



EMPOWERED INTERACTIONS:

Delivering a Competitively Differentiated Student Lifecycle Experience

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EXECUTIVE SUMMARY

These are challenging times for institutions of higher education. A pervasive culture of information and choice is making it more difficult than ever to effectively recruit, retain, and advance students across their highly individualized lifecycles. Constituents are demanding greater attention to their personal needs. If they don't have a sense that you know who they are—and if they don't have a sense that you care—they're going to go elsewhere.

To compete successfully, colleges and universities must therefore adopt best practices that enable them to consistently interact with their diverse constituencies in a highly personalized manner. At every touch-point across the student lifecycle, their staffs must understand who they're talking to, what that person's current state-of-affairs is, and how to best satisfy the need that is being expressed. Only through such empowered interactions can institutions deliver the kind of differentiated experience required to attract applicants, retain active students, and maintain quality relationships with alumni.

This white paper describes how educational institutions around the world are taking advantage of evolving CRM technology to deliver highly personalized, competitively differentiated student experiences across the recruitment, retention, and advancement lifecycle. It highlights the eight core capabilities that enable these institutions to successfully meet—and even exceed—the expectations of today's highly demanding constituencies. And it outlines the tangible benefits these institutions reap by consistently satisfying their constituents in this way.

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SATISFYING CONSTITUENTS IN A CULTURE OF CHOICE

Institutions of higher education have to satisfy multiple constituencies to survive and thrive in a marketplace where other institutions are actively competing for those same constituents. The importance of this satisfaction is greater now than ever, since today's constituents have more choices—and greater inclination to exercise that choice—than ever.

These constituents are highly adept at gathering information from multiple sources via multiple communication channels. They are easily turned off by disappointing personal experiences. And they see little reason to remain loyal to any organization that they don't believe is meeting their needs.

Colleges and universities also have to be more diligent than ever about maintaining strong relationships with their constituencies across the entire student lifecycle. Gone are the days when an incoming freshman could be automatically expected to someday become a contributing alumnus. If they're not happy with their experience from Day One, they might not even stay for their sophomore year.

In fact, the student lifecycle presents a whole spectrum of relationship management challenges from start to finish:

Recruitment challenges

The choice of a college or graduate school is one of the biggest decisions an individual can make. It's an expense for which they may have saved for years and/or will go into debt. For undergraduates, in particular, choosing a college presents a whole range of issues with which they are unfamiliar: academic programs, financial aid, housing, healthcare and other campus services, as well as the nature of the surrounding community. Parents may be intensively involved in the process as well. A slow answer or no answer to any of their questions may be as problematic as a “wrong” answer. Often, a potential applicant will have particular concerns—which may range from accommodation of physical handicaps to specialized courses of study. Institutions must be highly responsive and personalized during the recruitment process if they are to seat a freshman class with the caliber and diversity of students they seek. Many students are applying to multiple institutions, so in addition to providing answers, institutions need to provide them in a way that is more compelling than other institutions the prospective student is considering.

Retention challenges

Once a student begins attending an institution, there is no less need to provide a personalized, responsive experience. In fact, the delivery of such an experience can become even more complex as students become engaged in all the aspects of campus life: using services, eating in the dining hall, running up bills, participating in academic programs and student activities, using the student shuttle, encountering problems, and gaining a clearer picture on what they ultimately want to accomplish with their education. Students who don't feel their needs are being met, who don't get enough help with their problems, or who are not sufficiently challenged may drop out or transfer to another institution that looks more attractive—whether or not they will, in reality, be any better off there. No student paying tens of thousands of dollars in tuition wants to be treated like a number. That's why colleges and universities have to understand all of their students as individual human beings

with their own personal preferences, goals, and expectations. And that understanding has to inform every interaction that the institution has with the student.

