



Make the most of your data

Microsoft Dynamics 365 and Power Platform for Higher Education

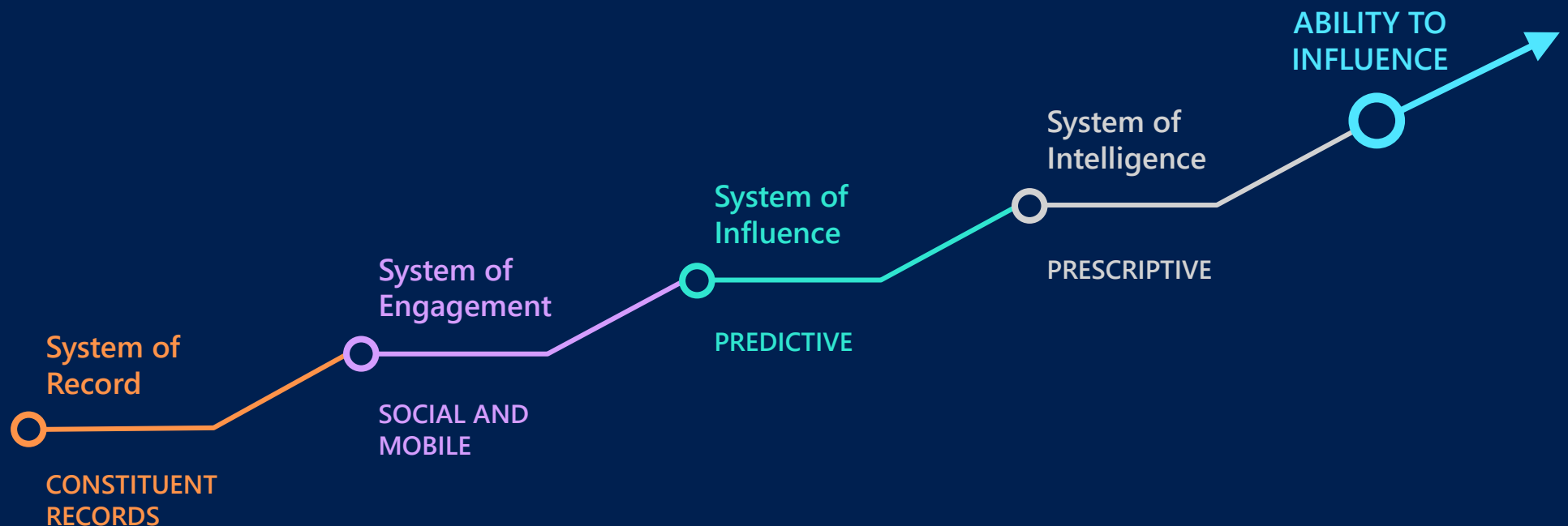


The rise of intelligent data

Over the past decade, the rise of **AI and advanced analytics** have enabled increasingly intelligent data. At the most basic level, data is a **system of record**—a collection of the information you know about your students, faculty, and staff, along with other institutional data.

When taken to the next level of intelligence, your data platform becomes a **system of engagement**, tying data to action. You use what you know about constituents to tailor your interactions, digital or otherwise. A **system of influence** generates data-driven insights and helps to predict future patterns, such as which students might be at risk for falling grades or in what ways your retention rates might fluctuate.

The final level is a true **system of intelligence**, meaning that the system can recommend actions based on data-driven insights. Whether that means automatically generating a study package customized to a student's specific needs, or prescribing steps that might help improve retention and completion, the point is that the system automates response where possible.

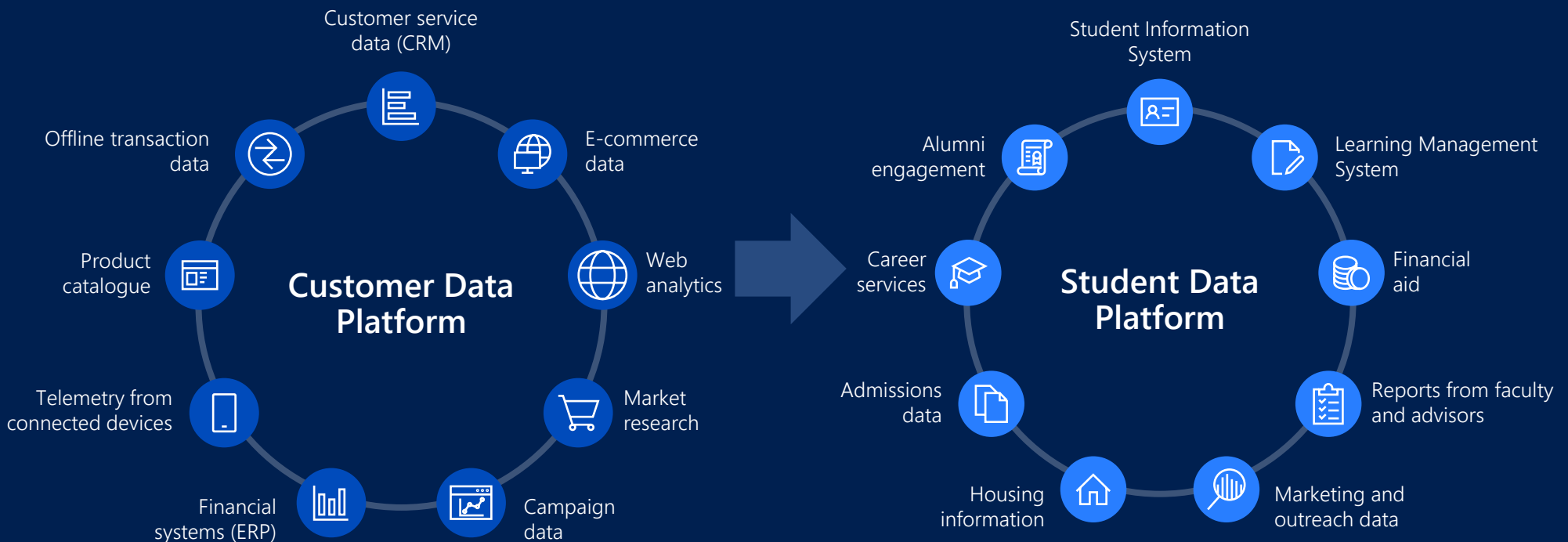


Students expect personalized engagement

Intelligent data represents enormous potential for transformation that many industries have already capitalized on. The use of data in sectors like retail and entertainment has put pressure on higher education to make the most of data as well. **Students expect that type of innovative engagement.** It's about aggregating data from multiple, distinct sources into one central platform.

For retail, this involves categories like market research and product catalogues and transaction data.

For education, it all comes back to the student experience.



Learner-centered engagement

Uniting student information helps to **support success from admission to graduation and beyond**. In order to help students succeed, you need to know who they are and what their needs are. It's difficult to get a comprehensive picture if all your data is fragmented across different locations. It's even more difficult to generate useful insights, much less automate responses. Without a unified data platform, you're stuck at a system of engagement.

With a unified data platform, you have a **basis to truly improve student outcomes**.



Institutions are seeking to organize, automate, and improve student interactions and experiences

A system of intelligence saves time by **making decisions easier and automating processes**, and the end result is more time for you to spend on the things you care about—like driving student success. Whether you want to meet enrollment and retention goals, modernize communication and services, or revamp alumni engagement, data should be the foundation of your efforts.



