

2018

P R O D U C T
S U R V E Y



SUMMARY REPORT

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HIGHER EDUCATION USER GROUP

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INTRODUCTION

CLOUD PRODUCT SURVEY

The Higher Education User Group (HEUG) is proud to release the results of our 2018 Product Survey conducted during the Spring of 2018. This was the fourth year in a row, that the HEUG gathered information about the plans our institutional members have related to their core administrative systems. This year we had over 750 responses, representing 270 institutions, from 15 countries across every region of the world.

As part of this, for the first time, the survey also looked at other products institutions may be evaluating as part of their move to the cloud. While many institutions are not looking to move away from Oracle, many have communicated with the HEUG of their intention to at least look at other solution providers as part of their due diligence process for their next project. For some this may be in add-ons for best of breed targeted solutions, and for others it may be complete system replacement.

To better support the varying needs of institutions, the survey was broken into 5 different individual surveys to allow projects across the institution to be better represented. Those systems include:

- Student Information Systems (SIS)
- Human Capital Management Systems (HCM)
- Financial Management Systems (FMS)
- Research Management Systems (RMS)
- Customer Relationship Management Systems (CRM)

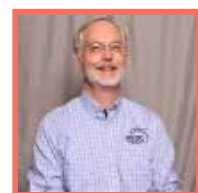


750+ RESPONSES
REPRESENTING 270 INSTITUTIONS
FROM 15 COUNTRIES ACROSS THE WORLD

Highlights and details of each of the individual surveys can be found in this document, with summarized results for each appended at the end. While the results do show many institutions looking at change and new projects, as this is the first year to gather much of this data, this survey is intended to be a snapshot in time (Spring 2018), with no specific historical correlations to be made.

In the past this survey was primarily focused on cloud awareness and readiness of our member institutions. As the Oracle Cloud products have matured however, the question of adoption of Oracle Cloud and new projects for moving to the cloud have been asked more and more by the HEUG membership. This year it was determined to focus the survey on getting insights into the actual projects currently underway, and for those not started, the anticipated timing of their next project.

We would like to thank everyone who submitted a response and everyone who helped manage and collate the results from this survey. All of the information provided is used by the HEUG to continue to evaluate and further our mission of education and advocacy on behalf of our members, and to better understand the current and future directions of our members.



CRISS LAIDLAW

HEUG BOARD OF DIRECTORS

STUDENT INFORMATION SYSTEMS

SURVEY HIGHLIGHTS

The Student Information Survey (SIS) survey focused on systems supporting academic records management, student financials and curriculum management. For some that may include other functions such as recruiting, admission, financial aid, and academic. This survey received the largest number of respondents (318) and the highest number of unique knowledgeable responses (168) of all the surveys run.

52% OF RESPONSES CURRENTLY IMPLEMENTING OR EVALUATING A PRODUCT

While a majority of institutions responding (52%) that their project direction was currently implementing or evaluating a project, most of those had not started any implementation (43% vs. 9%). There was also no clear consensus on the product selection for those evaluating projects. Oracle Student Cloud appeared as a potential product on the most surveys (appearing on 76% of responses). However, many were looking at upgrading/staying on PeopleSoft Campus Solutions (48% of responses), and the majority indicated a mixture of products would be evaluated. A breakdown of the primary product mentions is included here.

Outside the US, those looking at projects are clearly in the minority with over 56% of international institutions saying that that have no plans to evaluate a project in their immediate future.

In the free form comments provided it was noted that several institutions were looking at bolt-ons to replace / enhance specific functionality instead of changing their entire systems.

