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# A MODERN CRM FOR HIGHER EDUCATION

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E-BOOK



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Right now, higher education institutions across the world are making fundamental changes to how they interact with their stakeholders. These stakeholders include prospects, students, alumni, corporate contacts, faculty members and donors: a diverse number of different audiences with different needs. To engage and communicate with these distinct audiences, universities are turning to technology.

This ebook will explain how a Customer Relationship Management (CRM) solution can help you communicate and stay connected with your stakeholders more efficiently. We'll have a look at the ways a CRM can streamline your team's processes and the specific features which facilitate this. We'll also outline a series of steps your university will need to take before adopting a new CRM in order to make the most of the new technology solution.

## What is a CRM for higher education?

A CRM is more than just a database designed to track communication with your stakeholders. Today, a CRM can provide universities with a view of prospects and customers across every channel – no matter where they are. To be able to do this, your CRM needs to be able to tap into all the software and systems that the modern university operates, which is becoming more and more complex.

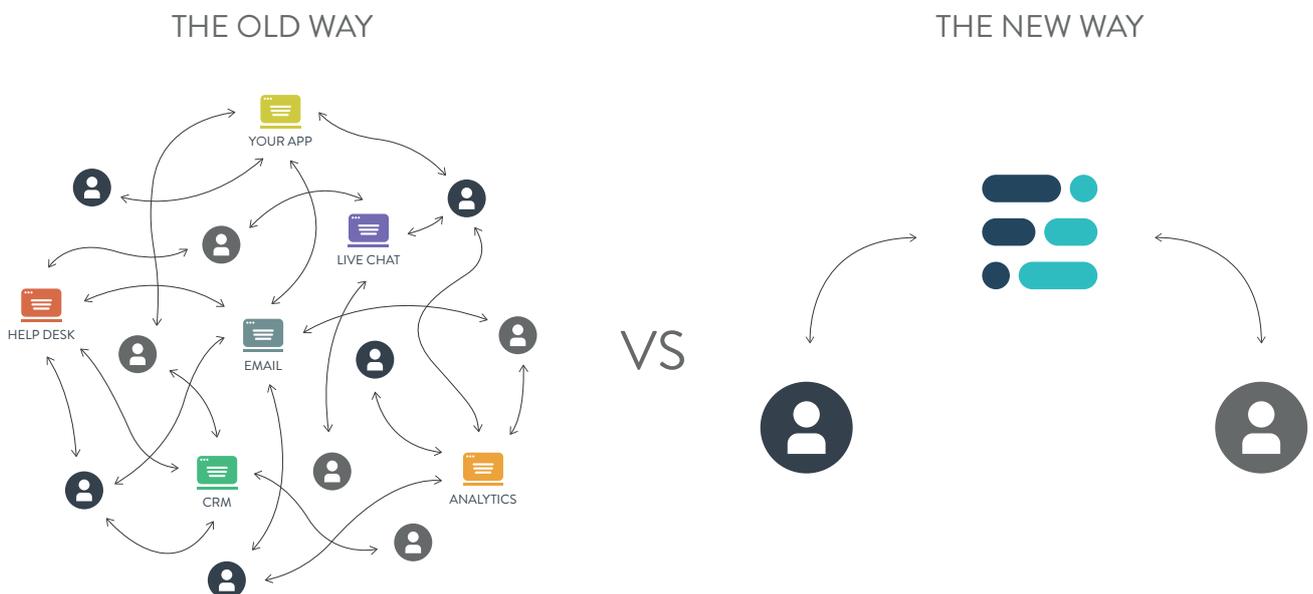
## A modern CRM should:

- Effectively manage all touchpoints with every single stakeholder
- Personalise your interactions
- Be customisable according to your processes and workflows
- Enable collaboration within your team
- Take analytics to the next level
- Be accessible from anywhere
- Be accessible on a pc, laptop, mobile and tablet

## Put your CRM at the centre

In every university, there will be a number of systems that departments and teams use to accomplish their work: for example, tools for event management, admissions, SIS and accounting systems.

An integrated and fit-for-purpose CRM pulls all this technology together, creating a platform that sits in the middle and catches all the information: the multifunctional piece of technology your team depends on.



The more teams and systems you have integrated into it, the more information you can collect and share across your institution. With more information available to all, your customers will receive a richer experience and your university will begin to make efficiency savings. The benefits can be multiplied many times over.

If you have spreadsheets everywhere, mountains of paper applications and different databases of contacts between departments, it's definitely time to think about adopting a CRM.

## The steps to success

Before you can implement a new CRM solution, there's a series of simple steps you'll need to complete.