Advancement challenges

The challenge of maintaining strong relationships with constituents takes on a new form once a student leaves an institution and is longer engaged with its various services and departments on a daily basis. Once students become alumni, it takes even more effort to maintain visibility into their current state and to drive effective interactions with them. This visibility can be particularly important when it comes to fundraising, since people are can be very sensitive about how they are treated by organizations that are asking them for financial donations. At the same time, institutions may need to become more aggressive about pursuing these relationships than in the past—since alumni may wind up with historical ties to more different institutions as they transfer with greater frequency and attend receive more post-graduate education. Alumni relations departments must therefore evolve their operations accordingly in order to successfully compete with other institutions vying for the mindshare and disposable income of the same constituents.

The relationship between an institution and its constituents is constantly changing as the student lifecycle unfolds. The things recruiters and admissions officers do to engage the attention of a high school junior are very different from those that fundraisers do to secure an endowment from a wealthy retired alumnus. But there are commonalities as well. Whatever the state of the constituent may be, institutions need visibility into that state. They need to know who they are talking to. They need to know the date and outcome of the last interaction they had with the constituent, as well as the one before that and the one before that. They also need a good “macro” view of their collective constituent interactions, so they can detect trends and pinpoint shortcomings in their strategies and tactics. And they have to accomplish all of this interactive excellence within budget constraints that are often quite daunting.

So how exactly can institutions of higher education best satisfy their constituents in this culture of personal choice and information overload? How can they empower their constituents and their staffs so that both can have the information they need—where and when they need it? How can they most cost-efficiently conduct their ongoing “conversations” with their constituents to optimize outcomes in both the short term and the long term?

While the answers to these questions may vary to some degree from institution to institution, certain core capabilities have emerged as essential for satisfying constituents in today’s rich, multi-channel communication environment. By acquiring these capabilities, colleges and universities can greatly improve their ability to recruit, retain, and advance constituents across the student lifecycle. They can also achieve significant competitive advantages over other institutions that fail to do likewise—and are therefore less able to meet the expectation of prospective, active, and former students.

EIGHT CORE CRM CAPABILITIES FOR HIGHER EDUCATION

Every institution of higher education is different. Each one has its own structure, programs, policies, culture, and strategies. However, there are certain common principles that determine the quality of a constituent's experience with any institution. The attributes of a great constituent experience are essentially constant and measurable, regardless of the particular characteristics of the institution. These attributes include the ability to get consistently fast, accurate answers to questions; service that is polite and highly personalized; being supported with timely, relevant notifications and reminders; and the ability to use whichever communication channel is most convenient at any given time.

In other words, the delivery of a great constituent experience is a matter of treating every constituent well every time you interact with them—regardless how, when or why that interaction takes place.

While quality of interaction may at first glance seem to be a somewhat abstract concept, experience demonstrates there are actually specific, concrete steps institutions can take to maximize it. Experience also shows that specific, concrete benefits result from taking these steps.

In fact, there are eight core capabilities that colleges and universities can acquire to ensure that their interactions with constituents are of sufficient quality to cumulatively produce a positive experience across the recruitment/retention/advancement lifecycle. The capabilities are typically acquired through implementation of CRM best practices and technology—adapted as appropriate to accommodate an institution's specific structure, programs, policies, culture, and strategies.

THE EIGHT STEPS

Step 1: Creating a “knowledge foundation”

Every interaction with a constituent entails an exchange of knowledge. Knowledge may flow to the constituents, from the constituent, or both. But the quality of this knowledge exchange directly impacts the quality of the constituent experience.

A robust knowledge foundation is therefore essential for delivering a positive constituent experience. Unfortunately, many institutions have struggled to create such a knowledge foundation. That's because knowledge is often scattered across the organization—or locked away in the heads of subject-matter experts. Knowledge is also often inadequately managed over time, so it becomes out-of-date and inaccurate. For example, parents and students are looking further and further ahead to plan but changes in loan programs can be significant from one school year to the next. If the loan program information is not kept current, they will assume the information is accurate and problems, which could have been avoided by keeping information up-to-date, can occur.

Many institutions, however, have overcome these obstacles so that they can provide both constituents and frontline staff with knowledge that is consistently accurate, up-to-date, and relevant to their immediate needs.