Achieve recruitment and enrollment goals



Deliver modern communication



Gain insights through data-driven analytics



Deliver services that match current student lifestyles



Retain students and foster academic achievement



Produce successful graduates ready for the job market



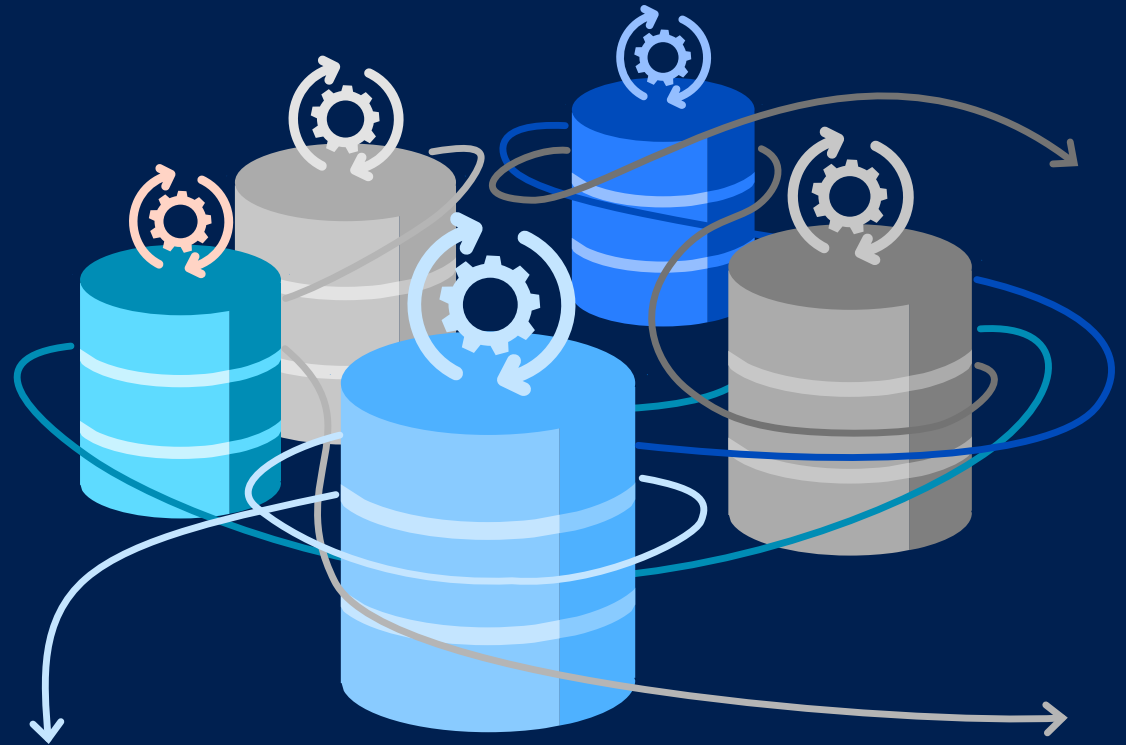
Engage alumni and encourage long-term affinity

Avoiding accidental architecture

What does life look like without a unified data platform? You probably have multiple databases, with **different departments using different tools** and storing information in different places.

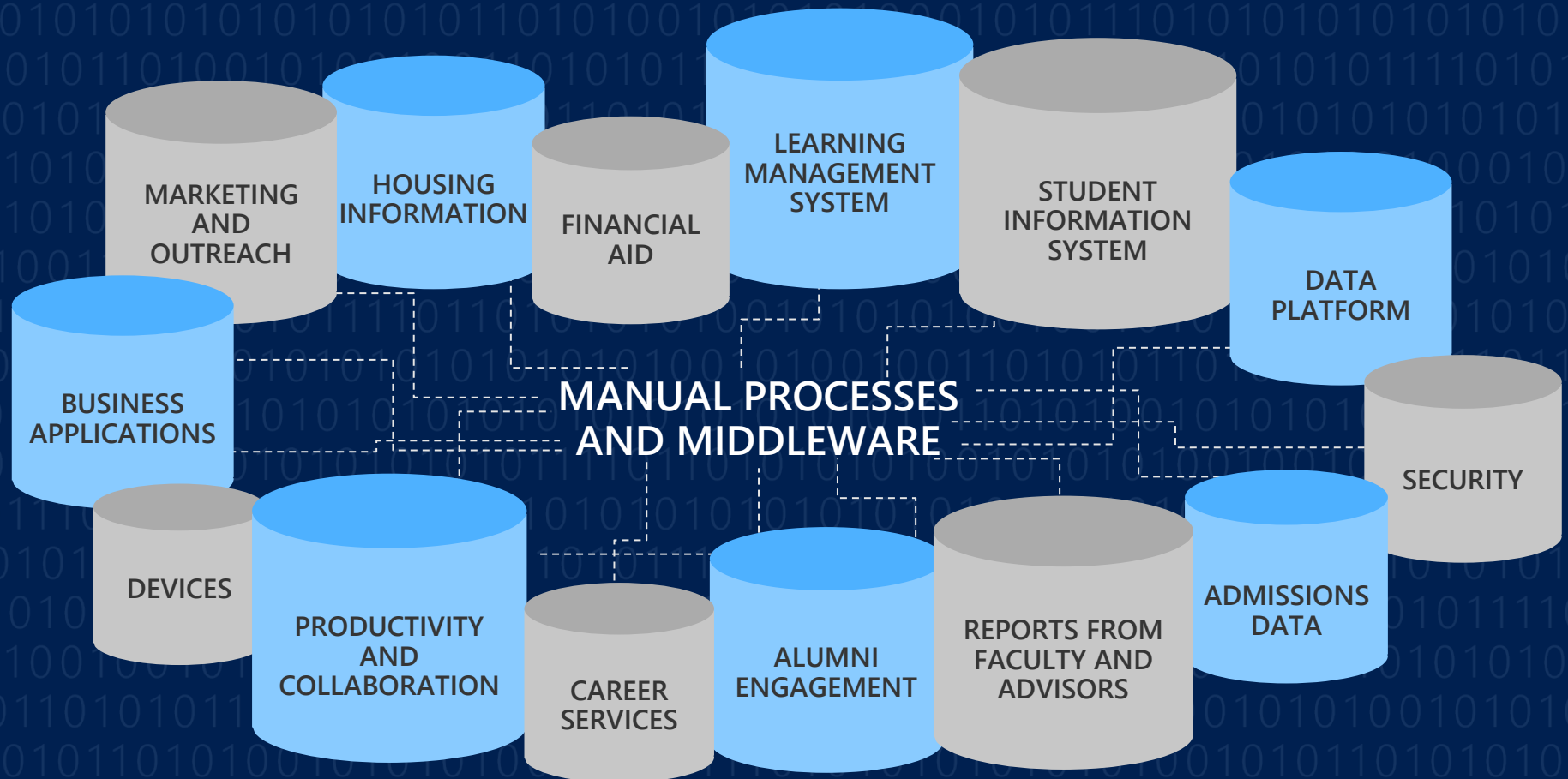
Instead of maintaining a single source of truth, your admins and IT pros spend time designing and establishing **records in a disparate variety of places**. You may also still have paper records that are impossible to reference and integrate like digital data.

In addition, you may **lack a rapid database application platform**, meaning that you have no set process for easily developing and pushing out new apps without consuming IT's time or even outsourcing to a developer.



The challenge of data silos

Without a unified data platform, you end up with information for key areas—from your SIS to your LMS to marketing and device management—stored in distinct **silos that don't talk to each other in useful ways**. And even when you can connect these silos, it's often through a **jumble of middleware and manual processes** that prevent you from gaining insights or setting up automated processes.



Microsoft offers the only truly integrated cloud

With Microsoft, it's possible to bring your data together in one place, including data from your SIS and LMS. Dynamics 365 and Power Platform enable you to **use that data as a foundation** and easily build custom business apps to help **address the student experience** across your institution.



