



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

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TECHNOLOGIES
SUMMIT 07

RightNow in Education: Using CRM to Deliver on Recruiting, Retention, and Advancement Strategies

Introduction:

Lisa M. Sherwin Wulf

Public Sector Industry Solutions Manager, RightNow Technologies

Presenter:

Nicole Engelbert, Senior Analyst, Education & Vertical Markets
Technology, Datamonitor

Agenda

- Introduction
- The Future of CRM in Higher Education
 - Nicole Engelbert, Senior Analyst, Education & Vertical Markets Technology, Datamonitor
- Customer Panel
- Roundtable/Q&A



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The Future of CRM in Higher Education

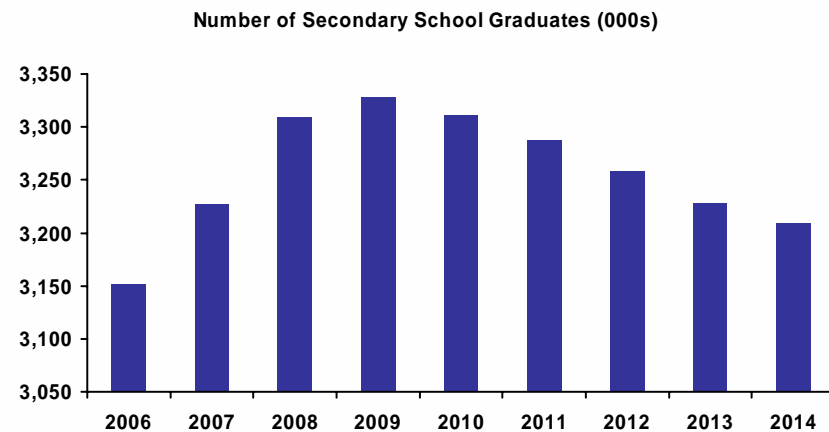
Nicole Engelbert