One way they typically accomplish this is by becoming intentional about building a knowledge foundation that is sufficiently comprehensive. Such a knowledge base usually includes:

- CRM data such as students' personal demographics and academic histories
- Real-time process knowledge such as the status of a prospect's application or a parent's question about a billing item
- Program knowledge including academic, athletic, and extracurricular offerings
- Institutional knowledge such as admission policies and campus regulations
- Competitive knowledge about other institution's offerings and performance
- External knowledge about scholarships and loans, affirmative action rulings, and graduate school requirements
- Analytical insights necessary for continuous improvement of the constituent experience—such as complaint trends and survey results

To facilitate the creation and ongoing management of this broad knowledge foundation, successful institutions are now also leveraging artificial intelligence (AI) technologies such as adaptive clustering and fuzzy logic. These “self-learning” technologies make it much easier to continually optimize the relevance, organization, searchability, completeness, and “freshness” of the knowledge foundation.

Often, for example, a very large percentage of constituents' questions can be addressed with a relatively small number of answers. A properly automated knowledge foundation will track which answers these are—even as they change over time—and make sure they're the ones most immediately available to constituents. It will also identify gaps in content, so they can be immediately filled.

Every institution's “knowledge profile” will be different, of course. But the establishment of a comprehensive and relevant knowledge foundation is a key first step in delivering quality experiences across the entire constituent lifecycle.

Step 2: Empowering constituents with self-service

Great self-service is an integral component of a great constituent experience. With self-service, constituents can find the information they need on the web or via an interactive voice response (IVR) system—instead of having to wait and engage with your next available staff member. Additionally, this is often the way the millennial generation and non-traditional students prefer to access services and information. Institutions are able to be more efficient and provide what students perceive to be better service. With the right kind of knowledge foundation and associated best practices, colleges and universities can achieve self-service rates of 85 percent or higher. Some have even achieved rates as high as 98 percent for specific topics. The benefits of self-service for both constituents and educational institutions are considerable:

- It's immediate so constituents don't have wait on the phone or keep checking their email for a reply.
- It's 24/7 so constituents can get help any time and from anywhere.

- It's effective since well-crafted text, graphics, hyperlinks, and other content can be provided to make answers abundantly clear to constituents.
- It scales to handle big spikes in inquiries with little if any incremental cost.
- It takes pressure off other channels so frontline staff can spend more of their time on issues that truly require their personal attention.
- It delivers rich insight by tracking what types of answers constituents are looking for every day.
- It saves huge amounts of money by radically reducing phone and email workloads.

There are several keys to successful self-service. One is obviously a **knowledge foundation** that is complete and well-aligned with constituents' actual information needs. However, self-service can be extremely effective even with a fairly limited amount of knowledge content. That's because a large percentage of constituents' questions typically revolve around a relatively small set of issues. So many institutions quickly achieve good results with a small but well-focused set of answers, and then build from there.

Another key is **ease-of-use**. In the case of web self-service, it's best to give constituents several ways of finding the information they seek—including keyword searches, natural-language queries, and browsing by category. It's also a good idea to maintain a “Top 20” list of the most commonly sought answers and to place it in a prominent position on the site. Such a list will ensure that the maximum number of constituents find what they need with a single click of the mouse.

In the case of voice self-service, ease-of-use can be best achieved by allowing constituents to navigate the system via both touch-tone inputs and through the spoken word. In fact, today's speech recognition technology enable the same kinds of searches that constituents use on the web to be performed over the phone.

Institutions that are most successful with self-service are also diligent about **managing and fine-tuning** their self-service systems. They review keyword reports to see if there are any topics for which their content is currently inadequate. They solicit feedback from constituents to see if content needs to be improved in any way. They also drive traffic to their self-service systems by featuring them prominently on their website, mentioning them on their “on-hold” messages, and referring to them in their printed product manuals.

In addition, it's important to **make it easy for constituents using self-service to quickly escalate their problem to a human being**. Otherwise, they feel “trapped” in the system and will therefore become less likely to use it again in the future. With the bulk of student inquiries answered through self-service staff are more readily available to address these more complex issues.

Step 3: Empowering frontline staff

Constituents don't want to hear someone say “I'll transfer you” or “Let me give you another number” when they call. They want their questions answered and their problems solved.

