Customer Relationship Management (CRM) in Admissions and Records

AACRAO 2008 Annual Meeting
Orlando, FL
#293, 8:30-9:45
Wednesday, March 26, 2008
In Today’s Presentation

• Definition of CRM technology
• University of Minnesota
  • Meeting increasing student needs with finite staff and financial resources
  • Best practices for CRM implementation on your campus
• University of Michigan
  • Case studies of CRM use in the Office of Admissions and Registrar
• Questions
What is CRM?

- **Customer (Constituent) Relationship Management (CRM)** technology is used by organizations to develop and maintain relationships and manage interactions with people.

- Offers tools for managing both incoming and outgoing communications with constituents.

- Available from a variety of companies, and software can vary in function and price.
CRM in Higher Education

In higher education, CRM can provide an at-a-glance view of a constituent’s relationship with your college, including:

- Email exchanges
- Phone conversations
- Chat sessions
- Web visits
- Communications campaigns
- In-person appointments

Enhance communications and service to University constituents throughout their lifecycle:

- Prospective Student
- Admitted Student
- New Student
- Returning Student
- Graduating Student
- Alum
- Donor
University of Minnesota–Twin Cities

- Minnesota’s only research university
- 28,703 undergraduates
- Ranked 6th-best public in ASU’s “Top American Research Universities” study (2007)
Our overriding recruitment philosophy is to provide extra-mile customer service, because we believe that by serving others, the University serves itself.
Challenges We All Face

Volume: The 80/20 Principle

Complexity: Multi-Year, Multi-Channel Messaging

High Expectations: Consumer Mindset

Limited Resources: Finances and Staff
The Choices We Faced

Add Staff and Create a Budget Deficit
Fall Short of Constituent Expectations

or

Find a High-Tech, High-Touch Technology Solution: CRM
How the University of Minnesota Office of Admissions uses CRM:

- Self-service portal (Knowledge Base)
- Phone inquiry follow-up
- Email response
- Electronic communications campaigns
Outcomes for the Student

• *Easier to work with us!*
• Multiple channels available for service
• Instant information 24 hours per day
• Customized, proactive information from the University
• Average phone hold time is 23 seconds
• Email response time is 24 hours
• Seamless experience from Admissions, to Orientation, to College Advising & Career Center
Outcomes for the University

• Meeting and exceeding student/constituent service expectations

• Our Web’s self-service rate is 97.6%
  – In 2006, we had a 47% decrease in inbound email
  – In 2007, we had another 13% decrease

• No added staff, despite application increases

• Meeting University expected enrollment outcomes
Lessons Learned (so far)

1. Be thoughtful and purposeful.
What is your student service philosophy? How will this new technology help you meet the needs of your students?

2. Collaborate with campus colleagues.
By partnering with campus colleagues, you can bring costs down and find a solution that enhances student services from admission to graduation.
Lessons Learned (so far)

3. **Understand your options.**
CRM technology can vary. Does your unit need the bicycle model or the Harley Davidson?

4. **Take one step at a time.**
If your CRM package offers several functions, try implementing the functions one at a time.
5. Measure your level of service.

CRM technology offers innumerable ways to learn more about your audience. Learn how to use the analytics and constantly evaluate, evolve, and improve service to students.
Customer Relationship Management (CRM) in Admissions and Records

Paul Robinson | University Registrar
Erika Sanders | Associate Director | Office of Undergraduate Admissions
Undergraduate Admissions - The Situation and the Solution

29,000+ applications | 12,000+ admits | Freshman class of 5,600 | Undergraduate enrollment of 25,000 | Graduate enrollment of 10,000

• Call Center being overwhelmed by emails!
• Email dialogues – 2.5 weeks to respond at peak seasons
  • FY 02 – 49,755 emails
  • FY 03 – 93,280 emails
  • FY 04 – Implemented CRM Knowledge Base
  • FY 05 – FY 07 – 6,000–7,000 emails
• .5 FTE to manage – moving to 1 FTE
  • Accurate information available 24/7/365
  • 98.9% self service rate
Leveraging the Solution

- Using chat functionality
- Utilizing confidential Q&A as an office intranet that is accessible by student-workers
- Expanded to four interfaces
  - Added Registrar’s Office, Orientation, Graduate Admissions
  - Assisted with implementation
  - Semiannual meetings
    - Email group
    - Sharing best practices
    - Coordinate implementation of new versions
    - Discuss shared issues, and seek resolution with vendor
- Expanding use of work queues to support paperless review
Marketing Implementation

• Summer 2007 began use of Marketing tool
  – Email blasts to prospects on a weekly basis until application
  – Targeted communication to specific groups
  – Personalization of messaging
  – Complements “paper” marketing campaign

• Capabilities include
  – Html design
  – Extensive reporting
  – Segmenting messages
  – Scheduled campaigns
  – Web registration forms
  – Market testing (send email to x% of population at a time)
Dear Vanessa,

You have great academic potential, and an education from the University of Michigan opens a world of possibilities for you. Because of your excellence, you are invited to an Application Preparation Workshop - this is your chance to discuss and personally submit an application to your admissions counselor.

Visit our workshop schedule to choose one near you - but check it out today because they start next week! Keep an eye out for other events or school visits and learn how to become a Wolverine!

Vanessa, we are looking forward to meeting you and seeing your application soon.

Go Blue!
University of Michigan
Office of Undergraduate Admissions
Thank you for your interest in our Counselor Workshop! Please fill out this quick form, and note that all fields are required.

