



**WINNING SERVICE STRATEGIES
FOR COLLEGES AND UNIVERSITIES:
HOW TO OPTIMIZE RECRUITMENT, RETENTION, AND
OPERATIONAL EFFICIENCY BY PROVIDING EASY, IMMEDIATE
ACCESS TO INSTITUTIONAL INFORMATION**

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EXECUTIVE SUMMARY

Higher education is a tough business. The competition for prospective students is fierce. Even after you've successfully recruited your students, you have to work to keep them.

One of the most important things you have to do to successfully recruit and retain students is get them information. Prospective students and their parents want information on admissions, financial aid, curriculum, athletics, and other issues affecting their decision. Current students need to know about course registration, financial aid, housing, parking, and other aspects of campus life. Schools that can't quickly and accurately provide this vital information miss recruitment opportunities and achieve less-than-optimal retention rates.

Several factors typically limit the ability of colleges and universities to deliver accurate information to students and prospects in a timely manner:

- Information resides primarily in the heads of specialized administrative staff, so the ability to answer questions is constrained by the availability of those specialists
- Information is dispersed across multiple independent offices, forcing students to look in several places before finding someone or something that can answer their question
- Administrative offices typically handle communications on an ad hoc basis, so there is little consistency or synergy between the answers students are given on the phone, via email, in person, through a mobile channel, or on the web
- Budgets for phone support, email management, and web content development are limited, undermining communications capabilities across all channels

Fortunately, many institutions of higher learning have already demonstrated that these challenges can be overcome by the right combination of best practices and new technology. These schools have succeeded by implementing information delivery strategies based on the following core principles:

- Creating a knowledge base that effectively and continuously captures the information in the heads of staff experts
- Using that knowledge base as a centralized, web-based repository of information where everyone can find all the answers they need
- Leveraging that knowledge base across all channels, so questions can be quickly, accurately, and consistently answered over the phone, via email, on the social web, via mobile channels, in person, or on the web
- Taking advantage of hosted technology to reduce costs and accelerate time-to-benefit

This document explains how these principles work and provides specific examples of how they've been successfully applied at a wide variety of colleges and universities. These institutions have achieved significant results by adapting customer service tools and techniques that have already proven themselves in the commercial sector. Their experiences prove that any school can improve its ability to answer questions within existing budget and staffing constraints.

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QUESTIONS AND ANSWERS

It seems simple enough. Someone is thinking about attending your institution and has a few questions. You have lots of smart, knowledgeable people who would love to answer those questions. So, theoretically, the questions should get answered and the prospective student should be one step closer to enrollment.

Unfortunately, the reality is quite different. Prospective and active students alike often find it quite difficult and time-consuming to get the answers they need. Parents, alumni, and other constituencies face the same struggle as well. Their frustration is not beneficial to either recruitment or retention. So communication problems aren't just unpleasant. They have a direct impact on the financial performance of every college and university.

Students and parents may find their experiences particularly frustrating in light of the expectations created by their interactions with private-sector companies. Many of these companies have invested millions of dollars in multi-channel contact centers and therefore enable them to quickly respond to consumer inquiries over the phone or the Internet. Because colleges and universities don't have these kinds of large, sophisticated customer service departments, they face significant challenges in offering the same kind of responsiveness the average American is used to.

In fact, colleges and universities face several challenges when it comes to providing responsive service. These include:

Specialization

Unlike corporate contact centers—which make use of large numbers of first-tier service/support generalists—colleges and universities generally rely on subject-matter specialists to answer questions. These administrative employees have accumulated a wealth of knowledge over the years about programs, policies, and processes. That makes them great resources for students and parents with questions. However, this approach also means that valuable knowledge remains “locked in the heads” of these key specialists. A school's ability to answer questions is therefore largely constrained by their personal availability.

Fragmentation

Corporate customer service departments usually provide a single 800 number for people to call and/or a single “Ask a question” link on their websites. Once they receive an inquiry, they may route the customer to accounting, merchandise returns or some other department—but they first handle it in a very centralized manner.

