salesforce foundation

HIGHER EDUCATION:

YOUR COMPLETE CRM HANDBOOK

EVERYTHING YOU NEED TO KNOW TO GET STARTED WITH CRM

Introduction

WHAT IS CRM?

CRM is much more than a buzzy acronym that's been tossed around the business and sales world for the past decade or so, and higher education institutions are putting it to use for recruiting, student success, advancement, marketing, and more.

C-R-M stands for "Constituent Relationship Management."

With a CRM application, there's no secret formula. It simply manages most of your critical constituent information so you can see it all in one place. Without leaving the app, you can view contact info, follow up via email or social media, manage tasks, and track success metrics, among other benefits. Implementing the right CRM can increase institutional efficiency. You can improve relationships with prospects, students, alumni, faculty, staff, and corporations.

Is it time to invest in a CRM?

The contents of this e-book will help you determine that. Over the next four chapters, we will examine the following topics:

- Signs your school needs a CRM
- How CRM can improve your productivity and efficiency
- Building your CRM strategy
- How to maximize your ROI

First up, the 7 signs your business needs a CRM.

Table of Contents

Chapter 1

SIGNS YOUR SCHOOL NEEDS A CRM

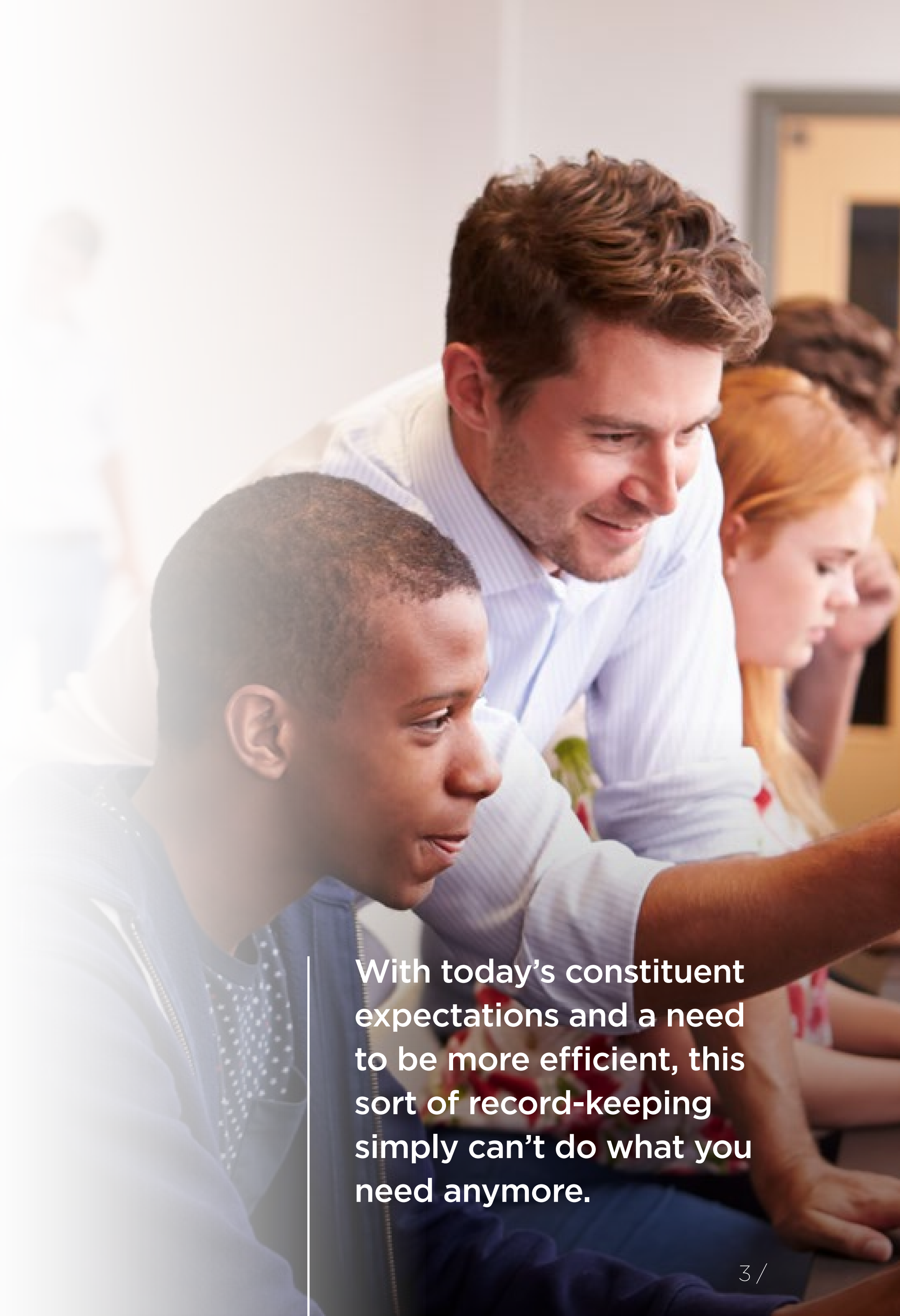
Relationships in higher education can begin in a plethora of ways – from a prospective student requesting information on your website to gift officers calling on alumni. Many departments may keep track of the status of tasks, transactions, and notes on an Excel spreadsheet, but this simply doesn't scale and is very inefficient. As your school's operations grow and you need to share information across departments and with peers, this sort of record-keeping can't do what you need anymore. Here are some warning signs it's time to trade in those old ways and start managing your relationships more effectively:

1. There's no single source for information.

Storing constituent relationship information in more than one location, such as a spreadsheet or notes stuck to your computer, puts your teams at a disadvantage. They lack a single view of every constituent interaction, request, donation, etc.

2. There's little or no visibility.

Not only do you lack visibility into how your constituent groups are connecting with your school, you also lack insight into what your different departments are doing. This makes it difficult to help them be successful – and keep them accountable.



> **With today's constituent expectations and a need to be more efficient, this sort of record-keeping simply can't do what you need anymore.**

3. Reports are tedious and painful.

Generating reports and analytics of your team's monthly progress would be ideal. But creating reports manually is cumbersome, often resulting in no tracking at all.

4. You are losing data.

It's hard for you to schedule follow-ups with prospects and potential donors. Great meetings happen on the road, but teams don't always transfer their notes and important details get lost, especially if staff leave the institution.

5. It's hard to stay in touch on the go.

Your recruiters and gift officers are out in the field, meeting with prospective students and donors and discovering valuable info. But all this new data gets stored on handwritten notes or in files on personal computers, instead of being shared with the team.

6. Every stakeholder is treated the same.

Your communications are not targeted or personalized. For example, you don't target potential donors based on their value to the school. Rather, you are sending the same messages to donors in very different stages of the giving process, as well as in different segments and geographies.

7. You lack a plan to scale fast.

At a time where you have to do more with less, are you using your staff's time efficiently? Are they spending so much time with manual processes that they can't work more strategically? If someone left, would you lose all the information about their work?

If any of these apply to your school or one of your departments, don't despair. These are exactly the issues that a CRM system can address. Next up, let's take a look at how a CRM makes your institution more efficient and productive.

Does your institution need a CRM?

Not sure if your institution is ready for a CRM? If you check any of the following boxes, a CRM could dramatically improve your institution's performance.

- [ ] There's no single source for information
- [ ] There's little or no visibility
- [ ] Reports are tedious and painful
- [ ] You are losing data
- [ ] It's hard to stay in touch on the go
- [ ] Every stakeholder is treated the same
- [ ] You lack a plan to scale fast

Chapter 2

HOW CRM IMPROVES EFFICIENCY AND PRODUCTIVITY

You probably know the old saying, "there never seem to be enough hours in the day." This is especially true in higher education.

