

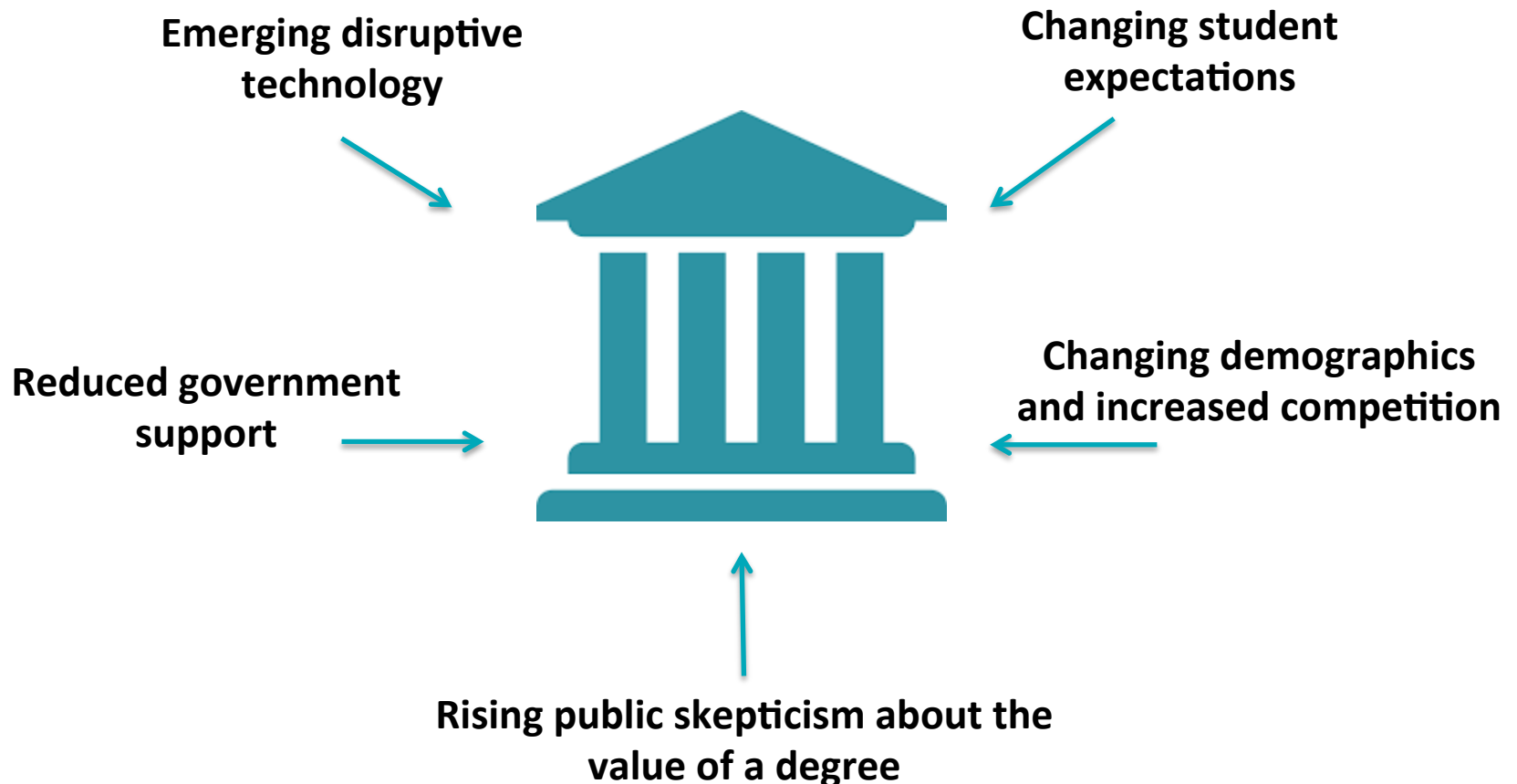
CRM for Student Success - Aligning System & Strategy