Senior Analyst, Education & Vertical Markets Technology

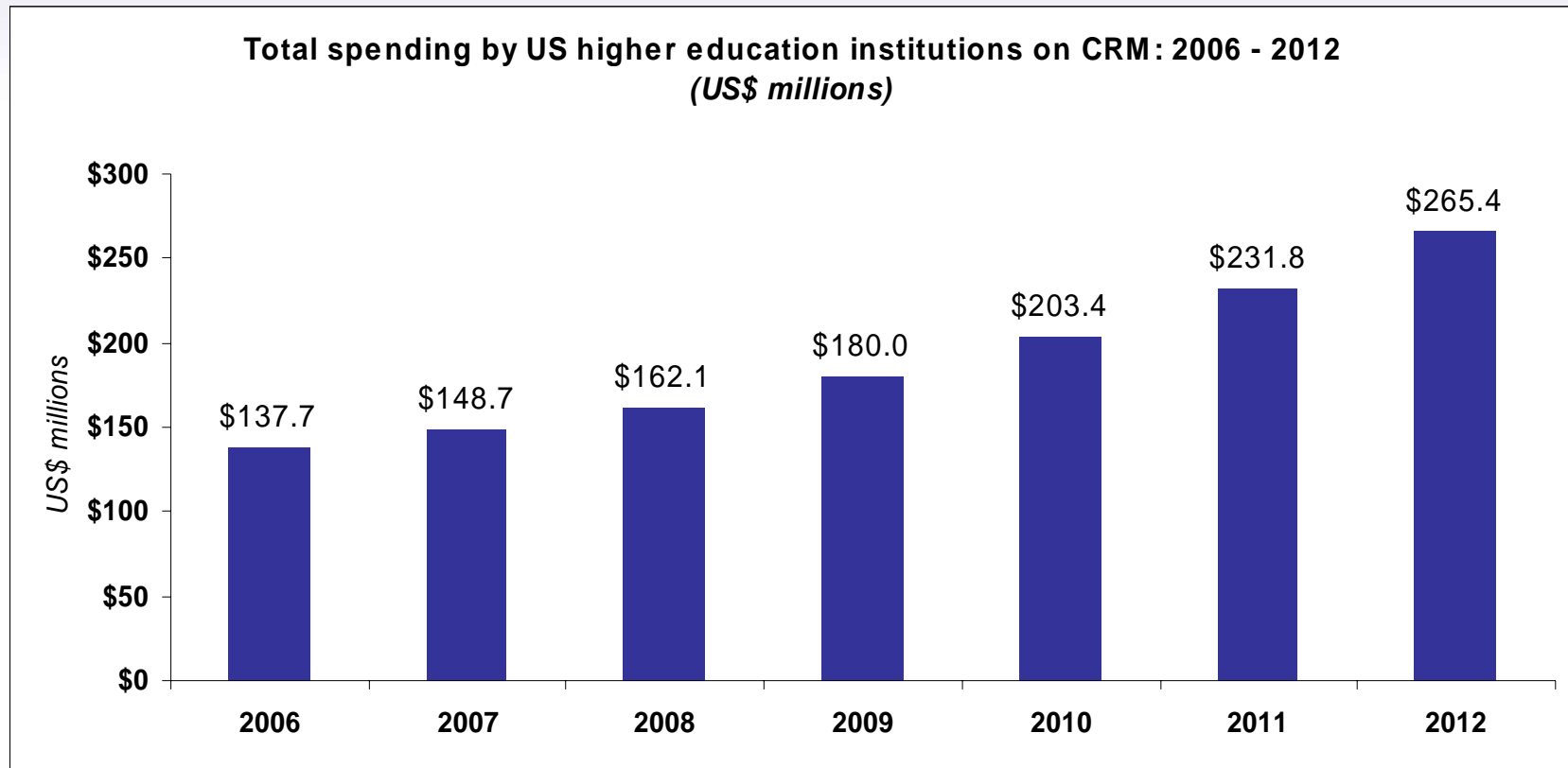
Datamonitor

All roads lead to the more widespread adoption of CRM

- The number of secondary school graduates will start to decline in 2010.
- Non-traditional programs are expanding the range of educational options for students.
- Other English-speaking countries are seeking a larger percentage of the international student market.
- The millennial generation increasingly expects an individualized experience.
- Doing more with the less or same has become a permanent part of the education landscape.



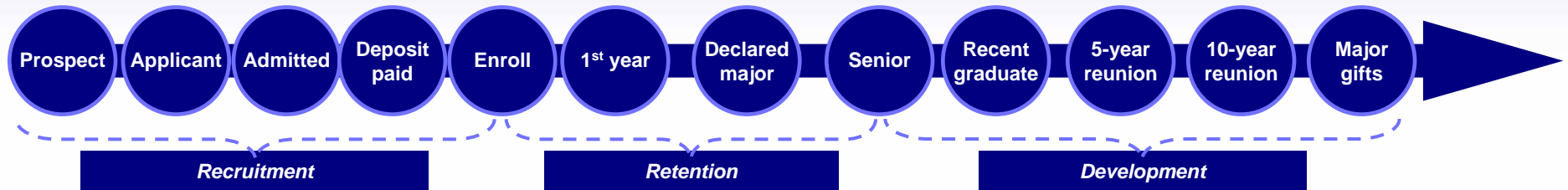
Institutional spending on CRM will grow rapidly over the near-term



Source: Datamonitor, *US & Australian Higher Education Spending on CRM, 2007 – 2012*, July 2007