Microsoft

STUDENT INFORMATION SYSTEM

DATA PLATFORM

LEARNING MANAGEMENT SYSTEM

BUSINESS APPLICATIONS

SECURITY

PRODUCTIVITY AND COLLABORATION

MARKETING AND OUTREACH

FINANCIAL AID

ADMISSIONS DATA

REPORTS FROM FACULTY AND ADVISORS

DEVICES

ALUMNI ENGAGEMENT

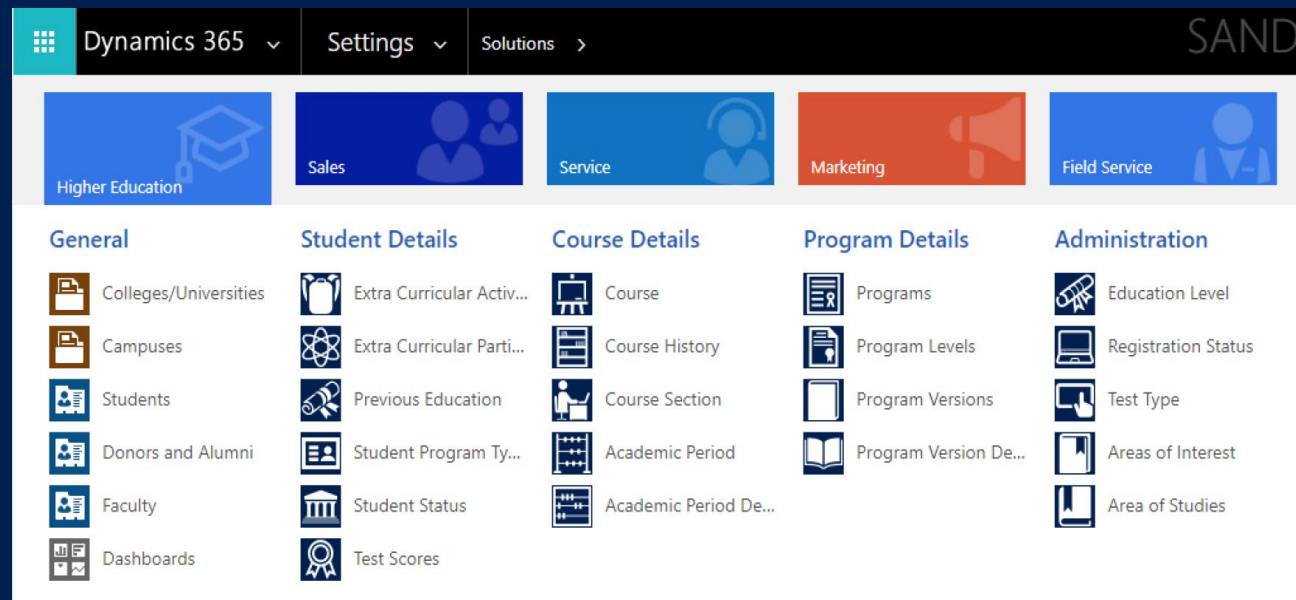
CAREER SERVICES

HOUSING INFORMATION

Common Data Model for Higher Education

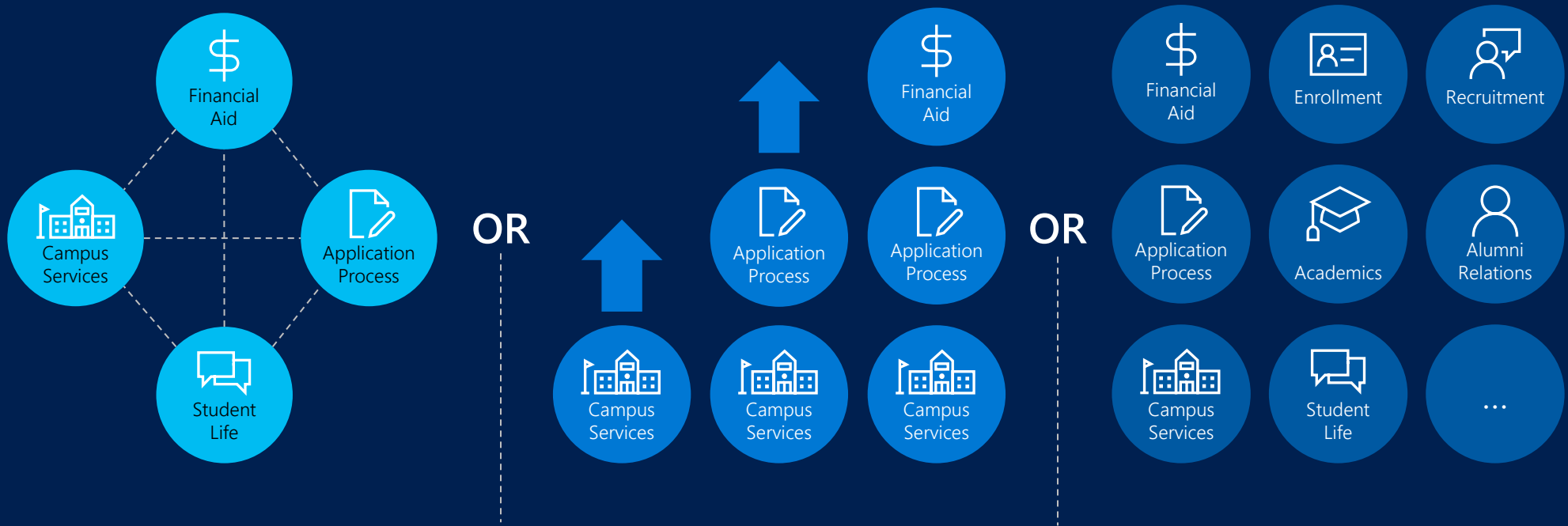
Built on the Common Data Model (CDM), the Dynamics 365 **higher education accelerator** enables you to develop solutions based on entities and attributes that higher education institutions use—including entities around **student engagement, internship, scholarships, grants, and accomplishments.**

- Extends **existing entities** and creates **new HED ones** in our Common Data Service
- Includes **sample analytics** with sample data via Power BI to visualize student data
- Includes simple **Power Apps** for various scenarios
- Seamlessly integrates with **Dynamics 365, Microsoft 365, and Azure**
- Content is **open-source on GitHub**, including additional SDK extensions



Flexible deployment

There is no set, single pattern for deploying the CDM at your institution. The CDM integrates with your existing systems, so you can start small. You can also start with one workload as a trial and add other workloads over time. Or you can deploy the full solution all at once. **Whichever route you choose, we customize deployment for your systems and requirements.**



