Opportunities for LogMeIn Rescue in the Higher Education Industry









Market Research Report

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CONTENTS

SUMMARY OF FINDINGS 7
Funding 7
Technology Trends 7
The Changing Role of IT 7
Help Desk 7
Bomgar Competitive Analysis 8
Rescue Opportunities 8
PART I. OVERVIEW OF THE EDUCATION MARKET 9
Market Information 9
Total Size of U.S. Education Market 9
Total IT Spending in Education 9
University IT Budget Percentage 9
Eroding Support and Budget Pressures 9
Key Trends in Higher Education 10
Data-Driven Institutions 10
Digital Course Materials 10
Mobile Technology 11
Mobile Devices on the Rise 11
Key Use Cases for Mobility 12
Mobile Devices Drive the Student Experience 13
Example 1: The College of William and Mary 13
Example 2: Massachusetts Institute of Technology 14
PART II. INFORMATION TECHNOLOGY IN THE ACADEMY 15
The Changing Role of IT 15
From Tactical to Strategic 15
Importance to Institutional Success 15
Student Perceptions of the Value of Technology 16
What Matters to Higher Education CIOs 17
1. Information Security 17
2. Student Outcomes 17
3. Strategic Importance of IT 18
4. Data-Informed Decision Making 19
5. Student-centric institution 19
6. Affordability 20

7. IT Staffing 21
8. Data Management and Governance 22
9. IT Standardization 22
10. Change Leadership 23
IT Organization and Funding 23
The CIO Function 23
Students as Help Desk Staff 24
IT Spending 24
Staff Compensation 25
Evolution of the University Service Desk 26
Self-Support and Outsourcing 26
Competitive Differentiator 26
Professional Development 26
Case Study: Tradition of Student Involvement (UC Berkeley) 26
PART III. OPPORTUNITY ASSESSMENT 27
Competitive Analysis: BOMGAR 27
Value Proposition 28
Key Features 28
Message 1: Secure access for your growing academic environment 28
Message 2: Support your technology-enabled campus 29
Flagship Collateral for Higher Education 29
Case Studies 30
Higher Education Brief 31
Is Rescue in the Game? 32
Advantages 33
Faster Connections and Data Transfers 33
More Intuitive Interface 33
Better Mobile Support? 33
Obstacles 34
Vendor Incumbency and Stickiness 34
Integration Features 35
Reporting: Who Is Better? 36
Positioning 36
Tactical: Easy to Use, Easy to Manage 36
Strategic: Remove Barriers to Student Success 36

PART IV. RESCUE ASSET AUDIT 37
Infographics 37
Collateral 37
BANNERS 38
LANDING PAGE 39
PART V: RECOMMENDATIONS 39
Additional Research 39
Competitive Analysis of Mobile Support Capabilities, Rescue versus Bomgar 39
Prioritized Importance of Features 39
User Satisfaction with Incumbent Vendors 39
MESSAGING 39
Vertical Messaging Framework 39
Tagline 40
CUSTOMER-FACING ASSETS 40
Business Brief 40
Technical Brief 40
Vertical White Paper 40
eBook 41
Infographic 41
Customer Evidence 41
DIGITAL MARKETING 41
Email campaigns 41
Vertical landing page 42
Explainer video 42
ELEVATION MARKETING 42

FIGURES

Figure 1. Mobile Applications Used in U.S. Higher Education 12
Figure 2. Top Campus App Platforms in U.S. Higher Education 13
Figure 3. Screenshots, William and Mary Mobile App 14
Figure 4. Screenshots, MIT Mobile App 14
Figure 5. Usage of Mobile Devices on College Campuses 16
Figure 6. Security: The Top IT Issue for 2018 17
Figure 7. Roles for CIOs as a Function of Cabinet Inclusion 19
Figure 8. Adoption of Data-informed Decision Making in Higher Education 19
Figure 9. Prevalence of Tracking Systems in U.S. Higher Education 20
Figure 10. Breakdown of Total IT Spending 20
Figure 11. IT Budget Cuts, Fall 2016 21
Figure 12. IT Salaries in Higher Education, Survey Results 22
Figure 13. Technology Integration Trends in U.S. Higher Education 22
Figure 14. IT Spending Priorities in Higher Ed 24
Figure 15. IT Spending in Higher Education by Expense Category 25
Figure 16. IT Salaries in Higher Education 25
Figure 17. Bomgar Landing Page for Education Vertical 28
Figure 18. Featured Assets for Education Vertical 30
Figure 19. Sampling of Bomgar Case Studies in Higher Education 30
Figure 20. Bomgar Overview of Higher Education Solutions 31
Figure 21. Features Comparison, Bomgar versus Rescue 32
Figure 22. Connection Time Comparison, Rescue versus Bomgar 33
Figure 23. Vendor Incumbency for Remote Support Products in Higher Education 34
Figure 24. Bomgar Messaging for ITSM Integration 35

SUMMARY OF FINDINGS

FUNDING

- Total spending on higher education IT exceeds $12 billion, about 4 percent of the typical institution budget. The breakdown of the higher education IT budget is 80% for operations, 10% for growth and 5% for innovation.
- IT budgets are under pressure due to declining enrollment, increasing consolidations and pushback from boards regarding digital initiatives.

TECHNOLOGY TRENDS

- Digital education is fundamentally reshaping higher education, impacting students, faculty and staff alike.
- IT must continue to think about how their systems and infrastructure can scale into platforms and devices that go beyond the traditional and instead into a more competitive, mobile-friendly marketplace.
- Mobile technology is an absolute must-have for higher education institutions.
- The key use cases for mobile technology are:
    - Real-time information
    - Student-teacher interaction
    - Mobile commerce
    - Campus safety
    - Branding
- Many universities develop their own apps to fulfill these functions, however, help desk support is rarely integrated into the app design.

THE CHANGING ROLE OF IT

- The CIO is increasingly taking on a more strategic posture. The ultimate success of the institution depends on a productive partnership between the IT and the academic functions.
- A recent survey found that three out of four college and university students think technology has had a positive impact on their academic success.
- Key pain points for CIOs include:
    - Information security: Especially the rising threat of ransomware
    - Student outcomes: How technology contributes to the academic mission
    - Strategic importance of IT: The CIO as a strategic partner to leadership
    - Data-informed decision making: Business intelligence and data analytics
    - IT staffing: Budget pressures are making it difficult to staff and create new positions needed to assimilation new learning technology
    - IT standardization: Need for system interoperability, scalability and extensibility across departments with their own IT systems.

HELP DESK

- Key staffing trends:
    - Employ students to staff help desk.
    - Use self-help to provide institutional communities with support 24/7
    - Outsource IT service desks to either supplement or, in some cases, replace institution-staffed service desks

- The growing competition for students is leading institutions to reevaluate the role of support services in the overall effort to deliver positive student experiences

BOMGAR COMPETITIVE ANALYSIS

- Bomgar is the top vendor in the higher education vertical, the perceived gold standard. Rescue, TeamViewer and ConnectWise are roughly at the same level, far behind Bomgar. Reword appears to be the top vendor, list of clients and effort.
- Bomgar has invested heavily in verticalization for higher education, with a highly effective and well-messaged landing page and an impressive list of case studies and name drops.
- Bomgar's value proposition emphasizes connection speed, session reliability and security.
- Secondary messages focus on mobile support, embedding in devices and systems and integration with ITSM and service desk tools.

RESCUE OPPORTUNITIES

- Rescue and Bomgar are roughly equivalent in features that are important to higher education.
- Previous research identified three areas where Rescue is superior to Bomgar: faster connection and data transfers, more intuitive interface and better reporting. While not sufficient to win against Bomgar, they form the foundation for a more comprehensive narrative.
- We propose two aspirational positioning statements to discuss and research further:
    - Easy to Use, Easy to Manage: Create a convincing and compelling case that Rescue is more intuitive and easier to use (helpful for students staffing help desk) and Rescue makes it easier for IT supervisors to manage help desk staff (helpful for harried CIOs)
    - Remove Barriers to Student Success: Exploit the pressure on CIOs to further the education goals of the institution and improve the student experience. Positive student outcomes. We're with you in the goal of ensuring student outcomes.

PART I. OVERVIEW OF THE EDUCATION MARKET

MARKET INFORMATION

This section describes the U.S. market for information technology in the education vertical. The publicly available information is from the period 2012 through 2016, we were unable to find more current data. However, the information is sufficiently accurate to contextualize the detailed analysis and recommendations of this report.

Total Size of U.S. Education Market

The total size of the U.S. education market is about $1.3 trillion, representing about 9% of GDP. The breakdown is:[1]

- K-12: $670 billion
- Higher education: $475 billion
- Early childhood: $70 billion
- Adult learning (continued education): $55 billion
- Online education market: $20 billion
- Textbook (online and print): $8 billion
- Tutoring/test prep: $1 billion

Total IT Spending in Education

- K-12: $14 billion
- Higher education: $12.8 billion[2]

University IT Budget Percentage

Nation-wide, 4.2 percent of institutional spending goes to IT, allocated as:

- 80% operations
- 10% incremental change (growth)
- 5% non-incremental change (transform)[3]

Eroding Support and Budget Pressures

Higher education is undergoing a shakeout fueled by changing demographic trends along with rising costs, lackluster job markets and questions about how well students are being prepared for the workforce. Based on unfavorable federal policies, Moody's downgraded the outlook of the sector from "stable" to "negative." And Harvard University professor Clayton Christensen went viral with a prediction that half of all colleges will be bankrupt in 10 to 15 years.

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[1] Jeff Dunn, "Just how big is the US education market?" Daily Genius, August 10, 2015. https://dailygenius.com/just-how-big-is-the-us-education-market/ Based on research conducted in 2012 by noted industry analyst Jeff Silber. Multiple sources including U.S. White House in 2016 cite these figures.

