TAMBELLINI GROUP
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StarChart™:
2024 Student Systems

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INTRODUCTION AND REPORT SUMMARY

The Tambellini Group, the leading analyst and advisory firm focused on higher education, is pleased to present the *Tambellini StarChart™: 2024 Student Systems.* As institutions navigate unprecedented change associated with societal forces and economic factors, a StarChart™ is designed to help higher education institutions visually navigate their current technology landscape through the lens of usability and innovation—which Tambellini research shows are the two biggest drivers to how institutions make technology investments.

StarCharts are part of Tambellini's multifaceted approach to helping institutions achieve their best technological state, while also leveraging Tambellini's Future Campus™ framework. Tambellini's Future Campus framework compliments the StarCharts, providing additional clarity on an institution's needs and requirements, and ultimately helping to inform and guide modernization initiatives. The Future Campus is Tambellini's vision of where innovation and cutting-edge technology converge to create a sustainable, leading higher education institution.

This groundbreaking approach builds on more than 20 years of higher education research and proven success providing relevant and timely contextualized information. Tambellini's proprietary methodology leverages input from hundreds of higher education institutions, Tambellini analysts and strategic advisors, vendors, implementation partners, and more.

It is important to note that placement on the StarChart does not necessarily mean a solution is the best fit for every institution. In fact, the underlying innovation in the approach proves that depending on the orientation of the institution, the same solution can appear stronger to one institution than another.

The student systems evaluated include:

- Anthology Student
- Ellucian Banner SaaS Student
- Ellucian Colleague SaaS Student
- Jenzabar One Student
- Jenzabar SONIS
- OneWorldSIS
- Oracle Fusion Cloud Student (Oracle Student)
- Populi College Management
- Salesforce Education Cloud
- Student First SIS
- Thesis Elements
- WDCi Group RIO Education (RIO)
- Workday Student

FUTURE CAMPUS IMPACTS

The Future Campus™ Framework is Tambellini's innovative tool for generating strategic-level conversations and action for appropriate investments and divestments across the four key pillars of people, process, data, and technology.

The Framework is scored across ten key higher education workspaces. Student Systems can affect the following Future Campus workspaces:

Outcomes	Student systems can bolster students' academic performance.
Employ	Student systems can enhance institutions' talent base by engaging employees and improving employee satisfaction.
Operations	Using a modern student system can revamp an institution's operations.
Innovate	Student systems that continually innovate and include innovative functionality, such as AI and generative AI, will improve users' engagement with the system.

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STUDENT SYSTEMS TRENDS ANALYSIS

From 2023 to 2024, there was a shift in market demands for student systems, which the 2024 Student Systems StarChart addresses.

Market demands for usability in 2024 include financial aid, implementation effort, resources required to maintain, proven market presence, training and post-implementation support, and minimal need for third-party partners.

Market demands for innovation in 2024 include AI and generative AI capabilities, workflow and automation maturity, user experience, non-credit and certificate program native functionality, student success supporting features, data model and data extraction capabilities, and extensibility.

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NAVIGATING THE TAMBELLINI STARCHART

Tambellini StarChart: 2024 Student Systems shows how each student solution scored against a matrix of usability and innovation criteria. The scoring is developed to help institutions identify the best solution for their needs.

On the right side of the StarChart, institutions should expect to see the most complete and usable student systems that have been proven to support institutions of all types and sizes. However, as you might expect, usability comes at a cost, possibly making these solutions cost-prohibitive for some institutions. The student systems positioned on the left side of the StarChart support less functionality that is typically needed by large and complex institutions, and they have not demonstrated scalability in these larger segments. However, solutions on the left side are more affordable and have been proven to support the needs of small- to mid-market institutions, depending on their requirements.

Usability is evaluated based on the following factors:

- User satisfaction survey results

- Vendor usability evaluation (customer support, software release cadence, implementation, training)

- Functional solution breadth

- International and US higher education market presence (demonstrated scalability in the market)

- Presence of 2024 market usability differentiators

At the top of the Tambellini StarChart, institutions should expect to see products that both demonstrate innovation and possess the capacity for sustained and future innovation. The products on the bottom of the Tambellini StarChart generally have less embedded innovative features and may not have the ability to innovate and sustain that innovation at scale. Innovation is evaluated based on the following factors:

- Vendor capacity for future and sustained innovation

- Innovative functionality within core features

- Presence of 2024 market innovation differentiators

Tambellini StarChart Orbits further segment vendor solutions into three categories on the StarChart. The **Commander** category is the outermost orbit located in the top right corner of the StarChart. Institutions should anticipate that solutions in the **Commander** Orbit are market leaders with highly innovative and user-centric designs that set the benchmark for what is possible.

