

**Sharing Good Practice in Customer Relationship
Management Strategies and Processes in HE**

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Coventry University Technology Park

Event Feedback

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Introduction

This event, funded by the Joint Information Systems Committee (JISC), provided participants with the opportunity to discuss needs, explore issues, and share and develop good practice relating to the use of Customer Relationship Management (CRM) systems in Higher Education (HE). The event was attended by 45 representatives all involved in the engagement of external business and community partners/customers for knowledge transfer and exchange, as well as those involved in IT strategy.

Engagement between HE institutions and their external partners and clients is growing in both scope and richness, driven by the needs and opportunities of the knowledge economy. The focus is increasingly on knowledge transfer and exchange – whether to offer research-based or education based services, or a combination of the two. Knowledge transfer is becoming embedded in institutional strategies, supported by a growing third stream of funding. This engagement, the relationships, opportunities and intelligence that surround it, require systematic control as well as sustainable and effective processes and data management.

In May 2006, following discussion amongst members of the Association for University Research and Industry links (AURIL), Coventry University hosted an event (chaired by AURIL) to share experiences of CRM implementation within HE. It highlighted the fact that many participants were experiencing similar difficulties when implementing CRM within their institutions. Feedback from the event suggested a clear and imminent need for guidance on CRM and related issues within institutions.

This year's follow-up event will lead to the development of a range of good practice materials, based on the day's discussions and with input provided by participants drawn from within and outside the HE sector.

Feedback from the working group meeting is extremely important. Not only does this highlight the relevance of the content but also how participants would like to see the group develop in the future.

Evaluation of feedback forms

The following results present feedback captured from the event feedback form. The data is a mix of qualitative and quantitative results. Where quantitative data exists participants were asked to score between 1 (poor) and 10 (excellent). In total 45 delegates attended the event, 24 of which completed a feedback form (not all participants answered every question on the form).

Question 1: How interesting and relevant did you find the content of the event?

Sample Size: 24										
Score	1	2	3	4	5	6	7	8	9	10
% result						12.5%	25%	25%	25%	12.5%

General comments from question 1 were:

“Although I do work in education I found many of the presentations relevant to anyone implementing CRM”

“Excellent – very useful as we are just starting to implement a CRM so the sharing of good practice was very useful”

“Second session in morning less useful”

“Very informative with lots of different insights, good to meet others in the same position”

“Large amount of information for an institution which is behind, however was repeated a couple of times”

“We are not alone”

“The practical tips / sessions were very useful. I could have done without the more academic session”

Question 2: Have you gained any insights that you can usefully apply in your organisation?

Sample Size: 24										
Score	1	2	3	4	5	6	7	8	9	10
% result				3.5%	7.1%	10.7%	40%	25%	3%	10.7%

General comments from question 2 were:

“Reinforced some of the lesson we have learnt the hard way”

“Again, many aspects of sharing good practice”

“Yes – some but could have got more if time for more questions”

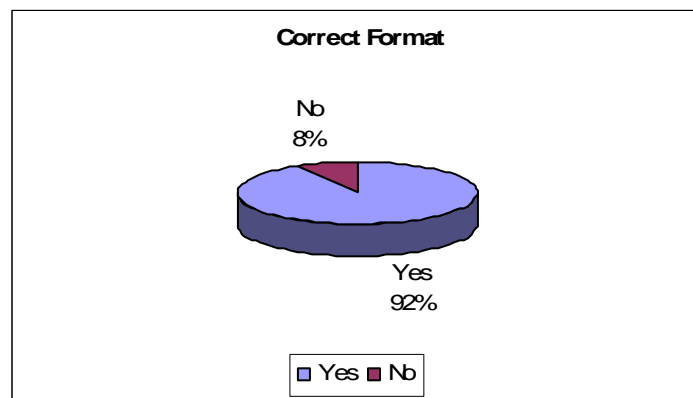
“I work for a supplier but found it very interesting and useful”

“Will need more thought and investigation but basic principles maybe useful”

“Lots of tips, but a long way to go”

Question 3: Do you believe the event is the correct format for discussion of the topic?

92% of a sample of 24 felt the event is the correct format for discussion of the topic. The opportunity for networking and discussing CRM implementation with representatives from other institutions was a popular result. However some felt that on-going support and a vested interest from relevant parties is essential for success. 8% felt the event was not in the correct format.



Question 4: How would you like to see the event organised in the future?

It was felt overall a similar approach would be useful in the future incorporating the following:

- Same format – different discussion points and presenters.
- Better facilitation of the steps required to implement the business philosophy, not the IT system.
- Move around table discussions / greater sharing of experiences.
- More opportunity for break-out group work.
- Delegates would like to know more about the benefits of CRM systems in a HE establishments and whether they pay for themselves and are they maintained as they should be.
- Add a survey of delegates.
- Break up some of the discussions.
- More interaction time needed as this was more useful than the speakers.
- Events targeted at Head of institutions or Heads of IT who are less familiar with marketing issues.
- More talks from Universities at different stages – case studies / models.
- Something similar with case studies.