When you use your time more effectively and efficiently, it becomes much easier to meet and exceed success metrics. Colleges and universities that succeed do so by creating open and efficient lines of communication internally to ensure every department is on the same page and has access to the same information. That is where a CRM application comes in.

Break Down Silos

Bridging the data gap between departments can be challenging for any organization, let alone a complex higher education institution. Siloed departments often struggle with things like:

- Inability to route prospective student leads to the appropriate team member
- Lack of information on potential donors
- Inability to connect students with the right department for fast support
- Poor visibility into constituent information and lack of constituent engagement.

"Our student recruiter productivity has tripled with Salesforce. What used to take weeks or months now takes minutes."

-Algonquin College

A CRM app facilitates collaboration amongst faculty and staff so they can share files, team up on cases or tickets, and discuss projects – all from within a single system. Plus, it tracks activity so you can visibly measure your success.

Time to Get Stuff Done

Obviously, people need time to do their jobs well. But by eliminating some time traps, you can significantly improve operational efficiency and productivity. Here are some things that can be easily fixed:

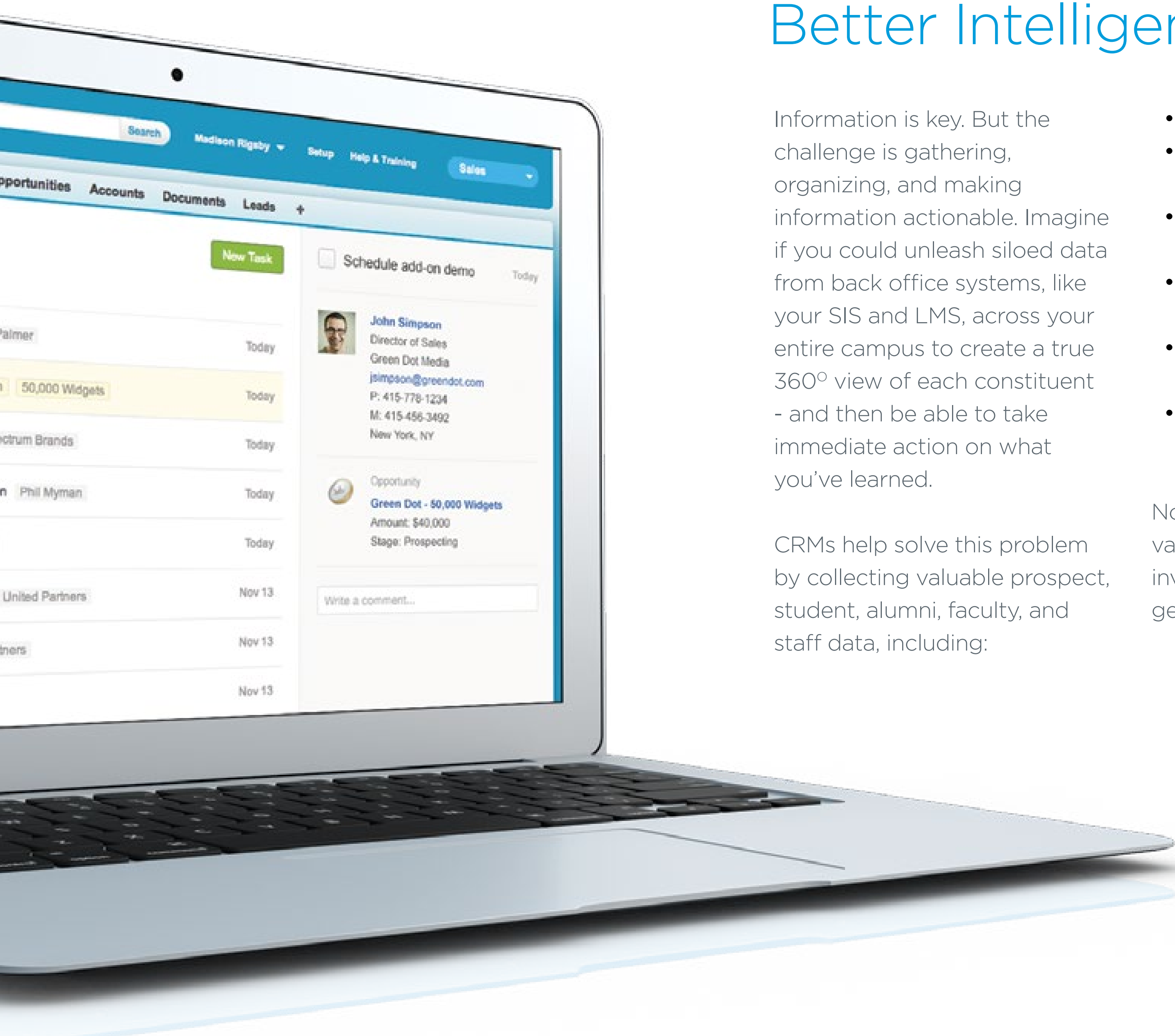
In a mobile world, many of your recruiters and advancement professionals are out on the road as are other staff members. Having the ability to access a constituent's record, submit a report, take notes, send out information, or move a prospective donor along the lifecycle from their phone or tablet, wherever they are, saves a ton of time and improves the constituent experience.