The **Navigator** category is located in the middle orbit. Solutions in this orbit demonstrate a balance of innovation and usability with more comprehensive and adaptable capabilities beyond niche specialization.
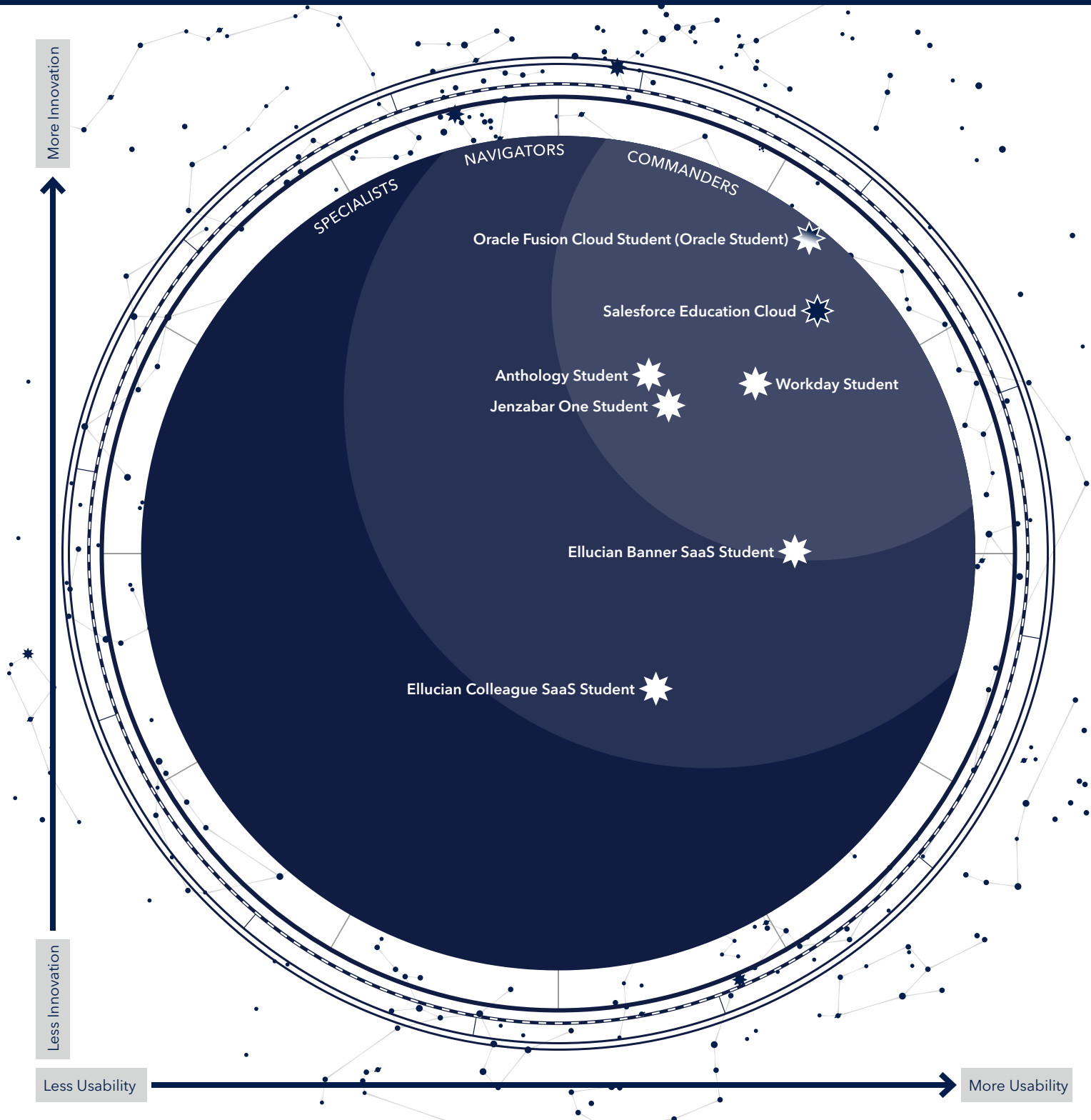
The **Specialist** category is the innermost orbit. Solutions in this orbit represent niche offerings that are more narrowly focused on specific technology and functional needs, providing high-value to its clients and meeting focused market demands.