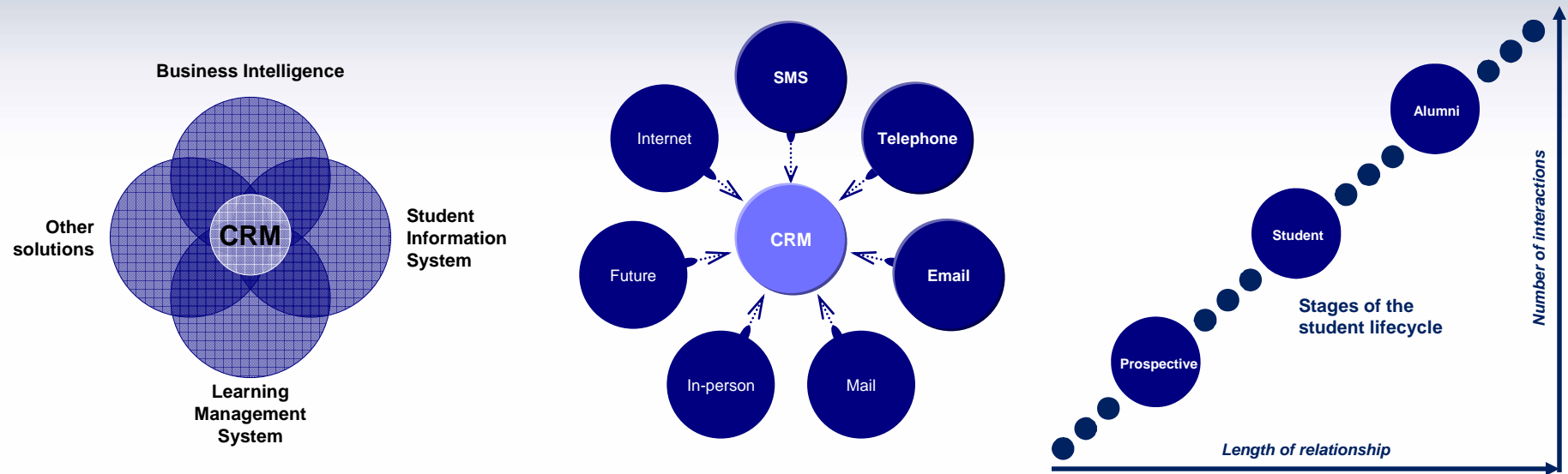
CRM strategies should support the entire student lifecycle

HIGHER EDUCATION STUDENT LIFECYCLE



- The millennial students hold different assumptions about how they expect to interact with their higher education institution.
- A large and diverse set of interactions, across the entire student lifecycle, determine the quality of the student – institution relationship.
- Too often the “relationship bar” is raised during the recruitment phase but institutions fail to maintain the same standard after students enroll.

The road ahead for CRM in higher education



- Driven by the need for more advanced analytics and ease-of-use, the boundaries between CRM and other mission-critical applications will fade.
- Advanced functionality, such as multi-channel capabilities and automated workflows will become widely adopted in the higher education market.
- CRM will move out of the admissions office and expand across the entire student lifecycle to include retention and development.

Customer Panel

- Debbie Harju
University of Michigan
- Linda Thompson
Carla Johanson
Minnesota Online
- Judi Voeller
University of Oklahoma Financial Aid Services



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Debbie Harju

**University of Michigan – Office of the Registrar
Ann Arbor, Michigan**

Live Since – February 25, 2005 – Version 6.0

Current Version – 8.0.3 → 8.1 Service Pack 2

University of Michigan – Office of the Registrar

Business Objectives

- Reduce number of “general” incoming phone calls and emails
- Promote self-service - make website information easier to find
- Centralize incoming customer/department requests
- Provide better overall customer service!



University of Michigan – Office of the Registrar

Challenges

- Decentralized Campus - Second of 4 interfaces to come on board
 - 1st Office of Undergraduate Admissions
 - 2nd Office of the Registrar
 - 3rd Office of New Student Programs
 - 4th Rackham Graduate School
- Office of Undergraduate Admissions to upgrade from 5.5 to 6.0
- Analyze and organize existing website content
- Identify and name content managers/business owners across the office
- Train 42 staff members to use the product



Results

- Twenty-six active queues (work groups) responding to incidents
- Responded to over 43,500 incidents since February 2005
- Maintain current information — all published answers are reviewed/updated at least once a year
- Maintain a minimum 99.6% self-service rating



Best Practices Recommended

(Multiple Interfaces)

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

(General)

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





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Minnesota Online e-marketing campaigns

RightNow Summit

“Using CRM to Deliver on Recruiting, Retention, and
Advancement.”