- Automation of repetitive tasks gives the team more time to concentrate on building relationships

- Providing one channel for teams to share information and connect eliminates endless email loops and phone tag.

The right CRM system syncs with mobile devices anywhere, anytime via the cloud, so the entire team is on the same page and has the most current information at their fingertips.

> "A CRM allows an institution to store data on constituents so information is ready at each interaction."



Better Intelligence

Information is key. But the challenge is gathering, organizing, and making information actionable. Imagine if you could unleash siloed data from back office systems, like your SIS and LMS, across your entire campus to create a true 360° view of each constituent - and then be able to take immediate action on what you've learned.

CRMs help solve this problem by collecting valuable prospect, student, alumni, faculty, and staff data, including:

- Prospective student history
- Current student status and preferences
- Constituent social media presence
- Past interactions with alumni and donors
- Constituent relationship maps
- Student case history

Now that you've seen the value of a CRM system, let's investigate best practices for getting a CRM strategy in place.

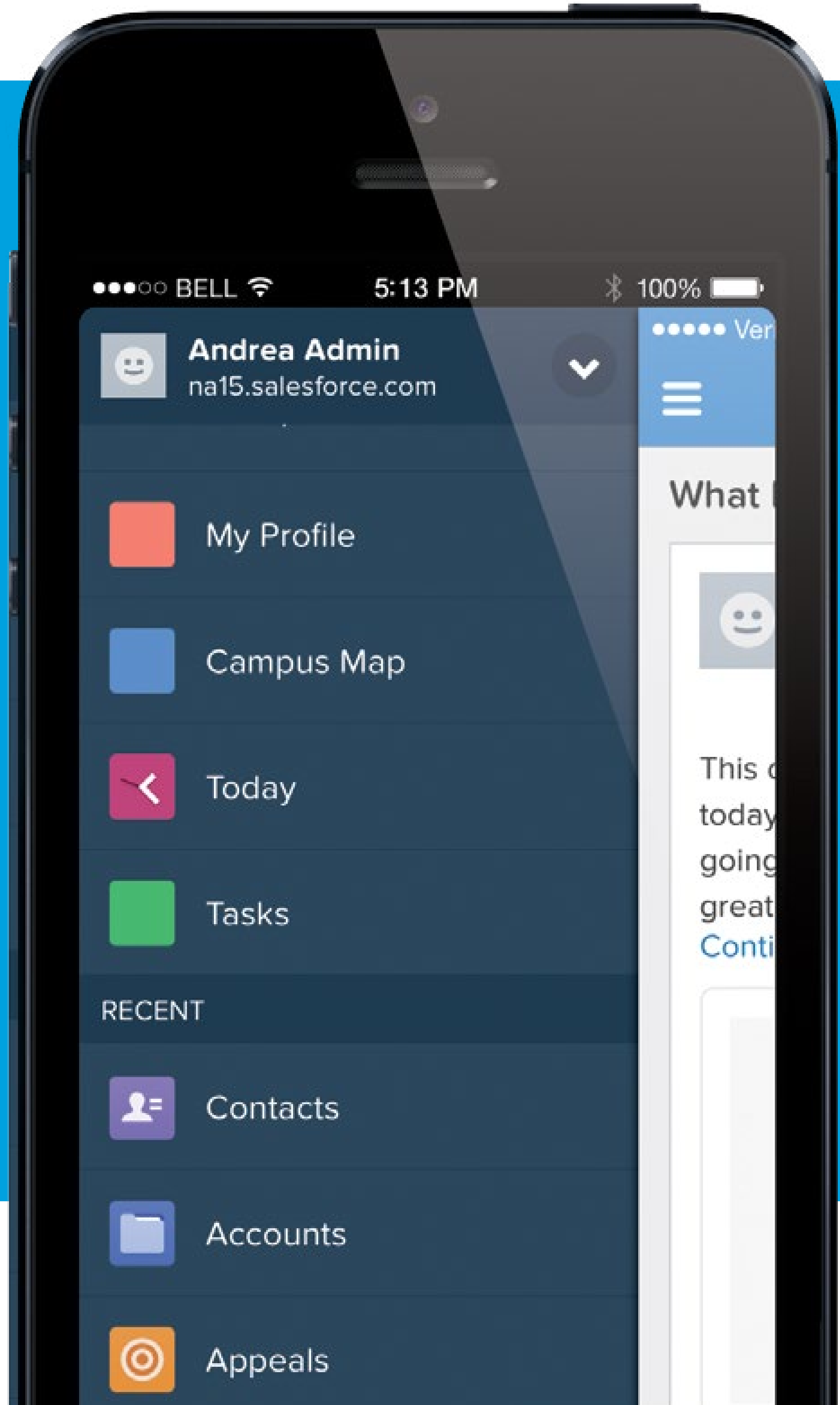
DON'T FORGET TO THINK MOBILE

The Mobile Campus

As you consider CRM solutions, it's important to consider that the modern recruiting team, for example, is no longer confined to their desks for 8 hours a day. They are always on, always connected, and incredibly mobile. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity, and fits into your team's existing workflows.

Mobile CRM Tools