Colleges and universities, on the other hand, typically interact with their constituencies in a more fragmented way. A student has to decide whether to call financial aid, the registrar, the bursar's office, the athletic department, or admissions. Even at schools that have implemented some sort of information “clearinghouse,” these separate departments still maintain a good deal of independence in terms of how they manage and deliver information. This can be problematic for student and parents, who may not know exactly which department to talk to and end up contacting several departments to ask multiple unrelated questions.

Ad hoc communications

Corporate contact centers usually have highly structured processes for answering questions, sharing knowledge and escalating queries. Because of the structure and culture of most educational institutions, such formalized processes usually don't exist. One department may try to handle every phone call that comes in. Another may ask callers to email their questions so they can be handled later. Some may be more proactive about developing helpful web content than others. As a result, students and others have to deal with each department in a different way. The service experience may be inconsistent within a single department. In fact, without standardized processes in place, students often receive different information from a person they speak to on the phone than they get on the website.

Limited resources

Universities can't afford to hire legions of call center operators or the telecom infrastructure those operators need to do their jobs. They can't spend a lot of money on fancy websites or on content development for those sites. They don't have budgets for scaling up their email management capacity. These resource limitations make it difficult for them to deliver the kind of responsive, high-quality customer service that students need and expect.

Despite these apparent hurdles, colleges and universities need to find a way to deliver better service. No one wants to lose a potentially great student because a parent couldn't get a question about financial aid answered. And no one wants to lose an existing student because of a course registration or housing snafu.

Recruitment and retention aren't the only reasons for streamlining service processes. If your administrative staff is tied up asking the same questions over and over, they won't be able to get to their more critical and/or strategic tasks. If your alumni don't feel they're being treated properly, it could adversely impact your endowments. And if you don't have a way of quickly letting everyone know about parking policies, IT services or campus safety, you could be opening the door to potentially expensive and disruptive problems.

That's why it's critical for today's complex educational institutions to aggressively re-evaluate the way they answer questions across all of their communication channels. The financial performance of the institution and the quality of student life are at stake.

In this section, we describe the problem in more detail—building on the four bullet points in the summary:

- Creating a “living” knowledge base
- Making the knowledge base useful
- Leveraging the knowledge base across all communication channels
- Eliminating IT costs with a hosted solution

Case studies of winning service strategies for colleges and universities are presented as well as a step-by-step plan for you to launch a successful online information initiative.

A BETTER WAY

As the examples throughout this paper illustrate, forward-thinking colleges and universities have been able to effectively address the issues that have historically impeded communications with students and other constituencies. And they have done so without having to overhaul the structure or the culture of the institution—or making massive investments in contact center infrastructure.

While every institution takes its own unique approach to improving the quality and responsiveness of its communications, several common strategies have proven themselves useful in this context:

Creating a “living” knowledge base

The best way to overcome the limitations imposed by specialization is to get knowledge out of the heads of individual staff members and into a knowledge base. This is a critical first step in expediting the delivery of information to students and others, where and when they need it.

This can seem like a daunting, labor-intensive task. But with the right technology and processes in place, it can actually be rather painless. Generally, the institutions most successful at knowledge base implementation have been those that have not taken a heavily “front-loaded” approach. That is, they haven’t invested a huge amount of person-hours trying to create some kind of massive, comprehensive knowledge base. Instead, they have taken a more incremental approach—starting with a good initial body of knowledge items and evolving it on an ongoing basis.