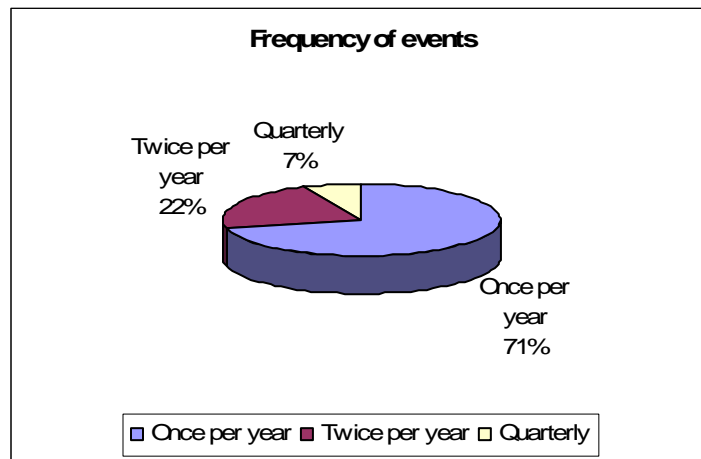
Question 5: What further support of CRM implementation would be beneficial to your organisation?

- Further networking opportunities across the sector.
- Funding for staff to implement the business philosophy, planning and delivery, eventually an IT system.
- A network of CRM / HEI users meeting regularly.
- Consideration, classification of costs versus benefits.
- Clarity of the benefits.
- Case studies to troubleshoot common stumbling blocks and give the best chance of success especially people management.
- Survey of products.
- Interfacing with different systems – data cleansing.
- An external opinion on what is needed and a possible structure to this.
- Individual consultancy from an expert to solve issues specific to each institution.

- Selling the benefits to key stakeholders.
- Guidelines on best practice / system function, implementation and culture change within organisations.
- An on-line community – regular meetings.

Question 6: How often would you like to see such an event take place in the future?

A sample size of 22 responded to the question of frequency of events. 71% would like to see such an event take place once per year, 7% would like to see a quarterly event and 22% felt twice per year was adequate.



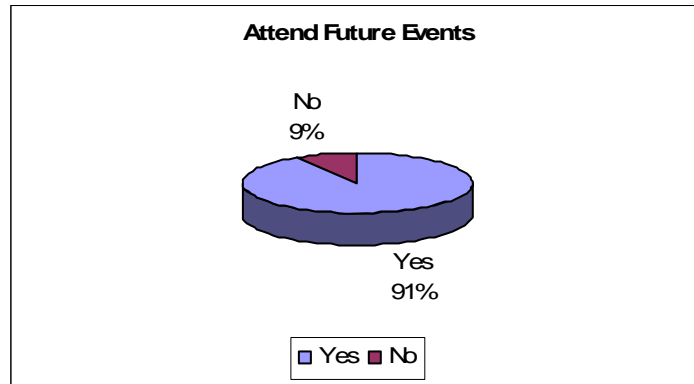
General comments from question 6 were:

“An on-line discussion would be good. This could be a permanent on-line feature”

“Perhaps local / regional smaller clusters for sharing good practice in between national events”

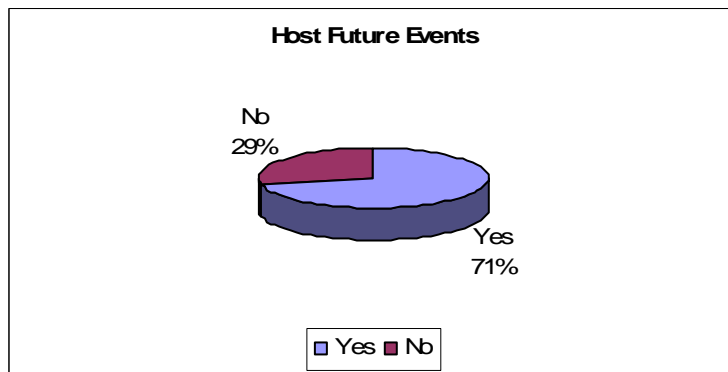
Question 7: Would you be interested in attending future events?

91% of a sample of 22 would be interested in attending future events. 9% would not be interested in attending future events in this format.