August 2007

Linda Thompson

Carla Johanson

Minnesota Online e-marketing?

- Target specific program campaigns to specific audiences
- Get specific data to appropriate students
 - RightNow Marketing
 - Monitor traffic (Google Analytics, RightNow)
 - Google AdWords Campaign
 - Search Engine Optimization
 - Banner Ads



RightNow Marketing

- Overview of Loonie University
- Demonstration
- Student Relationship Process



Welcome to Loonie University



an internationally engaged institution!

Nature's renowned university excels in bringing nature's ideas to life while making a distinctive contribution to society in research, teaching and knowledge transfer.

Established in 2006, the university's mission is to better preserve the world's natural surroundings.



Loonie U Programs

Duck Feathers



Bear Tracks



Moose Troop



Webform



- Student signs up for information
- Campaign launches

Opportunities

Sales Console (Minnesota Online)

Opportunities

Quick Search Go - View **My Opportunities - All** Search Edit - Delete - Print - Forward

Viewing My Opportunities - All Records Found: 21

Opportunity	First Name	Last Name	Stage	Status	Date Updated
1 Distance Info Request - michelle.blaney@minneso	Michelle	Blaney	Initial	Test Opportunity	02/14/2007 07:21 PM
2 Test Campaign - michelle.blaney@minneso	Michelle	Blaney	Initial	Test Opportunity	02/09/2007 08:50 PM
3 Distance Info Request - michelle.blaney@minneso	Michelle	Blaney	Initial	Test Opportunity	02/09/2007 08:21 PM
4 ATC Paralegal - teresa.theisen@minneso	Teresa	Theisen	Initial	Test Opportunity	02/01/2007 08:31 AM
5 South Central Med Lab Tech - michelle.blaney@	Michelle	Blaney	Initial	Test Opportunity	01/31/2007 03:47 PM
6 Test Letters for Paul	Paul	Orange	Applied	Test Opportunity	01/30/2007 08:36 PM
7 ATC Paralegal - linda.thompson@minneso	Linda	Thompson	Initial	Test Opportunity	01/28/2007 01:27 PM
8 MNVTC Wladsmthing - nicole.weller@minneso	Nicole	Weller	Initial	Test Opportunity	01/28/2007 01:27 PM

My Opportunities Home [Create New Opportunity](#)

My Opportunity Tasks

Opportunity	Task	Due Date
Distance Info Request - pvhne	Follow-up on Prospect	05/12/2007 09:40 AM
Distance Info Request - katie.l.	Follow-up on Prospect	05/06/2007 10:50 AM
Distance Info Request - ann.w	Follow-up on Prospect	05/04/2007 07:27 PM
Distance Info Request - debbie	Follow-up on Prospect	05/03/2007 11:00 AM
Distance Info Request - michel	Follow-up on Prospect	05/02/2007 11:42 AM
Distance Info Request - silvya	Follow-up on Prospect	04/30/2007 11:41 AM
DE	Follow-up on Prospect	04/29/2007 12:00 PM
Distance Info Request - michel	Send Introduction Email	02/14/2007 10:42 AM

Forecasted Revenue by Opportunity [Generate](#)

Recently Modified Opportunities

Opportunity Name	Last Modified
Distance Info Request - jkarsten@bop.gov	02/21/2007 03:28 PM
Distance Info Request - pvrncps@mians.net	02/21/2007 03:26 PM
Distance Info Request - aiker28@msn.com	02/21/2007 03:24 PM
Distance Info Request - sarastuders@yahoo.com	02/21/2007 03:23 PM
Distance Info Request - kora@fordiernet.net	02/21/2007 03:22 PM
Distance Info Request - kristi.karets@minneso	02/21/2007 03:20 PM
MNVTC Wladsmthing - mellefield@yahoo.com	02/21/2007 03:18 PM
Distance Info Request - green_gard04@yahoo.com	02/21/2007 12:20 PM
Distance Info Request - stalletson27@hotmail.com	02/21/2007 12:15 PM
Distance Info Request - katie.l.lau@wellsfargo.com	02/21/2007 12:12 PM
Distance Info Request - ...	02/21/2007 12:11 PM