Heidi Schreiner – Manager, Business Relationships
Tribal Systems Canada

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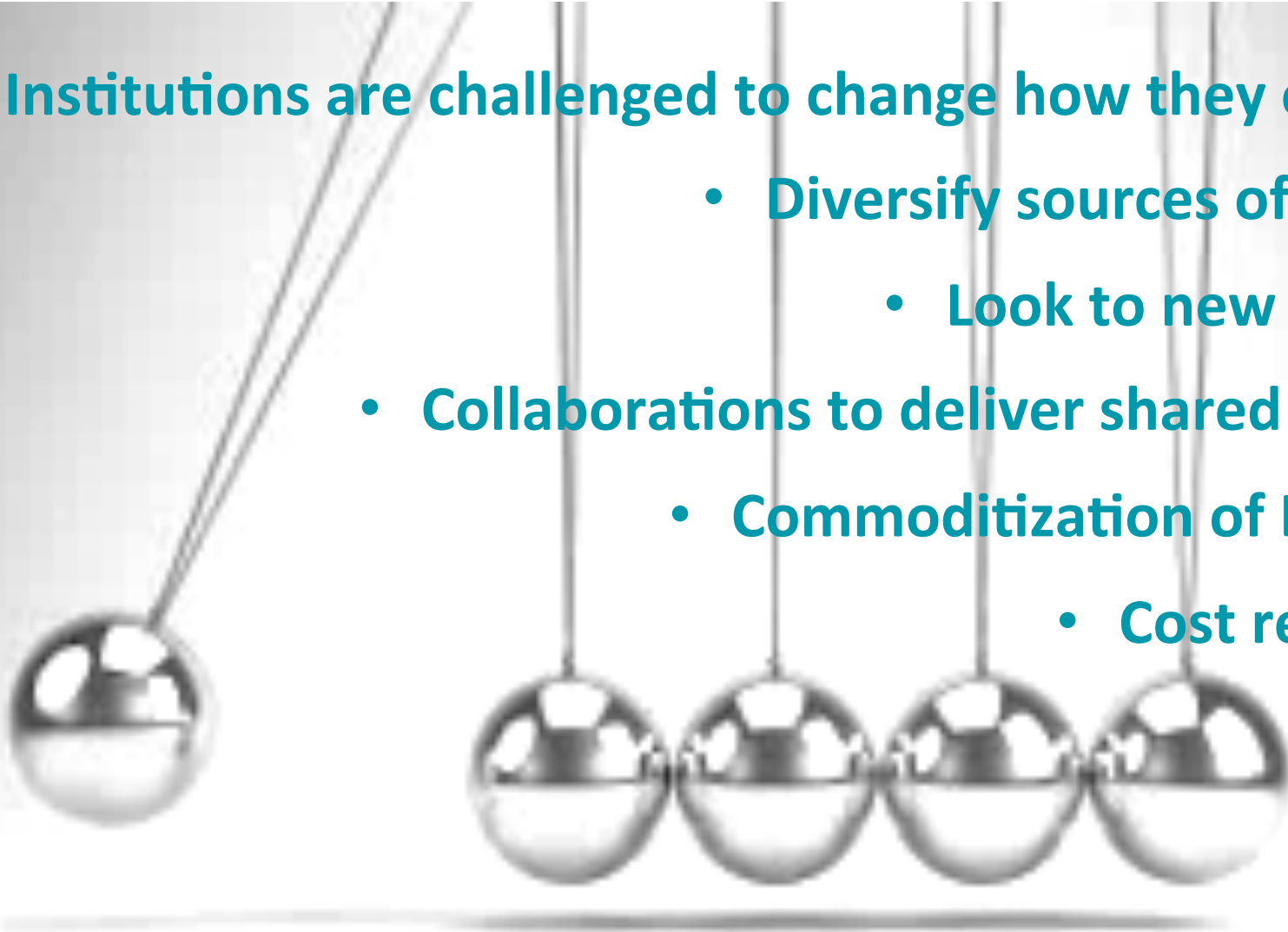
Success
Student
Management
Student-centred
Service-Oriented
Relationship
Engagement
Experience
Strategic

What are the forces impacting post secondary education?



