



Impact of CRM in Mechanizing University's Process, Business and Productivity

Manoj Kumar

CRM Consultant, IBM India Pvt. Ltd.

manoj.panwar@in.ibm.com

ABSTRACT

All universities and educational institutions seek to maintain information of all its currently enrolled students, affiliated colleges, Departments, alumni and participants. Moreover in the modern scenario it has become the need of Universities to consider their students as eCustomers for providing them 100% satisfaction. As a result of increasing enrolments day by day, there is a need of support system to better manage the ever increasing data and work processes. Currently, day to day operations of a university are carried out by manual process. Also, to monitor any activity sometime it requires the physical appearance of the user. Therefore, there is a great need to automate the university's manual processes using the CRM. It will optimize its operations by automating routine tasks and standardizing best practices to improve the day to day activities and of course the students/management satisfaction level. It will also enable authorities to make faster decisions through enhanced tracking of course enrolments and will give the ability to plan for new opportunities.

KEYWORD

CRM	Process
Business	Productivity
eCustomers	University

Preface

This paper provides an insight to the application of CRM to automate the university processes to enable them better manage their existing resources.

This paper is presented into 4 sections, Section 1 is the introduction, Section 2 discusses the current situation, Section 3 describes the possible solution and Section 4 describes the benefits of the CRM.

1. INTRODUCTION

Educational institutions worldwide are undergoing fundamental shifts in how they operate and interact with their “customers”: students, alumni, donors, faculty members, and staff members. Kotler and Fox (1995) state that “the best organization in the world will be ineffective if the focus on ‘customers’ is lost. First and foremost is the treatment of individual students, alumni, parents, friends, and each other (internal customers). Every contact counts!”

During the mid-1990s and the late 1990s, many colleges and universities began restructuring and reengineering their operating processes to cut costs and become more efficient while responding to increased competition. Yet these organizations also realized that building the in-house technology necessary to achieve these goals was expensive, difficult, and time-consuming. As a result, many turned to enterprise resource planning (ERP) applications. These applications helped them automate and optimize their internal business processes—in areas such as finance, grants management, student information, enrollment, inventory management, and human resources and freed them from some of the minutia found in day-to-day operations. The focus is currently shifting from improving internal operations to concentrating more on customers. Higher education customers are demanding more attention and immediate service—that is, “Internet time.” Proactive institutions are now adjusting their practices by refocusing their efforts externally. Because of the need to concentrate more on customers, many institutions are once again turning to technology— this time to customer relationship management (CRM) software. Similar to ERP, CRM solutions focus on automating and improving processes, although the focus is on front office areas, such as recruiting, marketing, customer

service, and support with lesser cost compared to ERP systems. CRM goes several steps further than ERP by helping institutions maximize their customer-centric resources.

2. Current Situation



“The solution supports end-to-end customer interactions, from the initial enquiry right through to the completion of the course and marketing of future courses.”

Lew Choong Heong ,
Director, Business
Process Solutions



Currently universities websites are the only source to provide the information to the existing students enrolled in the various courses, announcements and other activities but it is a one way communication as students can't interact with the websites but only get relevant information from them. Also, if we look into the “**Contact Us**” section of most of the universities they just

provide contact details of the University departments and don't have any separate “Student helpdesk/Support” units to resolve the students concerns on daily basis. In the modern era universities are treating their students as “eCustomers”, that is why it has become the basic need of every university/institute to improve its workflow systems by providing better support and strengthen customer support to its internal and external day to day operations. Improved workflow would enable any organization to better connect with its students, deepen its understanding of participant profiles, and provide support for effective marketing and management campaigns. It is also necessary to make the system as open as possible to its users to avoid possible discrepancies and also promote resource sharing among the internal users.

Distance education is also a challenging vertical for the universities where they need to do a lot to grab the students from the open market. Also to retain them for future courses would also be a challenge in this competitive market. This can be done by proving them top level support using the CRM operations.

