IDC MarketScape

IDC MarketScape: North America Higher Education SaaS and Cloud-Enabled Student Information Systems 2024 Vendor Assessment

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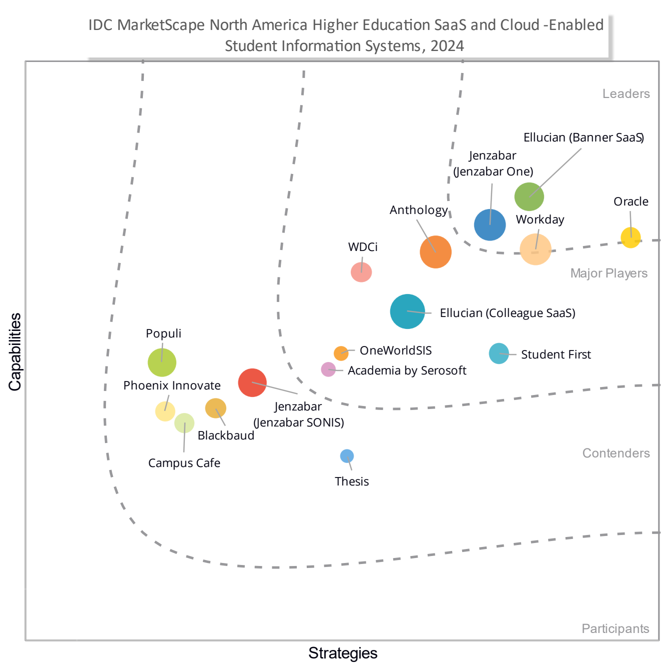
THIS IDC MARKETSCAPE EXCERPT FEATURES JENZABAR

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape North America Higher Education SaaS and Cloud-Enabled Student Information Systems Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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IN THIS EXCERPT

The content for this excerpt was taken directly from North America Higher Education SaaS and Cloud-Enabled Student Information Systems 2024 Vendor Assessment (Doc # US51810524). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The student information system (SIS) has historically served as the core system of record for student information and has supported routine administrative/transaction-based tasks as well as internal and external communications. As a result of years of customizations and deep integrations with applications across campus, legacy SIS is often an integral part of an institution's overall IT ecosystem and administrative workflows.

Recently, institutions of higher education have developed a greater appetite to move away from their legacy, on-premises SIS to a modern, cloud-based solution. In fact, in *IDC's Worldwide Industry CloudPath Survey, 2023: Insights for Cloud Service Providers in Higher Education* (IDC #US50305523, August 2023), one-third of higher education respondents indicated that they have firm plans to move their SIS to the cloud in the near term. In response to this demand, vendors have transformed their solution offerings. However, there are some notable challenges that are preventing the lion's share of institutions from moving to a cloud-based SIS:

- Cloud-based SIS migration is a resource-intensive, long-term, and high-risk endeavor.
- The cloud-based SIS market is still maturing, and many solutions are still in development, while several other solutions have not reached functional parity with their on-premises counterparts.
- Several high-profile (and costly) cloud-based SIS migration failures have overshadowed early success stories.

Also, in many cases, the on-premises student systems that institutions use today have been in place for decades. It is not uncommon to hear that these systems have been around longer than most faculty and staff. With that comes decades of investment and significant levels of hard-coded customization (as well as high levels of technical debt). Legacy student systems are deeply engrained not just in the operations of institutions but in the culture as well. This complicates the move to a cloud-based solution from an IT standpoint, as it also requires a major cultural and operational shift.

As a result of these challenges, most higher education IT leaders in recent years have taken a risk-averse, wait-and-see approach to cloud-based SIS migration. However, the tide is quickly turning. In the face of declining enrollments, changing student demographics, increasing budgetary constraints, staffing challenges, and societal and economic pressures to change, higher education leaders are looking to transform their operations and services while setting their institutions up for future success. Moving to a cloud-based student information system is at the core of these efforts for a large and growing share of institutions.