[2] "K20 by the Numbers," report by the National Center for Education Statistics, 2018. http://www.govtech.com/navigator/numbers/k20-by-the-numbers_89.html

[3] Joshua Kim, "How Much Does Higher Ed Spend on IT?" Inside Higher Ed, August 8, 2016. https://www.insidehighered.com/blogs/technology-and-learning/how-much-does-higher-ed-spend-it

Expect more financial pressures as enrollment growth slows or declines in traditional markets, increasing closures and consolidations, and questions from board members about innovation and digital offerings.[4]

KEY TRENDS IN HIGHER EDUCATION

Campus Technology magazine assembled a panel of four higher education IT leaders to answer the question: Which technologies and trends will have the most impact on higher education in 2018? Here are the key answers in the words of the panelists: [5]

Data-Driven Institutions

> *Universities are making great progress when it comes to using data to help with retention and student success. However, there is still much room for improvement to take advantage of data-driven decision-making across the entire campus.*
>
> *For instance, data can be used to determine if classrooms are being utilized optimally before new construction projects are kicked off. It can and should be used to determine if aging computer labs should be renewed or transformed into something that is more useful to the university. Efforts like these can not only streamline campus operations, but also ensure that we are making most of the resources we have in the service of teaching and learning.*
>
> *Thomas Hoover, Chief Information Officer and Dean of the Library, University of Louisiana Monroe*

Digital Course Materials

> *Digital education is generating new learning opportunities as students engage in online, digital environments and as faculty change educational practices using hybrid courses, personalized instruction, new collaboration models and a wide array of innovative, engaging learning strategies. As instructors create assignments and develop rubrics for assessing new forms of student work across academic disciplines, faculty and students would benefit from access to new collaborative spaces with the technology and consulting expertise to successfully complete media-rich assignments and projects.*
>
> *David Goodrum, Director of Academic Technology, Information Services, Oregon State University*

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[4] Julie A. Peterson and Lisa M. Rudgers, "Saddle Up: 7 Trends Coming in 2018," Insider Higher Ed article, January 2, 2018. https://www.insidehighered.com/views/2018/01/02/predictions-higher-education-coming-year-opinion

[5] Rhea Kelly, "7 Ed Tech Trends to Watch in 2018," Campus Technology, January 11, 2018. https://campustechnology.com/articles/2018/01/11/7-ed-tech-trends-to-watch-in-2018.aspx

Mobile Technology

> *The work being done across higher education institutions is becoming increasingly mobile, virtualized and geographically dispersed, which affords us to be more collaborative, effective and readily available. Mobile technology provides instant gratification both for efforts inside the classroom and out, but it also increases demands on resources and the expectations of many. Oftentimes, it is managing those expectations that can be the greatest challenge.*
>
> *The infusion of mobile technologies affords a multitude of opportunities, expanding use cases for how and where people learn and consume information, and allowing institutions to learn more about user behavior in more ways than can be imagined. Mobile technology on a college campus serves a variety of purposes, often with varied levels of success and effectiveness. IT divisions must continue to think about how their systems and infrastructure can scale into platforms and devices that go beyond the traditional and instead into a more competitive, mobile-friendly marketplace.*
>
> *Brian Fodrey, Assistant Dean for Facilities & Information Technology and Chief Information Officer, School of Government, the University of North Carolina at Chapel Hill*

MOBILE DEVICES ON THE RISE

In just a few years, mobile technology has gone from having no place in higher education to an absolute must-have for universities and colleges alike:

> *In higher education, mobile learning can "increase learner satisfaction and retention, widen participation and potentially reduce costs." Mobile technologies can also enhance the student experience, connect learners with advisors, and provide conduits for peer-to-peer engagement.*
>
> *Additionally, mobile devices can provide access to a wide array of features for users with disabilities. From captioned/sub-titled videos to voice-based search, mobile technologies, usually in the form of BYOD (bring your own device), provide powerful enhancements for student success.* [6]

[6] Eric Stoller, "Learning and Connecting on the Go – How Mobile Technologies are Changing Higher Education," Blog, March 17, 2017. http://ericstoller.com/blog/2017/03/17/learning-and-connecting-on-the-go-how-mobile-technologies-are-changing-higher-education/

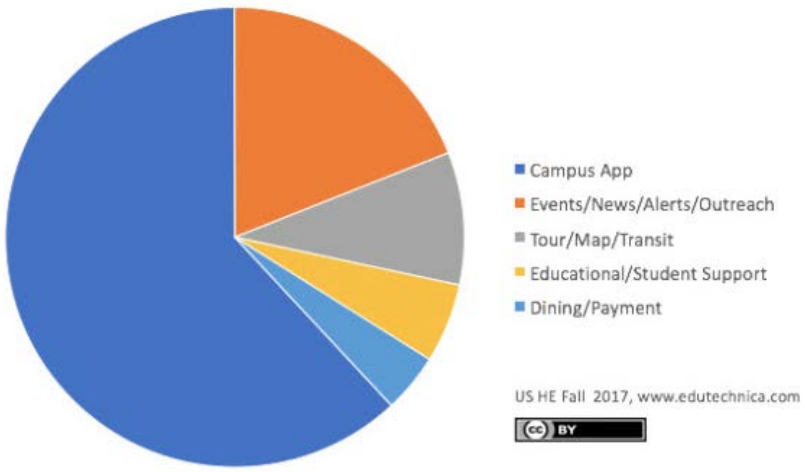
Echoing the trend toward mobile apps in other fields, more and more institutions are developing custom apps tailored to the unique needs of the organization. These apps frequently feature a high degree of personalization to the individual student. The available evidence is primarily anecdotal but illuminating nevertheless.

Key Use Cases for Mobility

1. Real-time information – Smartphones are a vital source of first-hand information and a crucial tool for research-based learning.
2. Student-teacher interaction – Purdue University allows students to provide real-time feedback, transforming the traditional lecture format into a collaborative social-media-like experience.
3. Mobile commerce – Embracing mobile payments is gradually giving rise to new levels of data and commerce, providing schools with a clearer picture of commercial campus activity, along with better ways to uncover the services that are doing the best (or worst) financially.
4. Campus safety – Colleges are giving students contacts of dedicated emergency-response teams, which they can call or text from anywhere and at any time.
5. Branding – Many institutions are using smartphone apps to connect with existing and prospective learners via social media, which paints them as exciting, interactive and futuristic centers of higher education.[7]

The figures below show the results of a recent survey of mobile application in use in higher education.[8]

Figure 1.Mobile Applications Used in U.S. Higher Education

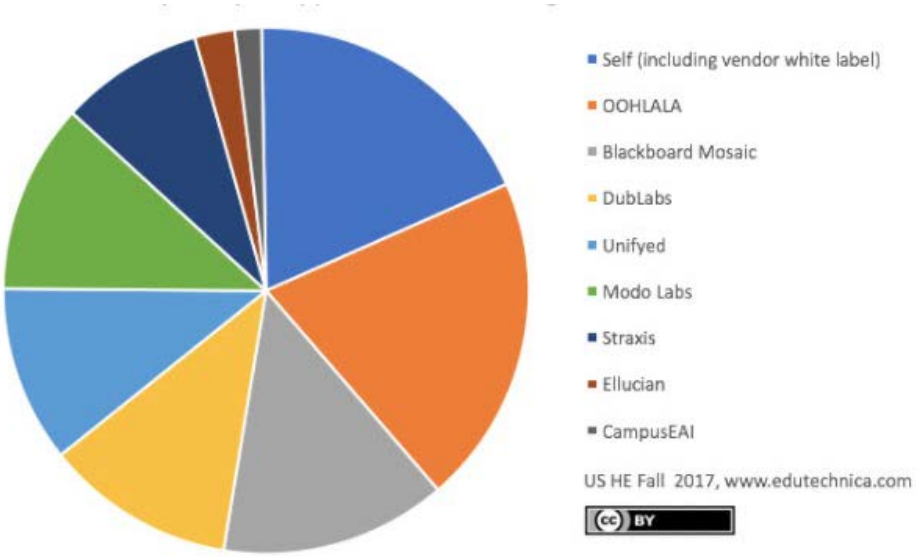


Source: www.edutecnica.com

[7] "Five ways Higher Education is making use of mobile technology," Full Fabric blog, January 25, 2018. http://blog.fullfabric.com/five-ways-higher-education-is-making-use-of-mobile-technology

[8] "Top Mobile Apps Adopted by US Universities," Edutechnica, October 25, 2017. https://edutechnica.com/2017/10/25/top-mobile-apps-adopted-by-us-universities/

Figure 2.Top Campus App Platforms in U.S. Higher Education



Source: www.edutecnica.com

Mobile Devices Drive the Student Experience

More than two-thirds of students in a recent study reported they had access to a campus mobile app. Students use their mobile devices to help them with the most important aspects of their college experience, for example (in descending order):

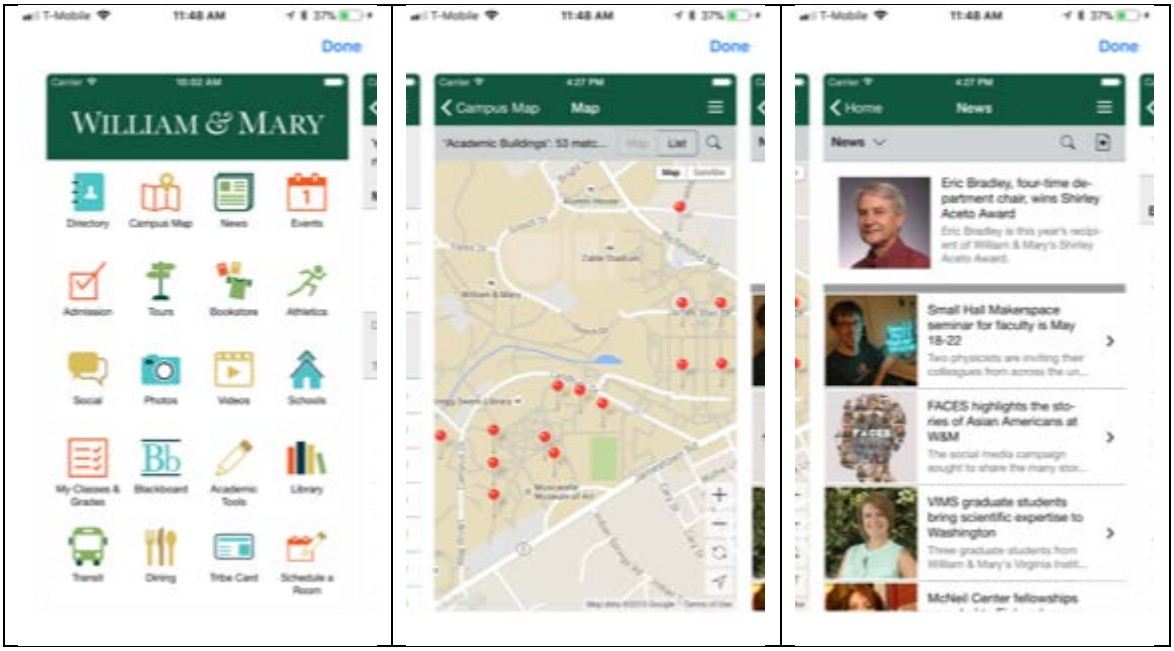
1. Keeping track of academic work
2. Receiving notifications about assignments, discussions and grades
3. Accessing email
4. Communicating with professors
5. Obtaining financial information about tuition and student accounts[9]

Example 1: The College of William and Mary

The second-oldest university in America, William and Mary is located next to Colonial Williamsburg, a living-history museum that showcases life before the American Revolution. Therefore, it's significant that such a tradition-bound institution has joined the ranks of the techno-literate by developing a custom mobile app. The William and Mary app supports all five of the use cases described earlier.