For that to happen, frontline staff must be equipped with the knowledge they need to treat constituents the way they want to be treated. They have to be given full visibility into the “state” of the constituent at the time of the interaction. Without this knowledge, they won't

be able to offer the personal attention that constituents expect. In fact, when problems arise, they may even aggravate the situation by saying or doing the wrong thing.

The knowledge-empowerment of frontline staff requires more than just a great knowledge foundation—although that knowledge foundation is an absolute prerequisite. However, it's also important to be smart about getting the right knowledge to people when they need it. Too much information can be as problematic as too little, since information overload can make it difficult for staff to immediately locate the specific knowledge they need to best handle a constituent interaction in real time. So it's essential to structure access to information based on the requirements of each interaction.

Several factors will determine what information to make available to each frontline person at any given time: In a decentralized environment, for example, each department will obviously have its own information needs. Those working in the bursar's office need different information than those doing academic counseling. Information will also often be specific to the constituent and/or an ongoing issue. Frontline staff should therefore be able to quickly view the “thread” of all previous interactions relating to that issue—even if some of those interactions were conducted with other people or via other communication channels. Institutions need to provide information and service in the same way that students perceive the institution. Student's think in terms of the “institutional experience” not the “departmental experience.”

Different modes of presentation are more suitable for different types of information. So, in addition to ensuring the relevance of the information on the computer screens of frontline staff, it's important to determine how to optimally present that information. Typical examples include tabular data, dashboards, on-screen alerts, and integrated “drill-down” access to back-end systems. For example, a student may walk into the a specific department or the student center for advice about changing their major. With a unified desktop all their information can be viewed on one screen, and the interaction can be captured so the next department or person they ask for advice can view their complete history.

All of these considerations underscore the importance of implementing knowledge-driven applications that facilitate delivery of relevant content to frontline staff desktops. The more empowered frontline staff become, the more effectively they can respond to constituents' needs. This translates directly into improved constituent satisfaction and reduced operating costs.

Step 4: Unifying communications across channels

An important element of a great constituent experience is choice. This choice includes the freedom to use whichever communication channel is most convenient at any given time. Today, constituents can communicate by phone, email, the web, chat, fax, “snail mail,” and in person. They will use these different channels at different times for different reasons. According to Educause's “Educating the Net Generation” e-book , 93.4% of students surveyed owned their own computer, all had access to the internet and 82% own cell phones. As a results, they are very likely to use these communication channels to access institutional information and services. The quality of any institution's constituent experience will therefore only be as good as its weakest communication channel. It will also be largely

contingent on how well those multiple separate channels are unified into a single, unified ongoing conversation with the constituent.

The growing tendency of constituents to use multiple communication channels presents several challenges to institutions of higher education. One of these is to provide consistent information across all channels. It is very problematic when the information a constituent gets on the phone is at variance with what is posted on a website. In fact, some constituents will even keep asking the same question in different ways until they get the answer they want—even if that answer doesn't reflect the institution's official policy.

The best way to address this challenge is to **leverage a common knowledge foundation across all communication channels**. In other words, the answers that get inserted into email replies should come from the same source as web self-service content. This way, all information given to the public will be accurate, clear, up-to-date, and consistent.

Use of a common knowledge base across all channels also improves efficiency and speeds an institution's response to changing circumstances—because all information is added, deleted, and revised in a single place, instead of being administered separately in multiple repositories.

With multiple communication channels, it can be difficult to achieve deep visibility into constituents' problems and preferences. For example, constituents may use the phone to address certain types of issues and use the web to address others. In such a situation, over-reliance on phone incident reports may draw inordinate attention and resources to a problem that is experienced by a relatively small number of constituents—while missing a much more common problem that constituents are trying to solve via self-service.

The solution for this challenge is to **consolidate feedback reporting across all channels** into a common system. This unified feedback ensures that the constituent's voice is heard regardless of how they choose to speak at any given time about any given topic.