The leading vendors in this market are those that are building the SIS not just for today but for tomorrow and the coming decades in higher education. The leading solutions provide core significant functionality out of the box but are highly scalable and flexible to be able to adapt to institutions and their students. The leading systems are pushing the bounds of innovation, have strong technical service teams supporting them, and are being built in close collaboration with customers. Most importantly, the leading vendors are investing in not just their products but change management and support services to help ease their customer's transitions to the cloud, ensure ongoing success, and enable institutions to maximize the value of their offerings.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

A critical point in this research effort is to meet the following inclusion criteria:

- The vendor must have a SaaS or cloud-enabled SIS available and actively being sold in market with functionality, features, or solutions specific to the higher education sector.
- The vendor must have active higher education customers in North America.
- The vendor must have acquired at least one new higher education customer in North America since January 1, 2023.
- The vendor must have a dedicated higher education industry vertical team and/or business unit that includes professional services teams/SMEs, products/services, and GTM strategy and offerings for the higher education industry.
- On-premises solutions are excluded from this study.

ADVICE FOR TECHNOLOGY BUYERS

Moving from an on-premises SIS to a cloud-based solution is one of the very, if not the most, challenging IT projects that institutions will ever undertake. Before selecting a vendor to move forward with, it is essential to ensure that the institution is equipped to successfully execute this transformation effort. To help education leaders overcome risk aversion and accelerate their cloud-based SIS transitions, IDC provides this "readiness checklist for higher education," which is designed to serve as a practical guide for higher education leaders looking to determine the following:

- Is a cloud-based SIS transition the right strategy for my institution?
- Does my institution have the capacity to lead a cloud-based SIS transition?
- Which vendor is the best-fit partner to work with for the long term?

Is a Cloud SIS Transition the Right Strategy for My Institution?

As noted previously, moving from an on-premises SIS to a cloud-based solution is a long-term, highly complex, and resource-intensive effort. While the payoff can be tremendous, it will potentially be several years before institutions realize the benefits. It is imperative for higher education leaders to determine (with absolute certainty) whether a cloud-based SIS transition is the right strategy to pursue and whether the timing is right.

The following checklist offers leaders a tool to gut check if a cloud-based SIS transition is the right strategy:

- **We have clearly defined our most important short- and long-term business challenges and strategic priorities**. Before making the investment, higher education leaders must clearly outline the key business challenges they are facing in the short and long term (e.g., enrollment declines, faculty/staff burnout and retention, financial health) and then prioritize those challenges based on the level of risk they pose to the institution. Many higher education technology leaders have equated cloud-based SIS transitions to "heart surgery." As with any high-risk medical procedure, excluding emergency situations, doctors must explore lower-risk and less invasive approaches to minimizing patient harm and ensure that they are addressing the root causes of the patient's health problems. The same holds true for moving from an on-premises SIS to a cloud-based SIS.
- **Considering our challenges and priorities, we have outlined a series of viable short- and long-term options/strategies to consider.** By outlining key challenges and prioritizing them based on risk, education leaders can outline a series of options to address the most pertinent issues. For example, if your

institution is struggling with rapidly declining enrollments or if your students are struggling with a confusing or complicated financial aid process, perhaps a new enrollment management solution or financial aid system is a better strategy to focus on before moving to a cloud SIS.