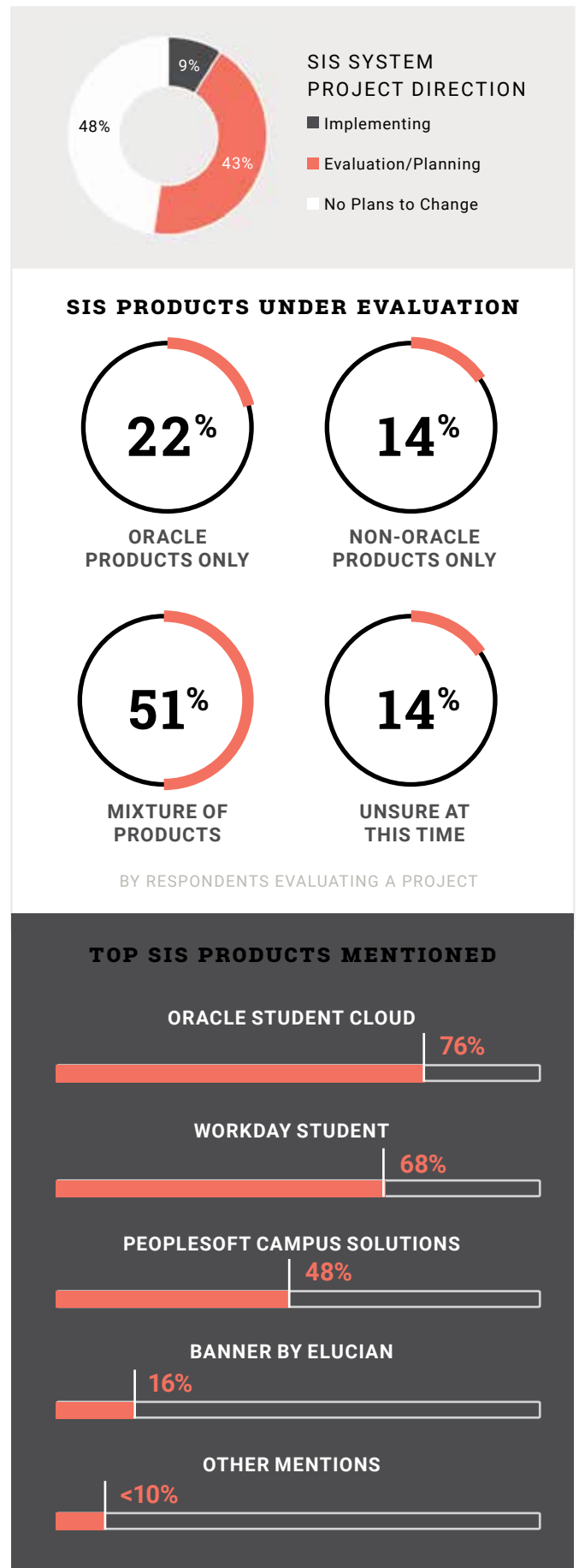
“Much more is being developed by our Web Team and just linking to PS, vs. using PS itself. It’s becoming a repository and not the front end.”

Several said that while they listed products they thought would be included in an evaluation, they were watching the market to see how the new SaaS products and their business needs changed:

“Just in early stages of discussion. We are revisioning how we want our student system to work.”

“It has just become a project to look at PeopleSoft and evaluate it against other systems.”

NOTE: A complete summary of responses can be found on page 10 of this report.



HUMAN CAPITAL MANAGEMENT SYSTEMS

SURVEY HIGHLIGHTS

The Human Capital Management (HCM) survey focused on systems supporting the core workforce administration function and potentially other functions such as benefits, payroll, recruiting, and time & attendance. This survey received about half the number of total responses (161) as the SIS survey, but still had over 121 institutions providing data.

59% OF RESPONSES CURRENTLY IMPLEMENTING OR EVALUATING A PRODUCT

Of the three larger product line surveys (SIS, HCM, FMS) the HCM survey featured the highest percentage of institutions that are currently implementing or evaluating a project with over 59% of the knowledgeable responses. This survey also had the highest percentages of institutions implementing or evaluating projects using Non-Oracle HCM products. The choice of potential products was very close with Oracle HCM Cloud appearing on 75% of responses, and Workday HCM appearing on 69% of responses (with SAP Human Resources a very distance third).

One area of note, which was consistent across several of the five product surveys, was that outside the United States those looking at projects are clearly in the minority with over 56% of international institutions saying that that have no plans to evaluate a project in their immediate future.

