

Degree Planning & Student Success Platform

Institution: _____

Prepared By: _____ Date: _____

Primary Champion: _____

Target Decision Date: _____

Questions?

Email partnerships@stellic.com | stellic.com

Executive Summary

2–3 sentences. What is the core problem, why does it matter now, and what does a solution make possible?

Current State

Describe the current environment across students, advisors, and registrar staff. What tools exist today? What's missing or broken? What are the key friction points?

Current system and cost

System in use today: _____

Annual cost (yr 2+): \$ _____

Contract Expiration: _____

Additional impact of current state

Translate your current state into financial and operational terms. Use the formulas below as a starting point and use directional estimates where exact figures aren't available.

Staff Efficiency

$$\left(\frac{\text{Advisor meetings/yr}}{\text{Advisor meetings/yr}} \times \frac{\text{Avg duration}}{\text{Avg duration}} \times \frac{\% \text{ transactional}}{\% \text{ transactional}} \right) \times \frac{\text{\# of advisors}}{\text{\# of advisors}} = \frac{\text{Hours lost to work software can handle}}{\text{Hours lost to work software can handle}}$$

Enrollment Leakage

$$\frac{\text{Waitlisted students}}{\text{Waitlisted students}} \times \frac{\text{Credits lost per student}}{\text{Credits lost per student}} \times \frac{\text{Tuition per credit}}{\text{Tuition per credit}} = \frac{\text{Revenue at risk per semester}}{\text{Revenue at risk per semester}}$$

Operational Costs

$$\frac{\text{Exception volume}}{\text{Exception volume}} \times \frac{\text{Avg days to resolve}}{\text{Avg days to resolve}} + \frac{\text{Any external consulting or scribing spend}}{\text{Any external consulting or scribing spend}} = \frac{\text{Baseline to reduce}}{\text{Baseline to reduce}}$$

Summary of estimated annual impact: \$ _____

Desired State

What does success look like across each stakeholder group in 12–24 months?

Desired Business Outcomes

List 3–5 measurable outcomes. These become your post-implementation success criteria.

- _____
- _____
- _____
- _____
- _____

Urgency

Why act now? Note contract timelines, strategic initiatives, leadership mandates, or competitive pressure.

Ideal Solution

What does the right platform need to do? Customize based on your institution's priorities.

- Real-time, student-facing degree audit connected to live registration
- Student-facing planning and what-if exploration
- Advisor co-planning with full student context in one view
- Real-time, student-facing degree audit connected to live registration
- Configurable exception and petition workflows with full audit trail
- Registrar-managed curriculum updates without IT involvement
- Native SIS integration with _____
- Transfer credit articulation and pre-enrollment exploration
- FERPA-compliant; SOC 2 certified
- _____
- _____

Stakeholder Value

Stakeholder	Name / Role	Primary Value
Executive Sponsor		
Registrar		
Advising Leadership		
IT		
Enrollment / Admissions		
Students		

Demo Scenarios to Request

Ask every vendor to walk through the same scenarios. Ask to see a live system — not slides.

1. A real student audit: dual major, with at least one transfer credit and one exception in progress
2. A student exploring a major change mid-program and seeing the impact on their path in real time
3. A registrar updating a curriculum requirement — from change to student-visible audit
4. An exception submitted, routed, approved, and reflected in the student's audit — end to end
5. An advisor entering a meeting with full student context: plan, history, flags, and notes

Mutual Action Plan

Milestone	Institution Owner	Vendor	Target Date
Internal stakeholder alignment meeting		—	
Current-state data gathered (Side A complete)		—	
Vendor longlist identified		—	
RFP issued or demos scheduled			
Demo scenarios run; scorecards completed			
Peer reference calls: registrar + advisor			
Proposals and pricing received			
Internal scoring and recommendation to leadership		—	
Contract execution			
Implementation kickoff			
Student-facing go-live			