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DELIVERING ON THE PROMISE.

# Customer Experience and CRM in Higher Education.

As universities increasingly turn their minds and efforts to the challenges of a rapidly evolving market; many are looking for ways to leverage CRM to deliver the experience students and others have come to expect.

To get CRM right however, we must look beyond 'installation' of software to implementing solutions that tie directly to the delivery of expected outcomes. Universities can increase their ability to deliver an exceptional user experience and expected outcomes, through an increased focus on:

- Clearly and concisely articulating the problem to be solved and the outcomes sought; ensuring they are complete, measurable and proactively managed.
- Designing for the target state before leaping into development.
- Ensuring experience design takes a holistic view across the enterprise and caters for the diverse needs of audience groups at different stages in their journey; both on and offline.

This paper provides insights to help organisations navigate several key challenges and avoid some of the common mistakes we have seen in CRM and customer experience implementations.

# 1 Be clear on the problem you are trying to solve.

Systems implementations can take on a life of their own - losing sight of the strategic intent (why are we doing this? What problem are we trying to solve?) and the target state (where are we headed?). In the absence of clear strategic direction, project teams are inclined to focus their attention on what is immediately in front of them; typically functionality and screen design, at the expense of delivering the full range of benefits and outcomes expected.

Key drivers will vary across institutions and are typically well understood at the executive level. A disconnect can occur when this strategic intent is not translated for project teams and key stakeholders, who are often unclear

unclear on the key problems or challenges the organisation is trying to address and the specific outcomes sought.

Clearly articulated and measurable strategic intent:

- makes concrete the vision and expected outcomes of CRM
- can be translated into clear goals for project teams
- informs design
- gives shape to the target state
- allows for prioritisation of outcomes and the development of a roadmap that balances risk and reward.

# 2 Consider the target state.

There are many well documented cases of projects that have gone awry due to piecemeal investments in siloed solutions; caused by insufficient focus on the target state architecture. Eager to capture “quick-wins” – project teams often pay insufficient attention to the essential first steps: designing and documenting the architecture needed to support the expected outcomes.

This short-sighted approach can lead to a host of issues including:

- functional duplication;
- data redundancy;
- poor data quality;
- prolonged project timelines;
- clunky integration; and ultimately,
- a disconnected user experience.



*Organisations that take the time to design for target state architecture up front, have a much greater success rate in delivering the expected benefits of CRM.*

Key internal and external organisational drivers are the first consideration – how can CRM contribute to organizational objectives? What are the key drivers? How can we maximise effectiveness? (e.g.: implementing across the organisation wherever customer touch-points exist – not just in isolated areas).

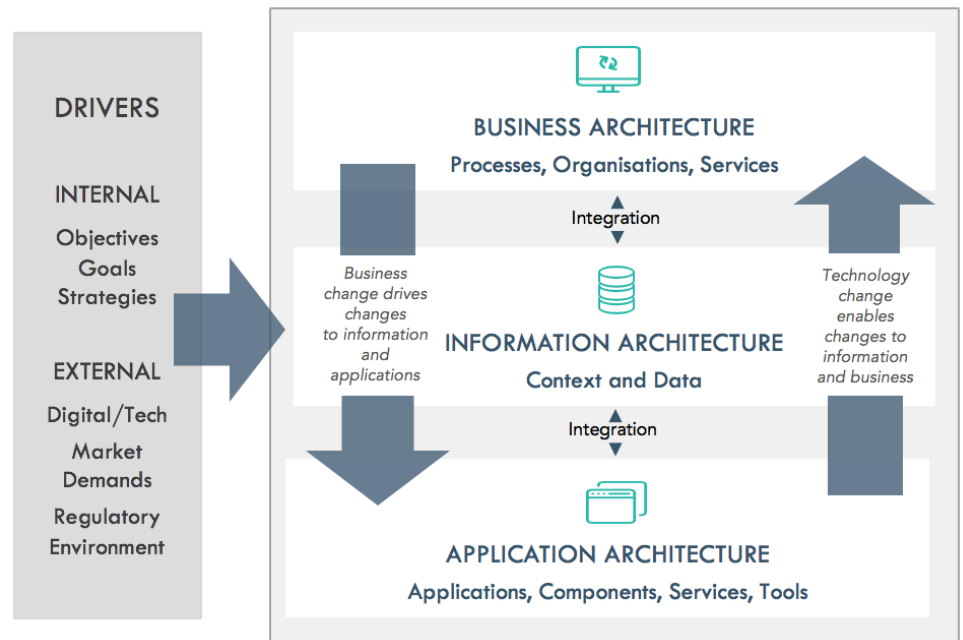
These key drivers and objectives should inform the target state design for business, information and application architecture; ensuring strategic alignment across the organisation.