[9] "Are Campus Mobile Apps Meeting Student Needs?" DubLabs survey, 2017. https://cdn2.hubspot.net/hubfs/460472/Student-Life-Survey-Results-2017.pdf

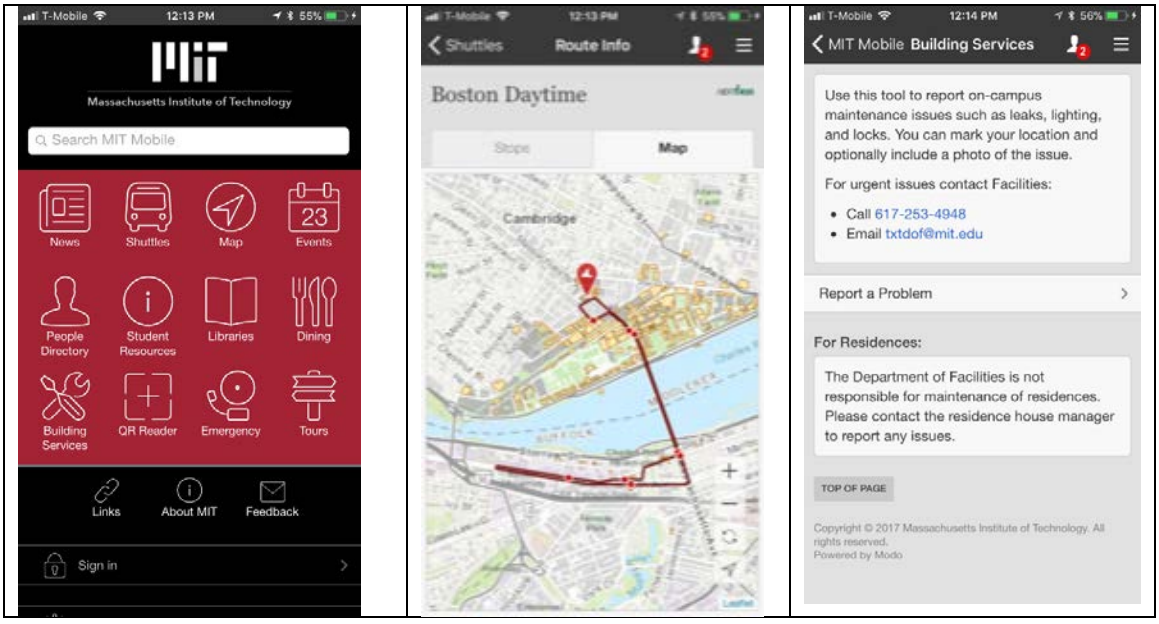
Figure 3.Screenshots, William and Mary Mobile App



Example 2: Massachusetts Institute of Technology

An exemplar of technology, MIT offers students a mobile app that also supports all the uses cases described earlier with a few wrinkles, for example, real-time tracking of campus buses.

Figure 4.Screenshots, MIT Mobile App



PART II. INFORMATION TECHNOLOGY IN THE ACADEMY

THE CHANGING ROLE OF IT

The current trends in higher education can be best understood by analogy to the role of the IT function in the commercial enterprise.

From Tactical to Strategic

Around the beginning of the current decade, the industry saw a shift of IT investment toward lines of business and away from the CIO's organization – the so-called consumerization of IT. Frustrated by what they perceived as IT's lack of responsiveness and inability to understand the needs of the business, LoB leaders reached outside the organization to procure "best of breed" offerings to drive innovation. This trend was enabled by technology and business advances such as software-as-a-service, cloud and mobility. As a result, the IT organization became marginalized, its function derisively referred to as simply "keeping the lights on."

Digital transformation turned the tide. Virtually every business today is now a digital business – success in this more dynamic and technology-driven world requires a partnership between IT and LoBs. As one pundit has stated it, "The unique opportunity in the age of digital transformation is to transform the IT organization and the CIO's role from a 'Chief Information Officer' into a 'Chief Innovation Officer.'"[10]

Importance to Institutional Success

> *IT can and should play a huge role in today's higher education institution. It goes without saying that IT first needs to focus on helping the institution fulfill the university mission and strategic plan. That should be the core responsibility for IT.*
>
> *Thomas Hoover, Chief Information Officer and Dean of the Library, University of Louisiana Monroe*

A similar shift is taking place now in higher education. In the past, the charter for higher education IT groups was to "keep the classroom lights on"," that is, offer email services, keep online academic records, and provide productivity tools to students and staff.

Like the shift in the commercial world, higher education IT is also becoming more strategic, driven by the convergence of a new generation of tech-savvy students and staff and the rapidly expanding role of technology in education. Digital technology is fundamentally reshaping higher education. The ultimate success of the institution depends on a productive partnership between the IT and the academic functions. It's no longer enough to keep the

[10] Sven Denecken, "Digital Transformation and IT: The CIO´s balancing act," ÜberTech, November 21, 2014. https://www.zdnet.com/article/digital-transformation-and-it-the-cios-balancing-act/

classroom lights on: IT now plays a crucial role in making sure that the seats are filled with students.

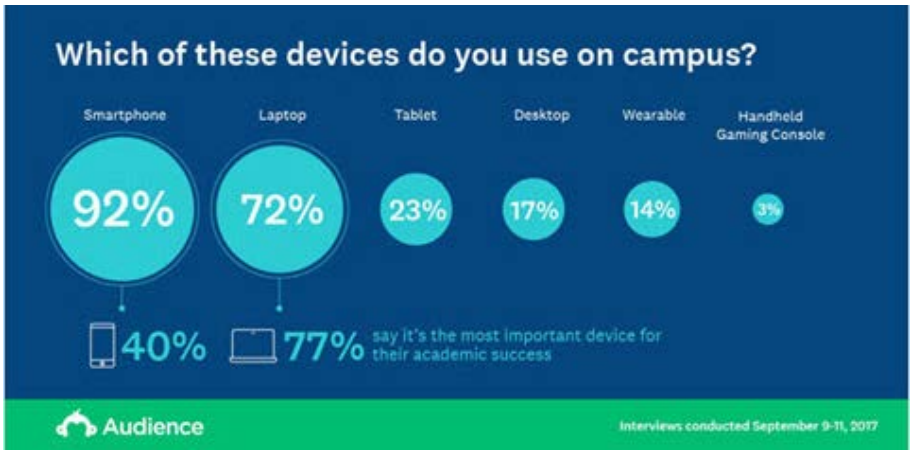
The focus of information technology in higher education for 2018 revolves around four strategic themes:

- **Institutional Adaptiveness:** Institutional and IT leaders are strengthening their individual and collective capacity for not only effective and efficient, but also consequential uses of technology.
- **Improved Student Outcomes:** Work on student success initiatives has become both more tactical, with a nuts-and-bolts focus on integrations, and more aspirational, with a new emphasis on students' entire experience with the institution.
- **Improved Decision-Making:** The data issue is every bit as complicated as has been predicted, and efforts to gather, manage, and use the data are advancing.
- **IT Adaptiveness:** IT organizations are adapting themselves to new economic, demographic, and industry models and realities and are approaching the information security of the institution with even greater rigor.[11]

Student Perceptions of the Value of Technology

The importance of IT to the institution's success can be demonstrated by how students perceive the role of technology in their academic success. A recent survey found that three out of four college and university students think technology has had a positive impact on their academic success. Laptops and smartphones are their preferred tools and are perceived as key success factors (see below).[12]

Figure 5.Usage of Mobile Devices on College Campuses



Source: Campus Technology

[11] Susan Grajek, "Top 10 IT issues, 2018: The Remaking of Higher Education," EDUCAUSE IT Issues Report, January 29, 2018. https://er.educause.edu/articles/2018/1/top-10-it-issues-2018-the-remaking-of-higher-education

[12] Rhea Kelly, "Most Students Say Technology Boosts Academic Success," Survey by Campus Technology, September 29, 2017. https://campustechnology.com/articles/2017/09/28/survey-most-students-say-technology-boosts-academic-success.aspx

WHAT MATTERS TO HIGHER EDUCATION CIOS

EDUCAUSE has identified the top issues, technologies and trends that will affect IT planning and management in coming years.[13]

1. Information Security

The top imperative for CIOs in higher education is to develop a risk-based security strategy that keeps pace with the ever-increasing prevalence and sophistication of advanced threats.

Figure 6.Security: The Top IT Issue for 2018



Source: EDUCAUSE

The amount of higher education systems breached have increased in the past few years. Just in Time Research: Data Breaches in Higher Education reported that from 2005 to 2013, colleges and universities made 551 breach reports — a rate of just over one per week. The largest proportion of the reported breaches fell into the hacking/malware classification (36 percent). Based on the Privacy Rights Clearinghouse (PRC) data, education (K–20) as an industry has the second largest number of reported breaches (727), and 73 percent of breaches attributed to the education sector included data about the number of records exposed per breach. See table 1.1

Higher education is now a top target for ransomware. One reason is that IT tends to be decentralized into departments. The resulting lack of standardization and haphazard patching increase the likelihood of finding a vulnerability. It's also easier to obtain email addresses from listings of professors and staff on the public-facing website. Once ransomware penetrates the institution, the relatively open nature of campus IT systems facilitates the spread to other departments.[14]

2. Student Outcomes

The charter for the higher education CIO is increasingly focused on the institution's strategic goals, of which student success is paramount. Investments for technology to support

[13] Unless otherwise noted, the quantitative data in this section are taken from https://www.educause.edu/research-and-publications/research/top-10-it-issues-technologies-and-trends

[14] Ashley Jarosch, "Why Higher Education is Now the Top Ransomware Target," Data On the Edge blog, January 23, 2017. https://blog.code42.com/why-higher-education-is-now-the-top-ransomware-target/

student success are rising: More than 44% of colleges increased spending on software for academic advising and planning during the period 2014 through 2016.[15]

Key areas of focus for technology planning in 2018 include:[16]

- **Standard commercial software use.** Schools have often opted for costly customized software to track performance and handle other administrative tasks. However, a growing trend towards the use of standard commercial software rather than custom development will emerge in 2018.
- **Integrated systems approach**. Legacy student information systems make it harder to adapt to new models, hampering admissions and advancement efforts. Growth strategies incorporating a new approach to core systems are starting to focus across the entire student lifecycle, which augurs the emergence of integrated system approaches in 2018.
- **Big data and analytics.** More schools will use predictive analytics to find and retain students. For example, colleges will use big data to track prospective students to make better decisions regarding outreach for admissions.
- **Automation focus.** Being able to reduce repetitive tasks and keep processes agile helps academic institutions to better support students. That's part of why a focus on automation in core systems to support early alerts and action plans for at-risk students will also emerge in 2018.
- **Mobile and self-service student experiences.** Tedious registration and application processes is a central pain point that academic institutions frequently tackle by providing students with better access to enhanced experiences online. Enhanced self-service portals help to further reduce these issues and expedite enrollment and subsequent interactions.
- **Increased use of CRM.** CRM technology allows schools to leverage deep profiles of students and alumni. This can present an opportunity for colleges to better reach alumni who have the capabilities to provide employment or mentorship opportunities for current students.