Institutions are challenged to change how they operate:

- **Diversify sources of funding**
 - **Look to new markets**
- **Collaborations to deliver shared services**
- **Commoditization of Learning**
 - **Cost reduction**



Strategic Enrolment Management (SEM)

- evolving from enrolment funnel to full student lifecycle

Student Relationship Management/CRM

- strategy versus system Importance of personalisation of service:- student support and engagement

Learning analytics

- How do institutions strategically apply what they know about students?

Competency based education (CBE) and outcomes focus

- clear visibility of student progress and non-academic achievement for employability



T R I B A L

working as one



DANGER

EXPECTATIONS

Student Expectations

Engagement

- Expect to engage in an online environment with the institution and with peers

Flexibility

- Expect to access resources and services as needed and to have options in their learning pathways

User Friendly

- Expect the online environment to be simplified and consistent

Personalization

- Expect to be known as an individual, either through personalized interactions or through the ability to personalize the online environment

Supportive Environment

- Expect a connected learning environment accessible through reliable tools

Problem

Solution

Problem

Pro

Problem

Problem

Problem

Problem

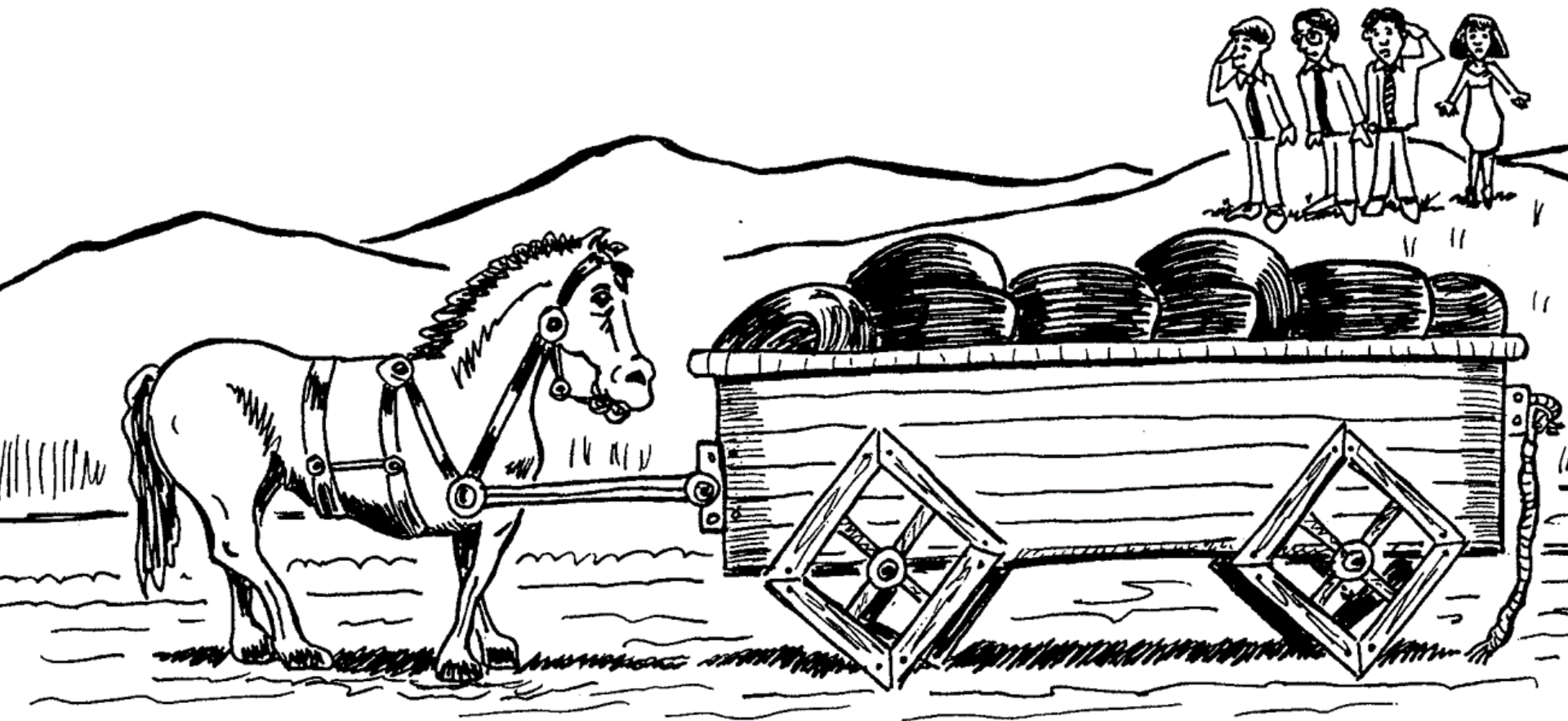
Problem



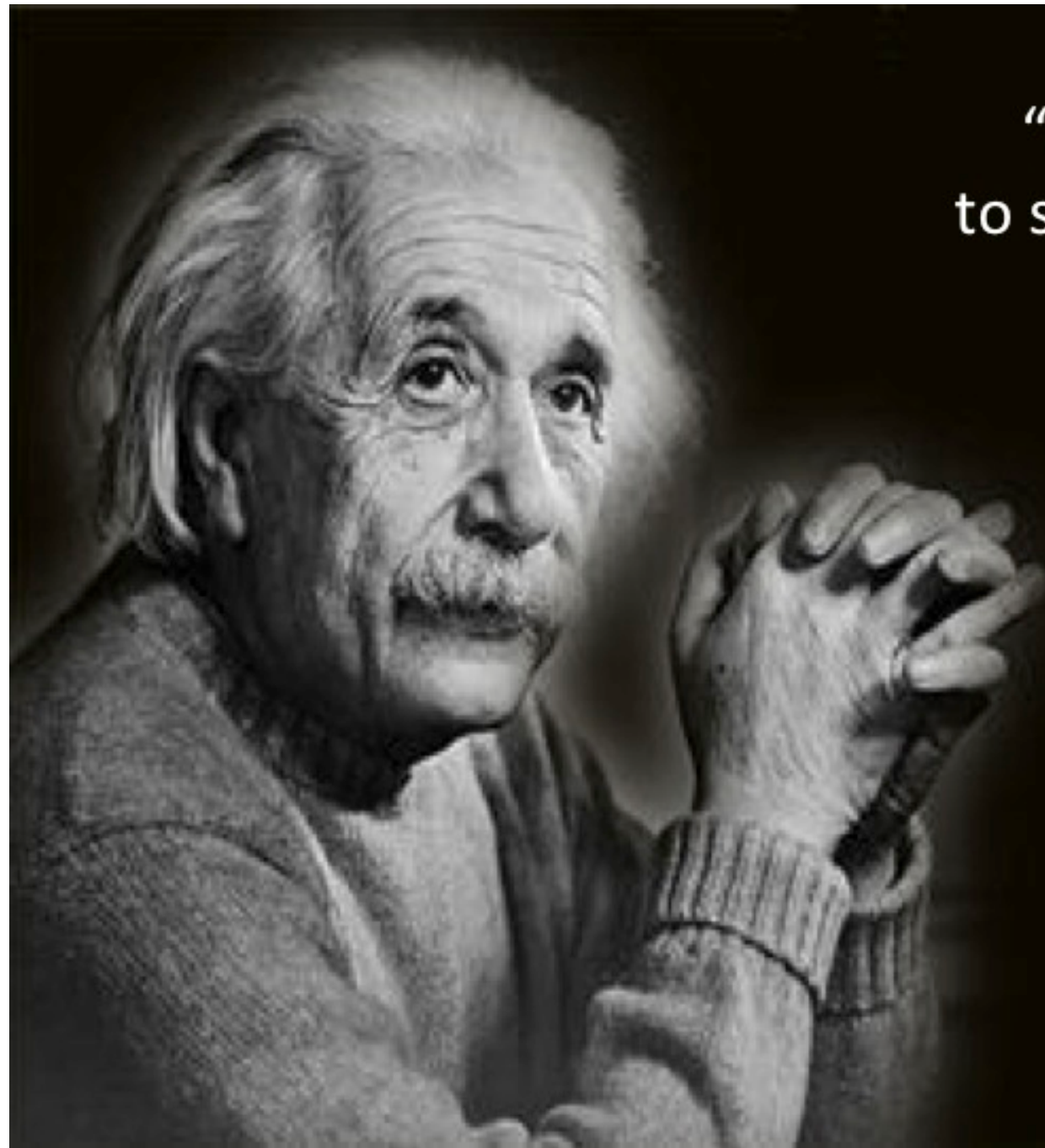


Solutions

P
Dow



Whoops...



