Guide to Procuring Academic Operations Software
Over the last few years, digital transformation has risen from one of many considerations for institutions to the number one priority. Digital transformation covers a wide range of items such as digital infrastructure for online learning, improved security, and IT support. It also means that many institutions are considering the value of procuring and implementing software solutions that can move the needle on things such as student acquisition, retention, and completion.

Procuring and implementing an academic operations tool provides several benefits for your institution such as reduced manual work from your staff, fewer errors in your course schedules and public catalogs, and streamlined processes that all ultimately benefit students. While the process of procuring, implementing, and learning a new academic operations tool can feel like an intimidating task to take on, the right vendor will be your partner the whole way and the benefits of a good tool are worth the upfront work. This guide helps you think through what you are looking for, how to evaluate your options, and how to select the right partner vendor for your institution.

“Instead of being seen as a service provider like a utility, technology is more valuable to higher ed when embedded in different aspects of campus life—to increase student success, research prowess, and prestige.”

- Jeffrey Selingo, Forbes
Step 1: Determine If There Is An Internal Need

Implementing academic operations software is an essential part of streamlining and modernizing your academic operations; however, in order to efficiently evaluate and select the best-fit provider, it is important to first define the goals you’re looking to achieve as a result of this software implementation.

Not only are these steps important for creating a smoother procurement process, they also help you start the process of getting buy-in for implementing a new solution from key stakeholders. If everyone is aligned on what they want to accomplish, it will be much easier to get user adoption.

### Academic Operations Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Potential Desired Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curriculum and program management</td>
<td>Be able to innovate institutional offerings faster by removing process bottlenecks</td>
</tr>
<tr>
<td>Course catalog development</td>
<td>Automatically updated public catalog that is accurate for accreditors and accessible for students</td>
</tr>
<tr>
<td>Academic policy administration</td>
<td>Create a single source of truth to easily view and edit academic policies</td>
</tr>
<tr>
<td>Academic scheduling</td>
<td>Fewer scheduling errors &amp; a schedule optimized for students</td>
</tr>
<tr>
<td>Accreditation reporting and compliance</td>
<td>Reports and data that can be easily pulled by staff and don’t require manual data manipulation</td>
</tr>
<tr>
<td>Instructional resource allocation</td>
<td>High level data about resource allocation and ability to easily optimize during scheduling process</td>
</tr>
<tr>
<td>Completion auditing</td>
<td>Course demand projections that protect completion pathways</td>
</tr>
</tbody>
</table>

### To do:

Work with the relevant stakeholders such as the registrar, department schedulers, academic department leadership, curriculum committee members, etc. to define:

- The area/processes in need of change
- The desired outcomes for students
- The desired outcomes for impacted staff and/or faculty
Step 2: Define Procurement Process

Timeline and Steps

Every institution’s procurement process is slightly different. To save time during the evaluation process, it is best to identify the steps and stakeholders involved at this stage.

Be aware that many implementations can take up to 9 months for a suite of academic operations tools, so when laying out the buying process and timeline, it is helpful to keep that in mind. The future steps outlined here have recommended target deadlines to ensure you set your team and your partner vendor up for a successful implementation. The most important thing is for your team to identify the timeline clearly early on in the process and communicate that to the vendors in the first conversation.

Month 1
- Prepare to evaluate solutions
- Contact vendors for an initial call

Month 2
- Schedule and attend a demo

Month 3
- Schedule additional demos as needed
- Talk with references

Month 4
- Negotiate
- Make a selection

Months 4-5
- Finalize any steps from the buying process

Implementation
- Implement selected tool

After implementation
- Start optimizing your academic operations!