There are several reasons why this is the better approach:

- **It’s impractical to try and build the “perfect” knowledge base in one shot.** You can waste a lot of time and effort trying to think of everything your students will ever ask you. It’s much more practical to come up with a relatively small and focused set of highly important knowledge items from subject-matter experts and/or existing departmental documents. This allows you to start realizing the benefits of a knowledge base more quickly.
- **80 percent of questions can be answered with 20 percent of your content.** Anyone with experience in a university office knows that students ask a lot of the same questions over and over. Just by addressing these “Top Answers” issues, institutions can significantly improve the quality and efficiency of student services.
- **Content should be driven by real needs, not best guesses.** Departmental staff may think they know what students want, but they can be wrong. That’s why it’s wise to put mechanisms in place that allow knowledge base content to be driven by the actual questions that students ask day in and day out. That way, the content will be well aligned with students’ real needs.
- **Information needs are always changing.** Even if subject-matter experts could come up with the perfect knowledge base, it would become obsolete as a new policy was issued or a new program was introduced. This is another reason why the management of knowledge base content should be approached as an ongoing, interactive process—rather than as a one-time brainstorming marathon.

Successful schools are always tracking the questions students ask and turning them into knowledge base content. They also ensure that the knowledge base can be managed and maintained by non-technical staff. This helps keep content fresh and eliminate the bottlenecks that occur when content authoring is dependent on the participation of already overburdened IT staff.

Making the knowledge base useful

It doesn't matter how relevant, comprehensive and up-to-date a knowledge base is if nobody uses it. That's why it's important to put the knowledge base on the web where everybody can access it. Just about every student today uses the web on a daily basis. They're used to going online to get fast access to the information they want from any device that can access the web.

But it's also critically important to make the knowledge base very, very user-friendly. After all, plenty of university websites are full of good information. And many have lists of frequently asked questions (FAQs). The problem is that it's hard for site visitors to find the needle of an answer they want in that huge haystack of information.

Robust search/query functions are therefore critical to knowledge base success. Rather than having to navigate their way through a complex website or scroll their way through dozens of FAQs, people with questions should be able to easily find what they're looking for with a simple keyword search or natural language query. This type of search function is an enormously powerful tool—allowing site visitors to quickly get answers 24 hours a day, seven days a week without any assistance.

Another useful knowledge base function is the “Top Answers” list. As noted above, a large percentage of questions any institution or department has to handle typically revolve around a relatively narrow set of issues—such as deadlines, forms and contact info. Presenting these most common answers first ensures that the maximum number of site visitors will find what they need after just one or two clicks of the mouse.

It's also important to make sure the link to the knowledge base is prominently featured on the home page. This ensures that anyone coming to the site with a specific question gets to the knowledge base right away. In fact, the most effective sites steer users to the knowledge base from a variety of different points so that they can still get to it even if they've browsed past the home page.

Many schools go one step further and actively promote the knowledge base in a variety of ways, such as in school periodicals or on their telephone hold messages. Some even create a “brand” and/or logo for their knowledge base in order to further maximize awareness and visibility for this strategic information resource.

Leveraging the knowledge base across all communication channels

While the web may be the primary medium for exploiting the power of the knowledge base, it's not the only one. Phone, the social web, mobile, and email are also very important communication channels. That's why it's important to leverage the knowledge base across those channels as well. Proper use of the knowledge base brings new efficiencies to phone, social web, mobile, and email communications. It also ensures people get consistent, accurate answers regardless of which channel they choose to use at any given time.

In general, a knowledge base is applied to phone communications by having university staff members use it as an internal reference resource. If a staff member takes a phone call, he or she can look up the answer in the knowledge base in much the same way as a student or parent. This strategy allows even new employees or temporary office workers to provide callers with accurate answers to their questions.

Sometimes, in addition to having access to all the answers available on the public site, internal staff is also given supplemental content appropriate for internal use only. This further enhances their ability to quickly answer questions regardless of their personal expertise.

On the email side, the knowledge base can be applied two ways. First, it can be used in much the same way as it is with the phone. Staff members responsible for responding to emails simply insert appropriate answers from the knowledge base into their replies. This greatly boosts their productivity, provides consistent answers and eliminates errors, since they don't have to type their replies.

Second, the knowledge base can actually be used to eliminate the need for a reply altogether. With the right technology, students' emails can be "scanned" and—by checking for keywords and other text-based clues—one or more items from the knowledge base can automatically be presented as possible answers. This technique can lead to significant reductions in email workloads.