“If I had an hour
to solve a problem
I'd spend
55 minutes
thinking about
the problem
and 5 minutes
thinking about
solutions.”

– Albert Einstein

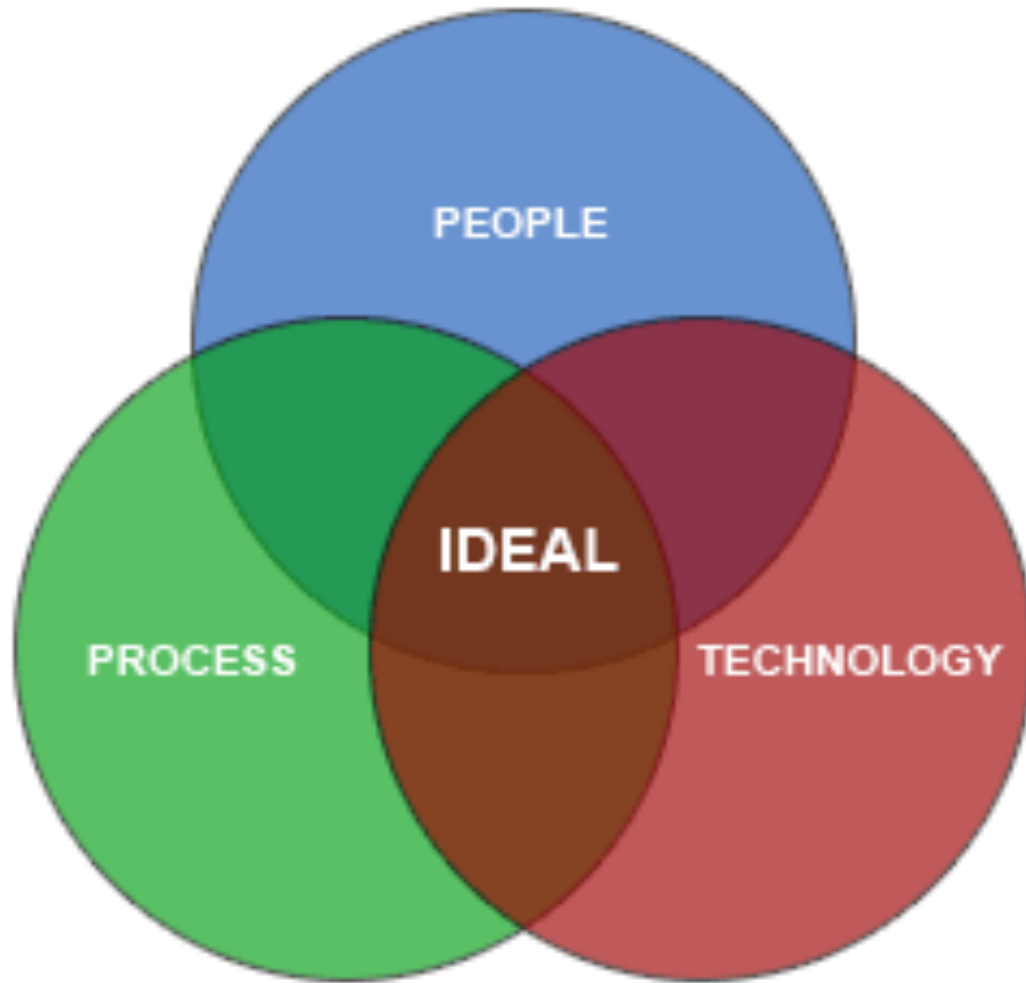
BEGIN
WITH
THE END