In addition, constituents will jump from channel to channel in the course of a single incident. For example, a transfer student may submit a question via email, and then follow up with a phone call when he or she needs further clarification or wants to ask a related question. Those follow-up phone calls can be frustrating for the constituent if the person answering the phone doesn't have immediate access to the previous email exchange. People don't like having to explain their problems twice. Students believe in the mythical "permanent record" and are often surprised when they learn that it doesn't exist. And such redundant conversations also reduce staff productivity.

To deliver a great constituent experience in a multi-channel world, it is therefore essential to **manage communication "threads" in a unified manner across communication channels**. Everyone interacting with a constituent should be able to see all relevant previous exchanges with that constituent, regardless of which channel or channels were used. The information about those previous exchanges should also be as rich as possible. That way, a staff can deal appropriately with a constituent who claims to have submitted a form via email a week ago—but who actually only did so the day before yesterday. Staff will also be better prepared

to deal with a constituent's emotions or special sensitivities if they can see notations from another staff member about a previous interaction.

Step 5: Actively listening to constituents

To provide constituents with a great experience, it's essential to know what they want—and to find out what they do and don't like about how they're being treated now. Unfortunately, most institutions only ask their constituents what they're thinking periodically. These “batch mode” surveys can be useful for planning or for getting a general sense of constituent satisfaction. But there are several reasons why surveys alone are insufficient for optimizing the constituent experience:

1) They don't capture feedback at “the moment of truth”

If something is threatening a constituent relationship, it should be discovered immediately—not six months after the fact.

2) They don't drive immediate corrective action

Institutions that respond quickly to problems as soon as they occur or wind up building relationships with constituents that are stronger than they would have been if not problem had occurred.

3) They don't generate sufficient response rates

Surveys typically only generate single-digit response rates. When constituents are asked for feedback in the context of an active interaction, on the other hand, response rates can reach of 30-40%.

These higher response rates provide much richer insight into what constituents are thinking and feeling. For these reasons and others, it's much more effective to integrate the capture of constituent feedback into every interaction—and to implement real-time response and escalation mechanisms that ensure rapid response to that feedback.

This can be done in several ways. For example, a simple set of questions can be automatically emailed to constituents after certain types of interactions. These “mini-surveys” can also be offered on the web or via interactive voice response.

It's important to note that there is a natural human tendency to avoid negative feedback. In fact, many institutions will use the fact that 95 percent of their constituents' feedback is positive to minimize the importance of dealing with the other five percent. But there are lots of good reasons to pay close attention to that five percent: Five percent is actually a lot of constituents to potentially alienate.

- That five percent can adversely influence a much larger number of friends and associates.
- The complaints registered by that five percent may provide insight about problems being experienced by the much larger number of constituents who simply don't choose to complain.
- Those complaints are the best indicators of what needs to be fixed in order to deliver a competitively superior constituent experience.

Ultimately, it is the willingness to really care about any constituent's dissatisfaction that differentiates merely good institutions from great ones. So, while it's certainly reasonable to feel good about high constituent satisfaction scores, that good feeling must never translate into complacency.

There are a variety of ways to ensure that appropriate action is taken when a constituent is dissatisfied. For example, workflow rules can be put in place that automatically notify the appropriate manager whenever a constituent gives any interaction a low rating. That manager can then initiate whatever steps are necessary for both resolving the immediate problem and addressing its root cause—so that it doesn't happen again.

Finally, the feedback loop should be closed by letting constituents know that action has been taken on their input. This can be done by informing constituent populations about changes made in response their collective input, as well through the notification of individual constituents about outcomes driven by their personal feedback. This kind of ongoing conversation gives constituents a strong sense of control over their educational experience, rather than simply being on the receiving end of a courseware delivery system created with little concern for their needs and preferences.

Step 6: Breaking down internal barriers

Many colleges and universities are highly decentralized. That is, various departments and campuses operate very independently from each other. This decentralization offers many advantages when it comes to decision-making, innovation, and the delivery of services. But it can pose challenges when it comes to the creation of an optimized constituent experience. That's because constituents don't necessarily know exactly how an institution has segmented its operations. They may not be aware that extracurricular activities are run by separate organizations on each campus, but that parking is managed by a single, university-wide security department. As a result, they don't always know exactly which office to contact for their particular issue. It may also be a bit of a hassle for them to have to contact five different offices to address five different issues.