- **We can clearly map out how a cloud-based SIS will help address our key business challenges and advance our strategic priorities.** Conduct an alignment exercise to map how cloud-based SIS addresses your business challenges/priorities. For example, implementing software updates with on-premises solutions can take six to nine months (or more) in some cases. Many institutions struggle to adapt to changing student demands and market conditions because of the time and effort it takes to maintain and upgrade on-premises systems. The benefits of cloud include offloading software maintenance and upgrades to vendors and quickly shifting to the changing market conditions. So if an institution has defined IT efficiency and/or institutional agility/innovation as high-priority business challenges, it can easily map how a cloud-based system can be leveraged in support of the institution's effort to address them.
- **Our stakeholders clearly understand that moving to a cloud-based student system will be a significant change from our on-premises legacy system.** Many institutions have been using their on-premises SIS for decades. With decades of use comes decades of heavy investment and customizations. Moving to a cloud solution means that the system will not be as customizable as the legacy application, and IT will no longer have control or as much visibility into the back-end database as they are historically used to. Moving to the cloud also means that institutions will have to re-architect many core business processes in order to ensure a smooth transition. It is important for institutional leaders to understand the implications of changing core business processes and losing features, functionality, and control that they have grown comfortable with in favor of moving toward a flexible and adaptable platform that will require significant technological, organization, and operational change to support.
- **We have clearly articulated "why" we are moving from an on-premises SIS to a cloud-based SIS.** By defining "why," higher education leaders can gain buy-in from technical and nontechnical staff and can define their end-state goals that will help guide a successful implementation. The following series of questions can help higher education leaders articulate their "why:"
    - **Are we trying to "get away from" our current system or are we motivated by the possibilities of what cloud-based SIS solutions have to offer?** Trying to get away from your existing system is understandable, but it's not a good reason to dive headfirst into a cloud transition. To benefit from

the cloud, it is imperative to reimagine what is possible in shifting away from an on-premises system.

- **Are we seeking to replicate what we currently do in the cloud or are we thinking about how cloud solutions can set us up for the future?** In some instances, a lift-and-shift approach is a sound strategy (e.g., the mainframe is quickly approaching the end of its useful life). However, institutions will likely fail to realize the benefits of a cloud student system by replicating existing business processes in the cloud.
- **How does a cloud-based SIS transition help advance the broader strategic goals and priorities of our institution?** Student systems touch nearly every department, and nearly all faculty, staff, and students will interface with the application. Given this, the cloud SIS transition strategy must align with the broader goals and strategic priorities of the institution to earn board approval and stakeholder buy-in.
- **What do we stand to gain (and lose) from the move to the cloud-based SIS, and does the cost-benefit analysis justify the investment?** As with any major technology transition, there is a cost-benefit analysis to consider. With a cloud-based SIS, you may gain new capabilities (e.g., disaster recovery, digital resiliency, continuous software updates, and flexibility) but you will also lose decades of investment and (in some instances depending on the cloud solution) some capabilities, features, and/or functionalities that the legacy system provided (at least in the short term).

Does My Institution Have the Capacity to Lead a Cloud SIS Transition?

After determining that a cloud SIS transition is the right strategy, the next step is determining whether the institution has the capacity to undertake this IT modernization effort.

The following is a list of key considerations that higher education leaders can use to determine whether the institution is equipped to move forward with the transition or if there are key check-the-box items they must address first:

- **We have experience with transitioning large-scale, administrative software systems to the cloud and have established "cloud readiness" for our SIS.** If your institution has no experience in migrating major administrative applications to the cloud (e.g., finance and HCM), then the SIS is not the best place to start because of its complexity. Start smaller, understand best practices, and develop some lessons learned, and then consider moving to a cloud-based SIS.

- **We have documented and agreed on a long-term, cloud-based SIS transition strategy that clearly articulates our "future state" vision.** Documenting a cloud-based SIS transition strategy that clearly articulates a future-state vision will provide a guiding light to keep the effort on track. Importantly, the strategy must consider implementation complexities and should include risk management plans. It is also important to have a complete understanding of the on-premises system and how it fits into the broader IT ecosystem (e.g., customizations and integrations) to ensure that the transition does not lead to major unforeseen disruptions. The strategy must also account for existing technical debt and have documented plans to reduce/eliminate that debt with the cloud-based SIS implementation.
- **We have established the roles that we want our new cloud-based SIS to play in our operations.** With the next generation of cloud-based student systems, the SIS is no longer simply a system of record for student information. To truly benefit from modern solutions, it is critical that education leaders rethink the role of their SIS. *IDC PlanScape: Cloud-Based Student Information Systems* (IDC #US48642522, February 2022) outlines key strategic planning considerations and describes four types of roles that modern cloud-based student systems can play, giving institutions framing to narrow their search for a cloud SIS that meets their needs:
  - A flexible and adaptable platform to enable continuous improvement, innovation, and change
  - A platform for student empowerment, designed to provide personalized guidance and support for students at all stages of their academic journey
  - A single source of truth for data to support institutional strategic planning and data-informed decision-making
  - A resource optimizer that enables institutions to augment and scale student support capabilities
- **We have sustained executive sponsorship and have clearly established a line of authority or a decision-making structure for making "the tough calls."** Executive sponsorship is critical for moving the cloud transition along. An executive sponsor is a C-suite or board-level executive that is tasked with steering the effort, ensuring that key milestones are met and that any problems/issues that arise are quickly resolved. The buck stops with the executive sponsor, as the executive sponsor is in place to make "the tough calls" when difficult roadblocks emerge or when a shift in strategy/direction is required.
- **We have established the SIS transition as a campuswide initiative, with each department head taking ownership of implementation in their**