3. Strategic Importance of IT

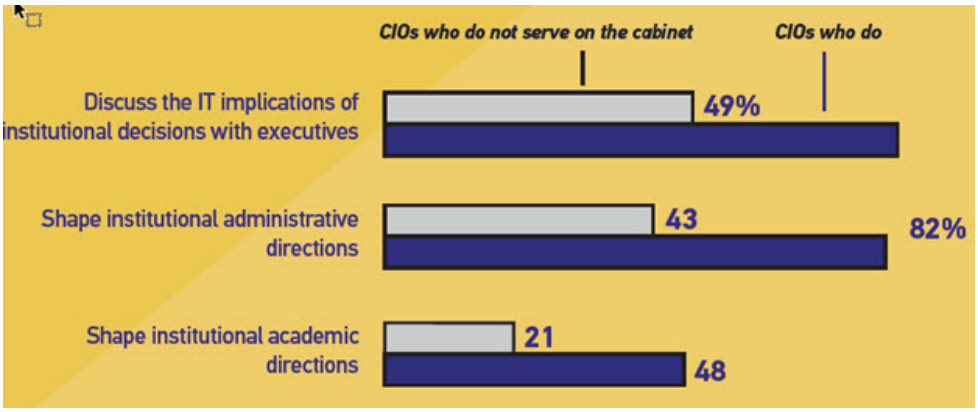
There is a push to reposition the role of IT leadership as an integral strategic partner to the institution's leadership. A recent survey found that 42% of higher education CIOs serve as members of the president's or chancellor's cabinet.

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[15] "Driving Toward A Degree: Establishing A Baseline on Integrated Approaches to Planning and Advising," Tyton Partners survey, 2016. http://drivetodegree.org/dtd-wp/wp-content/uploads/2016/04/driving-toward-a-degree-2016.pdf

[16] Otmar Zewald, "12 higher education trends to empower student success in 2018," diginomica, November 28, 2017. https://government.diginomica.com/2017/11/28/12-higher-education-trends-to-empower-student-success-in-2018/

Figure 7.Roles for CIOs as a Function of Cabinet Inclusion

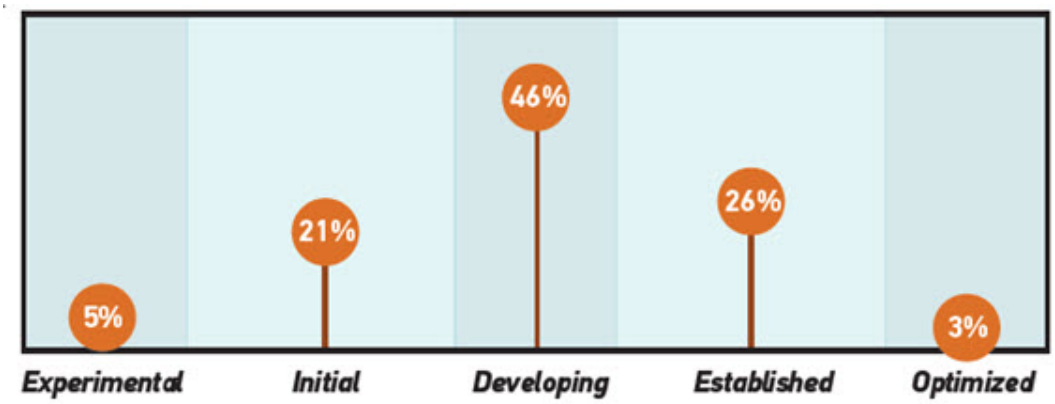


Source: EDUCAUSE

4. Data-Informed Decision Making

Institutions will make greater use of business intelligence and data analytics to inform the broad conversation and answer big questions. Most institutions are either developing a decision-making culture or already have one in place.

Figure 8.Adoption of Data-informed Decision Making in Higher Education



Source: EDUCAUSE

5. Student-centric institution

Technology will play an increasingly important role in helping university leaders create an institution that can compete effectively. Systems to track and manage student activities help define the student experience on campus from applicant to alumnus.

Figure 9.Prevalence of Tracking Systems in U.S. Higher Education

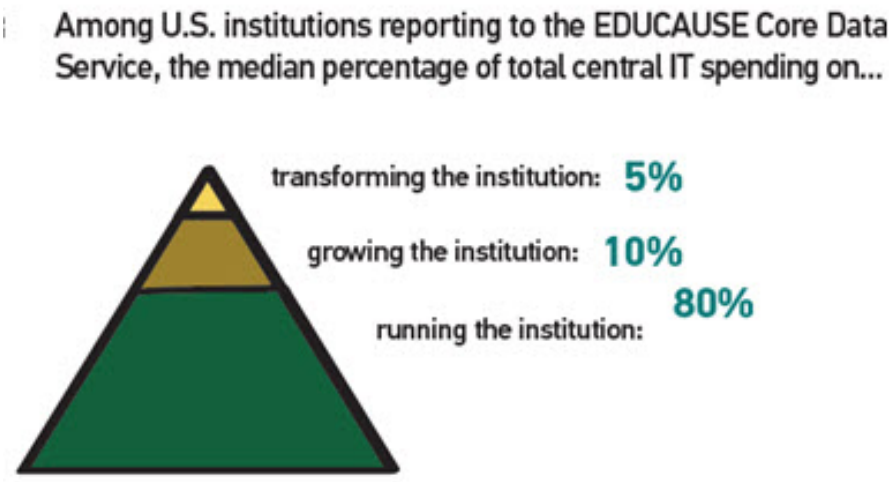


Source: EDUCAUSE

6. Affordability

CIOs must cooperate in the effort to make higher education more affordable by balancing and rightsizing IT priorities and budget to support IT-enabled efficiencies and innovations. While the bulk of the IT budget goes to operational tasks, allocations to growth and transformation represent the leadership's reliance on IT to achieve the institution's strategic goals.

Figure 10. Breakdown of Total IT Spending



Source: EDUCAUSE

Almost two-thirds (63 percent) of the CIOs and senior IT officers report that IT funding at their campus "has not fully recovered from the budget cuts we have experienced over the past four-six years."

Source on the quote

Almost a third of public universities and BA/MA institutions, a quarter of private BA/MA colleges, a fifth of private universities, and more than two-fifths of community colleges experienced IT budget cuts for the 2016-2017 academic year.

Many campuses suffered mid-year budget reductions for 2016/17, averaging 8 percent, which compounds the consequences of annual budget cuts. Unfortunately, this has been the recurring cycle for many institutions: annual cut followed by a mid-year budget reduction.[17]

Figure 11. IT Budget Cuts, Fall 2016

percentages	Annual Budget Cut (2016-17)	Mid-Year Budget Cut (2015-16)	Mean, Mid-Year Budget Cut
All Institutions	29.5	24.7	8.1
Public Universities	32.7	17.3	4.9
Private Universities	18.7	15.2	3.4
Public BA/ MA Colleges	31.1	15.5	12.0
Private BA / MA Colleges	23.1	30.5	8.0
Community Colleges	43.1	32.3	9.3

https://www.campuscomputing.net/content/2016/11/21/the-2016-campus-computing-survey

7. IT Staffing

Staffing remains a key issue for higher education CIOs. Cash-strapped presidents and chancellors often suspended IT hiring and are reluctant to authorize new IT positions (see below). This trend is detrimental in two ways:

- Existing staff are stretched thinner, leading to degradation in service quality and the student experience
- IT groups lack expertise in evolving technologies such as cloud, big data and analytics.

[17] "The 2016 Campus Computing Survey," The Campus Computing Project, November 21, 2016. https://www.campuscomputing.net/content/2016/11/21/the-2016-campus-computing-survey

Figure 12. IT Salaries in Higher Education, Survey Results

FIGURE 2

GROUPED SALARIES

What is your current salary?

	CIO/CTO/ CSO/CDO	IT DIRECTORS	IT MANAGERS	PROJECT MANAGEMENT	DEVELOPMENT/ APPLICATIONS STAFF	NETWORK/ DATA CENTER MANAGEMENT
PUBLIC	$113,494	$96,400	$69,177	$73,615	$63,355	$60,937
PRIVATE NOT-FOR-PROFIT	$165,657	$96,000	$76,826	NA	$72,484	$69,829

	INSTRUCTIONAL DESIGN/ TECHNOLOGY	WEB/DIGITAL/ MEDIA STAFF	SYSTEMS ANALYSIS	TRAINER	HELP DESK/ COMPUTER SUPPORT
PUBLIC	$66,215	$66,250	$69,059	$64,375	$57,503
PRIVATE NOT-FOR-PROFIT	NA	$52,900	NA	NA	$46,400

https://campustechnology.com/articles/2017/02/02/2016-it-salary-and-job-satisfaction-survey.aspx

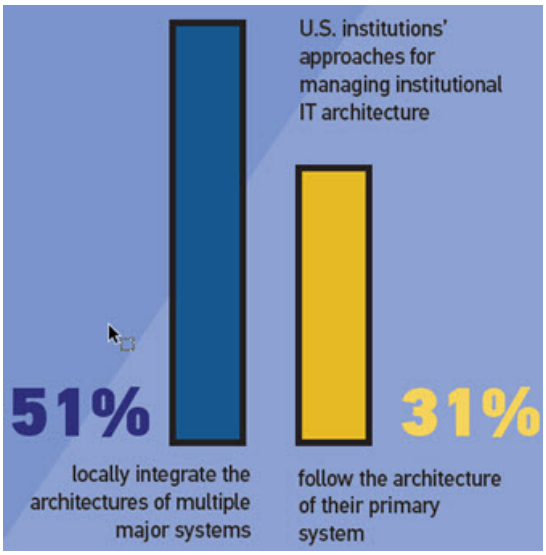
8. Data Management and Governance

Like their commercial counterparts, higher education CIOs are becoming more sophisticated in how they manage the organization's data. There is an increasing understanding of the value of data quality as opposed to data quantity. The need is for CIOs to implement and enforce effective data governance policies for the institution.