IN MIND

Covey 1989

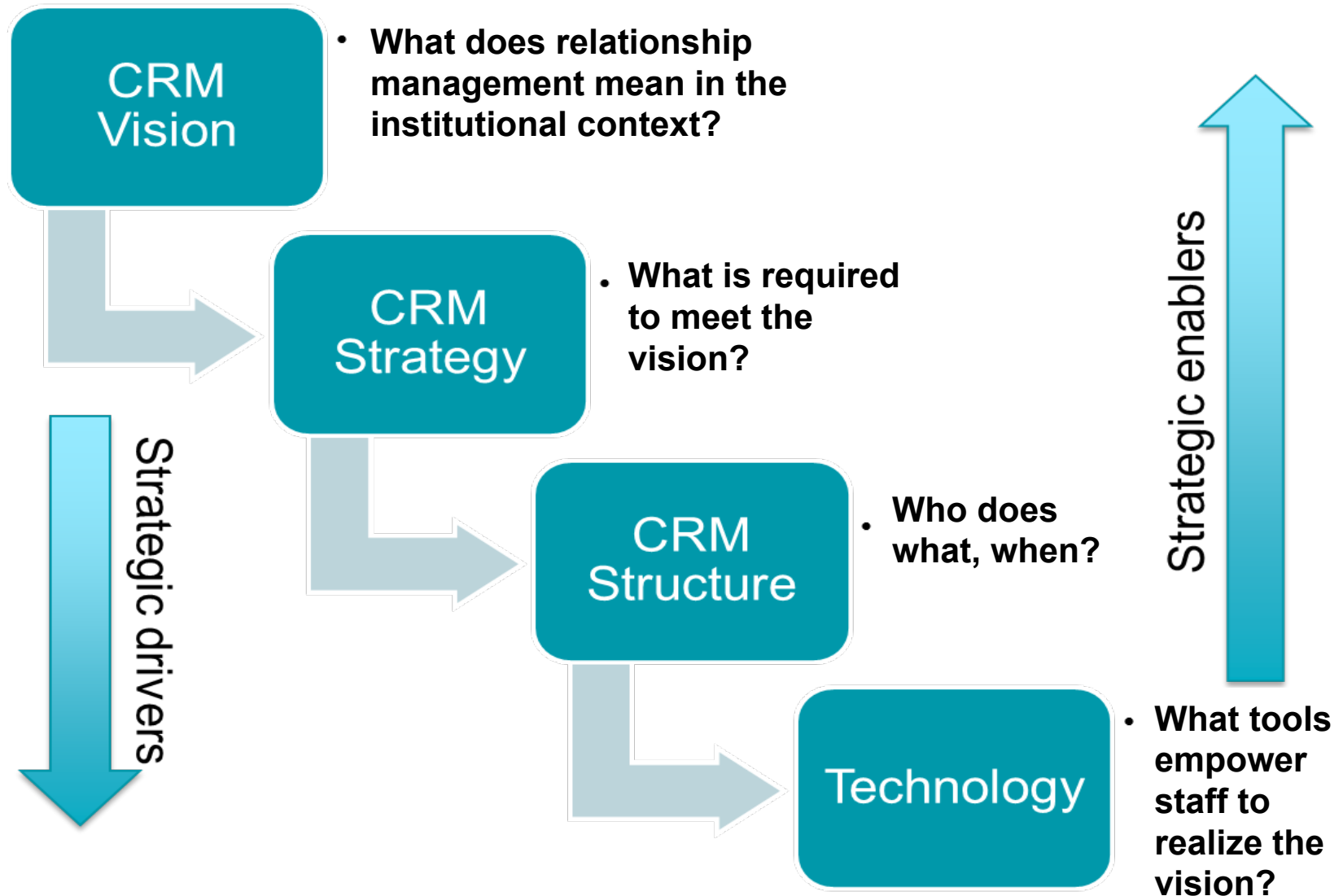
Agreeing an Approach

- Technology alone is not the answer
- Invest time in defining both the problem and the goals
- Cultivate a shared understanding