function. Cloud-based SIS transitions are supported by IT but not led by IT. Technology leaders can map solutions to each function's needs, but they do not intimately understand the core business processes that drive operations in each department. Each department leader must take ownership of cloud-based SIS implementation in their function, including future-state visioning and business process reengineering. However, for functional leaders to do so successfully, they need supportive tools and resources. These include conceptual models or rubrics for assessing and transforming business processes or guiding principles to help steer decision-making.

- **We have the human resources and technical skills to both transition to and operate in a cloud environment (and/or have documented plans to hire, reskill, and upskill as needed).** Your IT team will need new tools and skills to execute a cloud-based SIS transition and operate in the cloud. As the on-premises application sunsets, IT teams will have to restructure and reskill. Before moving forward, education IT leaders must determine their staffing and skill needs for the effort and ensure there are plans in place to hire, reskill, and upskill when necessary.
- **We have a complete understanding of the cost of transitioning to a cloud-based SIS.** Understanding the costs associated with a cloud-based SIS transition is important, as costs stretch far beyond the price of the product itself. For example, there are human resources (e.g., training) and staffing (e.g., backfilling roles or repurposing IT staff) costs, unexpected delays or roadblocks that prolong the project timeline, and any additional costs associated with change management and implementation support. Before moving forward, you must be confident that you fully understand the costs associated with the effort and that you have the necessary financial resources to undertake a large-scale, potentially multiyear implementation, including a budget for the unexpected. It is also important to understand your anticipated year-over-year costs post-implementation and plan for any budget changes that will be required (e.g., switching from capex to opex). Consider working with a third-party consulting or strategy service provider to gain a full understanding of the costs you will incur.

Which Vendor Is the Best-Fit Partner to Work with for the Long Term?

The next most important (and perhaps the most important) step in a cloud SIS journey is choosing a vendor to work with for the long term.

In the cloud SIS market, higher education leaders have several options and there are significant differences in the capabilities and offerings between vendors. This document breaks out the Leaders from the Major Players, Contenders, and Participants in this market according to the IDC MarketScape evaluation criteria set out for this document; however, the needs and requirements of institutions based on size, complexity, academic model, and other factors are often different from institution to institution. Some systems are designed for small colleges and universities while others are built for the needs of medium-sized and large institutions. Some solutions are a better fit for private colleges while others are a better fit for public institutions. Then there are systems that can support the needs of many institutions regardless of size, academic model, and level of operational complexity. This document is designed to help support vendor selection, but it is important to consider your institution's specific needs and weigh the strengths and challenges of each vendor.

To help determine the best-fit vendor to work with for the long term (beyond the IDC MarketScape scoring and profile details in this document), institutions should consider the following questions:

- **Vendor priorities/expertise questions:**
  - **How well does the vendor's long-term strategic plan/vision align with that of our institution?** Is the vendor speaking the same language as you and using terminology that aligns with your strategic goals?
  - **How well does the vendor understand the broader challenges of the industry, as well as that of our specific institution?** Does the vendor truly understand the nuances between higher education as a whole and your specific type of institution? Is the vendor putting in the work to understand your specific needs?
  - **How is the vendor balancing investments in marketing/sales versus product development?** What do vendor's financial statements show you about where its investment priorities lie? When you receive communications from the vendor or meet for demonstrations, is it sending the head of marketing or the head of product development? How much is the vendor investing in research and development?
  - **What is the vendor's history in serving the higher education market?** How long has the vendor served the higher education industry? Does the vendor have an industry-specific solution with functionality that was built with the needs of higher education in mind?
- **Vendor capabilities questions:**
  - **What types of cloud deployment models are offered by the vendor?** What cloud deployment model does the vendor offer (e.g., cloud hosted or SaaS), and does that model fit with your strategy? Do you have choice and flexibility in the deployment model based on your institution's needs and preferences? Does the SIS offer on-demand scalability and comprehensive disaster

recovery capabilities? Is the application accessible and responsive to any device?

- **Does the vendor have a proven track record of successfully implementing cloud-based SIS at institutions of a similar size and complexity?** Has the vendor done this successfully with peer institutions, and what was the result of those efforts?
- **What is the vendor's long-term track record of continuous product innovation?** Has the company demonstrated a commitment to navigating major technology shifts and implementing emerging technologies successfully?
- **What are trusted third-party sources saying about the vendor's product, execution, vision, and long-term viability?** Are independent third-party sources validating or refuting what the vendor is saying about its products, capabilities, and service offerings in the industry? Have you engaged any third parties to get a second opinion? Have you spoken to any other higher education institutions that have worked with this vendor to get their thoughts?
- **Does the vendor offer end-to-end project/change management support?** Is the vendor prepared to serve alongside your institution as it goes through this process? Does the vendor provide ongoing training and support for customers? Is the vendor prepared to serve alongside your institution as a long-term partner throughout your digital transformation?

- **Product-specific questions:**
  - **To what degree does the vendor enable choice and flexibility with its products?** How much power do you have to implement the changes you want to make? Can your institution configure the solution to support all students (e.g., traditional, nontraditional, and remote), program offerings (online degrees, certificates, and microcredentials), and term structures (e.g., semester or trimester)?
  - **What is the vendor's approach to product development, and what opportunities does it offer customers to inform/influence the product road map?** What are the vendor's guiding principles and/or priorities when it comes to product development? Will you have a say as the vendor crafts and executes its product road map? Will the vendor put in the work to understand your needs and improve the product based on the feedback you provide?
  - **How well do the vendor's cloud offerings work with the other solutions and systems we currently use?** How well does the application integrate with the other systems and applications that you currently use? Are there interoperability issues that will cause problems for your institution? Does the

product fit in with your existing tech stack as well as the tools and systems that you plan to use in the future?

- **Does the product provide robust security features and settings to protect sensitive student and institutional data?** Are the tools compliant with your country's or state's privacy and security regulations? Can your institution establish role-based security settings to ensure that unauthorized users do not gain access to sensitive data?
- **Does the product have a robust set of data management and analytics capabilities that fit our specific needs?** Can you pull data from multiple sources across campus or easily visualize data to understand what is going on in real time? What data can the tool generate to help inform executive decision-making? Will you be able to better understand or get to know your students on an individual level with the data available in the application? How easy is it to reclaim your institution's data if you choose to migrate to an alternative provider in the future?
- **Does the product have robust accessibility features?** Does the product have accessibility features and settings that can adapt with the needs of each user? Does the vendor develop the product using universal design frameworks or other accessibility design approaches?

Once your institution's team has answered these questions, review the vendor profiles provided in the sections that follow to determine a short list of solutions to evaluate further.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Jenzabar (Jenzabar One)

IDC has positioned Jenzabar (Jenzabar One) in the Leaders category in this 2024 IDC MarketScape for North America higher education SaaS and cloud-enabled student information systems.

Strengths

- **Trusted partnership with strong higher education expertise.** Jenzabar has established itself as a trusted partner in the sector, with nearly 30 years of experience exclusively serving higher education. Institutions feel well supported by the Jenzabar team, noting that the company's technical and support teams make their jobs easier, are very accommodating, and make you feel like the relationship is a "two-way partnership." Customers appreciated the ease of doing business with Jenzabar, with account and customer success teams being highlighted as great to work with. Jenzabar was described as a "very customer-focused team," with institutional leaders appreciating the company's responsiveness and quick resolution of issues, as well as its strong communication, particularly with nontechnical audiences.