9. IT Standardization

In higher education institutions, individual departments often have their own IT systems, which leads to lack of standardization and overall complexity. Given the impracticality of rip and replace approaches, CIOs must ensure system interoperability, scalability and extensibility across multiple disparate applications and platforms. This trend has implications for data integrity and governance as well.

Figure 13. Technology Integration Trends in U.S. Higher Education



10. Change Leadership

The pace of technology change in higher education is breathtaking; many professors and support staff find it challenging—not to say frustrating—to assimilate new tools and software systems.

The same is true of the IT staff due to a lack of funding for training and inability to use hiring to upgrade the department's technology skill set. Twenty-eight percent of higher education employees claim that gaps in their skills present moderate or strong obstacles to their effectiveness.

The IT function is increasingly being tasked with addressing these issues, often with little or no additional funding.

IT ORGANIZATION AND FUNDING

The CIO Function

CIOs in higher education most commonly report to the president or chancellor, followed by the highest-ranking academic officer (e.g., provost, vice chancellor for academics).

CIOs at doctoral institutions have the largest number of total reports, while CIOs at associate's institutions have the fewest. CIOs at medium-sized institutions (enrollment of 4,000–7,999) have the broadest scope of responsibility but little direct representation at the cabinet or board level. Precisely because these CIOs have such a broad scope of responsibility, however, they have a great deal of direct input into decision making in academic units.

CIOs have been in their current position for four years and higher education for 18 years (medians).

Almost half of all CIOs are hired from within their current institution and more than three-quarters from within higher education. In both cases, CIOs primarily come from other IT executive positions.

The demographics of CIOs in higher education are changing, reflecting greater ethnic diversity and younger individuals in the position. CIOs are predominantly male and white, but this is changing with the new generation of CIO hires. Unfortunately, the same is not true for gender diversity.

In general, CIOs focus on IT to serve the business of the institution. This reflects CIOs' understanding of the role as spanning the entire institution, requiring collaboration with other leaders across campus.[18]

[18] Jeffrey Pomerantz, "IT Leadership in Higher Education, 2016: The Chief Information Officer," EDUCAUSE Center for Analysis and Research, 2017. https://library.educause.edu/~/media/files/library/2017/3/ers1702cio.pdf

Figure 14. IT Spending Priorities in Higher Ed

Rank	Higher Education Priorities	% Respondents
1	Cyber/information security	18%
2	Enterprise resource planning	16%
3	BI/analytics	15%
4	Networking, voice/data communications	14%
5	Cloud services/solution	14%
6	E-learning/LMS	13%
7	Infrastructure/data center	12%
8	Customer relationship management	7%
9	Communication/connectivity	3%
10	Student information system	3%

Source: Gartner (October 2017) [19]

Students as Help Desk Staff

Many institutions rely heavily on students to provide a significant level of staffing for the university help desk. On-campus employment provides students with a valuable opportunity to gain hands-on job experience before they hit the real world. For on-campus employers, this means an opportunity to increase capacity via a captive workforce that's willing to trade time for experience and modest pay.

A recent user survey by LogMeIn found that in support roles: 62% of respondents rely on students for at least one-quarter of their help desk coverage.[20]

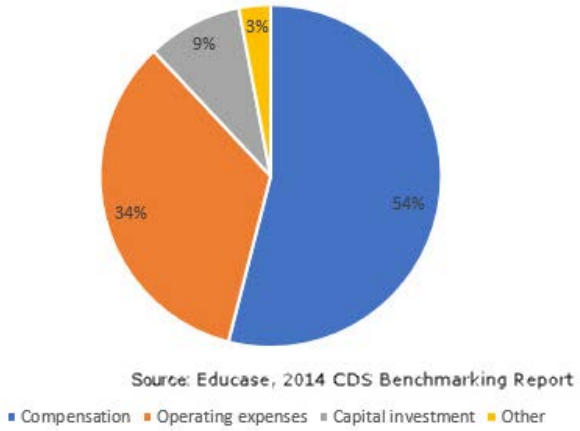
IT Spending

IT expense represents about 4.2% of total institutional spending, averaging $906 per institutional employee (student, faculty, or staff). More than half (54%) goes to compensation.

[19] "Gartner Survey Finds 59 Percent of Higher Education CIOs Expect Significant Business Model Change Due to Digital Transformation," Gartner press release, October 30, 2017. https://www.gartner.com/newsroom/id/3821765

[20] LogMeIn internal survey, April 2018.

Figure 15. IT Spending in Higher Education by Expense Category



Staff Compensation

The average salary across all types of institutions and every kind of IT role imaginable was $77,808. The median was $71,173. [21]

Figure 16. IT Salaries in Higher Education

FIGURE 2

GROUPED SALARIES

What is your current salary?

	CIO/CTO/ CSO/CDO	IT DIRECTORS	IT MANAGERS	PROJECT MANAGEMENT	DEVELOPMENT/ APPLICATIONS STAFF	NETWORK/ DATA CENTER MANAGEMENT
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https://campustechnology.com/articles/2017/02/02/2016-it-salary-and-job-satisfaction-survey.aspx

[21] Dian Schaffhauser, "2016 IT Salary and Job Satisfaction Survey Results," Campus Technology, February 2, 2017. https://campustechnology.com/articles/2017/02/02/2016-it-salary-and-job-satisfaction-survey.aspx

EVOLUTION OF THE UNIVERSITY SERVICE DESK

Self-Support and Outsourcing

Knowledge management and automation are enabling IT organizations to provide alternatives to supplement the traditional call-in or walk-in center model of service desk support:

- Web- or app-based self-help to supplement the hours of the help desk by providing institutional communities with support 24/7
- Outsourced IT service desks to either supplement or, in some cases, replace institution-staffed service desks[22]

Competitive Differentiator

The growing competition for students is leading institutions to rethink the role of service desks in the overall effort to deliver positive student experiences.

> *"Departments across universities are increasing customer service training. They know that students expect higher levels of service because of all the competition out there.*[23]
>
> *Heath Boice-Pardee, associate vice president for student affairs at the Rochester Institute of Technology*

Professional Development

> *"[Student staffing] is cost-effective, but that can't be what drives a move in this direction. It has to come from a commitment to developing students as professionals and utilizing their expertise as student users."*
>
> *"Once they graduate, these students have much more professional experience than people who only complete short-term internships…When they leave the campus, they often start in positions higher than entry level."* [24]

Anne Marie Richard, director of student technologies at the University of California, Berkeley.

Case Study: Tradition of Student Involvement (UC Berkeley)

The university's administrators designed the support service to be run almost entirely by students, an approach that fits UC Berkeley's tradition of student activism.

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[22] Bryan Alexander, Susan Grajek and Joanna Grama, "Trend Watch 2017: Which IT Trends Is Higher Education Responding To?" EDUCAUSE, August 23, 2017. https://library.educause.edu/resources/2017/8/trend-watch-2017-which-it-trends-is-higher-education-responding-to

[23] Alan Joch, "Colleges Revamp the Help Desk to Streamline the Customer Service Experience," EdTech, January 20, 2018. https://edtechmagazine.com/higher/article/2017/10/colleges-revamp-help-desk-streamline-customer-service-experience

[24] Ibid.

Until 2016, tech support was available only to the relatively small percentage of students who lived in UC Berkeley's residence halls. But the new campus-wide program took inspiration from that grassroots initiative, which sprang up in dorms with the rise of the public internet.

Today, about 35 student tech consultants staff phone lines and drop-in support stations, while student leads serve as paraprofessional managers.

The Student Technology Services program recruits widely for support staff, reaching out to lower-income students who need on-campus jobs and to female, African-American and Latino students — groups underrepresented in the technology industry. [25]

PART III. OPPORTUNITY ASSESSMENT

COMPETITIVE ANALYSIS: BOMGAR

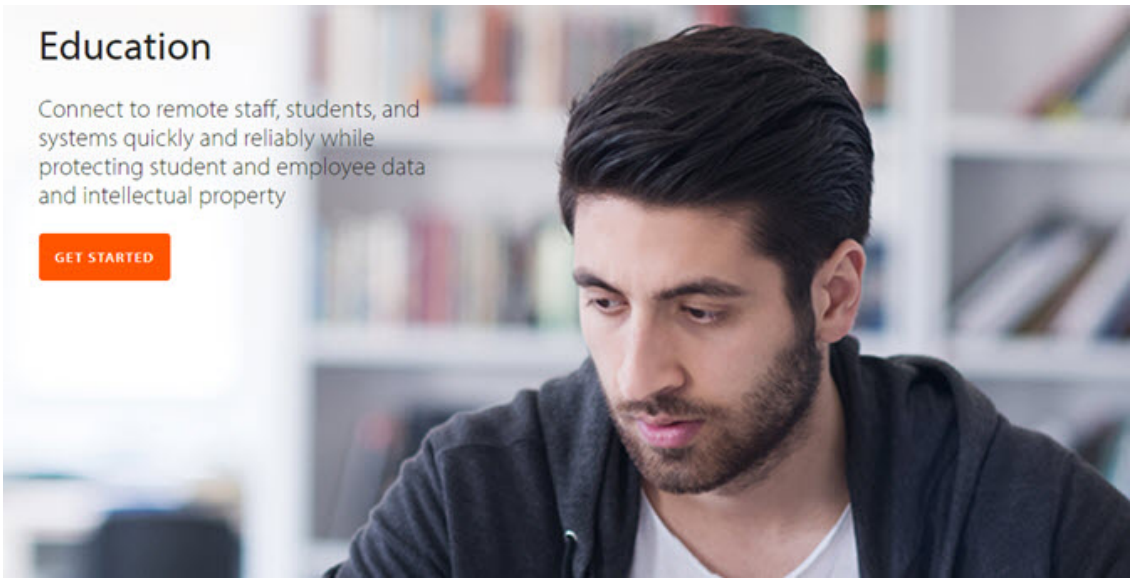
Bomgar is the only remote access solution with specific positioning for the education vertical, which is captured at their education landing page: https://www.bomgar.com/solutions/education.