Tambellini also positions products not yet generally available on the market. These are called **Forming Stars** and their position will reflect our projection for their score once released. A solution that has been announced and is in development will receive an outline of a star. A solution that has been sold and is currently in the process of being implemented will receive a gradient star.

An important consideration is that no product positions on the StarChart are either "good" or "bad" for all institutions. Those institutions with more complex needs and resources are likely to focus on one area of the StarChart, while other institutions with fewer resources and complexity may opt to focus on another area. The StarChart is not aimed at being the sole resource to make a final decision, but rather it provides a point of navigation to help make sense of the market and down-select to a more manageable number of products to take that next step.

For a more nuanced understanding of the chart and the particular vendor solutions, please contact your Tambellini Client Success Associate or Strategic Advisor to arrange a meeting with a Tambellini Analyst.

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StarChart™: 2024 Student Systems – Full Market

More Innovation

Less Innovation

SPECIALISTS

NAVIGATORS

COMMANDERS

Oracle Fusion Cloud Student (Oracle Student)

Salesforce Education Cloud

Anthology Student

Workday Student

Jenzabar One Student

Ellucian Banner SaaS Student

Ellucian Colleague SaaS Student

Less Usability

More Usability

KEY:

Core Systems

Forming Core Systems – Implementing

Forming Core Systems – Development

Usability measures the degree of ease in using a system and the degree of breadth in suitability for users to accomplish objectives.

Innovation measures the degree of addressing unique challenges and requirements with novel and/or advanced capabilities.

Forming Systems are in development but not generally available. Their positions are a projection.

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ANTHOLOGY STUDENT DIFFERENTIATORS AND STARCHART POSITIONING

Anthology Student is a comprehensive solution for educational institutions, addressing diverse colleges and universities seeking to modernize their technology. The new CEO, Bruce Dahlgren, has redefined the company's go-to-market strategy, positioning Anthology Student as a holistic solution encompassing Student, Finance, and Human Capital Management (HCM) products.

The repackaging aims to make Anthology Student synonymous with a complete solution that offers more value to institutions. The solution is marketed under the "Anthology Student" brand, with specific components like finance and HCM available as needed.

Investment areas include security, extensibility, integrations, faculty workload management, student experience, AI, and automation. The faculty workload management module streamlines managing teaching and non-teaching activities, adjunct faculty contracts, and integration with HR and payroll systems.

The student experience is another critical focus area, offering multiple registration pathways and AI capabilities to align skills to courses, predictive class scheduling, and course projections.

Internationalization efforts involve merging the Anthology Student schema with the international code branch to create a single global product that supports multi-language data entry, date-time formats, and localizations for financial aid, exam, and application management.

The company's achievements, including awards and partnerships with Microsoft, reflect its commitment to innovation and excellence. The robust ecosystem supports seamless integrations with various partners, ensuring the student system remains the core data system.

The Community and Idea Exchange platform fosters transparent dialogue and prioritizes new ideas, ensuring the product evolves based on user feedback. Anthology's ethical framework for AI use in higher education guides institutions in creating policies for ethical AI use.

The Anthology Student roadmap emphasizes the transition to an entirely cloud-based solution, which will enable continuous value delivery through iterative improvements.

ANTHOLOGY STUDENT MARKET ALIGNMENT

Anthology Student is a proven system with a strong market presence in the private, for-profit sector and growing adoption in the public, two-year and four-year sectors in the United States. It also has customers in Canada, Bermuda, and the United Arab Emirates.

Initially focused on the private, for-profit career college market, Anthology Student has expanded to private, not-for-profit, and public, two-year institutions. This shift aligns with the demand for flexible academic program delivery, a core strength of Anthology Student. The solution supports various program types, including short-term, online, on-ground, hybrid, and stackable credentials.

Recent partnerships, such as with the California Community College System, highlight its suitability for public, two-year institutions under pressure to offer skills development and career-focused programs.

ANTHOLOGY STUDENT MARKET OUTLOOK

Anthology Student is a robust and modern student system. When combined with Anthology's Finance and HCM, it offers a single-vendor platform for institutions looking to modernize. As institutions streamline their technology ecosystems and adopt single-vendor offerings, including LMS and CRM, Anthology stands as a solid alternative to legacy solutions and high-end platforms that are often out of reach for mid to small-size institutions. Anthology is steadily gaining strength among private, not-for-profit four-year institutions and is positioning itself to capture more market share. By drawing customers away from leading student solutions like Ellucian (Banner and Colleague), Jenzabar, and Thesis, Anthology is paving the way for more institutions to make the switch.