**Build Common Data Model
with existing systems**

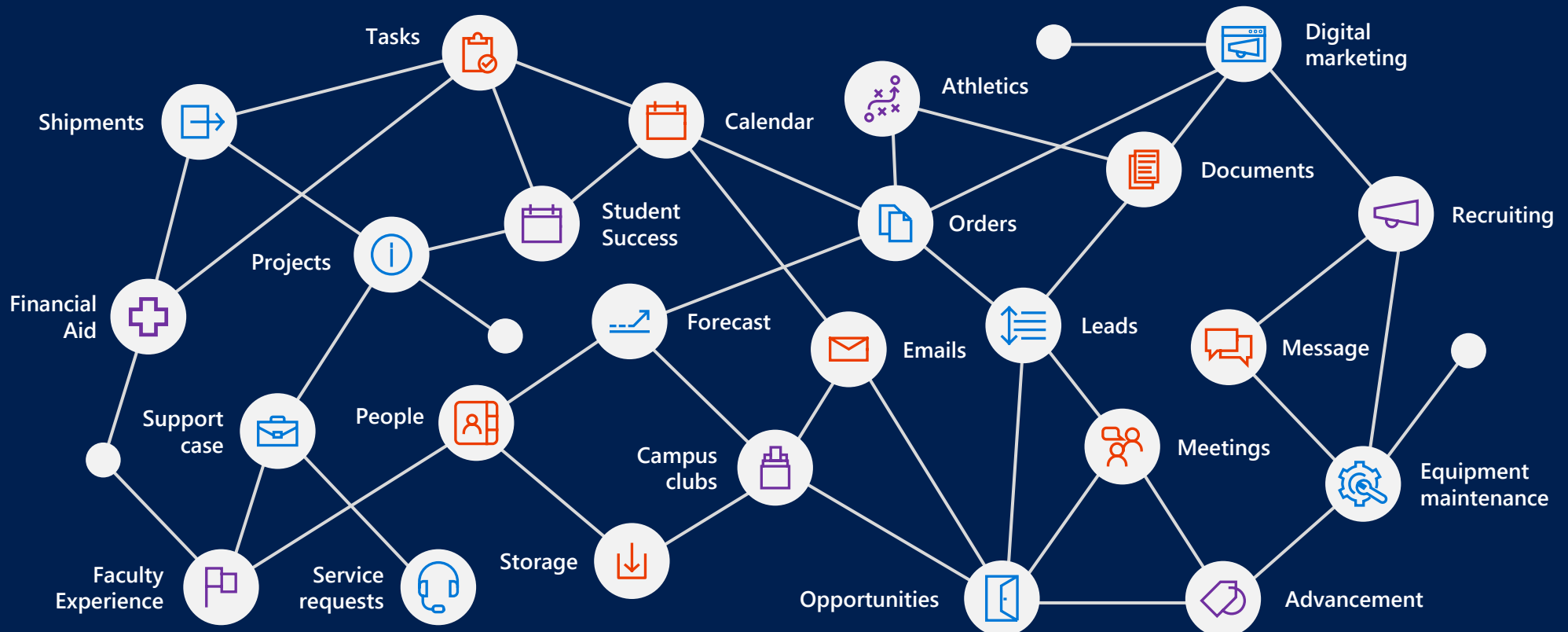
**Add a workload
at a time**

**Deploy
full solution**

Solutions tailored for your needs

With data as a foundation, you can create **CRM and ERP solutions** through Dynamics 365, saving time on processes like budget, support cases, and new student leads. Integrating these solutions with Microsoft 365 gives you **robust productivity tools** and a place to surface apps to students and faculty—including the central collaboration hub of Teams, which can integrate with Power Apps. Finally, Microsoft has an **extensive, trusted partner ecosystem** that can build other integrated solutions tailored to your needs.

Dynamics 365 + Microsoft 365 + Partner Innovation



Dynamics 365

With the Dynamics 365 and the D365 education accelerator, you can create solutions to improve student engagement, automate processes, and streamline operations. **Built on the unified data platform of the Common Data Model**, D365 enables solutions such as...



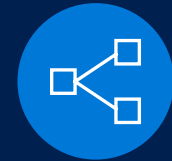
360-degree view of each student and aggregated system views of key areas



Custom web portals and automated outreach for students and parents



Extensions to engage students, personalize resources, and capture extracurricular work



Support for Power Apps to ease communication, facility management, and more



Rich reports on internships and scholarships



Dashboards for partners, donors, and alumni



Apps to track grants and donations



Automated state and federal reporting

Power Platform

Microsoft Power Platform enables you to **automate processes with apps, flows, and bots** that surface right in Microsoft Teams and save time for admins, faculty, and students. No coding experience is required, so anyone can capitalize on the possibilities of Power Platform.



Power Apps

Create custom apps to simplify administrative tasks or classroom management



Power Automate

Expedite time-consuming tasks like assessments, compliance, and more



Power BI

Get actionable, data-driven insights about students or key school processes



Power Virtual Agents

Employ chatbots to answer questions, learn from responses, and give insights

Microsoft and partners

We leverage our **broad, global partner ecosystem** to help all of our customers, regardless of region or size, reach their intended educational goals. Our partners create a variety of end-to-end solutions, built with Microsoft Dynamics and Power Platform, that are **designed to help you build better learning experiences for your students** and reach your institution's outcomes.

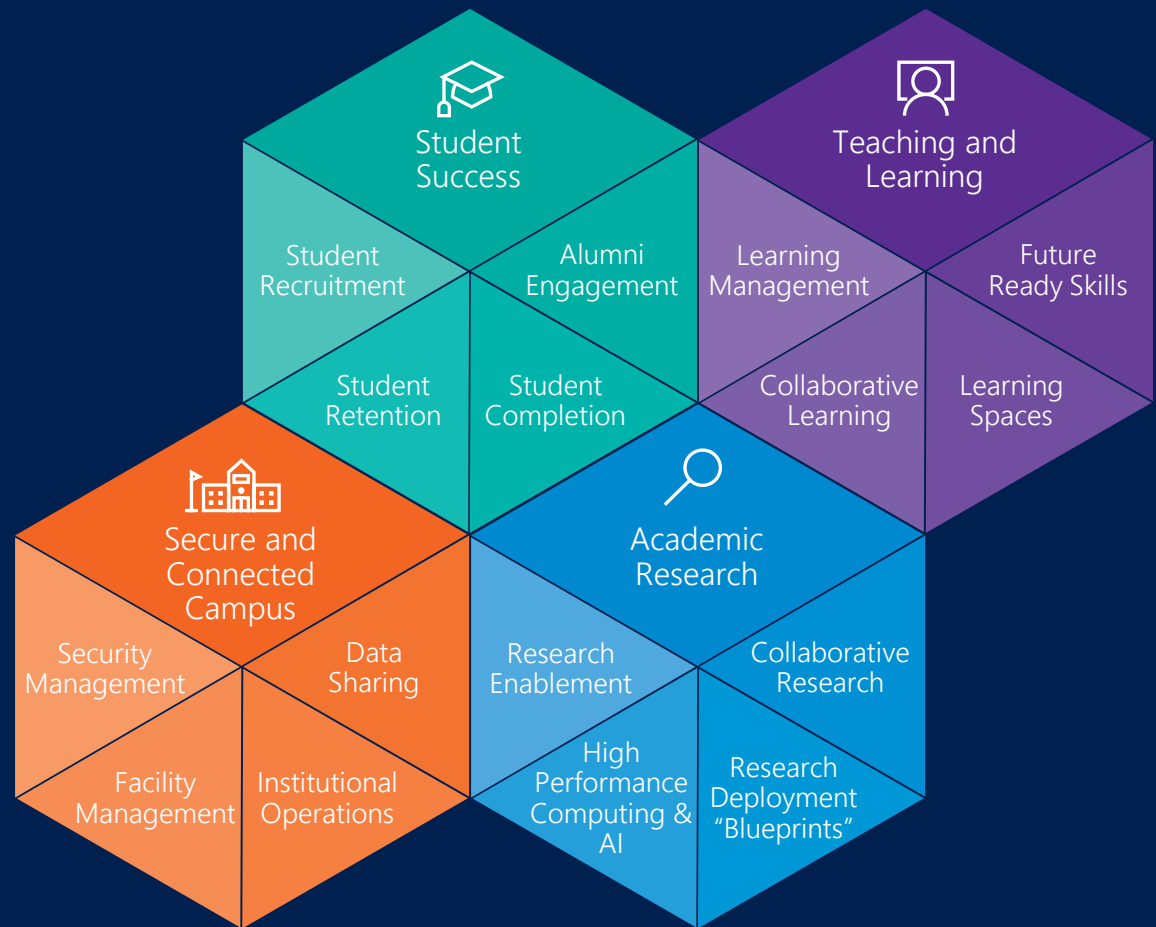
Below are just a few examples of some of our partners in the education space:



Where to start?

Our **Education Transformation Framework** identifies key areas across your institution where Microsoft solutions can enable transformation.

Dynamics 365 and the Common Data Model can help in any of these areas. On the following slides are example scenarios honing in on **Student Success** and **Secure and Connected Campus**.



Use the following table of contents to learn more about a scenario that interests you:

Student Success

- [Admissions and enrollment](#)
- [Student profiles and early alert intervention](#)
- [Student portal and central help desk](#)
- [Better insights for students](#)