Bomgar offers the following assets for selling into the higher education vertical:

- Vertical solution page: https://www.bomgar.com/solutions/education
- Case studies: University of Miami, Indiana University, USC Viterbi School of Engineering (16 universities and 1 community college total) https://www.bomgar.com/resources/case-studies#c=6938&lang=en
- Webcast: How Universities are Improving the Tech Support Experience for Students & Staff, Boise State, 2013. https://www.bomgar.com/resources/webcasts/how-universities-are-improving-the-tech-support-experience-for-students-sta

[25] Ibid.

Figure 17. Bomgar Landing Page for Education Vertical



Source: www.bomgar.com/education

We analyzed in detail the messages on the Bomgar vertical microsite.

Value Proposition

(a) Connect to remote (b)staff, students, and systems (c)quickly and (d) reliably while (e) protecting student and employee data and (f)intellectual property[26]

a	Defines the category: Remote access
b	Defines the domain: People and servers (unattended devices)
c	Differentiator 1: Connection speed
d	Differentiator 2: Session reliability
e	Differentiator 3: PII security
f	Differentiator 4: IP security

Key Features

- Remote Support – Provide fast remote assistance to any remote desktop or mobile device, with screen sharing, chat, and remote control.
- Privileged Access – Manage and control privileged insider and third-party access to your network.
- Mobile – Support mobile devices and tablets including Android, IOS, and Chromebook
- Embeddables – Deploy buttons or embedded links for users to request support directly from their devices or classroom systems
- Integration – Integrate with CRM and ITSM tools to maximize existing investments
- Granular Permissions – Set granular permission, network access levels, and specify time parameters to enforce "least privilege"[27]

Message 1: Secure access for your growing academic environment

"(g)Today's educational institutions face the increasingly complex task of managing a wide range of users, systems, and devices across locations, all while keeping sensitive data and

[26] https://www.bomgar.com/solutions/education
[27] https://www.bomgar.com/solutions/education

intellectual property secure. (h) Campus boundaries are expanding with the growth of online classes, remote branches, and international programs. (i) IT professionals are on the front lines of supporting the next generation of technology users, (j)who rely on personal laptops, smartphones, and tablets for classwork and also (k) prefer text-based communication like chat."[28]

g	Going all-in on security and manageability/complexity reduction
h	Identifies trends that are driving complexity in higher education
i	Pain point 1: Rising expectations of tech-savvy, success-oriented users ratchets up the pressure on IT
j	Pain point 2: Exploding growth of mobile devices exacerbates security and manageability challenges
k	Pain point 3: Shifting trends in interaction methods deemphasize walkup and phone support, require new business processes to support real-time chat and social media.

Message 2: Support your technology-enabled campus

"Technology is everywhere in education. Schools are making massive investments to enable students with their own laptops, netbooks, or tablets, support global campuses, and (l) provide more eLearning options. These systems and devices run different operating systems, may be used off network, and are set up across different locations.

"(m) Bomgar works across any operating system including Windows, Mac, and Linux and supports Android, iOS, and Chromebook devices - all for no extra cost. (n) IT service desks can remotely access and fix nearly any computing device, whether on campus or on the other side of the world, (o) for faster problem resolution. (p) Bomgar also works through your firewall without VPN tunneling, allowing technicians to remotely support devices while keeping perimeter security intact. (q) All session traffic is encrypted and logged for a detailed audit trail."

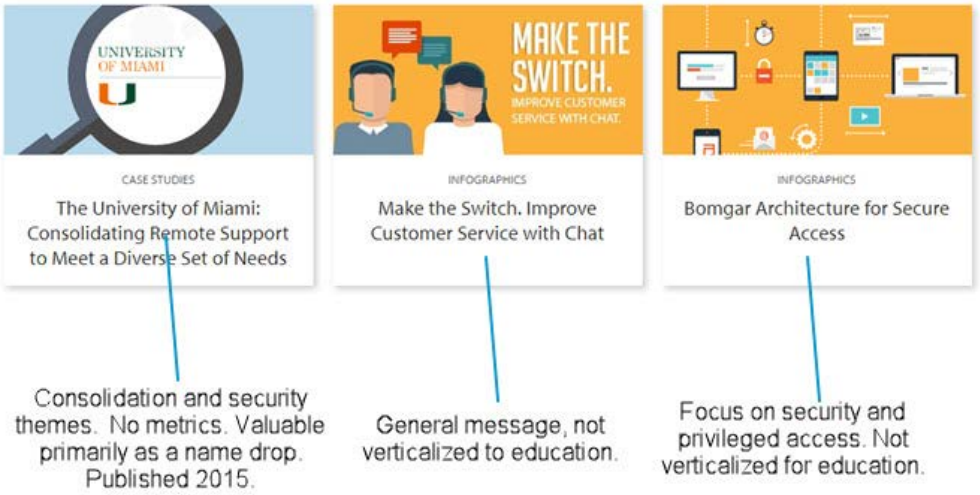
L	Nod to trends in curriculum delivery
m	Broad support for PCs, servers and mobile devices
n	Fluffy restatement of the definition of a remote access tool
o	Only mention of speed of problem resolution
p	More emphasis on secure access, aimed at technical evaluators
q	Only mention of compliance, a growing need in higher education

Flagship Collateral for Higher Education

Three assets are featured on the Education Vertical page, the University of Miami Case Study and two infographics (see Figure 18 for commentary).

[28] https://www.bomgar.com/solutions/education

Figure 18. Featured Assets for Education Vertical

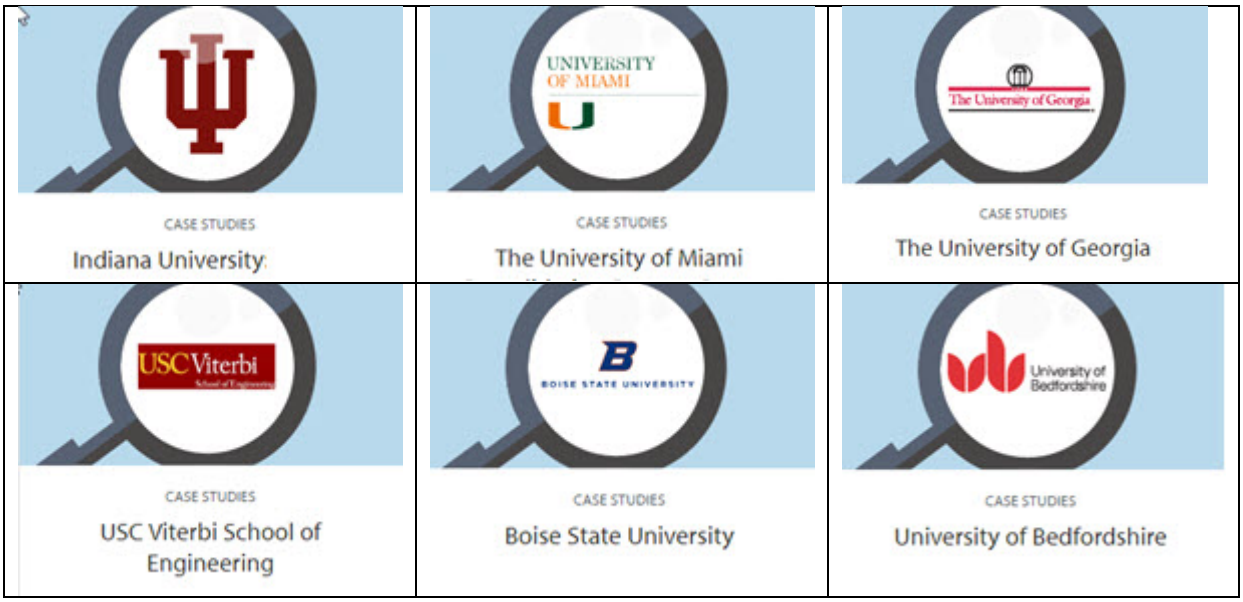


Source: www.bomgar.com/education

Case Studies

Bomgar has an impressive lineup of case studies for higher education. While the quality of the materials themselves is mediocre, the visual impression created by these name drops is powerful.

Figure 19. Sampling of Bomgar Case Studies in Higher Education



Source: https://www.bomgar.com/resources#c=6938&ct=caseStudies&lang=en

Higher Education Brief

Although called a white paper, this two-page document is more accurately described as a product overview. It highlights the larger Bomgar solution, of which remote support is one of four capabilities: the other three are privileged access, vault, and verify (authentication). This document is an effective piece of collateral, in large part due to the prominent quotes from IT directors at USC Viterbi School of Engineering and the University of Miami.

Figure 20. Bomgar Overview of Higher Education Solutions



Source: *https://www.bomgar.com/assets/documents/Bomgar-and-Higher-Ed.pdf*

IS RESCUE IN THE GAME?

In a word: Yes. LogMeIn has all the features that Bomgar presents in its verticalization materials.