Management of email workloads can also be made easier through the use of business rules. These tools enable incoming emails to be logged, tracked and routed—unlike conventional Outlook mailboxes, which don't provide any intelligence or automation.

Another important benefit materializes when organizations link their knowledge base with their phone and email channels, as well as to the web. Often, after responding to a phone call or email inquiry, staff members will realize the answer they just gave would make a valuable addition to the knowledge base. With the right processes in place, they can quickly submit that answer to an assigned knowledge base or website content manager. This approach is very effective for building a knowledge base that is very comprehensive and highly relevant to students' needs. It also takes the burden of trying to figure out exactly what students want off the shoulders of content managers. Instead, student-driven content gets produced and enhanced naturally and painlessly in the course of regular, everyday communications.

An integrated multi-channel approach also encourages use of the web. When staff members provide an answer on the phone, for example, they can point out that the information they just provided could have been found on the web. They may even direct the caller to the specific "online answer" for reference purposes. This increases the likelihood that callers will use the web knowledge base in the future.

Eliminating IT costs with a hosted solution

The high-impact, high-efficiency communications strategies described here require implementation of some fairly sophisticated technologies: a knowledge base management

engine, advanced search technology, business rules, etc. That can potentially be a problem for universities and colleges with limited IT resources. Such technologies can be fairly expensive to acquire and own. In addition to the software itself, the requisite server and storage infrastructure has to be deployed. Someone has to manage the server(s), storage and supporting database—in addition to the software itself. There are always upgrades to install and additional capacity to provide. Ultimately, these costs and workloads may make such a project prohibitive.

That's why many universities are opting to implement these technologies in the cloud a Software-as-a-Service (SaaS). Under a hosted model, all software runs on infrastructure owned and maintained by the hosting provider. This eliminates the upfront capital costs of buying software and supporting hardware, as well as the ongoing costs of technology maintenance. It also accelerates time-to-benefit, since it eliminates the whole process of installing software and hardware into the existing IT environment.

Instead, the technology itself is essentially ready to go as soon as a contract is signed. It may take a few days or weeks to actually go live, since an initial knowledge base has to be created and some business rules have to be put in place. But, with hosting, the mechanics of the technology itself don't slow things down. Hosting providers are also in a much better position to scale up capacity as required and provision fault-tolerant redundancy than an individual institution.

Web-based applications like online knowledge bases and email management systems are tailor-made for hosting. In fact, hosted web-based solutions can be accessed from anywhere anytime—since all that's required is Internet access. That makes it easy for managers and staff to work from multiple campus locations, as well as from home or on the road.

PROVEN RESULTS

These strategies aren't just theories. They are proven best practices that yield dramatic results at a wide range of educational institutions. Here are just a few examples of the results colleges and universities have achieved by combining hosted technology with improved processes.

UNIVERSITY OF OKLAHOMA

With over \$120 million under its management, the University of Oklahoma's Financial Aid Services organization is actually one of the states' larger businesses. It's also a critical resource for students and their families, who depend on aid to secure the future a university education can provide. Yet despite its importance, the department has just seven full-time employees operating in customer service. Those seven employees can receive over 1,000 calls per day at the start of the school year. Combine that with an onslaught of email and walk-in traffic, and things can obviously start to get bogged down.

To address the situation, the department implemented an online knowledge base. The resource was launched in 2002 with just 25 question and answer pairs. A year

later—based on actual questions students and parents had asked by phone, email, or a walk-in visit—that number had grown to 250.

The results have been tremendous. On the first day of the fall 2003 semester alone, the site attracted 476 sessions during which 1,654 answers were viewed. Of those 476 visitors, only 19 needed to escalate their questions to an email—for a superb 96 percent success rate!

The impact on the office has been dramatic. With their phone and email workloads reduced by hundreds a day, office staff now gives each client the full attention they deserve. They've also been freed to attend to the quality control measures necessary to ensure financial aid flows to students in a timely manner. In fact, during periods of peak activity, the department's director estimates the system has allowed over 140 person-hours a week to be re-directed from answering routine questions to fulfilling critical administrative responsibilities.