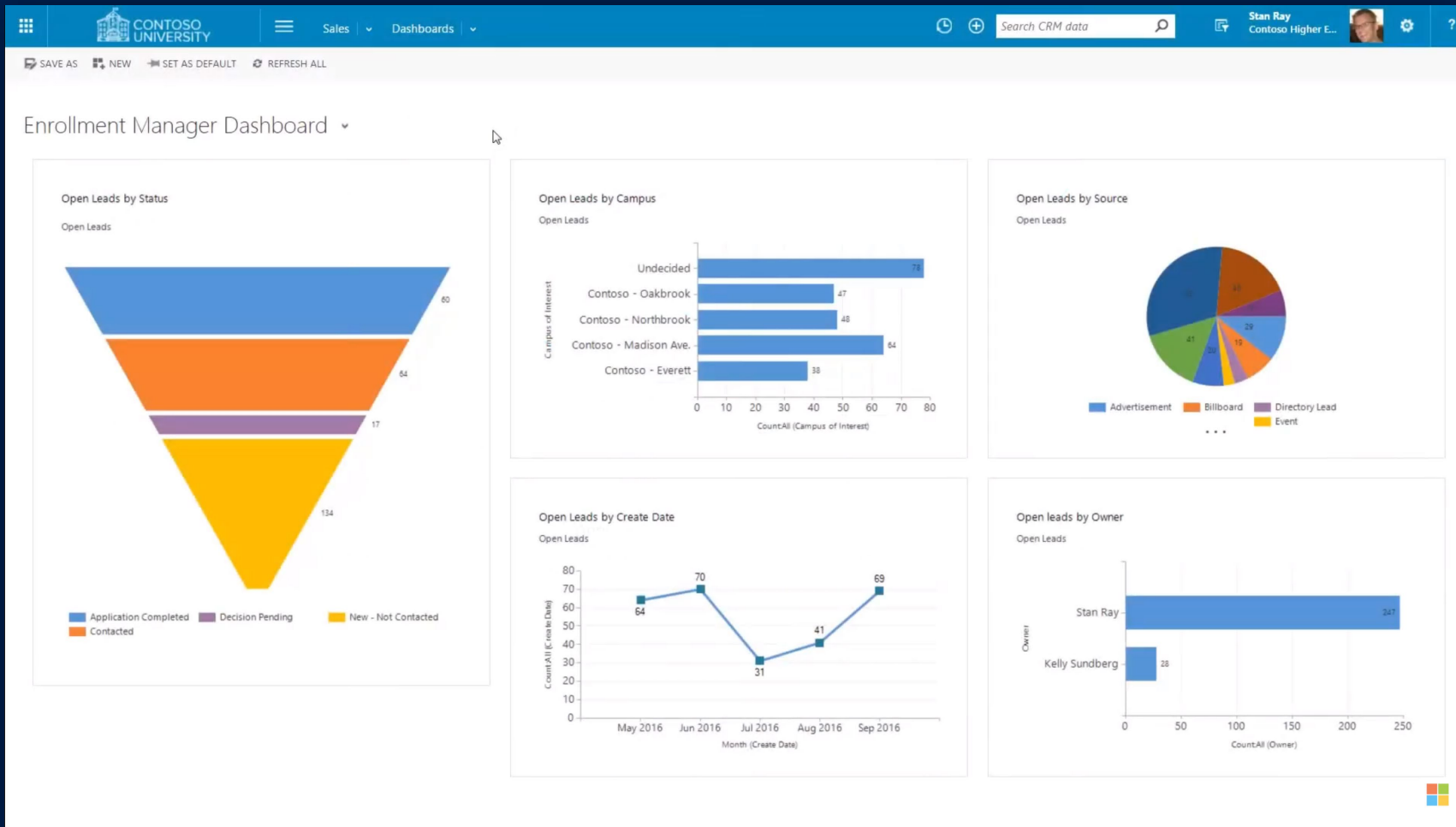
Secure and Connected Campus

- [Cases, requests, and ticketing](#)
- [Donor and alumni engagement](#)
- [Crisis communications](#)
- [Operational efficiency](#)



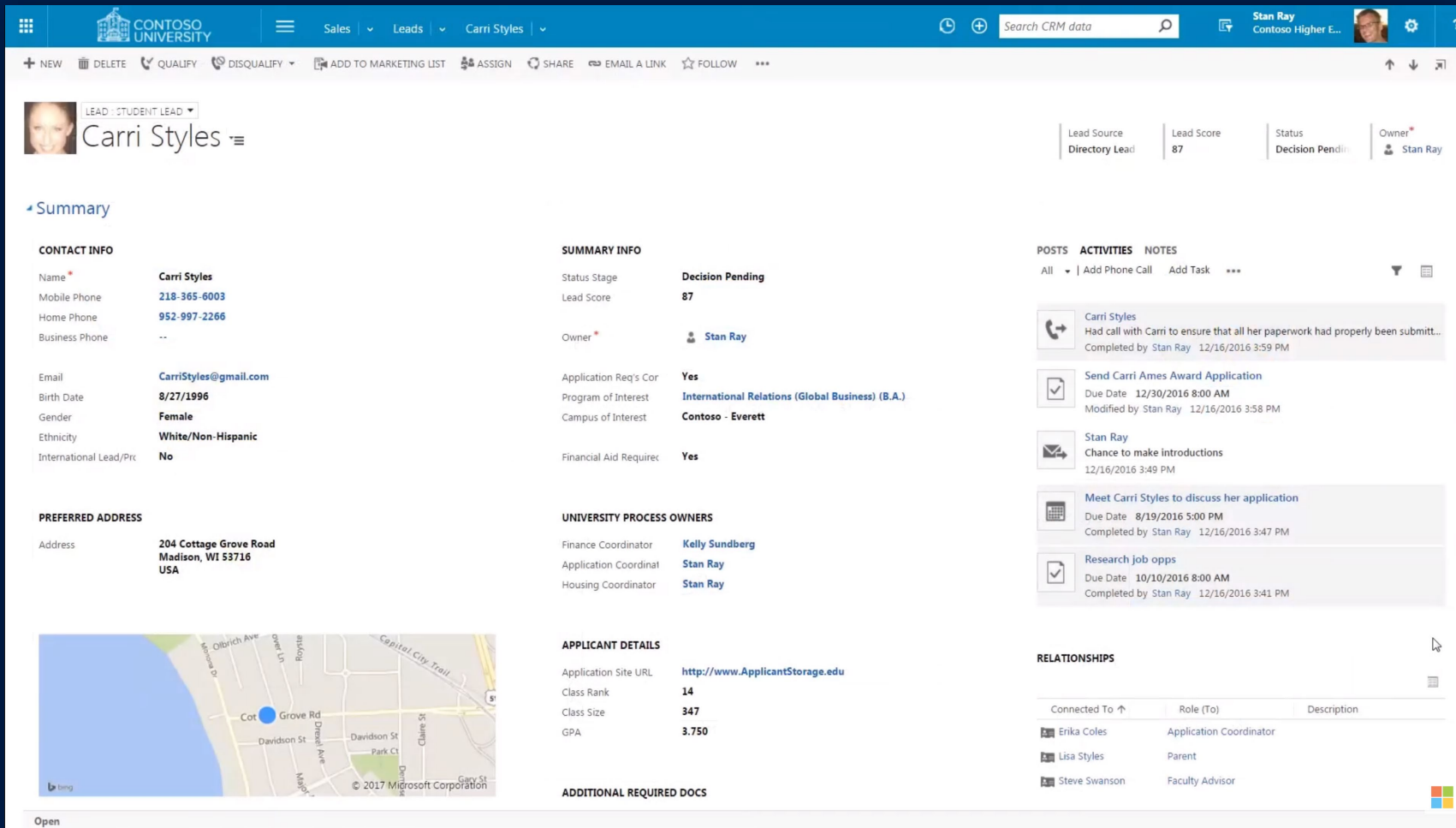
Admissions and enrollment

The recruitment dashboard provides an overview of potential students you are engaged with. D365 tracks the flow of applicants, including a lead record for every applicant with status, lead score, and desired major. Access to transcripts, test scores, and more are available under a single header, plus contact info and notes entered by other CRM users.



Student profiles and early alert intervention

Every enrolled student has a D365 record including contact information, notes, academic history, and more, fed from your SIS and LMS. The relationship feature shows connections to users like advisors, parents, and professors. The record also includes risk profile and the option to send notifications to engage students who might be faltering before it's too late. To learn more, watch [this video](#).



The screenshot shows a CRM interface for a student named Carri Styles. The interface includes a navigation bar with 'Sales', 'Leads', and 'Carri Styles' tabs. A search bar contains 'Search CRM data'. The profile is categorized as a 'LEAD - STUDENT LEAD'. Key details include contact information (Name: Carri Styles, Mobile: 218-365-6003, Home: 952-997-2266), personal information (Email: CarriStyles@gmail.com, Birth Date: 8/27/1996, Gender: Female, Ethnicity: White/Non-Hispanic), and preferred address (204 Cottage Grove Road, Madison, WI 53716, USA). A map shows the location. Summary info indicates a 'Decision Pending' status with a lead score of 87, owned by Stan Ray. The application is for 'International Relations (Global Business) (B.A.)' at 'Contoso - Everett'. University process owners include Kelly Sundberg (Finance), Stan Ray (Application), and Stan Ray (Housing). Applicant details show an application site URL, class rank of 14, class size of 347, and a GPA of 3.750. A list of activities and notes shows recent interactions, such as a call on 12/16/2016 and a meeting on 8/19/2016. Relationships are listed as Erika Coles (Application Coordinator), Lisa Styles (Parent), and Steve Swanson (Faculty Advisor).