- **Implementation project planning, management, and execution.** Jenzabar's implementation process is praised for its organization and management. Customers feel supported throughout the implementation, receiving helpful guidance and thorough documentation. The project planning and scoping are described as well thought out, and the process is seen as highly collaborative. This structured approach ensures that institutions can effectively integrate Jenzabar One into their operations, minimizing disruptions and maximizing efficiency. The Jenzabar team boasts 100% on-time and 98% on-budget delivery for implementations.
- **Collaborative innovation and codesign, product road map delivery**. Customers view Jenzabar as a partner in innovation, constantly working to stay ahead of industry needs. The company invests significantly in forums, white papers, discussion groups, and thought leadership, helping institutions stay informed on industry trends and remains engaged in ongoing digital transformation. Customers appreciate the opportunity to be deeply involved in feature enhancements and road map updates, feeling that the product road map is consistently in line with their needs and delivered as promised. Jenzabar frequently drives growth through the development of add-on solutions designed to address the evolving needs of higher education.
- **Breadth and depth of features and strong portfolio of offerings with modular flexibility, robust reporting and analytics, and strong partner ecosystem.** Jenzabar One offers significant breadth and depth of features and a robust portfolio of integrated modules. The system's modular flexibility allows institutions to start small and scale up over time, easing their transition to the cloud without requiring large-scale transformation efforts. This adaptability is appreciated for easing implementation and change management. Jenzabar One's integrated offerings, such as Jenzabar Student, Jenzabar Recruitment, Jenzabar Retention, and Jenzabar Financial Aid, help institutions streamline operations, eliminate data silos, enable cross-departmental collaboration, and improve data management. The system also includes prebuilt reports and tools for custom reporting, helping institutions easily meet state and national reporting requirements, as well as analytics capabilities to support data-informed decision-

making. Jenzabar also boasts a strong partner ecosystem to support diverse institutional needs and augment or complement their offerings.

Challenges

- **Migrating legacy on-premises Jenzabar installed base to the cloud while supporting change management**. Jenzabar has a significant installed base with legacy on-premises customers. The early strategy for migrating legacy customers to the SaaS offering has focused on migrating customers to cloud offerings, one module at a time, to minimize the challenges of cloud transformation and ease the pain of large-scale transformation efforts. Jenzabar must navigate the complexities of transitioning their large legacy installed base to Jenzabar One, balancing existing support commitments with the push toward cloud adoption.
- **Jenzabar currently does not provide dedicated change management services during cloud SIS transformations.** Customers note that a lack of change management support led to challenges in accelerating and/or maximizing the benefits of their cloud transformation. Users noted that Jenzabar could better understand and address the change fatigue and cultural challenges faced by institutions. Currently, the burden of managing these changes with Jenzabar One implementation largely falls on customers. In addition, migrating modules to a web-based platform requires significant effort from customers, indicating a need for more support during these transitions. Jenzabar recognizes that this is an important area for investment in the coming years as it seeks to migrate its legacy on-premises customer base to Jenzabar One.
- **Architectural flexibility and system configurability**. Customers have expressed concerns regarding the configurability and flexibility of Jenzabar One, with some users finding it challenging to customize the system to meet their specific needs. Several customers highlighted difficulties in tweaking the system for unique institutional requirements. While Jenzabar is in the process of re-architecting its suite of modules to a cloud-native architecture, customers are eager for this transformation to address the current flexibility challenges. Mixed reviews about the platform's configurability indicate a need for improvement in this area to better serve the diverse needs of its client base.
- **Pricing model, inconsistent ROI across modules, and complex billing/invoicing.** Jenzabar's pricing model has raised concerns among customers, particularly regarding the long-term sustainability of their investments. Recent price increases have significantly impacted some institutions' ability to fully leverage Jenzabar's offerings, with some noting that costs can snowball with each new module or add-on capability. Customers have noted variability in the return on investment across different modules, with some, like Jenzabar Communications, being well received, while others, like

Campus Marketplace, have yet to demonstrate clear value. In addition, the complexity of Jenzabar's billing and invoicing system has been described as a complex and confusing to navigate, with a lack of clarity of what institutions are paying for.