[See more...](#)

Tasks

Sales Console (Minnesota Online)

Tasks

Quick Search Go View My Tasks Search Edit Delete Print Forward

Viewing My Tasks: Top Level Groupset 6 (containing 6 records)

Date Due	Task	Organization	Contact	Opportunity
04/29/2007 12:00 PM	Follow-up on Prospect			DE
04/30/2007 11:41 AM	Follow-up on Prospect			Distance Info Request - silygr2007@ho
05/03/2007 11:00 AM	Follow-up on Prospect			Distance Info Request - debfisher@chari
05/04/2007 07:27 PM	Follow-up on Prospect			Distance Info Request - ann.wilson54@ver
05/06/2007 10:50 AM	Follow-up on Prospect			Distance Info Request - katie.lauff@ver
05/12/2007 09:40 AM	Follow-up on Prospect			Distance Info Request - pvrneo@meins.net

My Tasks Home Create New Task

Upcoming Tasks Due Tasks Due this Week Generate

Task	Opportunity	Due Date
Follow-up on Prospect	Distance Info Request - pvrne	05/12/2007 09:40 AM
Follow-up on Prospect	Distance Info Request - katie.l.	05/06/2007 10:50 AM
Follow-up on Prospect	Distance Info Request - ann.w	05/04/2007 07:27 PM
Follow-up on Prospect	Distance Info Request - debbs	05/03/2007 11:00 AM
Follow-up on Prospect	Distance Info Request - michel	05/02/2007 11:42 AM
Follow-up on Prospect	Distance Info Request - silygr	04/30/2007 11:41 AM
Follow-up on Prospect	DE	04/29/2007 12:00 PM
Send Introduction Email	Distance Info Request - michel	02/14/2007 10:42 AM

Recently Modified Tasks

Task	Due Date	Last Modified
Follow-up on Prospect	05/10/2007 02:52 PM	02/21/2007 03:20 PM
Send Introduction Email	02/22/2007 01:52 PM	02/21/2007 03:20 PM
Send Introduction Email	02/24/2007 08:48 AM	02/21/2007 03:20 PM
Follow-up on Prospect	05/11/2007 11:37 AM	02/21/2007 03:24 PM
Send Introduction Email	02/23/2007 10:37 AM	02/21/2007 03:24 PM
Follow-up on Prospect	05/10/2007 01:29 PM	02/21/2007 03:23 PM
Send Introduction Email	02/22/2007 12:29 PM	02/21/2007 03:23 PM
Follow-up on Prospect	05/09/2007 08:02 PM	02/21/2007 03:22 PM
Send Introduction Email	02/21/2007 07:02 PM	02/21/2007 03:22 PM
Follow-up on Prospect	05/11/2007 10:04 AM	02/21/2007 03:20 PM
Send Introduction Email	02/23/2007 09:04 AM	02/21/2007 03:20 PM

Done User: Michelle Blaney 5:09 PM

start Session Console (Min... Support Console (Min... Sales Console (Minne... 5:09 PM

Opportunity Notes

The screenshot shows a CRM interface with a list of opportunities and a detailed view of notes for a specific opportunity.