In the free form comments provided it was noted by many institutions their desire to use bolt-ons to replace / enhance specific functionality (Recruitment was most commonly mentioned):

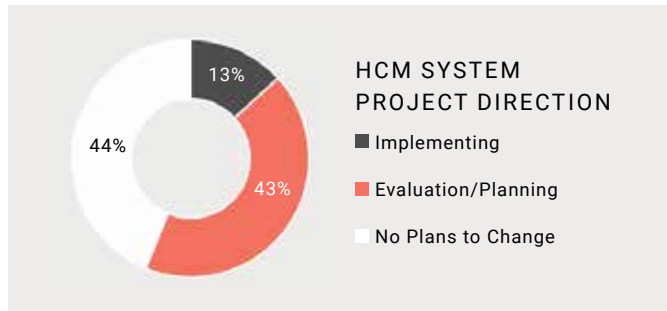
“HR has purchased add-on solutions for recruiting, onboarding and other deficiencies identified by HR.”

“Our HCM areas are currently upgraded to HCM9.2 and are now doing a re-engineering type of Project to implement new features and rethink business practices.”

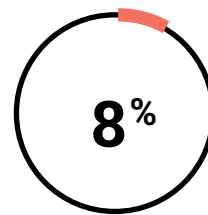
Several mentioned their current project is more focused on business process and strategy before moving to evaluation:

“We are currently conducting full business process reviews, in order to simplify, streamline, and improve overall efficiency of the system.”

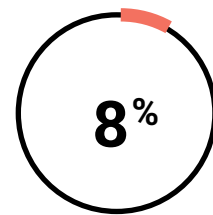
NOTE: A complete summary of responses can be found on page 11 of this report.



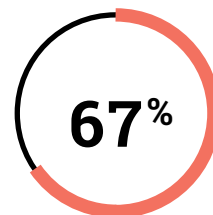
HCM PRODUCTS UNDER EVALUATION



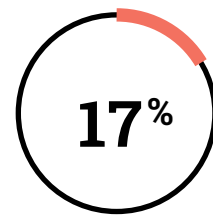
ORACLE PRODUCTS ONLY



NON-ORACLE PRODUCTS ONLY



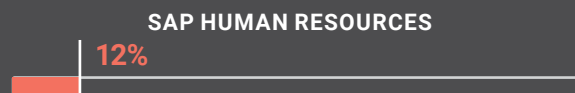
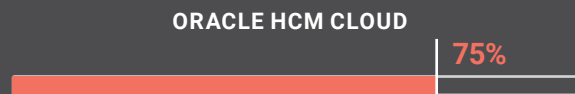
MIXTURE OF PRODUCTS



UNSURE AT THIS TIME

BY RESPONDENTS EVALUATING A PROJECT

TOP HCM PRODUCTS MENTIONED



FINANCIAL MANAGEMENT SYSTEMS

SURVEY HIGHLIGHTS

The Financial Management Systems (FMS) survey focused on systems supporting core functions such as general ledger & accounts payable and potentially other functions such as purchasing and financial reporting. This survey received about half the number of total responses (154) as the SIS survey, but still had over 119 institutions providing data. These counts are very similar to those that we received for the HCM survey for comparison.

43% OF RESPONSES CURRENTLY IMPLEMENTING OR EVALUATING A PRODUCT

Of the three larger product line surveys (SIS, HCM, FMS) the FMS survey featured percentage of institutions that are currently implementing or evaluating a project with less than 43% of the knowledgeable responses. The choice of potential products for those looking at a project was fragmented (8 different product mentions), but two products stood out. Oracle Financials Cloud appeared on 76% of responses, and Workday Financials appeared on 56% of responses. All other product mentions were mentioned on fewer than 10% of responses.

Outside the US, the FMS survey continued the trend of having a much smaller percentage of institutions looking at change. Only 26% of those institutions responding indicated that they were implementing or considering a project.

