Relationship Management

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The challenge

UK Higher Education, Further Education and Skills are under increasing pressure to work with a diverse range of clients, as well as effectively managing the student lifecycle.

This throws up a number of challenges for the institution, which includes:

- How best to collect and analyse a vast range of complicated data in order to benchmark and measure an institution's performance against targets
- Culture change – breaking away from a silo mentality; communicating more effectively across departments; achieving staff buy-in; customer/service mindset
- How to maximise relationships and their potential value – whether financial or not
- Improve the student experience by providing a more efficient and better quality service

Jisc is investigating two areas of Relationship Management: Customer Relationship Management, and Student Lifecycle Relationship Management with particular emphasis on Alumni Engagement.

> …an ineffective relationship management system carries significant reputational risk.
>
> The Wilson Review (2012)

Customer Relationship Management (CRM)

CRM unites, and makes easily accessible, information about customers, communication data, marketing effectiveness, sales levels and market trends.

Bringing this information together makes it easier to get the benefit from your customer relationships as well as improving your service to those customers.

> CRM implementation within HE institutions is still underdeveloped, typified by 'islands' of CRM with little interaction.
>
> Study of CRM issues in UK Higher Education Institutions, KSA Partnership (2007)

CRM is not just about technology, but also about people, culture and processes. Understanding how these components interact takes time, and you should not rush technical implementation until you understand how these relate and how CRM technology can support them.

There are two key parts to adopting CRM:

1. Adopting the 'business philosophy' of CRM—the overall strategy for your customer relationships, new ways of working, and turning intangible assets (contacts etc) into tangible results, e.g. donations or collaborative contracts and business intelligence

2. Implementing and integrating CRM software itself and the related training

Student Lifecycle Relationship Management (SLRM)

SLRM refers to the ways in which institutions organise their connections with students over the lifetime of their association.

It's particularly focused on maintaining and deepening the social, academic and cultural bonds between the student and a range of staff and other students to promote better understanding and engagement by the learner.

SLRM is increasingly becoming a business necessity, as institutions seek to differentiate themselves from competitors through a range of measures, including the quality of services provided to their students, and to manage the costs of their processes by increasing efficiency and effectiveness.

> [Jisc] wishes to support institutions in improving the overall quality of the student experience, the efficiency and effectiveness of their administrative processes and relationships' contribution to adding business value and delivering success.
>
> 'Landscape Study of SLRM', Chambers & Paull (2008)

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Addressing the challenge

The Landscape

Jisc funded two landscape studies in the early stages of the Business and Community Engagement (BCE) programme to explore how it might best support these two challenges:

Study of CRM Issues in UK Higher Education Institutions

http://bit.ly/2ljiz7

Landscape SLRM

http://bit.ly/QDQeh

Managing external relationships

CRM Process-Mapping and Self-Analysis

Jisc funded the University of Nottingham to develop a self-analysis toolkit, empowering UK further and higher education institutions to think through their people, process, and technology issues before, during or after the implementation of a CRM system.

The CRM Self Analysis Framework[1], currently hosted by Jisc CETIS, can help you make sound and coherent strategic and operational decisions in an enterprise-wide approach to CRM.

Process Improvement Trials

To ensure that it was fit for purpose and to explore CRM related process improvement further, Jisc funded 13 projects[2] to pilot and extend the CRM Self Analysis Framework.

Every project developed a case study and a final report in which a large amount of knowledge, learning and experience have been captured. Some projects also maintained a blog to capture their thought processes throughout their journey.

All of those outputs are available from the Jisc CETIS website.

Employer Engagement

Jisc also funded five small-scale pilots to investigate and test the processes, system integration and technology infrastructure needed to enable institutions to manage and deliver an effective, sustainable and integrated workforce development and CPD service, in support of strategic employer engagement.

The Learning from Employer Engagement Programmes (LEEP) project[3] provides an overview of the key findings.

Self-Analysis Trials

A mixture of 13 organisations were funded to trial the CRM Self Analysis Framework (SAF):

Birkbeck University of London

Bournemouth University

Coventry University

Doncaster College

Knowledge House

Loughborough University

Roehampton University

University of Central Lancashire

University of Huddersfield

University of Hull

University of Salford

University of Wales, Newport

York St John University

"

Strong personal and professional relationships work best — employer engagement is a 'contact sport' and consideration needs to be given to how technology can support the person-to-person contact.

LEEP Project, McTavish & Haywood (2009)

1 http://jisc.cetis.ac.uk/crm-tools/
2 http://wiki.cetis.ac.uk/Funded_RM_Projects
3 http://www.jisc.ac.uk/media/documents/programmes/bce/leepfinalreport.doc

Enhancing student relationships

Student Lifecycle Relationship Management (SLRM)

Jisc funded 7 projects to explore SLRM, which typically focused on three areas:

1. **Listening to the student voice** – gathering data from students and staff via surveys, interviews, mystery shoppers, focus groups, video logs and diaries
2. **Blueprinting** – to identify 'fail points' or 'blockages', which signal where improvements need to be made
3. **Trialling improvements** – making small modifications to processes, which are then tested via small-scale pilots designed to assess the impact of the changes made

This helped institutions to enhance their student experience, improve their quality of service and provide them with a competitive edge. Project case studies, final reports and blogs are all available from the Jisc CETIS website[4].