First Name
Last Name
Email
High School
ATP or CEBB Code
High School Address Line 1
High School Address Line 2
City
State
Zip

Will you be joining us for lunch?  ○ Yes  ○ No
Will you be joining us for a walking tour of campus?  ○ Yes  ○ No

Submit

---

Dear [Name],

Thank you for registering for our Fall 2022 Counselor Workshop to experience admission at the University of Michigan. This workshop will include breakfast, real case studies, staff and student panels, and an information fair and campus tour. We are so excited to spend the day sharing our process with you. Please arrive by 8:30 a.m. at the University of Michigan Union (230 E. State Street, Ann Arbor, MI 48109). Parking is available at the Michigan Street Parking Structure (at Michigan and William) and we will validate your ticket upon your arrival at the Union.

Go: [Name]  
Office of Undergraduate Admissions

Questions? Please visit [webpage] or contact:  
Mia Matsella, Recruitment Coordinator  
matsell@umich.edu  
734-647-3750

Melissa Perez, Senior Admission Counselor  
perezm@umich.edu  
734-936-2185

THURSDAY, OCTOBER 17  
FROM 8:30 a.m. - 1:00 p.m.
Sample Campaign Set-up
How the Office of the Registrar uses CRM

Business Objective:
• Reduce number of “general” incoming phone calls and e-mails
• Promote self-service – make web site information easier to find
• Centralize incoming customer/department requests
• Provide better overall customer service!
How the Office of the Registrar uses CRM

Challenges:

• Decentralized Campus – Second of 4 interfaces to come on board
• Office of Undergraduate Admissions to upgrade from version 5.5 to 6.0
• Analyze and organize existing web site content
• Identify and name content managers/business owners across the office
• Train 42 staff members to use the product
How the Office of the Registrar uses CRM

Today:

• Self-service portal (Knowledge Base)
• Centralized e-mail message access and tracking
• Workflow (Queues)
How the Office of the Registrar uses CRM

Self-Service portal (Knowledge Base - Demo)

https://umich-regoff.custhelp.com/cgi-bin/umich_regoff.cfg/php/enduser/std_alp.php
How the Office of the Registrar uses CRM

Centralized e-mail message access and tracking

- biodemo.updates@umich.edu
- final.exam.committee@umich.edu
- finalexams@umich.edu
- registrar@umich.edu
- ro.audit.staff@umich.edu
- ro.curriculum@umich.edu
- ro.diploma.staff@umich.edu
- ro.grades.questions@umich.edu
- ro.records.staff@umich.edu
- ro.reg.appt@umich.edu
- ro.registration.questions@umich.edu
- ro.schedule.questions@umich.edu
- ro.transcript.order.questions@umich.edu
- ro.tuition@umich.edu
- ...
How the Office of the Registrar uses CRM

**Workflow (Queues)**

![Image of CRM workflow interface]

<table>
<thead>
<tr>
<th>Reference #</th>
<th>Subject</th>
<th>Status</th>
<th>Queue</th>
<th>Contact</th>
<th>Assigned to</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>070917-000142</td>
<td>CIS Room Request ~ Michigan Japanese Quiz 80</td>
<td>Waiting</td>
<td>RO Event Scheduling</td>
<td>Jane Granich</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>071029-000093</td>
<td>1BOL 225 Review Session for Biol. 225 (1221)</td>
<td>Waiting</td>
<td>RO Event Scheduling</td>
<td>Christine Przyb</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>070815-000050</td>
<td>SS 08 Pharmacy 1544 CCL</td>
<td>Waiting</td>
<td>RO Event Scheduling</td>
<td>Pam Taylor</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>071105-000051</td>
<td>FWU room request update</td>
<td>Unresolved</td>
<td>RO Event Scheduling</td>
<td>Marc Kavedel</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>071105-000047</td>
<td>ECON 668 office hours</td>
<td>Waiting</td>
<td>RO Event Scheduling</td>
<td>Karen Dec</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>071105-000046</td>
<td>3 Final Exams on the same day (5,6, and 8)</td>
<td>Waiting</td>
<td>RO Final Exams</td>
<td>Stephenie Lask</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>071105-000032</td>
<td>FWU room on Dec. 14</td>
<td>Unresolved</td>
<td>RO Final Exams</td>
<td>Allison Friendly</td>
<td></td>
<td>Print</td>
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<tr>
<td>071101-000073</td>
<td>grading scale</td>
<td>Unresolved</td>
<td>RO Grades</td>
<td>Kendra Carver</td>
<td></td>
<td>Print</td>
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<tr>
<td>071102-000140</td>
<td>Scholars to Activate for the week ending Nov 2</td>
<td>Unresolved</td>
<td>RO Records Staff</td>
<td>Michael Andrus</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>071102-000139</td>
<td>Proxy Request</td>
<td>Unresolved</td>
<td>RO Records Staff</td>
<td>Mary Kelley</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>071102-000125</td>
<td>Request for Embedded Masters</td>
<td>Unresolved</td>
<td>RO Records Staff</td>
<td>Beth Goodwin</td>
<td></td>
<td>Print</td>
</tr>
</tbody>
</table>

Logged in as: Debbie Harju  | 102 Records
How the Office of the Registrar uses CRM

Results:

• Twenty-six active queues (work groups) responding to incidents
• Office has responded to over 54,000 incidents since February 2005
• Maintain current web site information – all published answers are reviewed/updated at least once a year
• Maintain a minimum 99.6% self-service rating
Best Practices Recommended:

(Multiple Interfaces)
- Establish and maintain naming conventions
- Establish and maintain communication plan(s)

(General)
- Establish and maintain content plan (content managers/review cycle)
- Develop and maintain user training materials
- Continue to evaluate/implement functionality
Questions?

University of Michigan

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