In the free form comments provided several comments noted that the FMS systems in place were not high on the list of priorities for replacement:

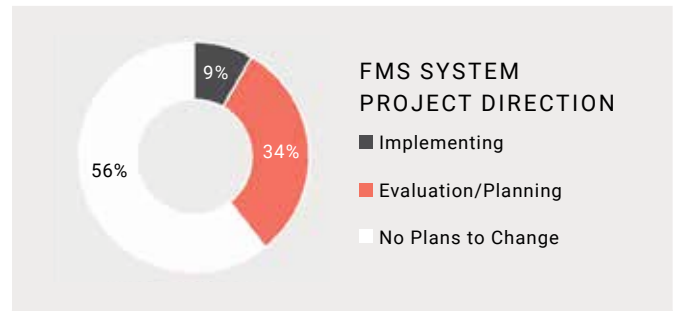
“We are looking at our options in the next 3-8 years, but currently see no significant functional, technical, strategic reason to switch products.”

“Finance is low maintenance.”

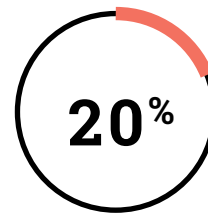
There were fewer mentions of outside bolt-ons which we had seen in other surveys, but as we saw with in other surveys, reviewing business process and strategy comments popped up:

“We are currently conducting full business process reviews, in order to simplify, streamline, and improve overall efficiency of the system.”

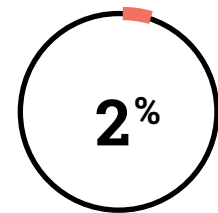
NOTE: A complete summary of responses can be found on page 12 of this report.



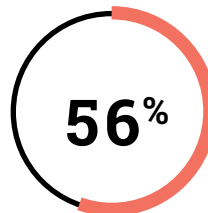
FMS PRODUCTS UNDER EVALUATION



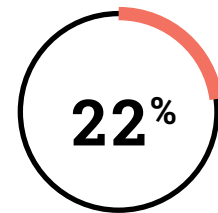
ORACLE PRODUCTS ONLY



NON-ORACLE PRODUCTS ONLY



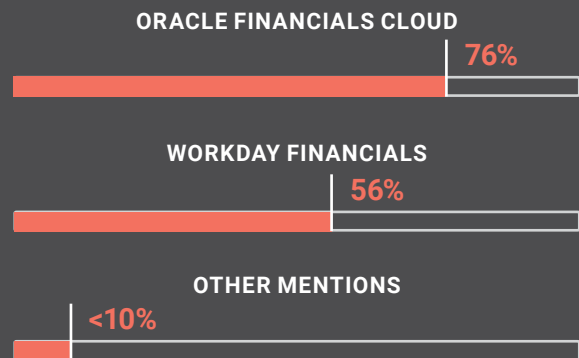
MIXTURE OF PRODUCTS



UNSURE AT THIS TIME

BY RESPONDENTS EVALUATING A PROJECT

TOP FMS PRODUCTS MENTIONED



RESEARCH MANAGEMENT SYSTEMS

SURVEY HIGHLIGHTS

The Research Management Systems (RMS) survey focused on management system(s) that offer/provide data for the research life cycle and the units which are party to them, for instance: organizations, grants, facilities, researchers, and research output. The RMS survey had by far the fewest number of respondents of any of the surveys with only 39 respondents (32 unique institutions).

60% OF RESPONSES CURRENTLY IMPLEMENTING OR EVALUATING A PRODUCT

While the smallest set of respondents, the RMS survey had the greatest variation in responses. 60% of institutions that responded were either implementing or evaluating a project. Of the institutions looking at new systems, all of them indicated that they were looking at products outside of the Oracle family. The choice of potential products for those looking at a project was heavily fragmented (10 different product mentions), and the RMS survey is the only survey where no product line garnered mention on more than 50% of responses. A listing of the top products mentioned is on the side of this page.

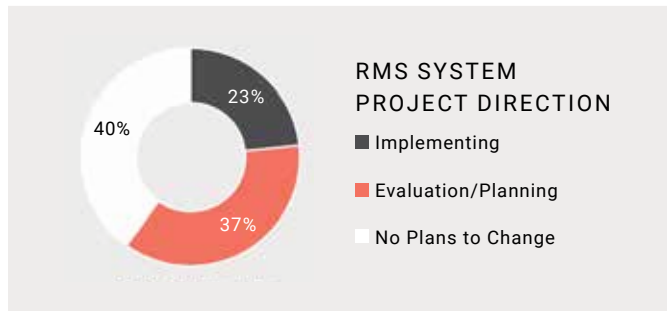
Internationally, the results were fairly limited with only 9 unique institutions. The results however, aligned with the several of the other surveys with fewer institutions looking at change systems (44% of respondents).

