



COMPANION TO THE BUYER'S GUIDE

Institutional Success Platform Selection Checklist

CHECKLIST

What to Look For in an Institutional Success Platform

Start Here: Are You Solving the Right Problem?

Before evaluating vendors, step back and pressure test your current system. You may already have key pieces in place—or an opportunity to better align efforts and resources for measurable impact.

ASK

- ☐ Do we know which students benefit most from intervention?
- ☐ Can we distinguish meaningful risk from background noise?
- ☐ Does insight travel across teams—or stay siloed?
- ☐ Do we learn from past outreach, or repeat the same efforts?

If these aren't clear, the issue isn't the tool. It's the system. The four steps that follow will help you assess readiness and evaluate platforms in a way that drives real outcomes.

STEP 1: Avoid Common Buying Traps



TRAP 1: Alerts = Action

- ☐ Does the system prioritize the next best action—not just flag risk?
- ☐ Are next steps clear and actionable?

TRAP 2: AI Without Adoption

- ☐ Can staff see why predictions are made?

- ☐ Is AI embedded in daily workflows?

- ☐ Are humans still in the loop of decision making?

TRAP 3: Predictions Without Prioritization

- ☐ Does the system rank where to act first?

- ☐ Are confidence levels clear?

- ☐ Does it reduce noise—not increase it?

TRAP 4: Platform Without Partnership

- ☐ Is there ongoing support after go-live?

- ☐ Will models evolve with our institution?

- ☐ Is there shared accountability for outcomes?

TRAP 5: Feature-Led Buying

- ☐ Does the platform strengthen our system—or add complexity?

- ☐ Can it connect data, teams, and decisions?

- ☐ Will the partner evolve with us?

STEP 2: Evaluate the Platform



HINT: Focus here! These are the capacities of a strong platform.

Connect Context

- ☐ Unified data across SIS, LMS, CRM, advising
- ☐ Shared view across teams

Prioritize Focus

- ☐ Clear identification of who needs support first
- ☐ Built-in triage and segmentation
- ☐ Suggested next best actions

Surface Patterns

- ☐ Trends across terms, courses, and cohorts
- ☐ Longitudinal analysis (not point-in-time only)
- ☐ Works for small and large populations

Reduce Noise

- ☐ Clear explanation of predictions
- ☐ Adjustable thresholds
- ☐ Supports multiple outcomes

Enable Action

- ☐ Clear, timely recommendations
- ☐ Workflows aligned to staff capacity
- ☐ Coordinated action across teams

Learn & Improve

- ☐ Measures what works (and for whom)
- ☐ Feeds results back into workflows
- ☐ Improves over time

STEP 3: Evaluate AI Carefully (Quick Test)



If answers are vague, risk is high.

- ☐ Are predictions explainable and transparent?
- ☐ Are models based on our institutional data?
- ☐ Do models improve over time?
- ☐ Are there clear governance and override controls?

STEP 4: Evaluate the Partner (Not Just the Platform)



- ☐ Implementation aligns to our workflows.
- ☐ Models are recalibrated over time.
- ☐ The partnership fits how teams work and evolves with institutional goals.
- ☐ Outcomes measured against institutional goals — retention, completion, and ROI.
- ☐ Vendor stays engaged post-implementation.

The work doesn't end at go-live. **Strategic Services** is how Civitas Learning partners — integrating analysis and practitioner expertise into the platform to turn insight into coordinated action and measurable outcomes, tailored to each institution.



Final decision check! Choose the option that...

- ☐ Reduces fragmentation across systems and teams
- ☐ Improves prioritization and decision-making
- ☐ Embeds insight into daily workflows
- ☐ Continuously learns and improves
- ☐ Comes with an operating layer connecting insight, action, and outcomes

If most of these aren't clear "yes" answers, the gap isn't the platform—it's the system behind it. Now is the time to step back and evaluate whether your current approach is built to drive coordinated, sustained impact.

For a deeper dive, explore the [Buyer's Guide to Evaluating Institutional Success Systems](#) or visit civitaslearning.com to learn more.

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