To do:

Work with leadership such as VPs, CIOs, and Provosts to:

- Align on timeline for purchasing and implementing
- Define critical success outcomes
- Create a high level scope
- Ensure adequate funding is available
- Outline who will be involved in the process and when they should be involved
- Clearly define the final decision makers
Step 3: Prepare To Evaluate Solutions

1 year from target go-live date*

At this stage, gather your list of vendors to evaluate and make sure you have the information prepared to have a productive initial call. Creating your initial short list of vendors can feel overwhelming, so reaching out to your network is a great place to start. Coursedog also has some resources, including this chart, of some of the top vendors with a breakdown of who has what functionalities:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Coursedog</th>
<th>Modern Campus</th>
<th>Courseleaf</th>
<th>Ad Astra</th>
<th>25Live</th>
<th>EMS</th>
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</thead>
<tbody>
<tr>
<td>Academic Section Scheduling</td>
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<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
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<td>Room and Space Optimization</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td>Online Course Catalog</td>
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<td></td>
</tr>
<tr>
<td>Curriculum Management</td>
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<td>✔</td>
<td>✔</td>
<td></td>
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<tr>
<td>Academic Reporting</td>
<td>✔</td>
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<td>✔</td>
</tr>
<tr>
<td>Course Demand Projections</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>

To do:

- [ ] Create a list of the solution providers you may want to evaluate
- [ ] Reach out to your network and ListServs to ask for recommendations
- [ ] Do internet research and look for tools that have images, videos, or interactive demos of the tool that look user friendly
- [ ] Gather information on your end that will prepare you to have conversations with vendors
  - Your student information system
  - The problems you are trying to solve for with a new solution
  - Timeline for purchasing and implementation
  - The outcomes you’re hoping to achieve

*All timeline suggestions are intended to give you a general idea of the process and are based on the average timeline we see, but they should not be viewed as required or set in stone. Adjust as needed based on your internal timeline that you defined in Step 2.
Step 4: Contact Vendors For An Initial Call

1 year from target go-live date

We highly recommend doing the initial call with at least three different vendors. When evaluating vendors, you will see two different ways to approach adopting a solution.

Option 1: Since academic operations is a (relatively) new category, most vendors can only act as point solutions.

Option 2: Instead of point solutions, Coursedog offers a fully integrated academic operations platform.
By working with multiple vendors at this initial evaluation stage, you will likely encounter different versions of these options. The work you did in steps 1 and 2 should help you be able to determine the best solution for your institution.

**To do:**

- Reach out to your selected vendors to set up an initial call
- Schedule times for the initial calls that will include individuals who can answer the following questions
  - Why did you decide to look for a new solution?
  - What are you hoping to do with a new solution?
  - What is your timeline?
  - What does your buying process look like?

**Top 5 Questions to Ask Every Academic Operations Vendor:**

- Do you have a pre-built, bi-directional, real-time integration with our SIS?
- Once we are live, what types of things would we need to contact support for in order to make updates to something inside of the system?
- How does an end user edit the catalog? What kind of updates can we handle on our own compared to what we will have to request for your development team to handle on our behalf? (i.e. content updates, navigations, etc.)
- Does your scheduling product allow us to schedule rooms, courses, sections, and instructors within the same platform?
- Does your solution allow for automated policy enforcement, such as timeblocks and primetime rules?
Step 5: Schedule And Attend A Demo

11 months from target go-live date

After the initial call, you may elect to schedule a demo with all the vendors you spoke with or just a subset of them. That depends on whether the initial call clearly disqualified any of the vendors due to limited functionality or other reasons.

This is a good time to refer back to the buying process laid out in an earlier stage to make sure you are including the right people at the right time. However, it is helpful to remember that most demos last around an hour and therefore may not cover everything in the tool. The next step outlines how to approach additional demos.

To do:

☐ Schedule a product demo with everyone who was including in the buying process outline made prior to starting the evaluation process

Step 6: Schedule Additional Demos as Needed

10 months from target go-live date

Depending on your buying process, you may need to have multiple demos of the platform. For example, many vendors will recommend a dedicated technical demo where you can include anyone from IT to discuss the more technical aspects such as API, integrations, and implementation.

If they didn’t already come up in the initial demo, these additional conversations are a good time to dig into the critical success factors outlined earlier in this process. Your ideal vendor should be able to speak directly to how they can be a tool that assists in those areas.