When considering CRM tools, you'll notice that a rare few have functional mobile components. Make sure the technology you are considering does not just add mobile functionality as an afterthought. Solutions like Salesforce were built mobile-first with a team's productivity in mind. Designed with apps and features that streamline organizational process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your institution, and one that revolutionizes it.



Chapter 3

HOW TO CRAFT A CRM STRATEGY

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from a business perspective. Here are seven basic steps to build a winning plan:

1. Define Your Vision

Some people dismiss vision statements as a waste of time, but successful leaders know the value of having a clear, repeatable, action-oriented vision that your team can rally around. Your vision can be many things, from increasing graduation rates, to redefining education for non-traditional students. Make it both aspirational enough to have an impact, and clear enough that the entire institution can understand it.

2. Define Your Strategy

Strategy is what makes your vision achievable. Say you want to be the largest education institution. Do you do this by changing recruiting processes, or offering unique student services, or by revamping your marketing plan?

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from an institutional perspective.

Building your CRM strategy.

Set yourself up for success by building a comprehensive CRM strategy. Take the following steps to hit the ground running.

- ☐ Define Your Vision
- ☐ Define Your Strategy
- ☐ Define Your Organizational Objectives
- ☐ Get Your Team On Board
- ☐ Identify the Metrics
- ☐ Prioritize Your Initiatives
- ☐ Define Your Roadmap

3. Define Your Organizational Objectives

Organizational objectives are where vision and strategy get translated into the day-to-day work. A common mistake when implementing a new CRM system is to replicate in it all the old objectives and processes, complete with their inefficiencies. Instead, view your implementation as an opportunity to review and optimize how you work.

