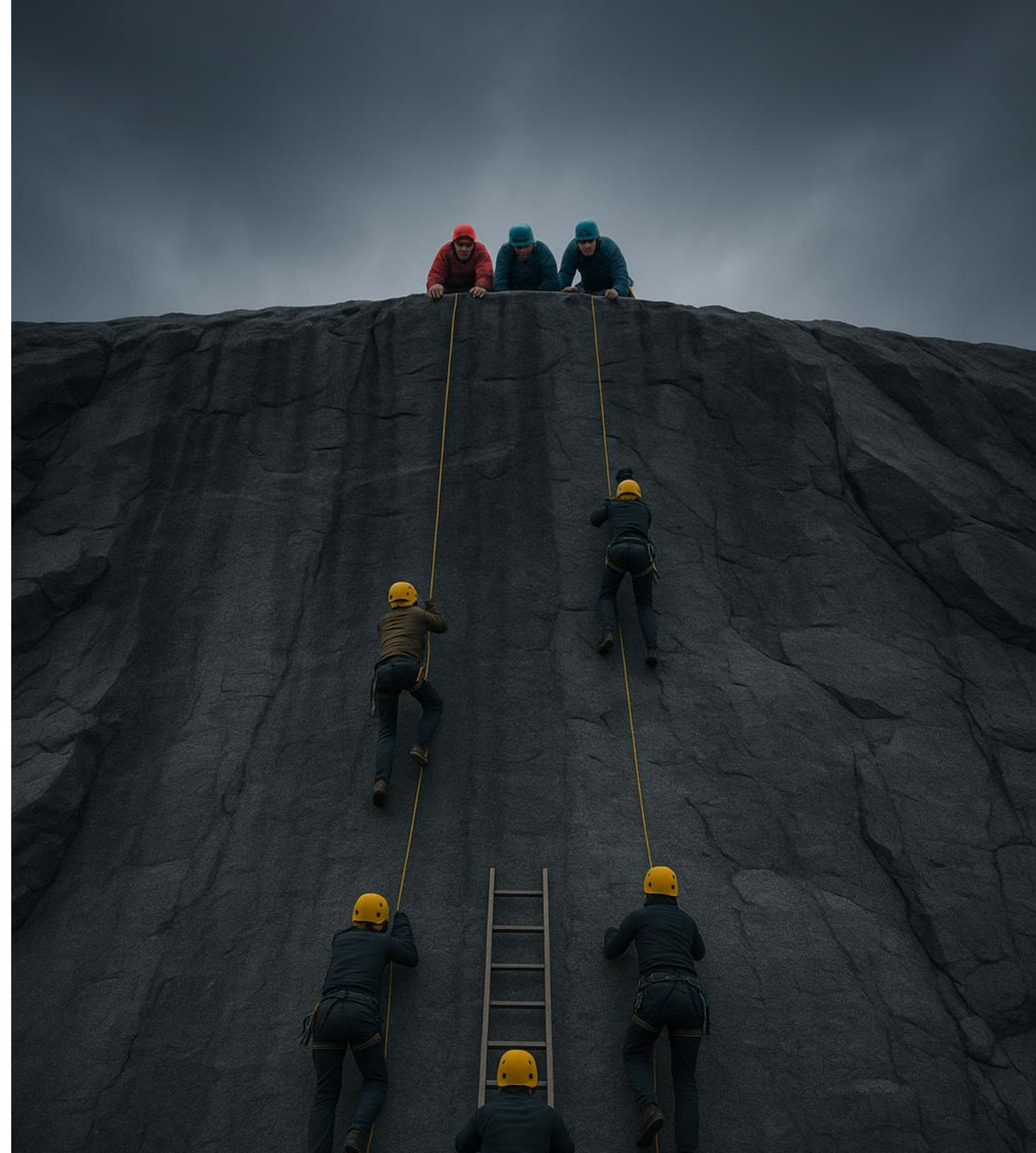
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2. Move from Impact Areas to Focused Impact *Objectives*

SMART framework: (Specific, Measurable, Achievable, Relevant, and Time-bound)

Examples:

- Use process and technology to create stronger, more personalized student experiences to improve retention by 3 percentage points over next 24 months.
- Modernize our data ecosystem to create a foundation to leverage AI across the student journey within 24 months.
- Reallocate 15% of IT budget to accelerate strategic project completion by 2027.
- Increase new enrollment revenue by 10% over next 3 years by improving funnel conversion metrics.



3. Develop the Strategy with a Data + Tech + Talent Gap Analysis

- **Impact Objective:** "Use process and technology to create stronger, more personalized student experiences to improve retention by 3 percentage points over next 24 months."

Data

- How well do our CRM, SIS, LMS, and website **exchange data with each other**?
- **Do we currently have a unified view** of the student journey from prospect through alumni?
- **How reliable, consistent, and accessible is our data** across departments?

Technology

- **Where are manual workarounds** still required in our student-facing or staff-facing processes?
- **How do our current portals and communication tools support** or hinder the student experience?
- To what extent have we **automated** registration, and financial aid processes?

Talent

- Do our enrollment and IT teams **have the capacity** to bridge disconnects across systems?
- **What expertise do we currently have** in systems integration, data engineering, and AI?
- **Do we have dedicated resources** focused on designing a lifecycle-driven student experience?

4. Build vs. Buy?

Category	Build Internally	Work With Partners (Buy)
Ownership	Full Ownership & Mission Alignment	Shared Ownership, Cultural Fit Needed
Expertise	Harder to Recruit/Retain Talent	Specialists Can Flex In and Out
Speed	Slower Implementation	Faster Implementation
Flexibility	Customizable	Flexible but Vendor-Influenced
Cost	FTE Expense	Fractional Resources Reduce FTE Expense

“Unless structure follows strategy, inefficiency results. The new strategy either is blocked by the existing structure, or it is implemented in a half-hearted and ineffective manner.”

— Alfred D. Chandler, Jr., *Strategy and Structure: Chapters in the History of the American Industrial Enterprise* (1962)

Select Partners that Build Lasting Value for You, Not Them

- The right partners help you **build institutional capacity, not dependency.**
- External expertise should **lay lasting infrastructure** (data, systems, processes) the university owns.
- Speed: Specialized fractional support can **bridge gaps quickly.**
- Partners **flex in for critical initiatives** and **roll off as internal teams grow.**
- **Question the partnership structure:** Who owns the data? The integrations? The content?



What's Next?



- 1. The rules of higher ed are shifting – leaders must adapt or fall behind.**
- 2. Focus on the overall student journey, not milestones.**
- 3. Define and prioritize focused Impact Objectives. How will AI and Automation add value?**
- 4. Identify gaps through the Data, Tech, and Talent framework and develop a strategy to win.**
- 5. Find partners to bridge gaps, build lasting improvements, and accelerate progress.**

Thank You!

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