Opportunities List:

Opportunity	First Name	Last Name	Stage	Status	Date Updated
1 Distance Info Request - michelle.blaney@minnes	Michelle	Blaney	Initial	Test Opportunity	02/14/2007 07:21 PM
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3 Distance Info Request - michelle.blaney@minnes	Michelle	Blaney	Initial	Test Opportunity	02/09/2007 06:21 PM
4 ATC Paralegal - teresa.theisen@minnesota.edu	Teresa	Theisen	Initial	Test Opportunity	02/01/2007 08:31 AM
5 South Central Med Lab Tech - michelle.blaney@	Michelle	Blaney	Initial	Test Opportunity	01/21/2007 03:47 PM
6 Test Letters for Paul	Paul	Drange	Applied	Test Opportunity	01/30/2007 06:36 PM
7 ATC Paralegal - linda.thompson@minnesota.edu	Linda	Thompson	Initial	Test Opportunity	01/29/2007 01:27 PM
8 MNVCTC Windsmiting - nicole.welter@minnesot	Nicole	Welter	Initial	Test Opportunity	01/29/2007 01:27 PM

Opportunity Notes for Distance Info Request - michelle.blaney@minnesota.edu

- Note (Michelle Blaney)** 02/21/2007 05:18 PM
Michelle has applied to the program.
- Note (Michelle Blaney)** 02/21/2007 05:17 PM
Michelle requested information about Computer Networking through an online form.

Add:
 Note
 Phone
 Email

Buttons: Save, Cancel, Spelling, Forward, Print

User: Michelle Blaney | 5:18 PM

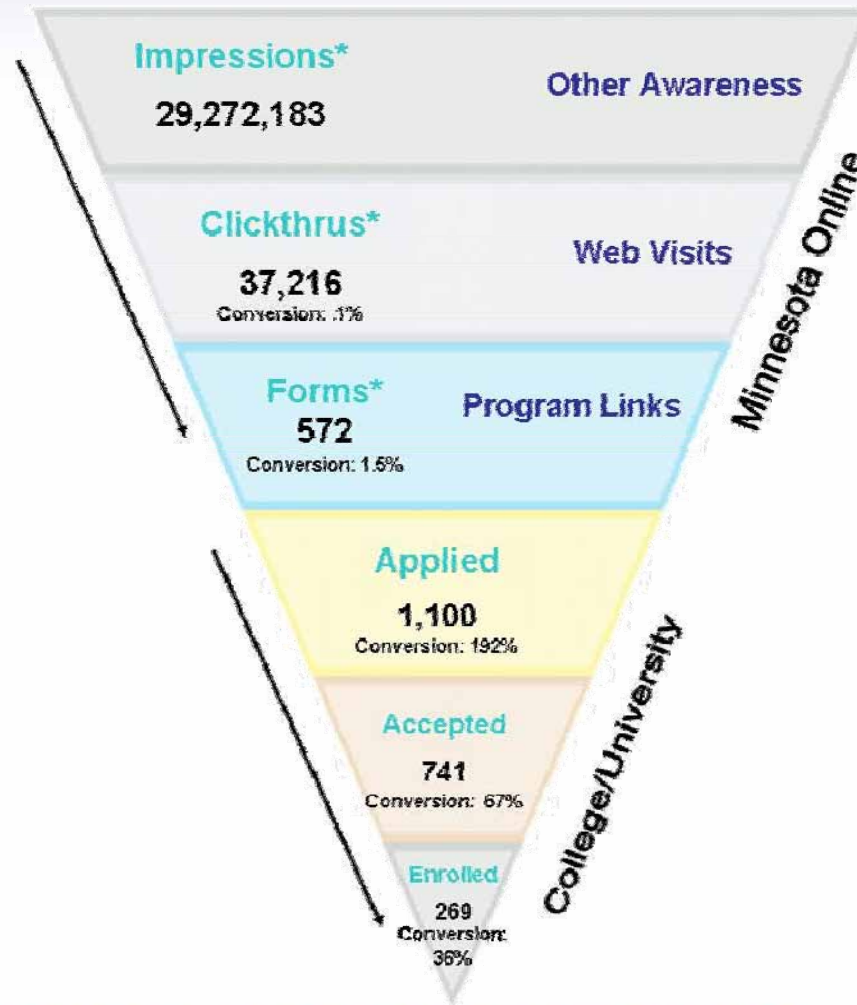
Campaign Process Recap



- Student completes webform
- Campaign is launched to student
- Support Center receives student information
- Support Center begins the relationship with the student



RightNow Reporting



RightNow Reporting

Support Center Report



Support Center Activity

- 495 "Ask a Question"
- 661 Live Chats
- 12,533 Incidents
- 24,133 FAQs Viewed
- 8, 233 Phone Calls

Marketing Activity

- 858 prospects using the marketing webform
- 406 applicants
- 464 registrations
- 155 lost

Questions!