Though the IT has grabbed into all spheres of the University operation but we have some admin operations that are still manual and the person

needs to get them done personally which is very exhaustive and time consuming. For example, in current scenario, if there is some discrepancy in the result of a student he/she has to personally visit the university administration department many times to get his/her work done. Student/University interactions such as issue of certificate/letter from the University, Clerical operations, work monitoring by the higher authorities, result discrepancies, mismatch data entries, operations to get the affiliation or accreditation by the colleges etc. These are the small things but plays major role in its day to day operations. CRM implementation can ease the life of an individual in such scenarios by enforcing a transparent ownership model which can also be monitored by the higher authorities, if required, for the smooth and fast processing.

CRM Solution

IT support has become a critical issue for universities, which are offering a greater range of computing resources to students and faculty members who, in turn, have become increasingly dependent on those resources in their daily activities. Fast, effective technical support is essential to optimize the educational experience and ensure the university realizes the full value of its considerable technology investments.

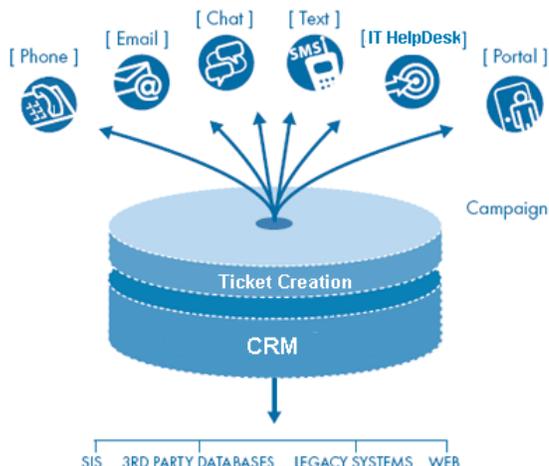
While there are surely many approaches being espoused in the market today, we believe there are seven main strategies that any University can employ to survive and improve student loyalty like:

1. Implement Ticket System for solving day to day issues
2. Automated Email routing /Case creation via mail
3. Phone call routing
4. Chat
5. SMS Text messages
6. IT help Desk
7. Integrate Knowledge base/ Portal with CRM

Institutions typically have identified and understand the key metrics which define “at-risk” criteria and the impact on losing students, but lack the ability to leverage that information to save the student before it is too late. CRM provides the vehicle to automate communication plans, targeting the highest-risk, highest value students with hands on activity such phone or face-to-face meetings with advisors, while

incubating low-risk students with personalized communications via low-cost channels such as email and SMS text messaging.

Pre-defined workspaces proactively present at-risk students to your advisor, based on risk level scores in order to highlight their risk before they leave campus. Dynamic workflows add at-risk students to pre-determined communication plans that automate timely communications via multiple mediums.



Ticket/Case Creation

The universities providing distance learning courses have lot of queries/concerns from the students on daily basis. Result discrepancy or attendance discrepancy and data discrepancy are the quite common issue faced by the students. Currently, either student needs to rush to the university personally or write them. There is no transparency in the existing system; a student doesn't know who is looking after his/her case or how long it is going to take to get resolved. There is no way to access the accountability of the concerned staff for the management. Using CRM operations a support application can be created for the generation of tickets/case for their problem and their efficient handling. A ticket is nothing but a summary of the problem with all the required information to get it processed. Every student can be identified by his/her enrollment number uniquely. Using the Support web application a user (student) can log in by providing his/her enrollment number as login id. CRM system will automatically fetch all the information of that student. Now the student is supposed to provide his/her problem description and also supply some mandatory information to the system so that the ticket can be dispatched to the queue of concerned department. Here, the “queue”

represents the “work group” of the same skilled personals. Queue can be configured according to the department like Examination, finance, Administration, Affiliation department etc. Employees would be the member of these appropriate queues. Once a case is dispatched in the appropriate queue, any employee can accept the case and start working on case resolution. As soon as a case is “accepted” by an employee the mail would be sent to the student regarding the status of the case till its closure. If no employee accepts the case with in time frame then CRM automatically can send the **escalation** mail to higher authority. This process will improve the accountability as well as will provide the quick resolution of the problems.

However, Some SLA (service level agreement) needs to be implemented in the University before implementing the CRM such that the **escalation** process can be carried out if no one is taking care of the issue within the SLA defined time frame.