To do:

☐ Schedule additional demos as needed
☐ Review your critical success factors to make sure you’ve discussed how the vendor can assist in those areas
Step 7: Talk With References

10 months from target go-live date

Your final vendor(s) should be able to provide you with a list of current partner institutions that are similar to yours. It is at this point that you should reach out to those references to discuss their experiences and hear from their perspective.

This step allows you to learn more from the user perspective and see how the various tools work post-implementation. This is the final step before making a selection, so this is a good time to talk about the critical success factors with the references to narrow down which vendor can really make a difference at your institution.

Questions to ask references:

• What was the implementation process like on your end?
• Where have you seen the most benefit from using this tool?
• What has been the most difficult part of implementing or using this tool?
• What advice would you give us if we went in this direction?
• Would you recommend this tool to us?

To do:

- Request references from your vendor(s)
- Prepare your questions for the reference conversations
- Schedule a time to chat with the references

At this point, it can be a good idea to double check with your institution’s procurement process to make sure you have all the information you need and are clear on next steps as you approach making a final decision.
**Step 8: Align and Confirm Expectations**

9 months from target go-live date

At this point, it is likely that the decision makers at your institution have a pretty clear idea of which vendor is the ideal option; however, there may be a few areas where you need clarity or would like to make changes.

This stage is the time for you to request a clearly defined statement of work as well as a copy of the contract from your top vendor if they have not already provided it. It is recommended to pursue this part of the process with only your top vendor, maybe top two if it is close. That way your team is only focusing their time and energy on reviewing contracts that are likely to be signed.

**To do:**

- Review statement of work documentation as well as the contract
- Revisit those critical success factors as well as the budget and timeline laid out earlier in this process to ensure that the statement of work and contract speak to those effectively
- Outline any desired changes and work with the partner vendor to come to an agreement

**Step 9: Make A Selection**

9 months from target go-live date

At this point, you should be prepared to make your final selection. Any questions you outlined at the beginning of the process should be answered by now, and you can move forward with making the selection.

Implementing a new academic operations tool can take some time, so it’s important to have a clear deadline for this step to ensure you leave plenty of time for a successful implementation before your target go-live date.

**To do:**

- Work with the defined group of stakeholders to make a final decision
- Ensure that the final decision makers have signed off and approved
- Inform your selected vendor that they are your official choice
- Inform any other vendors that you are going in a different direction
Step 10: Finalize Any Steps From Buying Process — 8-9 months from target go-live date

The final steps for how to sign a contract and facilitate payment differ greatly from institution to institution. Since those steps should have been defined in Step 2, these last few checklist items should be carrying out those final steps.

To do:

- Review institutional procurement process final items
- Implement those steps to get the contract signed and invoice paid

Congratulations!

Evaluating and selecting an academic operations tool may seem overwhelming at first, but by clearly outlining the goals, the process, and the stakeholders at the beginning, it will be much easier to evaluate and select a solution in the end.

The implementation process is next, so pause here and take some time to celebrate that you chose a new tool! By going through this process, you should have ended up with a vendor who will be a true partner with you through the implementation process, so you can take some time to enjoy this moment and envision everything you will be able to accomplish with this new partnership in place.
Our mission is to break down barriers to opportunity for students in higher education. From our work with over 100 institutions, we know that when an institution’s academic schedule and operations are not aligned with student demand and need, it hinders retention & completion rates, especially among underserved student populations.

Coursedog provides modern software that enables higher education administrators to supercharge the academic scheduling and operational experience, leverage demand-based analytics, and deliver top notch services that help more students complete their educational pathways in less time.

Coursedog’s Integrated Academic Operations Platform empowers academic administrators with integrated academic and event scheduling, course demand projections, curriculum, catalog, and academic reporting tools through a single, bi-directional integration with your SIS.

“With Coursedog, we have a platform where you are able to pull data to show that there are barriers in place that prohibit student success. And it’s given us an opportunity to talk about that. We now have the data to prove it.”

Jennifer Creech, Assistant Vice President for Student Success & Registrar at Chaminade University

Integrate your academic operations for student success today.

Get in Touch

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