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Judi Voeller

University of Oklahoma Financial Aid Services

University of Oklahoma Financial Aid Services

Goals

- Provide current and prospective students and parents with the critical information they need to finance their education
- Bring overwhelming phone and email volume under control
- Optimize use of the web self-service without burdening other systems resources



University of Oklahoma Financial Aid Services

Achievements

- Students and parents get fast, accurate answers to their questions 24/7
- Manageable phone and email volume even during “crunch” times
- Staff can focus on solving more complex problems instead of answering repetitive questions
- Use of Marketing – including notification for Sooner Aid Analysis
- Considering use of Marketing for Sooner Promise Students

The screenshot displays the 'Ask the Sooner' website interface. At the top, there is a banner with the text 'University of Oklahoma Ask the Sooner' and a photo of students. Below the banner is a navigation menu with links for 'FINANCIAL AID SERVICES', 'ADMISSIONS & RECORDS', 'TUITION INFORMATION', 'PROSPECTIVE STUDENTS', and 'HOUSING'. The main content area features a search bar with 'Search' and 'Browse' buttons, and a 'Search by Department' dropdown menu. Below the search bar, there is a table of 743 answers available, with the first page showing 20 results. The table has columns for 'Summary' and 'Department'.

Summary	Department
1. How do I use this site?	Help
2. Does the Ask the Sooner site apply to all OU students?	Help
3. New - Announcement regarding Chase Master Promissory Note (MPN) process for Chase borrowers.	Financial Aid
4. How do I contact Financial Aid Services?	Financial Aid
5. Where do I send my transcripts from other schools?	multiple
6. Is it possible to direct my online payment to pay specific charges?	Bursar
7. What are the new Academic Competitiveness Grant (ACG) and Smart Grant Programs and how do I apply?	Financial Aid
8. What are the guidelines for OHLAP disbursement?	multiple
9. How do I get a copy of my transcript?	Academic Records
10. Updated - Can I pay for a specific course?	Bursar
11. Who should I contact about the amount of my OHLAP award?	multiple
12. When will OHLAP be applied to my account?	multiple
13. Can my waiver be converted into cash?	Bursar
14. Updated - When is the best time to call Financial Aid Services?	Financial Aid
15. How much does it cost to audit a class?	Bursar
16. Can my waiver be held for another academic year?	Bursar
17. What happens to my OHLAP disbursement if I drop classes?	multiple
18. What do I need to know about third party sponsorships?	Bursar
19. What is a third party authorization?	Bursar
20. Why does it cost the same amount of money to audit a class as it does to enroll for academic credit?	Bursar

Customer Panel Q and A



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Learn More

- **Next at the Summit**

- 5:00 – 6:00 PM - Higher Education Community Roundtable
Location: Community Conference Room in Broadmoor Hall
Ballroom B

- 6:30-7:15 PM - *Public Sector Reception* with Greg Gianforte
Location: C.O.D. Room in Broadmoor South

- **RightNow Community:** <http://community.rightnow.com/>

- Higher Education Forum

- **Webcast - Best Practice with CRM in Higher Education**

- September 18, 2007, Featuring Nicole Engelbert, Senior Analyst, Datamonitor and University of Memphis

- **RightNow Higher Education User Group (HUG)**

- October 9-10 hosted by MnSCU in Minneapolis, MN

- Visit: www.rightnow.com/events for details and to register