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EVALUATION AND METHODOLOGY SUMMARY

Vendor solutions are positioned on the StarChart based on a proprietary algorithm that leverages usability and innovation data points. Usability data points include institutional usability surveys, functional breadth, segment presence, and demonstrated scalability. Innovation data points benchmark each solution's ability to address unique functional and operational requirements and the vendor's ability to sustain the innovation at scale.

Tambellini conducts proprietary, original research, and information used in the StarChart, including System Usability Scale (SUS) survey results, vendor surveys, interviews, selection data, and other information sourced from Tambellini Analysts, Advisors, and the Research team as appropriate. Usability is evaluated across criteria categories, including cost, implementation, international and US market segment presence, functional solution breadth, customer support, software release cadence, implementation, training, and customer experience. Innovation is evaluated across criteria categories, including vendor company and resource profiles, functional solution breadth, integrations, security, partnerships, and capacity for future and sustained innovation.

In 2024, Tambellini introduced three orbits as part of its StarCharts, including Commanders, Navigators, and Specialists. Orbits in this framework represent the path and reach of a solution's innovation and usability in the technological universe. The concept of an orbit allows us to visualize how closely aligned a vendor is with core market needs, as well as the extent to which they impact and are interconnected with the broader ecosystem.

- **Commanders** stand at the forefront of innovation and usability, leading the industry with groundbreaking technologies and user-centric designs. Solutions in this orbit command the highest category, distinguished by their visionary approach and the transformative impact of their solutions. Commanders set the benchmarks for what is possible, pushing the boundaries of technology and usability to new heights. Their leadership is characterized by a consistent track record of excellence, significant market influence, and the ability to anticipate and shape future trends. Commanders not only excel in their offerings but also drive the industry forward, inspiring change and innovation across the technology landscape.

- **Navigators** demonstrate a balanced blend of innovation and usability, guiding their customers through the complexities of the technology landscape with reliable and forward-thinking solutions. Positioned in the middle category, Navigators have successfully expanded their capabilities beyond niche specialization to offer more comprehensive and adaptable technologies. Solutions in this orbit are marked by their ability to steer development and adoption in promising directions, leveraging emerging trends and customer insights to navigate the market effectively. Navigators represent a critical bridge between focused expertise and broader market leadership, offering versatile and evolving solutions.

- **Specialists** represent vendor solutions designed to operate in a specific niche or aspect of technology. While they may not yet showcase broad innovation or high

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usability across a wide range of criteria, their focused, targeted solutions carve out significant value within their domain. Specialists are recognized for their deep understanding and capabilities in particular areas, making them valuable partners for specific needs. Their concentrated approach allows for specialized offerings that meet distinct market demands.

Tambellini's proprietary algorithm uses more than a hundred data points to position solutions on the StarChart, including information from surveys, vendor briefings, industry knowledge, institutional interviews, and more. All vendor solutions in each StarChart are evaluated using the exact same methodology and algorithm based on institutional criteria deemed most important by higher education. Additionally, Tambellini applies proprietary weighting to every StarChart, to ensure institutional criteria deemed most important in the current year's market, according to our research, has an appropriate impact on the final score. This weighting is applied consistently across all vendors and products in each StarChart. Incomplete information provided by vendors lowers the usability and innovation scores for their products. Tambellini reviews vendor survey responses against our body of research to ensure accuracy.

THE FUTURE CAMPUS

Tambellini's Future Campus framework compliments the StarCharts, providing additional clarity on an institution's needs and requirements, and ultimately helping to inform and guide their modernization. Tambellini analysts have identified that resilient institutions prepared to thrive through the changing digital landscape need to address a core set of problems—such as offering in-demand programs and experiences with proven employment outcomes, attracting and enrolling the right students, delivering the right experiences to retain and graduate students, modernizing operations, and right-sizing technical debt—to name a few.

Solving these problems requires a focus on people, process, data, and technology in parallel to propel institutions to the next state - their future campus. The Future Campus is Tambellini's vision and framework where innovation and cutting-edge technology converge to create a sustainable, leading higher education technology ecosystem. Not every institution will successfully make the transition. We are living through a pivotal turning point, forcing institutions to modernize at an unprecedented pace in order to remain competitive.