- **Faster roll out of feature enhancements while addressing buggy releases and performance issues.** While Jenzabar is recognized for its innovative capabilities and delivering on its product road map, customers have indicated that the rollout of new advanced features and capabilities takes longer than desired. There is a perceived imbalance in the investment and innovation across different modules, with some areas receiving more attention than others. Users have also reported that new releases are often buggy, necessitating significant planning to manage these issues, which can be burdensome for IT teams with limited resources. Performance issues such as slow load times and system glitches have also been noted, disrupting workflows and diminishing user satisfaction. Customers would like to see a more proactive approach to addressing bugs and performance issues to ensure smoother operations and drive internal change effectively.

Consider Jenzabar (Jenzabar One) When

Institutions should consider Jenzabar One when seeking a trusted cloud SIS provider with extensive higher education expertise and a strong commitment to collaborative innovation and codesign and offers a system that provides a breadth and depth of features while enabling modular flexibility.

Jenzabar (Jenzabar SONIS)

IDC has positioned Jenzabar (Jenzabar SONIS) in the Contenders category in this 2024 IDC MarketScape for North America higher education SaaS and cloud-enabled student information systems.

Strengths

- **Cost-effective system with strong value for money**. Jenzabar SONIS is noted for its competitive pricing, offering substantial value beyond just being an affordable system of record. Customers appreciate the robust features and functionality that support essential institutional operations. Over time, Jenzabar has continually improved the system based on customer feedback, ensuring that Jenzabar SONIS evolves to meet the needs of its users. This commitment to enhancements ensures that institutions receive significant value for their investment, making Jenzabar SONIS a cost-effective choice for managing academic and administrative functions.

- **Architectural flexibility and system configurability**. Jenzabar SONIS is praised for its architectural flexibility and ease of configurability, allowing institutions to adapt the system to their unique requirements. Customers have successfully customized Jenzabar SONIS to accommodate a wide range of institutional approaches, enhancing its usability and effectiveness. This flexibility ensures that the system can support diverse operational needs, making it a versatile solution for different types of educational institutions.
- **Implementation project planning, management, and execution**. The implementation process for Jenzabar SONIS is highlighted as a major strength, with customers noting the smooth and well-organized execution by Jenzabar's team. The company excels in project planning, setting targets, and adhering to timelines, which facilitate a seamless transition to the new system. This strong implementation support ensures that institutions can quickly and efficiently integrate Jenzabar SONIS into their operations, minimizing disruptions and maximizing the system's benefits from the outset.
- **Responsive and helpful service and technical support, strong customer communication**. Jenzabar SONIS is recognized for its responsive and supportive service and technical support teams. Customers value the frequent communication, hands-on assistance, and all-hands-on-deck response from support teams, especially when critical issues arise. Institutional leaders even noted Jenzabar's willingness to step up to help customers with technical support for third-party solutions, even when it does not have a direct benefit for the company to do so. However, some users have noted that responsiveness has decreased as the company has grown, with the ticketing system and email communications slowing down in the past year. Despite these challenges, Jenzabar's commitment to customer communication and support remains a key strength of the Jenzabar SONIS platform.

Challenges

- **User interface, feature enhancements, and system usability**. While Jenzabar SONIS offers a functional user interface, it is sometimes perceived as outdated and less intuitive. This can affect user experience and efficiency, especially for new users accustomed to streamlined interfaces. Although customers appreciate the breadth of features available, some features lack the necessary depth for effective utilization. Specific areas where enhancements would be welcomed include the degree audit, gradebook, attendance, and curriculum management features. In addition, managing multiple semesters simultaneously is challenging, requiring significant effort to juggle and maneuver between them. The Jenzabar team recognizes these critical challenges and is focused on enhancements to the user interface as well as several of these key features.