Business, information and application architecture support and inform each other and should be designed in unison to ensure alignment of objectives and outcomes across each domain.

A key consideration when designing target state architecture, is how best to achieve a seamless, ‘omni-channel’ integration of process and data across various platforms.

CRM should be the ‘experience platform’ that manages customer touchpoints and orchestrates data and ‘experience

processes from multiple transactional platforms. Data integration and synchronisation considerations are also paramount; including ensuring the ‘source of truth’ for student and prospective information is understood and clearly documented.



Internal and external organisational drivers inform the target state architecture. Considering business, information and application architecture in unison is key to enabling the development of a superior user experience.

# Key architectural considerations for CRM implementations in higher education.



## BUSINESS ARCHITECTURE & DESIGN

- What parts of the student journey will be digitised ?
- Will there be multiple service channels ? If so, how should they be harmonised and integrated to provide a seamless experience ?
- What functions are best provided via self service ?
- How will integration be achieved from both a process and data architecture perspective ?



## INFORMATION ARCHITECTURE

- What will be the source of truth for student & prospective student data ?
- How will a single view of student and prospective student be achieved ?
- How will student and prospective student data be synchronised across all student related systems ?



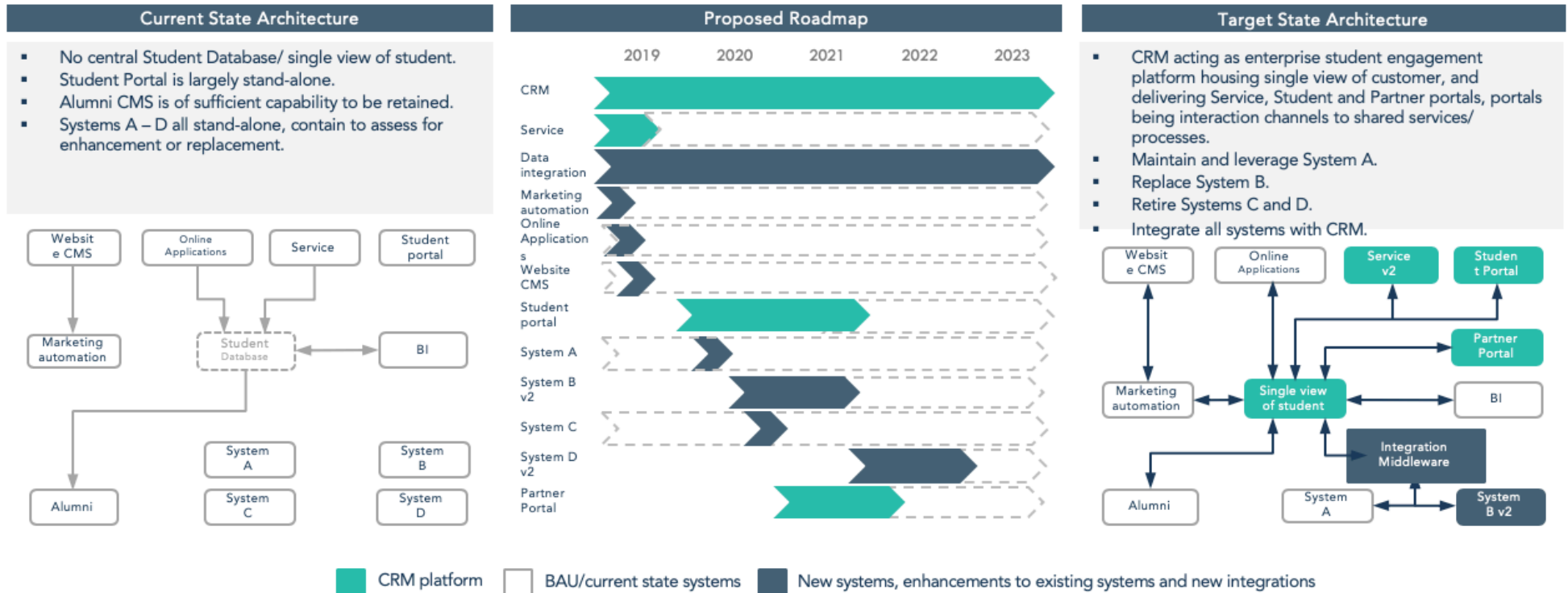
## APPLICATION ARCHITECTURE

- What functions should be in the core CRM solution versus other systems ?
- Should workflow be provided via the core CRM platform or via a specialist workflow tool ?

Documenting the target state should include developing an **architectural roadmap** that highlights the key activities to transition the business and IT architectures from current to target state. Uncovering these transitional activities in the early phase of the project, facilitates timely identification of potential risks and issues; reducing the likelihood of unexpected delays during implementation.

A pragmatic architectural governance regime should also be instigated to ensure the program stays true to the architectural intent and product releases and business changes are converging toward the target state.