Figure 21. Features Comparison, Bomgar versus Rescue

Features	Bomgar for Education [1] ✓ ×	src	LogMeIn Rescue ✓ ×
Reporting	✓	2	✓
Scripting	✓	3	✓
Branding/customization	✓	4	✓
Unattended device support	✓	5	✓
Multi-session support	✓	6	✓
Mobile support, IoS	✓	7	✓
Mobile support, Android	✓	8	✓
Chromebook support	✓	9	✓
Privileged access	✓	10	✓
Embeddable	✓	11	✓
CRM integration	✓	12	✓
ITSM integration	✓	13	✓
Granular permissions	✓	14	✓
Service desk app integration	✓	13	✓

Sources:

1 https://www.bomgar.com/solutions/education
2 https://www.bomgar.com/docs/remote-support/getting-started/admin/reports.htm
3 https://www.bomgar.com/docs/privileged-access/how-to/integrations/api/client-script/
4 https://www.bomgar.com/docs/remote-support/how-to/customize-portals/index.htm
5 https://www.bomgar.com/docs/remote-support/getting-started/rep-console/jump-clients.htm
6 https://www.bomgar.com/docs/remote-support/getting-started/rep-web/active-sessions.htm
7 https://www.bomgar.com/docs/remote-support/getting-started/customer-client/apple-ios/index.htm
8 https://www.bomgar.com/docs/remote-support/getting-started/customer-client/android/index.htm
9 https://www.bomgar.com/blog/entry/support-for-chrome-os-coming-in-new-version-of-bomgar-remote-support
10 https://www.bomgar.com/privileged-access
11 https://www.bomgar.com/docs/remote-support/getting-started/admin/bomgar-button.htm
12 https://www.bomgar.com/docs/remote-support/how-to/integrations/microsoft-dynamics/index.htm
13 https://www.bomgar.com/assets/documents/Bomgar-ITSM-Integration-Matrix_WEB.pdf
14 https://www.bomgar.com/remote-support/features/session-policies

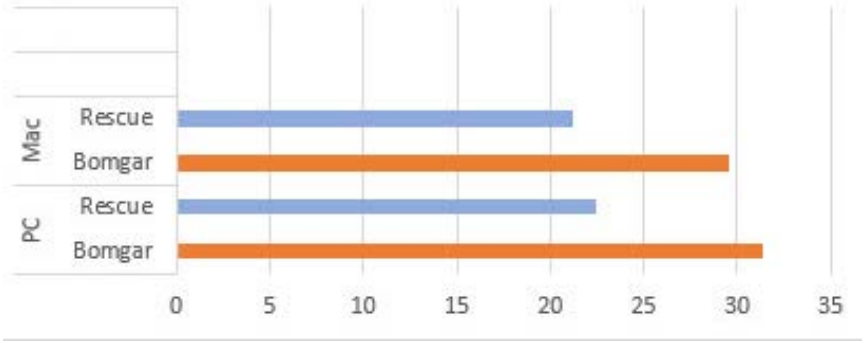
ADVANTAGES

Testing conducted by QualiTest identifies areas in which Rescue has advantages over Bomgar. We examine their relevance based on the competitive analysis given early.

Faster Connections and Data Transfers

The QualiTest study showed that Rescue connects faster than Bomgar. However, the relatively small magnitude of the time saving (see Figure 21, horizontal axis is seconds) is unlikely to convince current Bomgar users to switch to Rescue.

Figure 22. Connection Time Comparison, Rescue versus Bomgar



Source: QualiTest

Bomgar's value proposition (see page 28) starts "Connect to remote [users] quickly…" Assuming the QualiTest test data on connection and data transfer times are accurate, LogMeIn can attack Bomgar on this point.

The recent user survey adds punch to this advantage. In terms of desired improvements in incumbent remote support products, easier and faster connection was second only to reliability. LogMeIn internal survey, April 2018.

More Intuitive Interface

Goes to ease of use. University help desks rely heavily on students as support agents (see page 26), so there is potential competitive advantage in building a convincing case that Rescue is easier to use. QualiTest's findings support this direction:

> *Bomgar…wasn't easy to connect, it felt slow, and what data you could get was lackluster. Every step of the connection process seemed to hang. From connecting to the website, to the computer and then the screenshare; each subsequent hoop seemed to compound the overall connection time. The mobile was also extremely laggy and didn't give you much. It came off as a cut-rate rush-job version of Rescue.*[29]

Better Mobile Support?

QualiTest reports that Rescue has an edge in mobile support:

[29] Anthony Girardi & Ryan Plunkett, "Rescue Vs Teamviewer & Bomgar & GoToAssist & Connectwise: Final Report," QualiTest report commissioned by LogMeIn, October 25, 2017.

Rescue has the best mobile support coverage of all products tested. The Rescue's mobile interface shown to the technician is also the most robust and useful. TeamViewer is second with good support and data observation. Bomgar has file transfer, decent support, but has a critical bug with iOS 11 phones.[30]

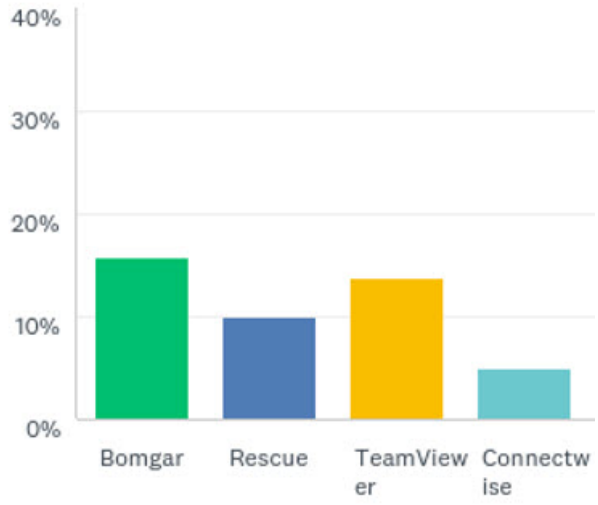
However, this assessment is subjective based on the evaluator's experience. The quantitative test results are inconclusive: On Android devices, Rescue beats Bomgar in download speed and connection time; for the iPhone, their positions are reversed. Given the importance of mobile support in higher education, this potential advantage warrants additional research.

OBSTACLES

Vendor Incumbency and Stickiness

There's good news for Rescue in the competitive landscape: no vendor has a dominant market share in higher education. Survey results found that, of the commercial support products, Bomgar is the most widely used (16% of respondents), followed by TeamViewer (14%) and Rescue (10%). These results imply a true playing field that is relatively flat. (However, Bomgar's outsized investment in vertical marketing tilts the perceptual playing field in their favor substantially.)

Figure 23. Vendor Incumbency for Remote Support Products in Higher Education



Source: LogMeIn internal survey, April 2018.

Total incumbency is high: A recent survey found that 72% of users already have at least one remote IT support product.[31] In addition, many organizations have cobbled together support solutions using point products such as Microsoft Remote Desktop Protocol (25%) and meeting tools (18%), a potential headwind in some organizations. The significance of

[30] Girardi and Plunkett, op cit.
[31] LogMeIn internal survey, April 2018.

these findings is that most selling situations will be displacements, relatively few will be greenfield opportunities.

IT decision-makers in higher education are highly loyal to incumbent vendors: LogMeIn's internal survey found that 78% either bundle remote support products with other products from the same vendor or plan to do so.[32] While this finding presents an opportunity for Rescue installations, that segment is only 10% of the market.[33]

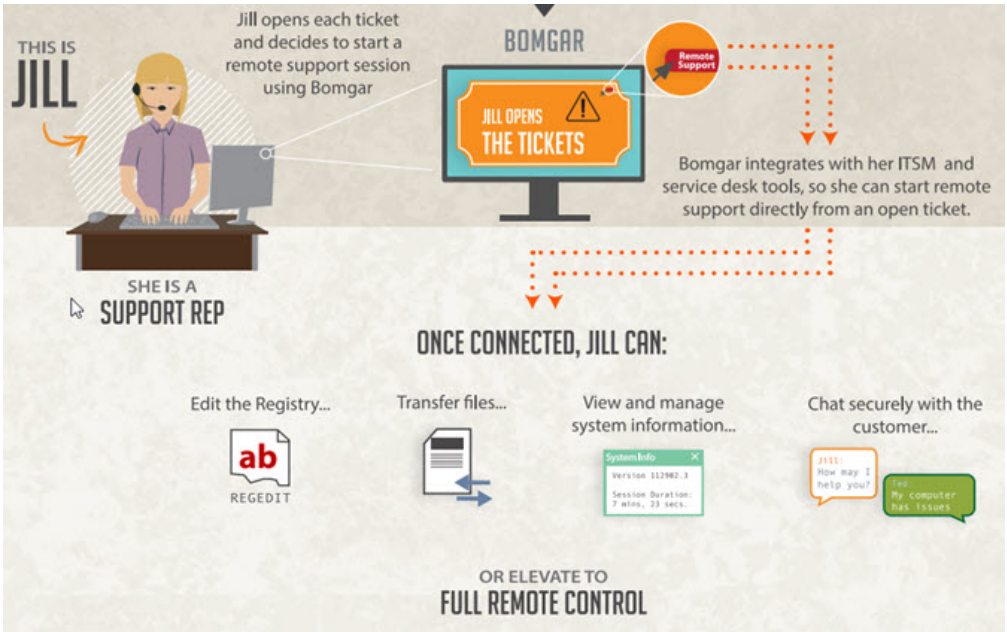
Remote support matters: More than 82% of respondents say that remote support is either very important or somewhat important to the overall IT experience for students, faculty, and staff.[34] Therefore, the pressure is on incumbent vendors to deliver: missteps are likely to create a significant opportunity for competitor displacement.

Integration Features

Bomgar's marketing messages convey the importance of specific features, for example, the ability to integrate with ITSM and service desk tools (see below). This feature is important and represents a potential competitive advantage for Bomgar.

While our top-level competitive analysis found Bomgar and Rescue to be essentially feature equivalent, Bomgar has created an impression of superiority that must be overcome. Further competitive research is needed to ensure that Rescue has equivalent capabilities, with reportable metrics wherever possible.

Figure 24. Bomgar Messaging for ITSM Integration



Source: Bomgar.com

[32] Ibid.
[33] Ibid.
[34] Ibid.

Reporting: Who Is Better?

In an overall assessment, the QualiTest report claims an edge for Rescue:

> *LogMeIn Rescue has a much more digestible layout for reports than Bomgar. The lack of filters and the reuse of the date selection options and the fact that you always stay on the same page, report after report, makes for a much cleaner interface. Rescue's lack of filters is made up for by the fact that there are many more types of reports to choose from. Personally, I think the Rescue system is much more useful for finding out the things a manager might want to know about their system, customer, and technicians.*

However, the specific analysis of Bomgar doesn't conclusively support this assertion. Bomgar has an extensive set of filters that allow the user to customize reports. It may very well be true that Rescue's canned reports are easier to use, however, support staff are proficient software users. We suspect that most would choose customizability over the ease of use of predetermined reports.

POSITIONING

Based on the information obtained in this research project, we offer the following recommendations for positioning.

Tactical: Easy to Use, Easy to Manage

The tactical opportunity for LogMeIn in the education vertical is to create a convincing case that a) Rescue is more intuitive and easier to use than Bomgar, and b) Rescue makes it easier for IT supervisors to manage help desk staff. To mount an effective displacement campaign, LogMeIn would need case studies from high-profile universities attesting to these claims.

Strategic: Remove Barriers to Student Success

We believe there is a strategic opening as well. Bomgar approaches verticalization in a highly tactical way, feature by feature. However, most discretionary higher education IT funding is tied to strategic goals as outlined earlier, especially improved student outcomes (see page 15):

- **Improved Student Outcomes:** Work on student success initiatives has become both more tactical, with a nuts-and-bolts focus on integrations, and more aspirational, with a new emphasis on students' entire experience with the institution.