Email

A CRM can be integrated to the Email server which can offer a quick, professional, cost-effective way to handle growing inbound inquiry email, Web form, and online application volumes at colleges and universities. A problem ticket can also be created via email by proving the necessary information. CRM system can parse the email and Case can be created against the student. Also a comprehensive, **rules-based** email response management system, improves constituent satisfaction with tools to provide timely, relevant, and accurate responses. An intuitive user interface and powerful productivity tools help staff members provide outstanding service levels.

Improve staff response time with intelligent routing and automation

CRM can automatically route each incoming email message to the appropriate staff member based on specified parameters, such as email subject and its content, language, staff member workload, constituent-staff associations or relationships, geography, code, agent skills, and time zones. As a result, the staff members can provide precise responses... quickly.

Enhance staff productivity

Powerful productivity features, including a comprehensive library of pre-built response templates and a knowledge base of articles and FAQs, ensure staff members provide personalized, consistent, accurate answers to all inquiries in a manner that is grammatically correct and approved by internal resources.

Phone

Phone lines can also be integrated with a CRM which can empower colleges and universities to efficiently and cost-effectively manage telephone interactions by merging data from disparate sources and threading a constituent’s entire interaction history into a single comprehensive system. Phone benefits tele-recruiting, tele-counseling, fund raising, IT help desk, and other groups that interact with constituents over the phone.

Provide top-notch constituent service with an optimized desktop

CRM linked Phone provides a powerful, optimized single workspace with access to all phone features, functionality, call controls, and resources necessary to provide helpful, efficient service. Students can be connected to **IVRs(Interactive voice response)**. Users can configure a desktop view based on their specific workflow requirements.

Provide consistent answers with dynamic call scripting features

CRM enabled Phone offers Dynamic Call Scripting, allowing your staff to build a script library using a simple graphical user interface. Easily personalize scripts by adding a name or inserting specific content. Recruit and retain students and facilitate donation telemarketing.

Enhance productivity with caller identification and screen pops

CRM integrates with interactive voice response (IVR) systems to enable sophisticated, customizable caller identification and notification features (“screen pops”) that provide unified contact history access. Calls and contact information arrive simultaneously into the phone workspace.

- Access the entire contact history from all channels in a single click

- Easily log call details to enable consistent support

Improve staff performance with better call control and management features

- Use automatic employee availability settings to accept, reject, transfer, and terminate calls
- Configure login mechanism to the automatic call distributor (ACD) based on user's call load and availability
- Perform warm-call transfers to another user or conference others in; transfer all associated context and data to that new user

Offer efficient third-party application access

CRM integrated phones can easily be accessed by external applications within the same screen pop. Integrate any ActiveX component, existing third-party applications, and many Web-enabled legacy systems. Students can be connected to IVRs, ACDs, and phone switch telephony equipment using industry-standard methods.

Chat

CRM integrated Chat enables institutions to communicate in real-time with online visitors, providing a dynamic way to answer questions, offer immediate assistance, or proactively engage visitors on the Web site. A cost-effective solution, staff members can proactively or reactively interact concurrently with multiple people while delivering personal and immediate attention to enhance the constituent's experience.

Optimize communication with instant text dialogue and collaboration functionality

Web site visitors can initiate a chat session from a Web site link, or your staff can proactively initiate the chat invitation based on predetermined visitor data attributes or actions. All chat session transcripts are automatically logged and added to the constituent's unique contact record. For added security, CRM encrypts sensitive information, such as credit card details and Social Security numbers.

Enhance staff productivity and improve constituent satisfaction

In addition to built-in routing and assignment strategies, staff have 24x7, single-click access to a unified view of all previous constituent interactions from any communication channel. Employees can quickly respond to inquiries using a knowledgebase of FAQs, response templates, Web links, and documents. As needed, employees can conference individual or multiple staff members into a chat conversation.

Supervise employees for consistently high levels of service

Train and supervise staff by auditing chat sessions, seamlessly taking over a chat session if necessary, or "whispering" information to the employee that is invisible to the constituent. Supervisors have a special chat workspace to view current queue status and chat session reports to monitor employee performance and load levels.

Ensure constituents have a positive chat experience

Set expectations by displaying queue position and wait times. Encourage a continued connection by notifying each party when the other is typing information.