Institutions of higher education must therefore to break down these departmental walls wherever they undermine the quality of the constituent experience—without compromising the functional independence of their various operating units.

Essentially, this step entails viewing the constituent's experience from their point-of-view outside the institution—rather than remaining locked into a strictly internal perspective.

What interactions will a constituent experience over the course of a given process? Who will they deal with at each stage of that process? What will the constituent expect that person to know or do? By answering these questions, institutions can get past the limitations of their org charts in order to design seamless, satisfying experience for their various constituencies across all stages of their lifecycle.

There are obviously many such processes: changing majors, enrolling in a year of study abroad at an allied institution, disputing charges on a term bill, etc. These processes can be supported with appropriate technology and business rules to ensure that constituents have a

satisfying experience—even though there may be multiple “hand-offs” between departments that otherwise operate independently of one another. Also, allowing students to fall through the cracks in departmental hand-offs has a detrimental impact on their level of institutional satisfaction and likelihood that they will persist through to graduation.

Keep in mind the design of these processes should be performed from the perspective of the constituent. It’s not the constituent’s job to figure out how to do business with the institution; it’s the institution’s job to figure out how constituents want to do business with them. Institutions that think in these truly constituent-centric terms will clearly differentiate themselves from those that don’t.

Step 7: Talking to constituents

A great constituent experience isn’t just about listening. It’s also about saying the right things to constituents at the right time. Many institutions struggle to do this. They often broadcast inadequately targeted messages to large numbers of recipients—in the vain hope that at least some of the constituents for whom the message is relevant will see it. Unfortunately, this “shotgun” approach, in addition to being highly inefficient, actually makes it less likely that recipients will pay attention to future messages. Especially when institutions are struggling with the fact that students often forward their university email to a Google or Yahoo account where it is automatically put into an infrequently read folder.

Institutions face a three-fold challenge when it comes to communicating with their constituencies:

1) Segmentation

Information should only be delivered to those constituents for whom it is relevant. That relevance may be based on one or more constituent attributes—such as gender, course of study, or where they are in the student lifecycle.

2) Personalization

Communications with constituents should feel personal. This personalization can include anything from the individual’s name to their projected year of graduation. The key is to make sure customers never feel like they are just another number in your database.

3) Context

Every interaction with a constituent takes place in a particular context. These contexts may be related to a process, a time of year, or some level of academic achievement.

These principles of segmentation, personalization, and context can be applied in all kinds of ways to enhance the constituent experience. Messages can be targeted according to demographic attributes. They can be driven by events such as registration deadlines. They can even be triggered by conditions such as a decline in a student’s GPA. Given the right technology and resources, institutions are ultimately only limited by their imagination and insight.

Institutions can employ any combination of segmentation, personalization, and context to execute these kinds of programs. For example, a demographically segmented recruitment mailing may include a personalized greeting and acknowledgement of a recent campus visit or off-campus interview.

Several key capabilities are necessary to put these concepts into practice. These capabilities include list management, opt-in/opt-out controls, collaborative content development, and message testing.

Of course, email is only one of the channels institutions can use to proactively communicate with constituents. Automated voice technology provides another highly cost-effective way to notify targeted constituents about special events, upcoming deadlines, past due balances, and other issues. Institutions can also make use of outsourced telemarketing, direct mail, and other channels to deliver messages to constituents—depending on factors such as cost and message complexity.

Step 8: Continuous measurement and improvement

A truism of quality assurance is that you can't improve what you don't measure. So to keep improving the quality of the constituent experience over time, it's essential to keep measuring it—and acting on those measurements.

The metrics institutions apply to their constituent experience may vary depending on their particular objectives and culture. But they will typically include survey results, first contact resolution rates, self-service rates, and time-based metrics such as hold-times for phone calls and turnaround times for email.