The OU's Financial Aid Office's system can be viewed at:
<https://asksooner.custhelp.com>

UNIVERSITY OF HOUSTON

UH knew it needed to address its growing communication challenges. Phone calls and emails were overwhelming UH staff. Subject-matter experts who had other responsibilities were constantly distracted by phone calls that frontline staff couldn't answer. Students and prospective students would often have to make several calls to track down the answers. UH even had to create an office called "OnCall" specifically to act as a clearinghouse for the information callers were seeking.

UH adopted a hybrid strategy to centralize information while allowing each department to retain its functional independence. Each functional area had its own project liaison and content manager. Each could determine how to present the knowledge base within its individual area of the UH website. However, the underlying knowledge base would be a common one, and search results would show users all relevant answers across all functional areas.

The system was dubbed "Ask Shasta," after UH's cougar mascot. Links to the Ask Shasta system are featured prominently on the UH home page, and it has been promoted vigorously through UH publications and other programs.

Use of this online resource has risen quickly from 11,633 viewed answers in November 2002 to 21,917 in October 2003. As a result, phone calls have decreased substantially—in some cases, as much as 25 percent. In addition, entry-level department employees use the knowledge base to answer all kinds of questions instead of referring them to subject matter experts. This saves UH money, while allowing department experts to focus on their primary work responsibilities.

UH's system can be viewed at: <https://uhhelpdesk.custhelp.com>

UNIVERSITY OF SOUTH FLORIDA

USF first implemented its online knowledge base as an IT support tool. The knowledge base was seeded with just ten answers, but within a month grew to over 100. More importantly, with those 100 answers readily available on the USF site, emails and phone calls to its help desk dropped a remarkable 20 percent.

USF thus got an immediate triple benefit:

- Students, faculty and administrative employees were able to find answers to their own questions immediately, instead of waiting for replies from IT personnel.
- Reduced email and phone workloads enabled IT personnel to respond to questions within 24 hours—instead of the five to seven days that had previously been the norm.
- Technicians could focus their time and energies on more critical, value-generating tasks, rather than answering of highly repetitive support questions.

IT's success caught the attention of other groups, which dealt with a similar flood of repetitive questions. As those organizations adopted the same technology, they experienced similar dramatic benefits: radical reductions in email and phone volume, improved service and support for their various constituencies, reduced operational costs, and the ability to have skilled employees focus on more compelling work.

The adoption of a single technology by these semi-independent departments created a common look-and-feel for a wide range of information resources across the organization. This, in turn, led to the development of a common information portal on the University website, entitled "Ask USF." The use of a single piece of software across so many functional areas also eased IT's job enormously—since instead of dozens of different applications to support, it only has to support one.

The USF system can be viewed at: <http://askrocky.custhelp.com>

MINNESOTA ONLINE

The online education market is booming. Analysts estimate that it will grow to \$52.6 billion by 2010. So it's essential for online providers to make the most of every lead and to differentiate themselves from the growing competition. Minnesota Online also has to manage information about a diverse range of educational programs—and make that information readily available to whoever needs it, whenever they need it. This is a significant challenge when you consider that the programs Minnesota Online offers are actually run by 32 independent institutions located across the state.

Minnesota Online has made RightNow a key component of its strategy for both growth and differentiation. Minnesota Online can track prospect and student

progress and issues at every stage of their lifecycle in order to quickly and effectively respond to their changing needs. The result is that Minnesota Online is well-positioned to maintain its leadership in the online education market—and to do so quite profitably.

One way Minnesota Online uses the database is to track the status of contacts as they go from merely expressing interest to actually applying to a Minnesota State College or University and registering for a specific program. This process can be somewhat complex, since students need to submit the necessary transcripts and test results. Minnesota Online makes it easy for its advisors to keep an eye on this process and send alerts to students via RightNow's automated customer services when they need to get something done. They also automatically send out a wide range of notices and reminders based on any definable set of conditions—such as when a deadline is approaching, a new course offering becomes available in the student's area of interest, or a certain amount of time elapses since the last contact with a prospect.