Lead Source	Lead Score	Status	Owner
Directory Lead	87	Decision Pending	Stan Ray

Summary

CONTACT INFO

Name*	Carri Styles
Mobile Phone	218-365-6003
Home Phone	952-997-2266
Business Phone	--
Email	CarriStyles@gmail.com
Birth Date	8/27/1996
Gender	Female
Ethnicity	White/Non-Hispanic
International Lead/Ptc	No

PREFERRED ADDRESS

Address	204 Cottage Grove Road Madison, WI 53716 USA
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SUMMARY INFO

Status Stage	Decision Pending
Lead Score	87
Owner*	Stan Ray
Application Req's Cor	Yes
Program of Interest	International Relations (Global Business) (B.A.)
Campus of Interest	Contoso - Everett
Financial Aid Requirec	Yes

UNIVERSITY PROCESS OWNERS

Finance Coordinator	Kelly Sundberg
Application Coordinat	Stan Ray
Housing Coordinator	Stan Ray

APPLICANT DETAILS

Application Site URL	http://www.ApplicantStorage.edu
Class Rank	14
Class Size	347
GPA	3.750

ADDITIONAL REQUIRED DOCS

POSTS ACTIVITIES NOTES

Activity	Due Date	Completed by
Carri Styles: Had call with Carri to ensure that all her paperwork had properly been submit...		Stan Ray 12/16/2016 3:59 PM
Send Carri Ames Award Application	12/30/2016 8:00 AM	Stan Ray 12/16/2016 3:58 PM
Stan Ray: Chance to make introductions		Stan Ray 12/16/2016 3:49 PM
Meet Carri Styles to discuss her application	8/19/2016 5:00 PM	Stan Ray 12/16/2016 3:47 PM
Research job opps	10/10/2016 8:00 AM	Stan Ray 12/16/2016 3:41 PM

RELATIONSHIPS

Connected To	Role (To)	Description
Erika Coles	Application Coordinator	
Lisa Styles	Parent	
Steve Swanson	Faculty Advisor	



Student portal and central help desk

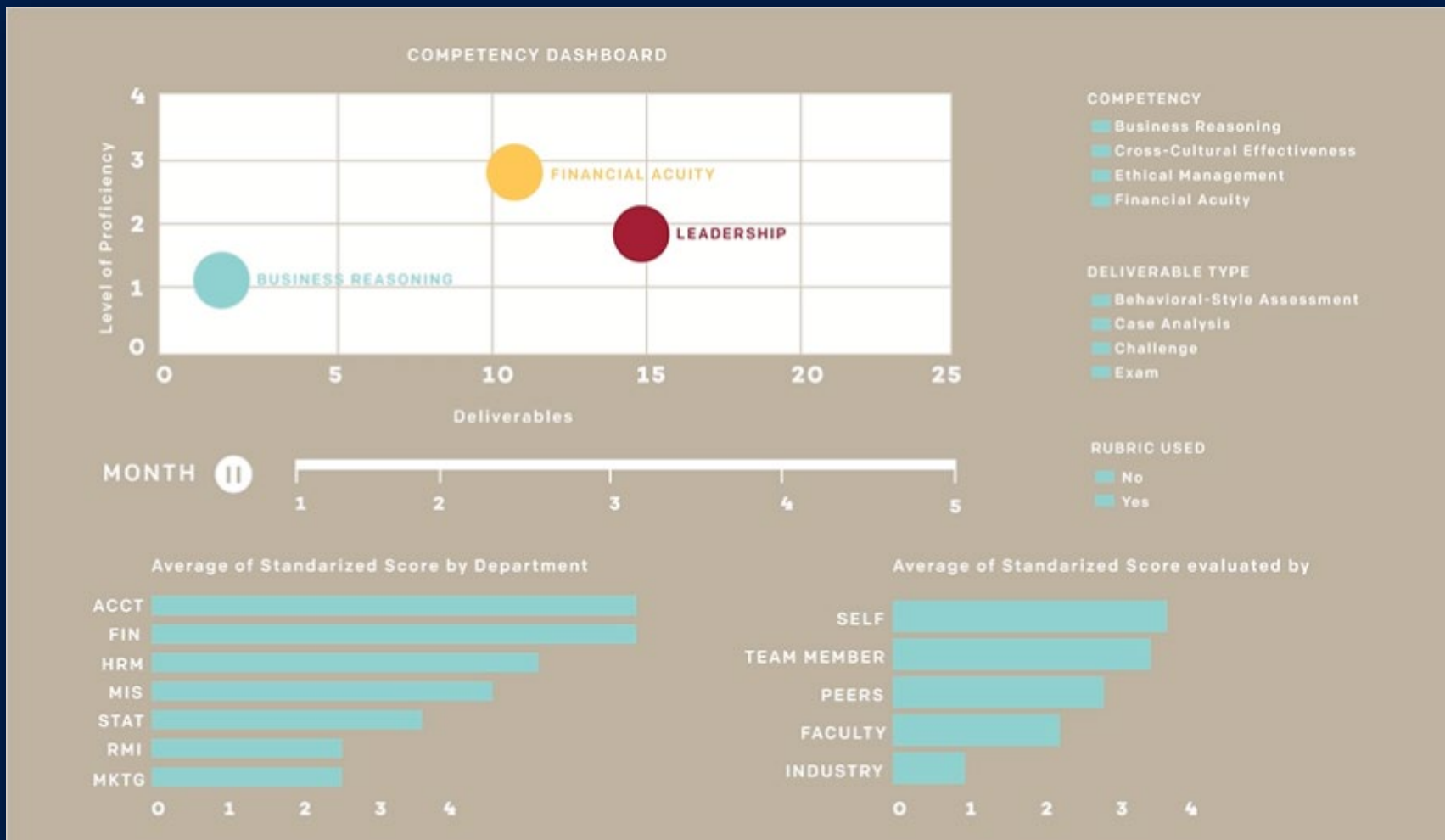
Give students a centralized portal to search the knowledge base, submit help tickets, register for classes, apply for scholarships, download key resources, read campus updates, and much more. You can customize the look and feel of the portal to match your institution's brand, and you can surface custom entities with all data originating in Dynamics 365. To learn more, watch [this video](#).

The screenshot displays the Contoso University Support Portal. At the top, a blue navigation bar contains the university logo, a home icon, and links for Knowledge Base, Create a Case, Blog, Downloads, a search icon, and a user profile for Adam Scott. Below the navigation bar, the page title reads "Contoso University Support Portal" followed by the heading "HOW CAN WE HELP?". A search bar is positioned below the heading. The main content area features three columns of cards: "Browse the Knowledge Base" with a "Go to the Knowledge Base »" button, "Get Help" with a "Create a Case »" button, and "Register" with a "Register Now »" button. At the bottom, a testimonial from Kevin Short is shown over a background image of a student, stating: "Everything I ever needed to know was either waiting for me in the Knowledge Base, or a few minutes away after submitting a request." A Microsoft logo is visible in the bottom right corner.