Service Design

Service design is an approach where the end-users, the students, are the main focus and the student experience is viewed holistically rather than concentrating on the individual processes which support service delivery.

One project in particular, DERBI[5], found Service Design extremely valuable in enhancing the student experience.

The technique gained a large amount of interest, so much so that a briefing paper was commissioned[6].

7 SLRM projects funded by Jisc

Goldsmiths, University of London
Kingston College
Swansea University
University College Birmingham
University of Derby
University of East London
University of Hertfordshire

"

I attended one of the Service Design workshops, and worked on the initial Blueprint for our enrolment process.

It was really enlightening to place myself as the student and imagine the experience from their standpoint, rather than putting process first, which we do too often.

After seeing the outcomes broken down into a service design plan with such tangible elements I can really see where I can apply this to other processes that my team work on.

Beverley Matthews,
Programme Advisory Service
Co-ordinator, University of Derby

Coming soon...

Jisc are developing a CRM handbook to help Further Education (FE) Colleges and Higher Education (HE) Institutions in their CRM journey.

Its purpose is to guide you through all the key considerations and decision points involved in developing strategic CRM processes across your institution, including guidance on information and data management, change management and organisational alignment.

The handbook will be publicised via the BCE Blog and mailing list.

http://bce.jiscinvolve.org

www.jiscmail.ac.uk/jisc-bce

Relationship Management – An Overview

Jisc CETIS wrote an overarching synthesis report drawing out specific themes emerging from the aforementioned CRM and SLRM projects.

The report highlights key messages, outcomes and lessons learned from across the 20 Jisc funded projects that were complete at the time of writing (July 2012).

http://bit.ly/zAdA57

Coming soon...

Mutually beneficial alumni engagement enabled by web technologies

4 http://wiki.cetis.ac.uk/Funded_RM_Projects
5 http://www.jisc.ac.uk/media/documents/programmes/bce/derbicasestudy.pdf
6 http://wiki.cetis.ac.uk/images/8/82/Service_Design.pdf

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Benefits and impact

Strategically managing relationships can result in a number of benefits across the whole organisation, to a range of different people. The two sections below, and quotes provided, demonstrate the value Jisc has added to Higher Education, Further Education and Skills through the projects it has funded.

CRM benefits

Business Intelligence — helps to determine the financial viability and revenue generation of each business interaction

Curriculum Design — more highly skilled workforce resulting in improved productivity and profitability

Improved Collaboration — cross-departmental and cross institutional boundary working

Improved Efficiency — less duplication of data; recording of interactions makes it easier for other staff members to respond in the event of absence

Reputation — more responsive and a reduction of embarrassing incidents

Better Communication — tailoring information appropriately to the audience

Policies and Procedures — greater focus on data quality, access, integration, and ownership

Compliance — ensures the organisation adheres to any external regulations

SLRM benefits

Student experience – improved administrative processes and stronger relationships help lead to a better experience

Quality of services – efficiency of organisation processes and systems increased

Competitive edge – helps you to look at the organisation through a different lens i.e. the student

Quotes

"This CRM project has provided the background information on internal stakeholder needs, underlying processes within BCE and needs of external stakeholders so that a CRM system for BCE can be introduced in an informed way. It also offers the opportunity to reconsider some of the processes prior to CRM introduction to enable the planning of a better service to external clients."

- University of Central Lancashire, Holifield (2010)

"The improved processing around registering for and administering events and non credit bearing CPD courses will allow the team to increase the number of events and courses offered and therefore the revenue gained by a significant percentage, without the need to increase staff numbers."

- The University of Salford, Macpherson (2010)

"…we have seen a 54% increase in online application uptake since January. This has key benefits to all involved with students able to take advantage of online reference requests whilst admissions staff have more time to provide better services to applicants rather than manually entering application details."

- Kingston College, Williams (2010)

"CABLE has enhanced the quality of the service a distance learner receives by extending on-campus service provision to a distance learning context."

- University of East London, Reid (2010)

"Improvements in the way business, community and public relationships are handled will benefit the University and customers; for example having the ability to monitor whether enquiries have been followed up in a timely manner will improve customer service which can have a positive effect on the University's credibility and professionalism."

-The University of Salford, Macpherson (2010)

"The development of this team of CRM champions has significantly improved internal communications between business units and has enabled the project to develop "trust" between the teams to support the sharing of 'sensitive' contact information."

- The University of Salford, Macpherson (2010)