In the free form comments provided, several comments provided insights into other product lines not listed within our potential products. One interesting note in these comments was the number of home grown systems that were mentioned which rarely showed up in any of the other surveys.

“We have a homegrown system for pre-award and post-award, but adopting a separate product for research compliance.”

Several did mention how a combination of products were used to provide a solution that fit their unique needs. Fitting with the overall results of the RMS survey, there were no consistent remarks to show any clear leader/patterns amongst those responding.

NOTE: A complete summary of responses can be found on page 13 of this report.

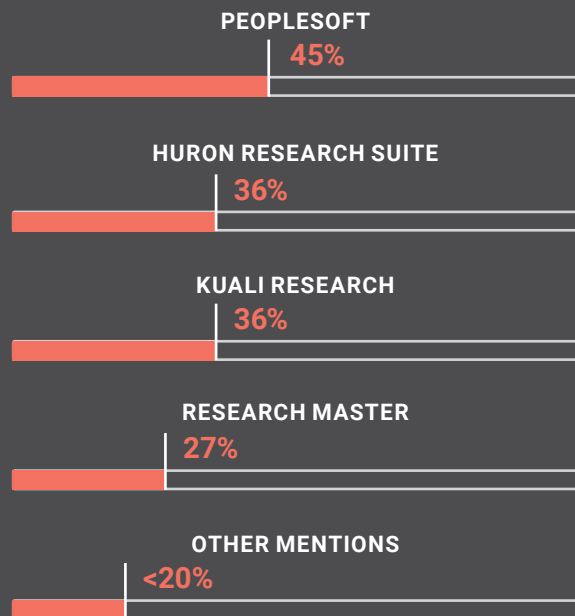


RMS PRODUCTS UNDER EVALUATION



BY RESPONDENTS EVALUATING A PROJECT

TOP RMS PRODUCTS MENTIONED



CUSTOMER RELATIONSHIP MANAGEMENT SYSTEMS

SURVEY HIGHLIGHTS

The Customer Relationship Management (CRM) survey focused on systems supporting marketing automation, sales, incident/ticket management, recruitment, social listening and engagement, retention case management, lead nurturing, onboarding, admission, event management, donor management. This survey was a bit more unique as it allowed institutions to note MULTIPLE systems that may be in place as well in evaluation as different CRM systems may be in use across the institution. Overall there were 79 respondents, with 58 unique knowledgeable responses for CRM.

66% OF RESPONSES CURRENTLY IMPLEMENTING OR EVALUATING A PRODUCT

This survey showed the greatest percentage of institutions with projects with 66% of respondents saying they are implementing or evaluating a project. This survey is the only one where a non-Oracle product appeared as the most mentioned product (SalesForce at 50%). While it was the highest percentage, there was no clear consensus with 8 different products appearing on 10% or more of the responses, and 50% of the surveys indicating that they were looking at a mix of products as part of their evaluation. A listing of the top products mentioned is on the side of this page.