Better insights for students

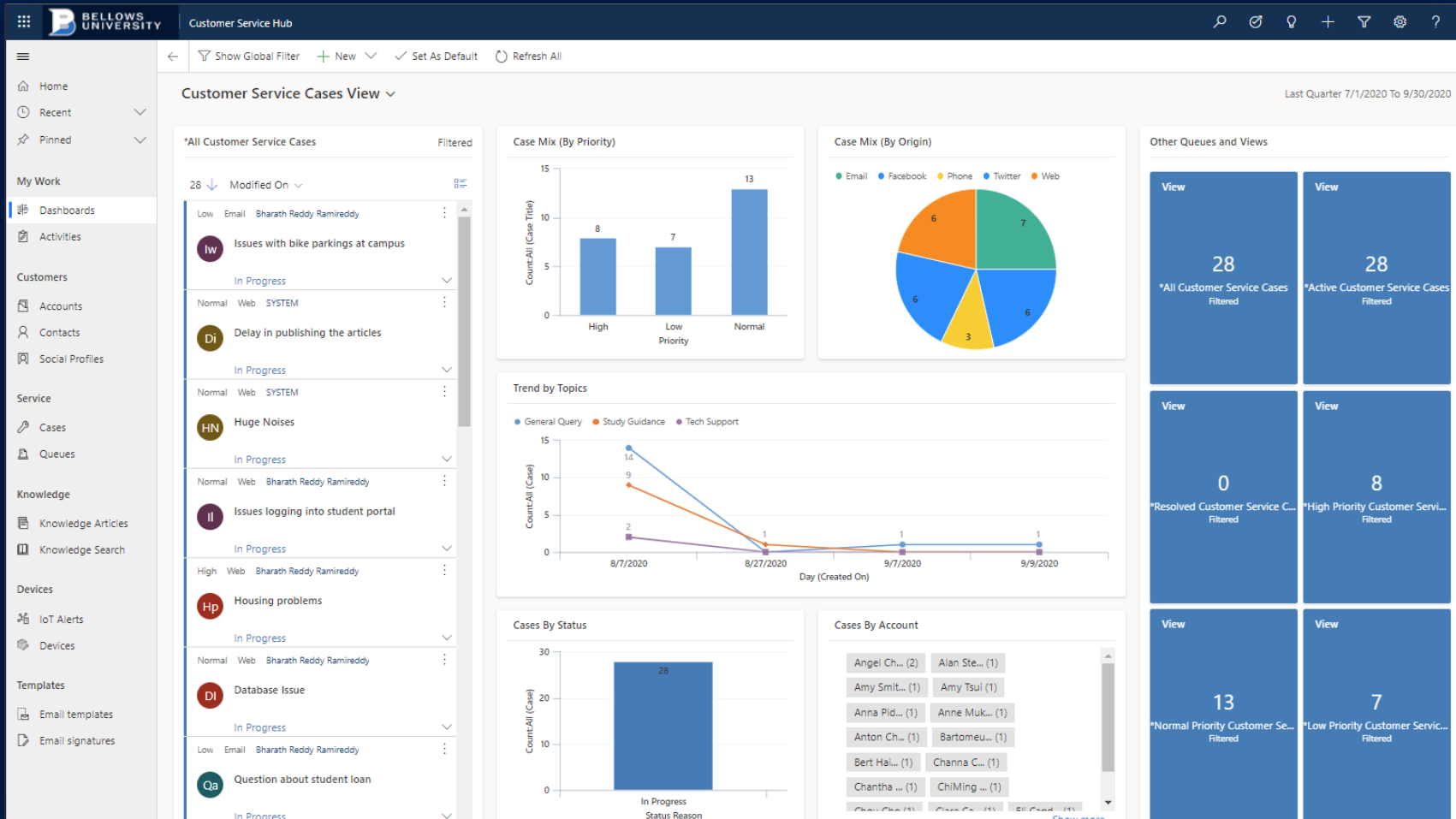
Help prepare students for the workforce by giving them insights into competencies that go beyond traditional coursework—areas like leadership, business reasoning, financial acuity, and more. Powered by Dynamics 365 and delivered through embedded Power BI, competency dashboards can be customized for various metrics, taking evaluations from faculty, advisors, and other groups into account.





Cases, requests, and ticketing

Support requests can be taken from students, faculty, employees, parents, alumni, and even business partners. The dashboard tracks all incoming requests and gives statistics about cases by subject, owner, and origin—so you can monitor each department's workload. Each case record contains a wealth of data to help resolve the case, including timestamped notes and actions. To learn more, watch [this video](#).





Donor and alumni engagement

Dynamics 365 provides a central database for you to keep track of all donors and alumni. Each entry has a dedicated profile page with contact information and preferences—such as whether they prefer to be contacted by phone or email. Having all this data in one place makes outreach and engagement much easier.

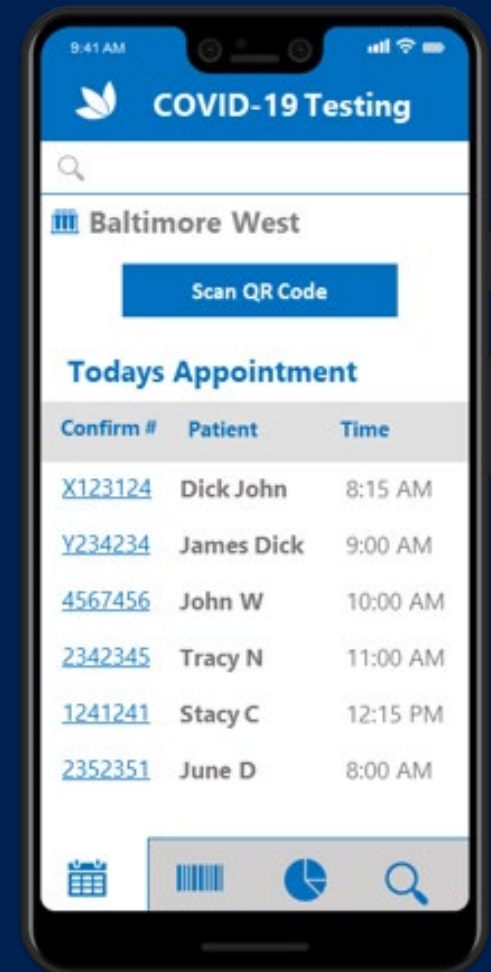
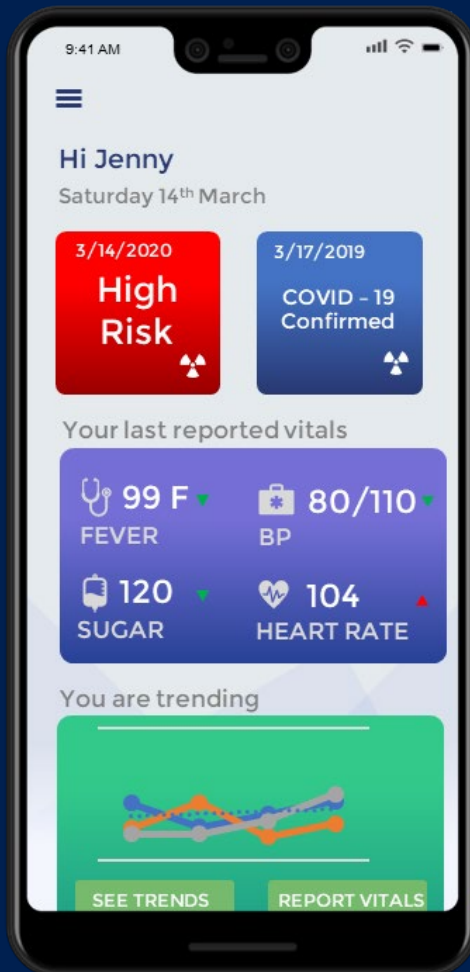
The screenshot shows the Dynamics 365 interface for Bellows University. The left sidebar contains navigation options: Home, Recent, Pinned, General (Account, Contact, Sample Dashboard), Details (Courses, Programs, Extra Curricular Activi..., Areas of Interest, Area of Studies), and Additional Information (Enrollments, Internships, Scholarships, Grants). The main area displays a table titled "Active Donors and Alumni" with columns for Full Name, Email, Company Name, and Business Phone. The table contains 20 rows of data.