4. Get Your Team On Board

Executive sponsorship is vital for your CRM vision, strategy and objectives, and for a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

5. Identify the Metrics

"You can't manage what you can't measure" is an adage attributed to many business thinkers – and it applies to higher education as well. Metrics should be visible to everyone, and this means creating dashboards for all levels of the institution, from recruiters and managers, to professors and deans, to the president of the university.

6. Prioritize Your Initiatives

You're not going to get everything done at once, so decide what's most important to deliver first. Training is often the priority, so everyone is ready to use the new CRM system as soon as it is available.

7. Define Your Roadmap

You shouldn't look at building an effective CRM system as a "big bang" event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you go live is equally important. Plan beyond launch day and consider what other capabilities you need to deliver for the institution.

Now that your CRM system and strategy are in place, it's time to see the best ways to measure and maximize the technology.

Customer Spotlight:

St. Norbert College

When St. Norbert College looked for a way automate manual processes and rid themselves of paper forms, they turned to Salesforce. The school replaced Excel spreadsheets, Access databases, and over 215 SQL scripts with native Salesforce functionality, giving their admissions, advancement, and advising teams a 360° view of each consistent. St. Norbert rolled out a mobile app for gift officers, streamlined their recruiting process, and cut their use of paper in the admissions process by 88%.

Read the full story here ›

> "The move to Salesforce has made our teams more efficient. We want to replicate this success in other departments across campus."
>
> – Ravi Agarwal, Director of Enterprise Applications

Chapter 4

MAXIMIZING YOUR ROI

Here are several best practices to remember when working to maximize your ROI, from CRM Search's Karen D. Schwartz:

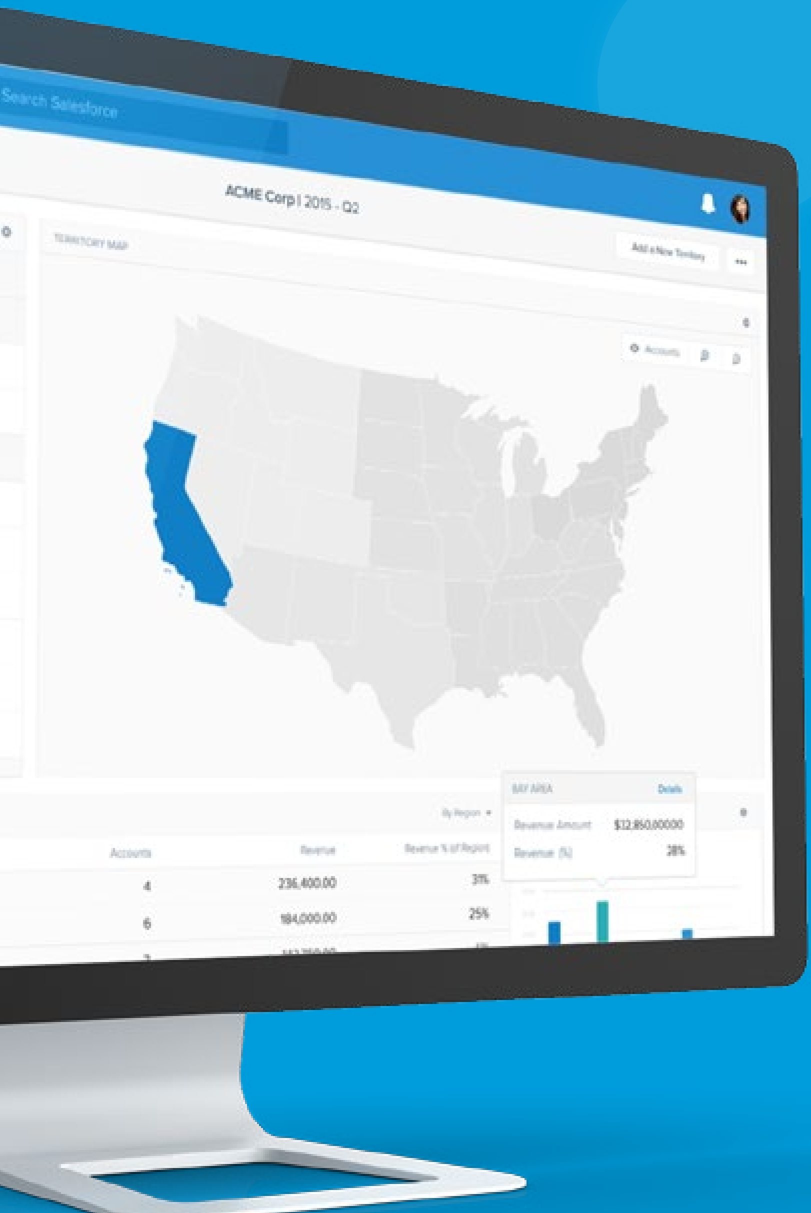
Choose a Cloud-Based CRM Solution

All major CRM vendors offer cloud versions of their apps. Choosing this software as a service (SaaS) model means schools no longer have to deal with things that on-premise CRM apps demand, like servers, software issues, and new version upgrades.

Integrate with Applications that Provide Value

Take advantage of the new business and social applications that are out there, and integrate them with your CRM system. These include marketing automation and accounting software, plus key social tools, which allow your school to follow people, information, and groups on social networks, and capture real-time data.

Take advantage of the new business and social applications that are out there, and integrate them with your CRM system.



Allow for Mobile Integration

Make everything accessible on mobile devices for your staff so they can work on the road — things like reviewing applications, correspondence, managing contacts, and helping students in need. The integration should also ideally work with back-office systems, social networks, and web conferencing.

And so you are fully covered, here are some practices to avoid when working to maximize your CRM ROI, from CRM Buyer's Christopher Bucholtz:

Infighting Between Departments

CRM data is valuable when used to qualify inbound interest in the school and to show which marketing campaigns and events lead to actual enrolment, for example. But these insights can be missed if all departments don't work together. Before you do anything else, get everyone in a room to map out common goals, and to discuss how to use the data.

Generating Reports for the Sake of It

The right CRM application can present data in an almost effortless preformatted report. But this analysis will do you no good if it is ignored. Take the time to not only read the reports, but to understand and act on them when needed.

Building "Relationships" with Constituents

CRMs are an excellent tool to connect with your constituents– whether prospects. students, alumni, faculty and staff, parents, corporations or all of the above - and build relationships that grow over time. But don't just assume that everything is fine and well. Be aware that constituents evolve and change, and a successful school changes with them.

Conclusion

It doesn't matter how big or small your university or college is – everyone can benefit from simplifying all of the processes that keep your campus running smoothly and from creating enduring relationships with constituents.

As your institution's operations expand, these relationships become more sophisticated. They're no longer transactional. You also need to share information across the various departments within your school that are making contact with the same constituents. A CRM system can serve as a vital nerve center to manage the many connections needed on a busy campus.

In a world where the most successful higher education institutions are constituent-focused, CRM apps make the constituent king. In short, CRM apps are how institutions truly become "connected campuses."

BECOME A CONNECTED CAMPUS

If you want to revolutionize the way you connect with prospects, students, alumni, faculty, staff, and corporations, you need an easy-to-use Constituent Relationship Management system. Salesforce allows staff in recruiting and admissions, student affairs and services, advancement, and marketing to access a single view of the constituent in a centralized location.

Learn more ›

86% Improved Overall Efficiency

84% Improved Ability to Achieve Mission

salesforce foundation

THE CUSTOMER SUCCESS PLATFORM