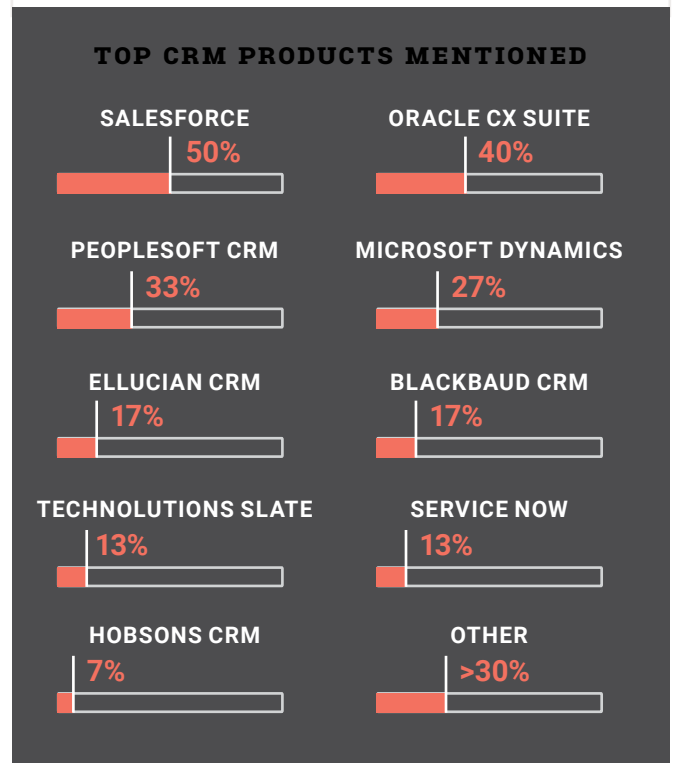
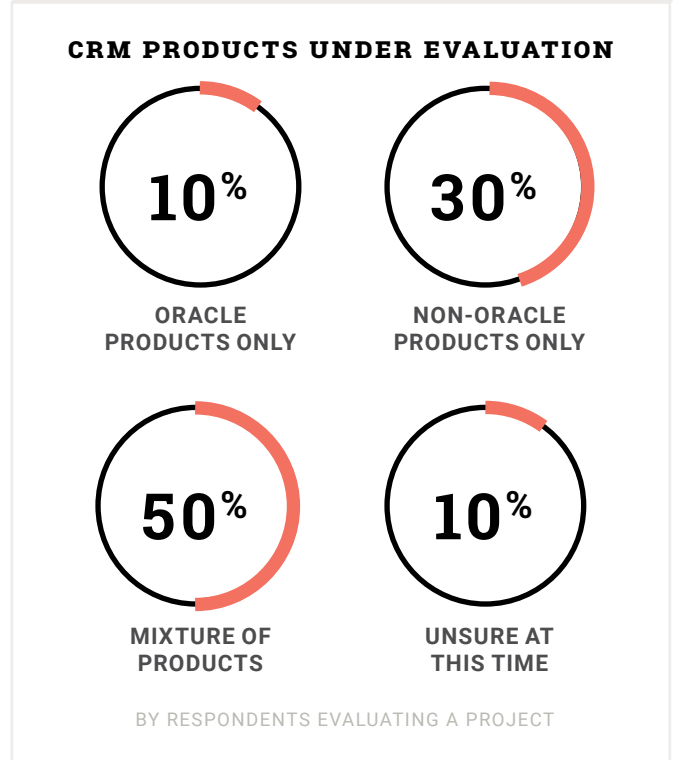
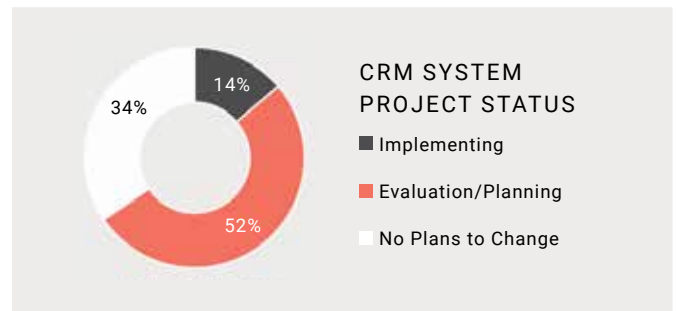
Internationally, this was the only survey where a clear majority was looking at projects, with 84% indicating that they were implementing or evaluating a project.

In the free form comments provided, several institutions noted products that were not part of our listing that they were looking at evaluating. Multiple institutions noted that they were looking at implementing different products to fit the varying needs, summarized by two specific institutions:

“This is a pretty confusing market - but we have found there is no one size fits all solution.”

“Our full, over-complicated (and ridiculously disparate, expensive CRM landscape) will come under scrutiny soon (again).”

NOTE: A complete summary of responses can be found on page 14 of this report.