SMS Text Messaging

Mobile device can also be used to create the tickets in the form of text message. CRM will automatically parse the text message and route them in a default queue. Also, CRM integrated SMS Text Messaging allows you to broadcast short messages and reminders. For example, admission changes the timing for a recruiting event; they will then be able to notify all attendees through an SMS blast about the updated timing, based on segmenting prospects by the region or by more specific class criteria if applicable. Financial Aid wishes to remind qualified students of application deadlines. Student Services needs to communicate an emergency notification, in real-time SMS Text Messaging can be leveraged by most any department on campus.

IT Help Desk

A typical help desk has several functions. It provides the users a central point to receive help on various issues. CRMs have the separate module for help

desk which typically manages incident (ticket) tracking system that allows them to track user requests with a unique ticket number. The help desk can often be an extremely beneficial tool for the universities when used to find, analyze, and eliminate common problems in a university environment.

Information Portal

Every university maintains its information through its internal web site or portal. CRM can be also be targeted to University's portal and the knowledgebase, which would be a powerful and robust system ,that enables constituents to instantly locate correct answers to their specific questions 24x7 via the Web site. Using CRM we can offer the facilities like FTS (Full text search) to the students. Also, the web site can also be integrated with the CRM to create the tickets from there and also the students can see the resolution status of there tickets as well.

Increase constituent satisfaction

CRM enabled Knowledgebase offers an intuitive user interface and flexible workflow experience that supports individual problem-solving approaches, improving first-time resolution rates. Inquiries are easily answered, as the solution actually opens the appropriate document and highlights the respective answer.

Conclusion

Faced with widespread economic, technological, and cultural change, academic institutions are looking to enhance the value and effectiveness of their existing customer relationships, while attracting new and loyal customers. As institutions begin embracing ebusiness and e-learning, the driving forces behind CRM will become even stronger. The notion of effective customer information management as a productivity issue is being replaced by the need for effective customer management as a competitive advantage. Tomorrow's systems will go far beyond productivity-related features (such as Web-based student registration) to the development of customer information as a strategic advantage. The concept of students, alumni, faculty members, and staff members as "customers" will become a competitive

imperative with profound impact on how colleges and universities attract, retain, and serve customers of all types.

REFERENCES

- i. Blattberg, Robert C., Gary Getz, and Jacquelyn S. Thomas, (2001), Customer Equity: Building and Managing Relationships as Valuable Assets, Boston: Harvard Business School Press.
- ii. Dyche, Jill (2002), The CRM Handbook. Upper Saddle River, NJ: Addison Wesley.
- iii. Edwards, John (2009-11-29). "Get It Together with Collaborative CRM". insideCRM. Tippit.
- iv. <http://www.insidecrm.com/features/collaborative-crm-112907/>. Retrieved on 2008-02-01.
- v. Gartner, Inc (2008-09-12). Gartner Says Worldwide Customer Relationship Management Market Grew 23 Percent in 2007. Press release.
- vi. <http://www.destinationcrm.com/Articles/ReadArticle.aspx?ArticleID=52164>
- vii. <http://www3.ntu.edu.sg/home/aszchen>
- viii. Kotler, P., and Fox, K. Strategic Marketing for Educational Institutions. Englewood Cliffs, N.J.: Prentice Hall, 1995.
- ix. Rust, Roland T., Valarie A. Zeithaml, and Katherine Lemon (2000), Driving Customer Equity. New York: The Free Press.
- x. Swift, Ronald (2001), Accelerating Customer Relationships. Using CRM and Relationship Techniques. Upper Saddle River, NJ: Prentice Hall.
- xi. Tsai, Jessica. January 2009. Predictive Analytics Can Pinpoint Profitable Customers. DestinationCRM.com.
- xii. User manual, AMDOCS Clarify CRM.
- xiii. Web Portals and Higher Education Technologies to Make IT Personal by Richard N. Katz and Associates, A Publication of EDUCAUSE and NACUBO, Copyright 2002 Jossey-Bass Inc. Published by Jossey-Bass, A Wiley Company. Reprinted by permission of John Wiley & Sons, Inc