- **Shifting pricing model, price increases, and configuration costs**. Jenzabar SONIS has faced criticism over its shifting pricing model and significant price increases, particularly for the financial aid module. Customers have found it increasingly difficult to manage costs, with the price competitiveness equation becoming less favorable. While customers value the ability to work with Jenzabar to configure the system, they note it can sometimes be cost prohibitive to do so and can also be time-consuming/disruptive. This presents a significant drawback for institutions needing specific adaptations to meet their unique and rapidly evolving requirements but are operating with significant budget constraints. These financial pressures can limit the ability of institutions to fully leverage the system's capabilities.
- **Integration challenges**. Integration with other systems is an area where Jenzabar SONIS has room for improvement. Customers have reported difficulties with data portability, often finding that data moves in one direction but not the other. Building integrations is not as straightforward as desired, placing additional burdens on IT teams to create and support the necessary connections. This can result in inefficiencies and hinder the seamless operation of various institutional processes that rely on integrated systems. The Jenzabar team notes this is a challenge for customers and are focused on bolstering the platform's API layer in the coming 12–24 months.
- **Organizational and cultural change management**. Jenzabar excels in technological change management but falls short in offering comprehensive services for organizational and cultural change management during SIS implementations. Customers have noted that Jenzabar needs to better understand the change fatigue and cultural challenges their institutions face and provide more support in these areas. The responsibility for managing these changes largely falls on the institutions themselves. Customers also mentioned that improved transparency and communication about product updates and issues are needed to help them plan and adapt. In addition, some users find the available training and documentation insufficient, making it difficult for new users to fully utilize the system's capabilities. The migration of modules to a web-based platform has also been labor intensive for customers, which can be a burden on resource-constrained institutions.

Consider Jenzabar (Jenzabar SONIS) When

Institutions should consider Jenzabar SONIS when they are small institutions seeking a trusted partner and cloud SIS provider with extensive higher education expertise that offers cost-effective, flexible, and configurable system with strong value for money and demonstrates commitment to implementation execution and responsive/helpful technical support.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

A student information system (SIS) is built on cloud architecture and delivered using the SaaS model. These systems house vital student data including academic records, enrollment, financial aid, and billing.

LEARN MORE

Related Research

- *Top 10 Global Tech Trends in Higher Education, 2024* (IDC #US51492324, January 2024)
- *IDC MarketScape: Worldwide Higher Education Cloud Professional Services 2024 Vendor Assessment* (IDC #US49968823, January 2024)
- *Building a Learner-Centric, Responsive Education Institution* (IDC #US50058723, January 2023)
- *Moving to a Cloud-Based Student Information System: A Readiness Checklist for Higher Education* (IDC #US50432323, March 2023)
- *IDC PlanScape: Cloud-Based Student Information Systems* (IDC #US48642522, February 2022)

Synopsis

This IDC study is a vendor assessment of the 2024 North America higher education SaaS and cloud-enabled student information systems market. The vendors and solutions included in this study are Anthology, Blackbaud, Campus Cafe, Ellucian (Banner SaaS), Ellucian (Colleague SaaS), Jenzabar (Jenzabar One), Jenzabar (Jenzabar SONIS), OneWorldSIS, Oracle, Phoenix Innovate, Populi, Serosoft (Academia by Serosoft), Student First, Thesis, WDCi, and Workday. This research was conducted to provide guidance for higher education IT leaders seeking to migrate to a cloud-based SIS; modernize the faculty, staff, and student experience; and set their institutions up for the future of higher education.

This research is an independent quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and includes input/feedback from vendors and their customers, as well as publicly available information.

"The vendors in the SIS market have made tremendous strides to transform their solutions in the cloud, and the competition is heating up. No longer is the SIS market sitting still," said Matthew Leger, senior research manager for IDC's Worldwide Education Digital Strategies Research program. "Moving to a cloud-based SIS is one of the most complex and difficult digital transformation efforts institutions will ever undertake. As institutional leaders take the bold first step to move away from their legacy, highly customized systems to a new cloud-based offering, they must choose wisely. This document is meant to help make this highly consequential decision."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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