



## Keeping Track of Multiple Contact Lists

### MASTERS OF FINANCIAL MATHEMATICS NORTH CAROLINA STATE UNIVERSITY

#### Challenge

A University program struggles to manage multiple contact lists using unrelated spreadsheets in various locations

#### Solution

Progress® Rollbase® enables their non-coding users to build a web-based contact management system in less than one day

#### Benefit

The new system makes it possible for program staff to manage contact data in 10% of the time it used to take

North Carolina State University was founded as a land-grant institution, built on the idea that education should bring economic, societal and intellectual prosperity to the masses. Rated as one of the best values in higher education, the 34,000 student school has long succeeded at economically delivering an outstanding education to students from diverse backgrounds.

NCSU's Financial Mathematics program ('Finance Math') offers a Masters degree that combines math, probability, statistics, modeling, investment theory, stochastic processes, and economics. The program prepares students for careers which include but not limited to finance, risk management, investment banking, hedge funds, actuarial science and portfolio management. Graduates are highly skilled quantitative analysts known as "quants" in the financial field. To ensure a successful experience for students both during school and after graduation, the program engages regularly with networks of alumni and firms that recruit its graduates and offer internships.

Financial Math program Directors faced a challenge, however. With minimal staff resources and budget cuts in effect across the university, they had been storing and managing all student and employer data on spreadsheets. This manual approach to contact management made it time-consuming to correlate and track the data. Admins were unable to get a true 360-degree view of information that could help students succeed. For example, the program might want to

know which employers participated in program activities related to career services such as student internships and job shadowing. Lacking this sort of data made it difficult to engage financial employers, which tend to be large companies with constantly changing contacts and policies. Similarly, with an ever-changing job market for “quants,” the program needed to have a clear idea of how students were interacting with the program and employers.

The program was growing substantially and looking to launch new and innovative initiatives that connected employers with the program and tracked students’ professional development activities. The Director of Career Services realized they needed a more agile and sophisticated way to manage the data on its disjointed contact lists. The program wanted a better way to support its growth and handle reporting to board members and the University. The school’s student data system of record was not a solution. It was restricted to enrollment and grade information and they needed a better way to keep current with students, alumni, recruiters, internship managers, faculty, and others.

**“Our curriculum is about data, so it was frustrating to have so little control over information that was important to us. We realized, after we took the Progress Rollbase training workshop, that we now had the tools to put that data to work for our program’s strategic mission.”**

Jeff Scroggs, Financial Mathematics Professor  
and program Director NCSU

## Quantbase: The Progress Rollbase Solution

The administrators at Finance Math investigated several possible solutions to their contact management challenge. Most were either too costly or complex to work with the program’s budget level and small staff. The administrators did not want to swap one problem for another by solving their contact management needs with a system that would itself be time-consuming to manage. Ultimately, they selected Progress Rollbase as the underlying platform for its new “Quantbase” solution, a central, cloud-based data store of all the program’s contact information.

Progress Rollbase is a proven “Rapid Application Development” (RAD) tool that enables non-coding users to assemble, deploy, and manage mobile and cloud-based business applications. Rollbase is known for helping virtually anyone build new apps in hours with just a browser and Internet connection and the point-and-click wizards walk “citizen developers” through the application building process. Rollbase’s security features also satisfied NCSU’s IT program’s security policies for storage of personal data in the cloud.

With Progress Rollbase, Finance Math was able to build an all encompassing web-based, cloud-hosted contact management system easily. Professor Jeff Scroggs, the program Director, and Leslie Bowman, Director of Career Services, undertook the project jointly. “Our curriculum is about data, so it was frustrating to have so little control over information that was important to us,” said Scroggs. “We realized, after we took the Progress Rollbase training workshop, that we now had the tools to put that data to work for our program’s strategic mission.” In less than one day, Scroggs and Bowman were able to assemble the contact management system in Progress Rollbase and transfer the spreadsheet data into it. As they were taught in the workshop (part of 2014 series of Progress App Dev workshops with stop in Raleigh/Durham), they practiced data uploads several times before making the final transfer of the contacts into the system.

## Benefits: A Time-Saving, Low-Cost Contact Management System

The program now has a simple, unified, web-based system for contact management. Quantbase offers users a single point of view on students and employers. Quantbase automates Finance Math's data management processes. It provides a comprehensive repository of historical data the program can use for better targeted communication with employers, alumni and students. The program uses Quantbase to track student participation at events such as career fairs, student workshops, and seminars. And as a result, they can measure the interest level and value of such events accurately and precisely. Possessing a more agile and sophisticated way to manage its data, the program can take advantage of new opportunities and launch new programs.

"We can manage the contact in about 10% of the time it used to take," said Bowman. "It's easier and more efficient to keep contacts accurate, pull lists, do searches, and more because of Progress Rollbase." The program is more easily able to service students who are in the process of applying for internships and jobs. Reaching faculty, students, and alumni takes much less time than it did previously.

**"Building this application in-house is simply not an option. We do not have the resources to develop such a software resource, that's why Progress Rollbase is such a great fit for us."**

Jeff Scroggs, Financial Mathematics Professor  
and program Director NCSU

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Leslie Bowman, Financial Mathematics Director  
of Career Services NCSU

Program staff time has been freed from contact management and can be applied to other tasks. For example, if a recruiter calls to say that he has a new email address or phone number, the program staff can immediately enter the new contact information into the Progress Rollbase system. The process is far faster than what was required to open and update the spreadsheets. Anyone who accesses the system from any browser—including on tablets in any location—can have instant, up-to-date contact information for anyone in the program's database.

### A First Step

Finance Math's use of Progress Rollbase for a contact management system has been a success. It shows how a small operating unit of a larger organization can take initiative to solve a data management problem and leverage an economical but powerful tool to create a useful, secure system. Now, the program is planning to take the solution further, adding online self-service contact management and other features such as direct student access. With this feature, students can manage their own activities and provide admins with visibility into each student's job search. This is envisioned as providing program-wide visibility into which activities are most effective for landing a job. Finance Math's experience with Rollbase can guide other programs at NCSU to create their own data management solutions.

## About Alexander North Carolina State University

The Financial Mathematics Program provides technically trained professionals with an understanding of how to value financial derivatives and complex investments, and assess associated risks. Graduates must have a rigorous training in mathematics especially in the area of stochastic processes and probability, in statistics, and in computation, together with a foundation in the institutional operation of financial markets. The Program also provides a focal point for Financial Mathematics activities such as seminars and workshops. [www.financial.math.ncsu.edu/](http://www.financial.math.ncsu.edu/)

## Learn More



Introduction to Rollbase



A Tour of Rollbase low-code development platform



Adding business logic to your Rollbase application

## Visit Website

[www.financial.math.ncsu.edu/](http://www.financial.math.ncsu.edu/)

## About Progress

Progress (NASDAQ: PRGS) is a global leader in application development, empowering the digital transformation organizations need to create and sustain engaging user experiences in today's evolving marketplace. With offerings spanning web, mobile and data for on-premise and cloud environments, Progress powers startups and industry titans worldwide, promoting success one customer at a time. Learn about Progress at [www.progress.com](http://www.progress.com) or 1-781-280-4000.

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