In addition to keeping track of students, Minnesota Online also has to manage information about a diverse range of educational programs. Information about courses and programs from all participating institutions is incorporated into Minnesota Online's knowledge foundation, where it can be easily updated and modified as required. More importantly, it can be readily accessed by both advisors and students via a variety of intuitive and accurate methods—including topical browsing, keyword search, and a "Top 20" list of the most currently popular subjects.

The Minnesota Online system can be viewed at: <http://www.minnesotaonline.org/>

UNIVERSITY OF SOUTHERN QUEENSLAND

USQ has built a reputation for excellence during its 35-year history and prides itself on maintaining a student-centric approach. But this approach was under threat in 2001, when the number of student inquiries began to outstrip Outreach Services' ability to answer them efficiently. Student support areas across the University were inundated with questions ranging from semester commencement dates to specific questions about assignments, fees, and exam results.

After evaluating alternative solutions, USQ moved forward with an online knowledge base. Known to the students as USQAssist, the system allows students to find answers to their questions online, in their own time. When USQAssist went live, it contained 10 question and answer pairs. One month later, this had increased to 200 pairs.

USQ immediately experienced a 20 percent reduction in its phone and email workload. It also cut the time it took to respond to student inquiries by 75 percent. The web-based solution also enabled USQ staff to work from home, creating opportunities to further improve service levels.

USQ's system can be viewed at: www.usq.edu.au/contact

The consistently positive experience of these institutions offers proof that the right knowledge base technology properly implemented can significantly impact communications with students, the quality of campus life and the operational efficiency of multiple departments. Prospective students, current students and internal constituencies all need a reliable, centralized source of information they can access whenever they need an answer to a question. University staffs need a way to get out from under the relentless deluge of questions they receive every day. Knowledge base technology addresses both of these needs in a highly efficient and elegant manner.

A PLAN FOR YOU

The benefits of knowledge base technology are available to every college and university. Several simple steps are all that is required to launch a successful online information initiative:

- **Assess current practices and workloads.** The best way to gain cross-departmental support for such an initiative is to lay out the nature and magnitude of the problem. Take a look at what your frontline staff and subject-matter experts are dealing with every day, and you'll be able to make a strong case for investing in a solution.
- **Gather evidence.** The examples provided in this document are just a few of the many educational institutions that have been successful in leveraging knowledge base technology to address their critical communication issues. Their experiences can be critical in securing funding and political support for your project.
- **Start small.** Most successful university-wide initiatives have their origin in an implementation of narrower scope—in financial aid, IT or some other department. By demonstrating the effectiveness of the solution on this smaller scale, you can gain the credibility necessary to expand the system.
- **Go to the cloud.** While it's certainly possible to deploy the technology necessary to support a knowledge base system internally, hosting is usually the preferable approach. By going the cloud, you avoid the capital costs and extended implementation times that can erode your return-on-investment.
- **Promote yourself.** Branding and publicity are important components of any communication strategy. That's why it's important to maximize the visibility of your information resources and let everyone know about your early successes.

Of course, it's also important to choose the right technology and the right technology partner. So look for a company with lots of experience in the education market, a proven suite of applications and a strong commitment to hosted services. Ideally, your prospective

hosting partner will be able to offer you a live demo of your planned system so you can see first-hand what you can expect for your efforts—and even show it to others as you build consensus.

The most critical step to take is that first one. Communication with prospective and current students will never improve if systems and processes remain as they are today. Someone has to initiate and champion change. The rewards of doing so are significant, numerous and easily attained.

ABOUT RIGHTNOW

RightNow is helping rid the world of bad experiences one consumer interaction at a time, eight million times a day. RightNow CX, the customer experience suite, helps organizations deliver exceptional customer experiences across the web, social networks, and contact centers, all delivered via the cloud. With more than eight billion customer interactions delivered, RightNow is the customer experience fabric for nearly 2,000 organizations around the globe. To learn more about RightNow, go to www.rightnow.com.

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