Full Name	Email	Company Name	Business Phone
---	ramkishore.y@sonata-software.com	---	---
Alan Steiner	asteiner@school.edu	Margie University	---
Amari Rivera	Amri@fabrikam.com	Fabrikam Organization	---
Amber Rodriguez	Amber@fincher.com	Fincher Ltd.	---
Amy Smith	asmith@school.edu	---	---
Amy Tsui	atsui@school.edu	Relecloud	---
Angel Chiu	angelc@school.edu	---	---
Anna Pidecabanyes	annap@school.edu	---	---
Anne Mukasine	annem@school.edu	---	---
Anton Chew	Alden.Lang@test.com	---	---
Ashley Schroeder	Ashley@lamna.com	Lamna Organization	---
Bartomeu Collelidemont	bartomeuc@school.edu	---	---
Bert Hair	Bert@school.edu	Proseware College	---
Bhargav Paruchuri	bp@school.edu	Nod University	2063892124
Brandon Stuart	Brandon@lucerne.com	Lucerne Ltd.	---
Briana Hernandez	Briana.H@microsoft.com	Microsoft Ltd.	04068989596
Carlos Lima	Carlos.Lima@microsoft.com	Microsoft Ltd.	04068989596
Chandra	chandra@gmail.com	---	---
Channa Chem	channac@school.edu	---	---
Chantha Mean	cmean@school.edu	---	---
Chen Tsai	ct@school.edu	Bellows University	2063892115



Crisis communications

Keep track of virus cases on campus. Enable students and faculty to easily enter their symptoms through the symptom checker chatbot, share health information with their provider, review safety information, and set up appointments in a Power App—including telehealth appointments in Microsoft Teams. Power Apps can also simplify the process of reporting to the CDC.





Operational efficiency

The previous scenarios are just a few examples of how D365 can help you make the most of your data. D365 empowers you to customize solutions for your needs, with a single system serving all departments with different views for each. Power Platform enables staff and faculty to quickly spin up apps, automations, and even virtual chatbots, no coding experience required.

The screenshot shows the Microsoft Dynamics 365 Home dashboard. At the top, there is a navigation bar with the Dynamics 365 logo and a 'Home' button. Below this is a large teal banner with the text 'The new home for all your business apps' and a 'Take a quick tour' button. The main content area features a search bar for apps, a 'Pinned apps' section with 'Cost Estimator', 'Operations', and 'Service Desk', and a 'My apps' section with 'Asset Checkout', 'Cost Estimator', 'Employee Rewards', 'GetSecure', 'Operations', and 'Plant Maintenance'. Each app card includes a brief description of its functionality. At the bottom, there are several social media and utility icons, including LinkedIn and a 'Find more apps that work with Dynamics 365' button.

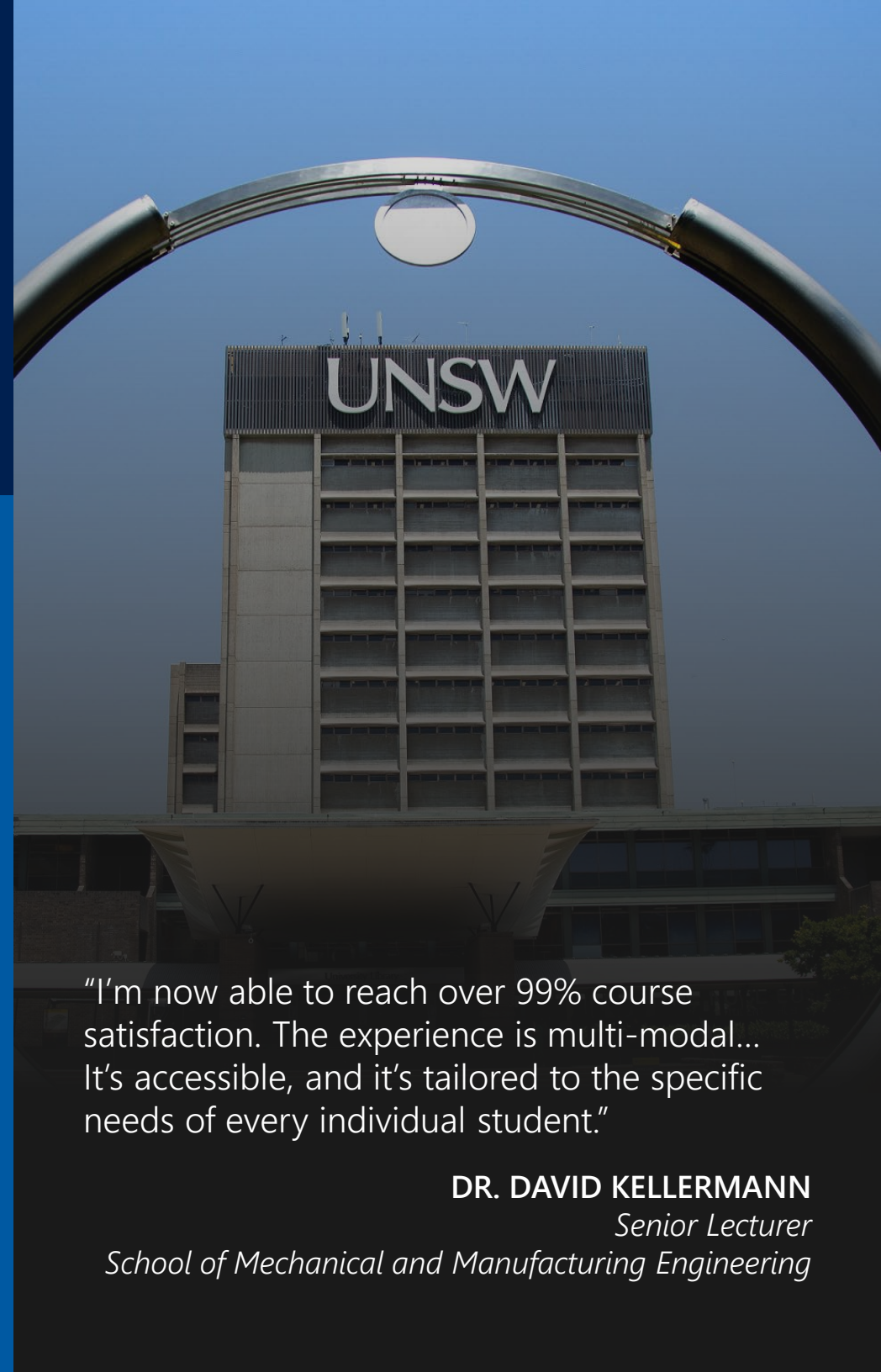
University of New South Wales (UNSW)

UNSW used Power Platform, Dynamics 365, and Microsoft Teams to personalize learning and transform operations

Created one-click dashboards about student success in Power BI, enabling predictive analytics, individual performance assessment, and customized study packages

Replaced 17 different CRM systems and data sets with an integrated D365 solution, resulting in a transparent, centralized portal for the entire student experience

Surfaced solutions in Microsoft Teams for easy access by students and administrators, integrated with student and enrollment systems supported by Dynamics 365



"I'm now able to reach over 99% course satisfaction. The experience is multi-modal... It's accessible, and it's tailored to the specific needs of every individual student."

DR. DAVID KELLERMANN

Senior Lecturer

School of Mechanical and Manufacturing Engineering


Northumbria University

Serving over 38,000 students, Northumbria eliminated silos and overhead with a holistic Dynamics 365 solution

Replaced legacy systems with a modern D365 portal that brings together various university offices and services into one platform with easy access

Saved time for IT and support staff by eliminating data silos, introducing efficiencies into areas like financial aid, disability services, and security

Enabled faster response to student needs by leveraging D365 to scan student requests for keywords that indicate urgent requests and to automatically send crisis resources



"We have seen a huge impact for staff and students. The Student Portal usage stats are huge, and the students are going to the self-service options first, which is exactly what we want them to do."

CAMILLA GREGORY
Senior Business Analyst

University of South Florida (USF)

With over 50,000 students across three campuses, USF used D365 and Power Platform to unify data institution-wide

Democratized data through Power BI, allowing stakeholders across the university to access data and generate their own actionable insights to share with colleagues

Gave professors and advisors an immediate student success solution to monitor and engage with students in real time, including dashboards integrated into Teams

Transformed the admissions experience by allowing a deep dive into the data for each prospect to inform choices based on a holistic picture of an individual



"The whole vision is 'One university, multiple campuses.' It doesn't matter where you are; your experience should be seamless."

SIDNEY FERNANDES

Chief Information Officer at USF System

Get started

To contact a seller and discuss next steps for establishing a unified data platform at your institution, visit aka.ms/ContactEDUSales