### 1. KNOW YOUR TEAM'S FRUSTRATIONS

Before you can optimise the admission process, you need to understand your team's main frustrations. Typically, universities face three key challenges in optimising the admissions process:

- **Creating a consistent brand across channels**

While prospects may be willing to accept different service levels from different channels, they expect your brand to remain consistent. Channel proliferation makes this difficult to achieve

- **Integrating channel and brand experiences**

Legacy technology, inefficient processes and bureaucracy can all be barriers

- **Forming a single view of the customer**

To allow unified and coordinated communications, it's important to consolidate data to form a single view of a customer across interactions, channels and products. However, this can be hindered by departmental silos, fragmented data and inconsistent processes

By pinpointing the key stumbling blocks in your workflow you'll be better placed to determine exactly how a CRM can make things easier

## 2. UNDERSTANDING NEEDS

Secondly, you need to make sure you fully understand your team members' needs. Be sure to map each individual's workflow and highlight each part of the process that may prove problematic.

We've outlined what we think some stakeholders may list if you ask them what their needs are:

### MARKETING NEEDS



- Attract the best students
- Establish and maintain a good reputation for the university
- Establish and maintain a good position in the higher education industry
- Convince members of their department to adopt modern rather than legacy technology
- Establish and maintain a good relationship with the press and media

### ADMISSIONS NEEDS



- Admit the best students
- Ensure students complete the full application
- Ensure admitted students enrol
- Convince members of their department to adopt modern rather than legacy technology
- Maintain good relationship with alumni and maximise on fundraising opportunities

### MANAGEMENT NEEDS



- Achieve quarterly goals set by university directors
- Make all workflows as efficient as possible
- Ensure marketing and admissions departments communicate and work together
- Improve statistics year-on-year
- Achieve and maintain competitive alumni career outcomes and salaries
- Achieve and maintain high rankings
- Tools to complete detailed reports
- High-level security protecting all prospect, student and alumni data

### PROSPECT NEEDS



- Not have to input data multiple times
- Use technology and not have to use paper forms
- Complete selection and application process without undue stress
- An intuitive and simple application process not reliant on preexisting knowledge of higher education: this is likely to be the first time they'll be going through a process like this

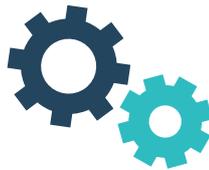
## How a CRM can help

- Nurture students throughout the whole lifecycle: from prospect to enrollee to alumna
- Maintain complete profiles of students. This centralises all information about a contact and helps you understand and measure your prospects' journeys at each touchpoint, across multiple channels
- Reach everyone in your community: prospects, enrolled students, alumni, staff, parents and other contacts
- Personalise every interaction according to behavioural data and personal interests
- Deliver relevant and insightful offers, recommendations, advice and actions precisely when prospects are most receptive
- Automate communications, freeing up your time for other tasks
- Increase retention: resulting in improved reputation, lower recruitment costs and protection of tuition revenue
- Achieve a more efficient workflow, allowing staff members to complete tasks easily and quickly. Cut down on paper use and the need to navigate between different data storage solutions
- Access, add and amend profile information 24/7, at the office or on the go using your mobile, laptop or tablet
- Provide students an easy way to upload information, pay course fees and communicate with staff
- Invite prospects, enrolled students and alumni to events. Send event reminders, track attendance and send follow-up messages
- Measure your return-on-investment. Gain in-depth insights into your marketing activities and channels and see exactly what's making money and how.

## Conclusion

A modern CRM saves time and gets results. It takes your data and transforms it into an interactive experience which lets you build better relationships with your stakeholders. A CRM gives your university a holistic, 360-degree-view of all of your prospect data, consolidated into one easy-to-use location that's accessible from anywhere and on any type of device.

Before your university implements a new CRM, you have to make sure you know exactly how your staff will make the best use of it; the processes the CRM will be able to streamline; and prepare your staff to put the CRM at the centre of operations. You should also be sure to effectively communicate the benefits of a modern CRM to every team member and make sure everyone's on the same page: collaboration is important in a successful implementation of all technology, and a CRM is no different.



## About FULL FABRIC

FULL FABRIC offers an integrated software solution to help universities manage the entire student lifecycle. We work with leading universities and highly ranked business schools across the world and take pride in helping them provide a better student experience while making processes easier and more intuitive for staff members.

Let us show you FULL FABRIC's CRM for higher education with a personalised demo. Visit our blog for weekly articles about higher education, technology and marketing and contact us if you'd like to learn more.



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