Sample architecture (simplified) and roadmap for CRM and related systems.



# 3 Take a holistic approach to experience design.

The importance of experience design is escalating at a phenomenal rate, with expectations as to what constitutes a 'good experience' rapidly evolving. Digital and social design innovations, spearheaded by major brands such as Uber, Apple, Netflix and Amazon, are dominating the market and the minds of consumers. These brand experiences are now the benchmark for all industries and are what consumers compare their experiences to.

Higher education students are savvy digital consumers with high expectations of service and accessibility. Information on-demand, across multiple channels and devices and tailored to their needs is expected. At the same time, the higher education industry is undergoing rapid change, with enrolments increasingly comprising overseas students.

The power dynamic is shifting, with prospective students needing to be treated as customers to be 'won over', in a globally competitive market.



# What does it take to design and implement a compelling customer experience that meets expectations?


Whilst there are a variety of design techniques at our disposal, when it comes to creating a superior user experience for service delivery, Human-Centered Design (HCD) plays a central role. HCD is often misunderstood or too narrowly applied; with an undue focus on techniques and processes, at the expense of staying true to the core principles of HCD.

Well executed HCD and related user experience design techniques should ensure:

- All people impacted by the service/process are central to design considerations and decisions.
- The right problems are being solved. Avoiding the pitfalls of focusing on 'symptoms' in isolation that do not necessarily address the root cause of the problem.
- The whole system is factored in – breaking down organisational silos, isolated processes and platforms to enable a holistic, seamless view of the end-to-end experience.

The work of experience design commences with identifying and understanding the perspective and experience of multiple audience groups, factoring in the diverse needs of key higher-education segments:

- **Different student cohorts**, including; domestic - current school leavers; domestic - mature age and international students.
- **Students at different stages in their academic journey**, including; first-time students; students transferring from other courses/institutions and post-graduates.
- **People and organisations acting on behalf of students**, including agents and parents.
- **Institutional partners.**
- **Employees.**



Experience is only as good as its weakest link. If the employee experience is fragmented; so too the student and external customer experience will be. Multiple touchpoints within the institution and poor continuity of service, leads to frustration for all concerned and represents a significant cost and lost opportunity. Looking at the experience for each engagement and each audience group holistically (on *and* offline), holds the key to a better understanding of how to unlock the true value of CRM.

Mapping the experience for each key audience group must go beyond the bounds of online transactions. Too often what is missed or underestimated in this process; is the relationship between the experiences of different groups and what happens 'off screen'. Design and mapping is often focused almost exclusively on the student's interaction with digital platforms – the online steps they go through to apply for a course. This is of course, a central consideration, however it fails to recognise the interplay of relationships, emotions and offline steps that contribute to the overall experience and decision-making process.

Ensuring a seamless and engaging process across multiple segments and steps in the journey is essential and

should be mapped and designed holistically; including designing for a truly seamless experience across multiple channels.

A common mistake made by organisations as they rush to be mobile; is the creation of stand-alone apps that further fragment the user experience. Being mobile isn't enough – full integration across multiple channels is essential.

To be effective, we must conduct this mapping process with representation from each of the key segments internally and externally; considering and resolving pain points and the desired target state; where-ever possible anticipating the needs beyond 'now' and looking to the foreseeable future.


Translating the outworkings of experience mapping into workable solutions that optimise user experience; also involves applying design thinking and human-centered design techniques to quickly test and adjust proposed solutions. This process can be enabled using a variety of techniques including:

- Prototypes in various forms (wireframes or actual web screens) in rapid cycles to test design variations with the target audience.
- Launching 'beta' releases to limited live customers, to identify further improvements from real-world conditions, before further modifying and release to all customers.

These techniques not only contribute to the design of a superior user experience, but also lay the foundation for building momentum and buy-in with internal and external stakeholder groups.



Tailored experiences can often be designed for multiple audience groups by providing different access and visibility levels, whilst sharing the same automated processes; both parties operating seamlessly under the same environment rather than silos.



Devising solutions to key organisational challenges, compels us to look beyond the implementation of software and take a holistic approach. CRM can be the catalyst for true transformation and has the potential to deliver significant benefits. By ensuring the solution:

- aligns with the organisation's strategic intent
- is designed with the target state in mind
- Is based on a holistic, human-centred approach

universities have the opportunity to unlock the true potential of CRM and implement a superior experience for students, partners and employees.



## ABOUT MOZAIC.

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[www.mozaicmgt.com.au](http://www.mozaicmgt.com.au)



### PHONE

Call us to discuss your needs or arrange a time to meet.

+61 (0)2 8076 7475



### EMAIL

Send us a message and we'll get back to you to discuss your needs.

[info@mozaicmgt.com.au](mailto:info@mozaicmgt.com.au)