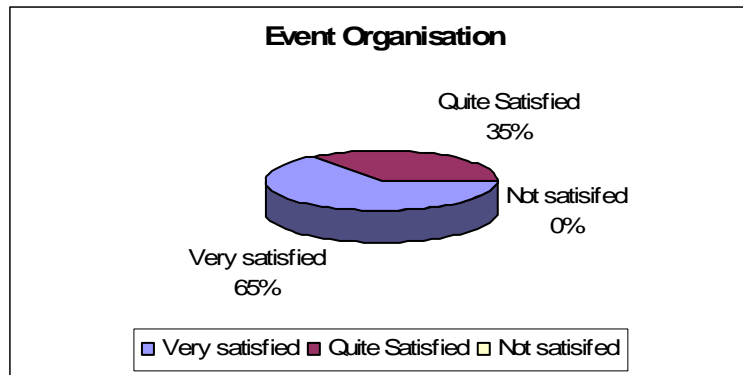
Question 8: Would you be interested in hosting future events?

71% of a sample of 22 would be interested in hosting future events. 29% would not be interested in hosting future events.



Question 9: How satisfied were you with the overall organisation of the event?

65% of a sample of 20, were very satisfied with the overall organisation of the event. 35% were quite satisfied and 0% reported an unsatisfactory score.



Question 10: How interesting and relevant were the presentations?

Sample Size: 21 - Speaker: Sarah Porter										
Score	1	2	3	4	5	6	7	8	9	10
% result	4.7%		4.7%	4.7%	9.5%	4.7%	47%	4.7%	9.5%	9.5%

Sample Size: 24 - Speaker: John Latham										
Score	1	2	3	4	5	6	7	8	9	10
% result				4.7%			16.6%	45.8%	16.6%	16.6%

Sample Size: 24 - Speaker: Chris Birch										
Score	1	2	3	4	5	6	7	8	9	10
% result						12.5%	20.8%	33.3%	16.6%3	16.6%

Sample Size: - 22 Speaker: Martin Penny										
Score	1	2	3	4	5	6	7	8	9	10
% result				4.5%	13.6%	9%	13.6%	45%	4.5%	9%

Sample Size: - 21 Speaker: Thomas Baaken										
Score	1	2	3	4	5	6	7	8	9	10
% result		4.7%	14.2%		14.2%	23.8%	23.8%	9.5%	9.5%	

Sample Size: - 21 Speaker: Luciano Batista										
Score	1	2	3	4	5	6	7	8	9	10
% result			14.2%	4.7%	28.5%	14.2%	23.8%		9.5%	4.7%

Sample Size: 11 - Speaker: Christopher Binns										
Score	1	2	3	4	5	6	7	8	9	10
% result			9%	9%	27.7%	18.1%	18.1%		9%	9%

Sample Size: 19 - Speaker: The KSA Partnership										
Score	1	2	3	4	5	6	7	8	9	10
% result			5.2%		26.3%	10.5%	26.%	5.2%	21.2%	5.2%

General comments from the presentations were as follows:

“I feel the majority of presentations benefited those from a HE background”

“Too many, didn’t want an Oracle sales pitch”

“A good balance without repeating”

“Would have been useful to hear how Luciano was using / benefiting from CRM at Exeter – if at all”

Question 11: How satisfied were you with the break-out sessions?

Sample Size: 23										
Score	1	2	3	4	5	6	7	8	9	10
% result	4.3%			4.3%	8.6%	13.1%	21.7%	21.7%	21.7%	4.3%

Comments from the break-out sessions are as follows:

“Found it really interesting – really varied views across the room”

“Not well facilitated”

“Very focussed on IT systems”

“A very good use of time”

“I thought we did not diversify our discussion enough. However it could just be it’s a new area for me”

“Very useful, a shame it wasn’t longer”

Question 12: Additional Comments

“I felt there was a real mix of people at the event, all at different stages in their work. I am sure this is a good forum for networking and help in driving things forward”.

“An excellent event – well worth the 4 hours it took me to struggle through the effects of the flooding. Well done everyone who put the day together”.

“Too many presentations in the morning and not enough time for questions / discussions”.

“A bit skewed in favour of CRM systems, feel like I haven’t seen the whole iceberg”.

“Very good excellent location”

3. Summary

This event consisted of delegates with varying degrees of knowledge of CRM systems and its implementation within organisations. The event gave delegates the opportunity to find out how other Higher Education institutions are investigating, implementing and managing a CRM system, highlighting the importance of planning and embedding a culture within organisations. Participants reported gaining an abundance of useful thoughts and ideas which could be applied into their own institutions.

A number of suggestions were highlighted as a result of the feedback:

- On-going support is needed and a vested interest from relevant bodies.
- Similar national events on a regular basis allowing more opportunity for information sharing.
- Smaller events; possibly regional cluster groups established.
- Consideration of the costs v benefits.
- Consider the culture change required to successfully implement CRM.
- Case studies and good-practice guide to be developed.

4. Next Steps

This report will be available on the JISC website www.jisc.ac.uk along with presentations from the event. Findings will be fed into the JISC to consider the suggestions for further assistance in this area.

Any future developments will be reported to all working group participants and those who have expressed an interest in the subject.