PROCESS & DEFINITIONS

CLOUD PRODUCT SURVEY

ALL 5 SURVEYS WERE LAUNCHED AND OPEN TO ALL MEMBERS OF THE HEUG TO TAKE FROM MARCH 6TH 2018 THROUGH APRIL 6TH 2018. SURVEYS WERE GATHERED AND FOLLOWED THROUGH THE FOLLOWING PROCESS TO GET THE DATA SETS PROVIDED:

-
- Each response was tagged with their appropriate institution, country and region (Total Respondents)
-
- Where multiple surveys were submitted from the same institution, the results were reviewed and the institution contacted to resolve any inconsistencies between responses, so that a single response would be recorded for each institution (Unique Institutions)
-
- From those unique responses, any response where the respondent indicated it was not their area, or they had no knowledge of the direction were eliminated from any reporting set. In all percentages and counts only these responses were included (Unique Knowledgeable Responses)
-
- The original surveys had 2 separate responses for the question of "Direction," of "Currently Evaluating New System," and "Plan to Evaluate a New System." For the purposes of the summary results, those were combined into a single value of "Evaluating Project" meant to represent any institution currently evaluating or planning on evaluating a system project. (Project Direction)
-
- When reviewing product selections, responses were broken out by those who were already under implementation (where a product selection had been made), separate from those evaluating a project. Any Oracle products (Oracle Cloud, PeopleSoft, etc.) were combined to represent "Oracle Products." (Products Under Implementation / Evaluation of Project Status)
-
- Only product mentions by those with a project direction of "Evaluating a Project" were included. Since a respondent could list multiple products being evaluated the, the percentages represent the percent of valid respondents who had that product listed. (Top Product Mentions)
-

SUMMARY DATA

STUDENT INFORMATION SYSTEMS (SIS)						
OVERALL COUNTS OF TOTAL RESPONSES						
Total Respondents	318					
Unique Institutions	188					
Unique Knowledgeable Responses	168					
PROJECT DIRECTION (OF UNIQUE KNOWLEDGEABLE RESPONSES)						
	All		United States		Outside US	
Currently Implementing	15	9%	11	8%	4	12%
Evaluating Project	73	43%	63	47%	10	29%
No Plans to Change System	80	48%	60	45%	20	59%
PRODUCTS UNDER IMPLEMENTATION / EVALUATION BY PROJECT DIRECTION						
	Currently Implementing		Evaluating Project			
Oracle Product(s) Only	12	80%	16	22%		
Non-Oracle Product(s) Only	3	20%	10	14%		
Mixture of Products	-	-	37	51%		
Unsure at This Time	--	-	10	14%		
TOP PRODUCTS MENTIONED BY THOSE EVALUATING PROJECT						
ORACLE STUDENT CLOUD		48	76%			
WORKDAY STUDENT		43	68%			
PEOPLESOFT CAMPUS SOLUTIONS		30	48%			
BANNER BY ELLUCIAN		10	16%			
OTHER MENTIONS (8 WITH LESS THAN 10%)						

SUMMARY DATA

HUMAN CAPITAL MANAGEMENT (HCM)						
OVERALL COUNTS OF TOTAL RESPONSES						
Total Respondents	166					
Unique Institutions	130					
Unique Knowledgeable Responses	121					
PROJECT DIRECTION (OF UNIQUE KNOWLEDGEABLE RESPONSES)						
	All		United States		Outside US	
Currently Implementing	16	13%	13	13%	3	17%
Evaluating Project	52	43%	47	46%	5	28%
No Plans to Change System	53	44%	43	42%	10	56%
PRODUCTS UNDER IMPLEMENTATION / EVALUATION BY PROJECT DIRECTION						
	Currently Implementing		Evaluating Project			
Oracle Product(s) Only	7	44%	4	8%		
Non-Oracle Product(s) Only	9	56%	4	8%		
Mixture of Products	-	-	35	67%		
Unsure at This Time	--	-	9	17%		
TOP PRODUCTS MENTIONED BY THOSE EVALUATING PROJECT						
ORACLE HCM CLOUD	39		75%			
WORKDAY HCM	36		69%			
SAP HUMAN RESOURCES	6		12%			
OTHER MENTIONS (4 WITH LESS THAN 10%)						

