

# Study of Customer Relationship Management (CRM) Issues in UK Higher Education Institutions

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**The KSA Partnership**

- To provide JISC with the knowledge of the UK HE sector's (and some examples from the FE sector's) **attitudes towards, and prevalence of, CRM usage** – particularly in the context of its leverage **to develop, maintain and enhance business and community engagement relationships**

- To what extent have HEIs deployed CRM-type technologies to realise their **strategic priorities**?
- **How and for whom** have HEIs deployed CRM-type technologies to support their core activities?
- What **issues, challenges and sensitivities** have been faced by HEIs in successfully deploying CRM-type technologies?
- What have been the **benefits, impact and effect** of deploying CRM type technologies on HEIs and the relationships that they have?
- What have been the **lessons learnt** about how CRM-type technologies can add value to HEIs and how they deliver on their strategic priorities?

- Project scoping
- Data gathering and analysis
  - Survey framework design
  - Institutional e-survey
  - Institutional visits
  - Comparative studies (collaborations, other public sector organisations)
  - Review, analysis and consolidation of data
  - Validation workshop
- Sharing the outcomes
  - Reporting to JISC (August 2007)

- Opportunity to share your practice in deploying CRM systems and to learn from others
- Introduce yourself
  - Who you are
  - Where you are from
  - What role you have
  - Background on the extent to which your organisation has deployed CRM systems to support its BCE activity
- Key questions for consideration

- What has been your institution's strategic intent in relation to deploying CRM systems to support BCE activity?
  - Which customers/clients/contacts have benefited?
  - Which relationships are being managed?

- Drawing on your experience of the deployment of CRM systems to support BCE activity:
  - What barriers and constraints have been faced? And, how did your institution overcome these?
  - What levers and enablers have helped to facilitate the process?
  - What have been the critical success factors?

- Thinking about your institution's support needs with regard to the adoption or development of BCE CRM:
  - What support would have been valued in the past?
  - What support would be valued now and over the next two years?

- Strategic drive to bottom up action
  - Piecemeal and adhoc
- Just starting out to (well) integrated and mature
- Testing the waters
  - Iterative process, learning from experience
  - Making it up as we go!
- Single to multiple systems
  - Potential for scalability and integration
- Local to global

- Increasingly there is a strategic drive... yet 'drivers' are not well articulated
  - Benefits and impacts
  - Measures of success, return on investment
  
- Prestige, reputation, profile
  
- Building, strengthening and sustaining relationships/ partnerships
  - Diversifying income streams
  - Better intelligence to inform strategic/operational decisions
  - Business process improvement
  - Facilitate multi-functional/transdisciplinary working

- Strategic leadership
  - Establish intent, set the direction and measures of success, reinforce the messages (continually!)
- Planned implementation supported by (adequate) resources
  - Understanding how the business works – its information architecture
  - Work towards integration with core business
- Engage key stakeholders throughout the process
  - Going with the grain, use appropriate terminology
  - Managing expectations
- Staff development
- Provide incentives and sell the benefits
  - Intrinsic and extrinsic
- Defining the HE offer and benefits to be gained

- Oh... and implement a software solution!

- Timing is right... institutions don't want to reinvent the wheel!
  - Best practice guidelines
    - Frameworks
  - Case studies of practice
    - Transferable, lessons learnt
  - Best practice groups
    - Networking, sharing, mentoring
  - Establishing full costs
    - Cost vs benefit, cost of not doing it!
  - Funding
    - Development, implementation, support
  - Evaluation
    - Identifying benefits, return on investment

- ... and celebrate our successes!