The opportunity is to create a compelling narrative along these lines:

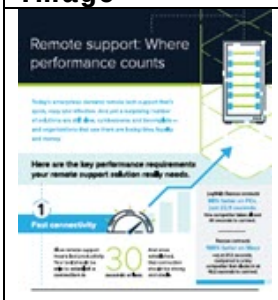
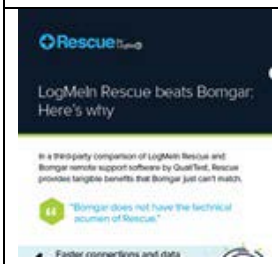
- Pain point: As technology becomes more and more engrained in the education process, students lose significant study time because they can't get timely and helpful technical support (This is a hypothesis which must be tested).
- Solution: Provide help desk agents with a powerful remote support tool that saves time across the entire support session lifecycle and facilitates fast, complete issue resolution
- Benefit: Students study more efficiently and achieve better academic outcomes.

This direction must be carefully crafted so that LogMeIn neither oversells nor undersells the value of remote access to the overall student experience. In that vein, additional research is required to characterize the impact of help desk support on the student experience.

PART IV. RESCUE ASSET AUDIT

At LogMeIn's request, we audited 12 Rescue assets to see if they could be repurposed for the higher education market. These recommendations constitute short-term tactics to create useable assets to jump-start LogMeIn's higher education initiatives. See the following section for recommendations about purpose-built strategic assets for higher education.

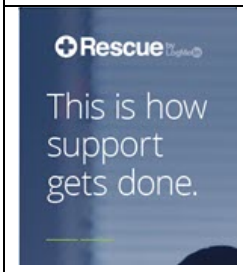
INFOGRAPHICS

Image	Description	Assessment/Repurposing
	Remote support: Where performance counts	REPURPOSE: 1. Rework all copy to use higher education language, e.g., "institution" instead of "enterprise." 2. Tie the benefits of Rescue to the student experience. 3. Reprioritize to emphasize "security" and "mobile support."
	LogMeIn Rescue beats Bomgar: Here's why.	AVOID May not be helpful in higher education. The quantitative benefits are not compelling enough to support a Bomgar takeout.

COLLATERAL

Image	Description	Assessment/Repurposing
	How four remote support teams improve customers' mobile experience	USE AS IS Customer evidence will be essential to drive market share gains in higher education. Only the Naval Postgraduate School is a higher education reference. Nevertheless, this piece can be used effectively without modification. Longer term, LogMeIn needs to identify credible references in higher education and incentivize them to agree to case studies and video testimonials.
	Mobile Support: No Longer an Option Business readiness checklist	AVOID This piece may come across as condescending to a higher education audience. Telling university CIOs that they are thinking wrong is a dubious persuasion strategy.

BANNERS

Image	Description	Assessment/Repurposing
   	Mobile campaign banners	REPURPOSE Mobile support is a top priority for higher education CIOs, so a mobile-based campaign can be a good strategy: 1. Focus on the student experience. 2. Use images that show students and university scenes. See Mobile Devices Drive the Student Experience and Student Perceptions of the Value of Technology for more information to help reposition this campaign.
	IDC report banner (links to IDC report, Prioritize support services to rise above the competition)	AVOID Universities compete aggressively for top students, but they are not versed in marketing language such as “competitive differentiators.” The way to compete in higher education is to show how remote support can improve the student experience.
	Pop-up banner	USE AS IS This basic message is suitable for higher education.
	LinkedIn banner	AVOID In general, higher education IT professionals are less active on LinkedIn than other verticals.

LANDING PAGE

Image	Description	Assessment/Repurposing
	How to select the right remote support tool	REPURPOSE LogMeIn needs a higher education landing page that is visual appealing, information-rich, and carefully positioned for higher education. Having a better destination page than Bomgar is table stakes.

PART V: RECOMMENDATIONS

ADDITIONAL RESEARCH

While there are many areas where research could help direct LogMeIn's go-to-market strategy for higher education, the following topics are the top priority.

Competitive Analysis of Mobile Support Capabilities, Rescue versus Bomgar

As noted on page **Error! Bookmark not defined.**, the QualiTest results suggest an advantage for Rescue, but this assertion needs additional documentation. Even if the analysis shows otherwise, LogMeIn will value by having hard information.

Prioritized Importance of Features

We have found no credible evidence of which features have the most influence on decision makers and how they tie to organizational pain points in higher education. This information can be of significant value when crafting a competitive strategy.

User Satisfaction with Incumbent Vendors

As our findings show, the most likely sales engagement will be a competitive takeout. Pinpointing vulnerabilities by vendor, feature, and respondent level will pay dividends.

MESSAGING

Depending on the magnitude and nature of LogMeIn's go-to-market (GTM) strategy, these activities can deliver significant value.

Vertical Messaging Framework

A standard internal asset for any GTM initiative, a messaging framework should include:

- Value proposition. The goal of this section is to identify the intersection of customer needs in higher education, inadequacy of Bomgar and other solutions ("white space") and the unique capabilities of Rescue. Preferred format is FOR/WHO/PROVIDES/UNLIKE/ONLY.
- Feature-level positioning. Clear, compelling explanations of each important feature. Typical components include short description (3-5 words), long description (25 words), feature details (3-5 mutually exclusive bullets), and benefits (3-5 bullets with proof points).
- Use cases. A reformulation of the positioning by user problem, for example, "support iPhone applications" or "enable secure access to student grades."

- Boiler plates. A set of plug-and-play paragraphs that anyone in the organization can use as-is. Typical lengths are 25, 50, and 100 words.

Tagline

From a marketing perspective, the higher-education IT space is relatively buttoned-down. That's probably why Bomgar relies on descriptive but bland taglines such as "Secure access for your growing academic environment."

There's an opening for LogMeIn to differentiate with punchier, more informative taglines. Blackboard (www.blackboard.com), maker of a learning management system (LMS), addresses the higher education market with more compelling messages:

> Flexible, Efficient, Complete: A New Way to Learn (Blackboard Learn)
>
> Engaged Students. Empowered Faculty. Institutional Success. (Blackboard Collaborate)

CUSTOMER-FACING ASSETS

The actual assets needed is strongly dependent on the channel and GTM strategies. Typical high-value assets to consider are presented below.

Business Brief

700-800 words, front and back of a single sheet. Quick read for business executives and other high-level decision makers in the higher education vertical. Makes a strong though generic argument for Rescue (only mentions Rescue by name at the very end):

- Problem—Pain points with statistical evidence
- White space—Why existing solutions are inadequate
- Solution—Outline of a comprehensive solution
- Benefits—Should map closely to the problem statement
- Brand drop—Introduce the product name (Rescue) briefly
- Call to action—Next steps

Technical Brief

Same length and structure as business brief, but with a greater focus on the technology that underlies the solution. In the case of Rescue, it's not clear that the technology itself is sufficiently differentiated to justify a technical brief. We would need to interview someone from the development side to make that determination.

Vertical White Paper

1500-2000 words, 5-8 pages, depending on template and graphical content. Aimed at the next level down in the organization, often director/manager with more technical backgrounds. However, the focus is on delivered business value, not a deep dive into the technology. Similar overall structure to the business brief with key additions:

- Situation analysis of trends in higher education to creates a broader context for the problem statement
- Solution statement with more technical details
- Illustrations for important information, for example, block diagram, software stack
- Use cases describing common problems and solutions

eBook

10-15 screens, online consumption only. The content depth is on a par with the business brief. Hyperlinks provide jumping off points to more specific content, ideally LogMeIn online properties. High visual appeal and compliance to corporate branding guidelines are essential. eBooks are particularly useful assets for digital marketing campaigns.

Infographic

Another staple of digital marketing, infographics require a surprising amount of research, specialized copy writing, exceptional design skills, and extensive review cycles. There's a tendency to overdesign infographics, creating complex visuals that obscure the basic information.

Customer Evidence

Effective takeout campaigns require convincing evidence. Evidence programs require careful planning, meticulous execution, and targeted investment in assets such as assets such as approved customer quotes, joint press releases, written case studies, and video testimonials.

Careful planning to identify high-value use cases is essential. Trying to blanket the entire solution space is an expensive and unwieldy approach due to the large number of permutations of customer vertical, company size, geography, and application. We advise the creation of a detailed plan for a customer evidence program by a consultant with extensive experience in this field.

DIGITAL MARKETING

Email campaigns

LogMeIn must develop a strategy to drive awareness of Rescue for higher education to generate a pipeline of prospects as well as educate and nurture these prospects through the sales cycle (12-18 months). Targeted email blasts are the preferred vehicle to accomplish this goal.

We recommend at least three themed email campaigns:

1. The changing university helpdesk (awareness): 3-5 emails, each highlighting a specific finding of this report. This campaign positions LogMeIn as a thought leader in higher education IT and grows awareness of the Rescue brand. Supporting assets include Explainer video, business briefs, eBooks.

2. Rescue for higher education (lead generation): 3-5 emails, each recapping a key point from the previous campaign and showing how Rescue provides a compelling solution. This campaign positions Rescue as a viable solution to the problems presented in the awareness campaign. Supporting assets include white papers, infographics, technical briefs.

3. Rescue beats Bomgar: 3-5 emails, each explaining a specific advantage that Rescue has over Bomgar. This campaign stakes an aggressive takeout posture, the goal being to drive prospects to start a free trial of Rescue.

To maximize the investment in digital marketing, the content for each campaign should be developed as a single project. This approach ensures a coherent, interesting set of messages that will engage the prospects.

Vertical landing page

Indispensable for vertical marketing. Bomgar's landing page is unremarkable: it uses modern responsive-design techniques to deliver a pedestrian set of assets, many of which have not been verticalized for higher education. To effectively challenge Bomgar's perceived prominence in the vertical, LogMeIn can and should do much better for Rescue.

Explainer video

There's a great deal of debate in digital marketing about the efficacy of explainers (1- to 1.5-minute animations). We believe in the value of explainers, especially as a centerpiece of the vertical landing page. However, there's a caveat: Certain popular styles such as the magic white board and cutesy stick figures are highly inappropriate for an IT audience. The best explainers trace a linear path from problem and solution to benefits and branding, using clean, interesting graphics to keep the viewer engaged and interested.

ELEVATION MARKETING

This report was created by Elevation, a national, full service, B2B marketing agency that looks at your brand through the lens of your business. We believe in data-driven, strategic solutions that bridge the marketing and sales gap to drive business growth. With an extensive team of in-house specialists dedicated to providing unique insight into the challenges facing your business, we are passionate about executing campaigns that deliver real ROI for your organization.

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