SUMMARY DATA

FINANCIAL MANAGEMENT SYSTEMS (FMS)						
OVERALL COUNTS OF TOTAL RESPONSES						
Total Respondents	154					
Unique Institutions	129					
Unique Knowledgeable Responses	119					
PROJECT DIRECTION (OF UNIQUE KNOWLEDGEABLE RESPONSES)						
	All		United States		Outside US	
Currently Implementing	11	9%	9	9%	2	13%
Evaluating Project	41	34%	39	37%	2	13%
No Plans to Change System	67	56%	56	54%	11	74%
PRODUCTS UNDER IMPLEMENTATION / EVALUATION BY PROJECT DIRECTION						
	Currently Implementing		Evaluating Project			
Oracle Product(s) Only	6	55%	8	20%		
Non-Oracle Product(s) Only	5	45%	1	2%		
Mixture of Products	-	-	23	56%		
Unsure at This Time	--	-	9	22%		
TOP PRODUCTS MENTIONED BY THOSE EVALUATING PROJECT						
ORACLE FINANCIALS CLOUD	31		76%			
WORKDAY FINANCIALS	23		56%			
OTHER MENTIONS (6 WITH LESS THAN 10%)						

SUMMARY DATA

RESEARCH MANAGEMENT SYSTEMS (RMS)						
OVERALL COUNTS OF TOTAL RESPONSES						
Total Respondents	39					
Unique Institutions	38					
Unique Knowledgeable Responses	30					
PROJECT DIRECTION (OF UNIQUE KNOWLEDGEABLE RESPONSES)						
	All		United States		Outside US	
Currently Implementing	7	23%	6	29%	1	11%
Evaluating Project	11	37%	8	38%	3	33%
No Plans to Change System	12	40%	7	33%	5	56%
PRODUCTS UNDER IMPLEMENTATION / EVALUATION BY PROJECT DIRECTION						
	Currently Implementing		Evaluating Project			
Oracle Product(s) Only	1	14%	0	0%		
Non-Oracle Product(s) Only	6	86%	5	45%		
Mixture of Products	-	-	5	45%		
Unsure at This Time	--	-	1	10%		
TOP PRODUCTS MENTIONED BY THOSE EVALUATING PROJECT						
PEOPLESOFT	5		45%			
HURON RESEARCH SUITE (FORMERLY CLICK)	4		36%			
KUALI RESEARCH	4		36%			
RESEARCH MASTER	3		27%			
OTHER MENTIONS (6 WITH LESS THAN 20%)						

SUMMARY DATA

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEMS (CRM)						
OVERALL COUNTS OF TOTAL RESPONSES						
Total Respondents	79					
Unique Institutions	70					
Unique Knowledgeable Responses	58					
PROJECT DIRECTION (OF UNIQUE KNOWLEDGEABLE RESPONSES)						
	All		United States		Outside US	
Currently Implementing	8	14%	4	10%	4	21%
Evaluating Project	30	52%	18	56%	12	63%
No Plans to Change System	20	34%	17	44%	3	16%
PRODUCTS UNDER IMPLEMENTATION / EVALUATION BY PROJECT DIRECTION						
	Currently Implementing		Evaluating Project			
Oracle Product(s) Only	2	25%	3	10%		
Non-Oracle Product(s) Only	5	63%	9	30%		
Mixture of Products	1	13%	15	50%		
Unsure at This Time	--	--	3	10%		
TOP PRODUCTS MENTIONED BY THOSE EVALUATING PROJECT						
SALESFORCE	15		50%			
ORACLE CX SUITE	12		40%			
PEOPLESOFT CRM	10		33%			
MICROSOFT DYNAMICS	8		27%			
ELLUCIAN CRM	5		17%			
BLACKBAUD CRM	5		17%			
TECHNOLUTIONS SLATE	4		13%			
SERVICENOW	4		13%			
HOBSONS CRM	2		7%			
OTHER	2		30%			