Identifying the Factors



Providing the Context – Case Study



Framing a Tailored Solution

- Establish a guiding vision
 - Consult with campus stakeholders
 - Assessment of current environment
 - Identify key areas for improvement
 - Articulate potential issues, risks and constraints
 - Describe the future state
 - Agreement on next steps
- Create a template for approaching future phases

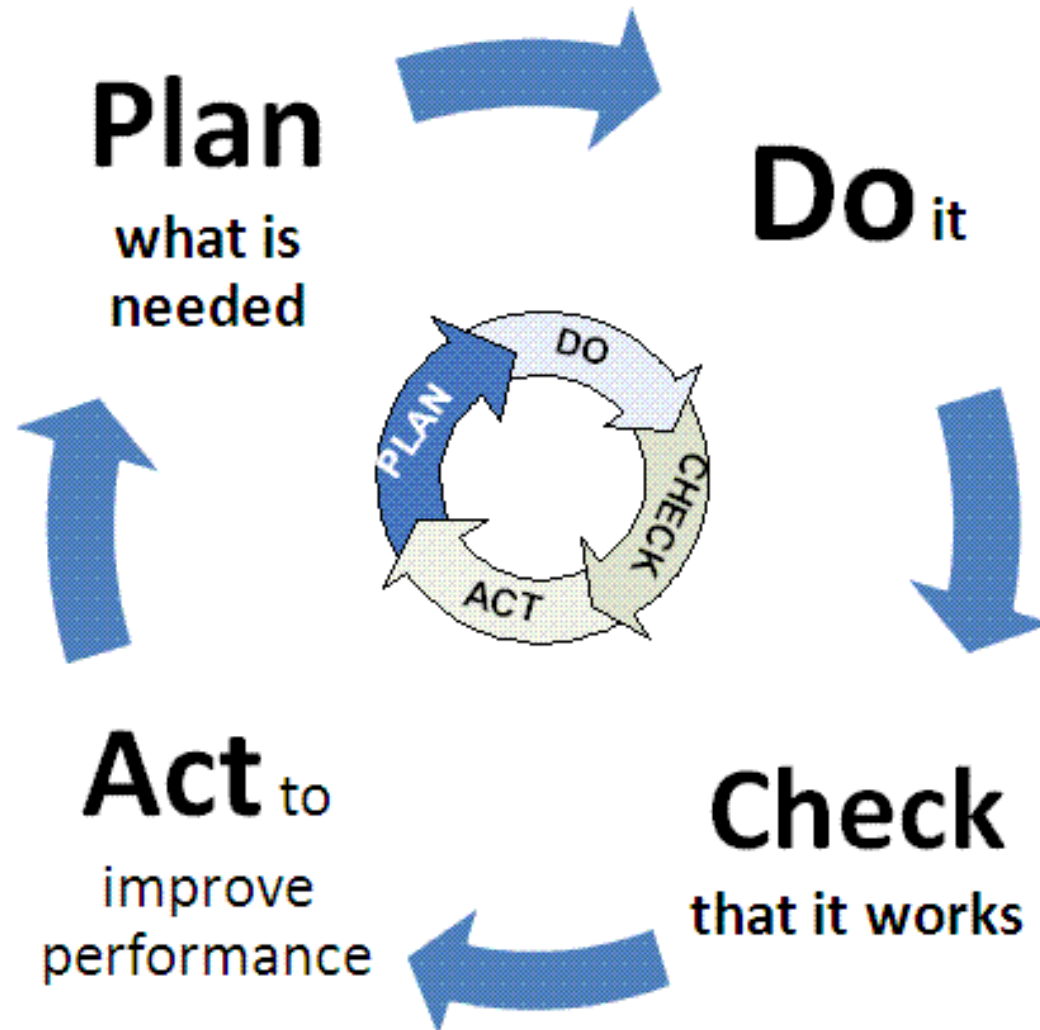


Defining a Target Operating Model

- Constituents
- Channels
- Stage
- Organization
- Systems
- Analytics



Facilitate Continual Improvement



Questions?

For more information, contact:

heidi.schreiner@tribalgroupp.com