The CRM Project

Anthony Allen
SES CRM Programme

working together to provide an exceptional Student Education Service
Strategic Customer Relationship Management - background

Student Relationship Management

- Secure authentication
- A single point of contact for the whole student experience
- Flexibility to meet the differing needs of different cohorts
- Data captured accurately once at source
- Frequent, timely and relevant communications
- Consistent information and services available from multiple channels
- Recognition of who they are, their history and their potential
- Self service 24*7

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The Admissions Project:

• *What’s happened so far...*
  – ‘To be’ process mapping (PATs)
  – ‘As is’ process mapping (Conference Room Pilots - CRPs)

• *Recently...*
  – Tactical initiatives
  – Development of the Operating Model
  – SES Business Case
  – CRM procurement (appointment of Microsoft – supported by PWC)

• *What’s next...*
  – CRM Discovery
  – Implementation planning
  – Process re-engineering to meet Operating Model objectives
Admissions: The key issues identified from the CRPs and PATs

- The need to define an ideal applicant experience
- Major inconsistencies and inefficiencies in ways of working despite the overall headline process being similar across all areas
- Multiple contact points with the applicant with little if any coordination
- The current core systems Banner/Documentum/WebTop do not support the organisation in delivering a modern and timely service
- Multiple offline databases, spreadsheets and paper systems to support the process. The use of Access databases as a workaround to core process/system inefficiencies has become prolific. Every area looked at as part of the CRP had its own offline database to support the process
- Lack of applicant management information and no way of producing this in real time to predict numbers and take
- Many versions of the same information (in both electronic and paper based formats) – data protection and data management a real concern
- A lack of classification in the core systems or key student groupings (for example no way of identifying ‘Access to Leeds’ students, Study Abroad students, etc)
- Some ineffective processes and lack of timely communications
Admissions Project: Tactical Initiatives

• Major projects
  – International PGT deposits
  – Outreach CRM
  – Access to Leeds

• Smaller initiatives
  – Reference protocol
  – Application processing
  – Offer letter complexity
  – Qualification standards consistency
  – Communications
    • Communication schedules
    • UG, PGT, PGR Offer Guides
    • Accommodation communication
  – Interim improvements to the online applications form
  – Argos reporting
  – Internal clearing

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Development of the admissions operating model

Goals

- Principles
- Targets

Operating Controls

- Marketing / Communication
- Segmentation
- Governance Process
- Roles / Responsibility
- Systems
- Process Design
- SLAs
- Product development

Applicant Journey

- Prospect
  - Pre-application
  - Application submission
  - Application checking
  - Apply selection criteria
- Make decision
- Applicant notified
- Applicant responds
- Confirm entry criteria met
- Student On Campus

Review

- KPIs
- Management Information
- External changes / drivers
- Price and Product Review
How does the CRM fit in?

- Contact Management
- Campaign Management
- Event Management
- Workflow & Metrics

- Registration
- Student Record
- Student Admin

Outreach CRM
Admissions CRM
Student CRM
Alumni CRM

Student Information System (Banner)

UCAS Feed
Strategic CRM: mobilisation timeline

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Strategic CRM: mobilisation timeline

**Phase 1**  
Spring 2014

**Phase 2**  
September 2014

**Phase 3**  
September 2015

**Phase 4**  
2015 / 16 Academic year

**Enquiry**  
- Enquiry  
- Pre-application Marketing  
- Open Day

**Direct Applications**  
- PG Taught  
- Language centre  
- PG Research  
- Applicant acceptance to enrolment processes

**Undergraduate**  
- Application  
- Access to Leeds  
- International Foundation Year

**On course**  
- Single view of the student  
- Service management  
- Multi channel contact centre  
- Track progress

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Questions?