To get the most value out of these metrics, institutions should actively apply a variety of best practices for process improvement. These best practices include:

- **Communicating goals** so that everybody on the team understands them and can work towards them. For example, if subjective ratings currently average 3.2 on a 5-point scale, it should be clearly articulated to all frontline staff that the institution's goal is to raise that average rating to 4.0 within 18 months.
- **Making metrics visible** so that everybody can monitor their individual and collective progress towards the goal. This can be done with graphical desktop “dashboards” and/or regular periodic emails.
- **Rewarding achievement** to positively reinforce desired behaviors. These rewards can include both individual and team recognition.
- **Establishing corrective processes** for handling less-than-satisfactory constituent experiences. Such “recovery” behaviors can actually leave constituents feeling better about the institution and its concern for their well-being than they did before the problem occurred.
- **Adjusting goals** to reflect constituents' changing expectations. Those expectations are likely to rise as institutional performance improves, so success should be followed by a new set of higher goals—rather than complacency.

It's also useful to benchmark institutional performance against other comparable institutions. It may not make much sense for an institution that is already out-performing its peers in email response times to invest too much time and effort trying to reduce those response times by an additional 20 percent. On the other hand, for an institution that is severely lagging behind its competitors, a 20 percent improvement may not be ambitious enough.

Of course, there are many things that colleges and universities may choose to do to improve their overall constituent experience across the student lifecycle. Some institutions may need to translate their knowledge foundation into other languages to attract overseas and foreign-born students. Others may create a forums and social networking sites to foster a stronger sense of community among students and alumni. So the preceding eight steps should be viewed as a practical guide based on the experiences of successful institutions—rather than a formulaic recipe for the perfect constituent experience.

The main advantage of these steps is that they provide a proven methodology for breaking a large, somewhat abstract institutional challenge into a series of smaller, readily achievable objectives. By starting with a knowledge foundation and sequentially focusing on the “quick wins” available through self-service, frontline empowerment, and the succeeding steps, institutions can logically and effectively work towards a strategically important goal: transforming themselves into the kind of institution that applicants are more likely to choose, students are less likely to leave, and alumni will remain more loyal to after they graduate.

THE REWARDS OF EMPOWERED INTERACTION

An improved constituent experience doesn't just happen. It takes planning, time, and budget. However, experience shows that those investments quickly yield a wide range of important rewards. Those rewards include:

More effective recruiting

Prospective students are more likely to enroll in institutions that give them personalized, responsive attention. By making themselves more attractive to these prospects, institutions can also become more selective about who they admit—thereby maximizing both the quality and diversity of their student bodies. It's not just about being selective—it is about recruiting and retaining the “right” students for your institution—the ones targeted by the institutional mission.

Higher retention rates

When students feel valued and receive the support they need to get the most out of an institution's available programs and resources, they are far less prone to consider transferring elsewhere. This improved retention ensures the continuity of the student lifecycle experience and relieves pressure on both recruiting and admissions. It also helps institutions to execute their institutional mission more effectively.

Stronger alumni relationships

Students who complete their entire education at a single institution—and who continue to be treated as a constituent of that institution after graduation—are more likely to donate, promote, and otherwise support their alma mater on an ongoing basis.

Stronger institutional “brand”

Empowered interactions result in higher-quality experiences across all of an institution's various constituencies. These experiences generate positive word-of-mouth advertising and generally optimize improved perception of an institution's brand. Stronger brands, in turn, enable institutions to attract more students.

Better staff allocation

When constituents can readily get the information they need when they need it, an institution's staff spends less time dealing with repeat requests, last-minute emergencies, and other distracting hassles. They can therefore spend more time on core tasks that enrich the educational experience.

Cost reduction

The more efficiently and reliably an institution communicates with its constituents, the less money it has to spend on support services. These budget savings can be used to reduce tuition or fund other critical initiatives.

Simply put, an improved constituent experience is one of the best investments an institution of higher learning can make. And the best way to improve the experience is by putting in place the technology and best practices that ensure optimum empowerment of every interaction at every stage of the student lifecycle. As the evolving business strategies of the private sector continue to elevate the public's expectations about how they're treated across all communication channels, educational institutions can't afford not to make investments in their constituent relationships. The stakes are too high, and the competition is too fierce to postpone action any longer.

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