



# 5 ways to achieve student success with your data



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# Part I

## Introduction

The demands on the administrators, faculty, and staff of your school get more rigorous every year. Students and parents expect that they're getting the best value for the cost of education, but they also want to know that the level of service they receive will ensure student success.

As a result, student success is more important than ever—and the stakes are higher. It is these very demands that are guiding rapid technology adoption among schools of all types and sizes. Fortunately, the tools to help students achieve success have become more powerful.

Your constituents expect personalized attention and instantaneous service. To meet those expectations, proactive schools now use cloud-based tools to manage administrative and classroom responsibilities. Previously, "software as a service" was primarily used by large businesses to manage their relationships with customers. However, because schools have such a wide variety of interactions to keep track of—involving students, alumni, donors, faculty, staff, and more—these same tools are the perfect solution to satisfy constituents' evolving needs.



# Why do you need this e-book?

Too often, data and communications are siloed within departments, resulting in duplicated or incomplete information. The technology environment in your school can be improved to help better manage the student life cycle.

Regardless of the challenges or limitations that your school faces, there is always room for improvement, no matter what systems are currently in use. Overcoming these and other challenges is about more than just keeping pace with the speed of technology; it's about keeping pace with—and anticipating—the needs of students, faculty, and other constituents.

Customer relationship management (CRM) systems provide data in real time and help users visualize the information so that it can contribute to better decision making. Through CRM systems, school administrators can track every aspect of a student's life cycle, and beyond.

In this e-book, you'll read about five ways your school can use data to improve the life of the student, advance communications with alumni and community stakeholders, assist and manage faculty, and deliver better services.



## Part II

# Introduction

The personal and lifelong nature of an individual's relationship with a school is at the core of a school's success. Successfully managing all of the communications and interactions of each individual across an educational institution remains one of the biggest challenges schools face today. Below are five of the most common hurdles schools encounter in managing relationships with their constituents—learn how the right technology solution can transform these challenges into stronger, more valuable connections.



# I need to manage relationships with people outside of my institution

By gaining a 360-degree view of an individual's relationship with your institution, you can make every conversation more effective and efficient, increasing that individual's confidence in their relevance to you. Successful lifelong relationships with students, parents, alumni, and other constituents enable greater success for your school by unlocking the resources these individuals possess.

## ALUMNI MANAGEMENT

With the help of a CRM system, you can track all elements of your school's relationships with former students. You'll have visibility into every interaction, including donations, guest lecturing, student mentoring, and career opportunities.

By establishing an alumni database, you can cross-reference relatives to identify family legacies within your institution. Keep track of life events that may affect individual and family giving—such as moving, getting married, having children, and changing jobs—and strengthen your relationship with those alumni as they grow. You can also fully integrate your alumni database with accounting systems to see how your efforts affect alumni and family donations over time.

## CORPORATE AND COMMUNITY OUTREACH

Never miss opportunities to manage engagements and projects with outside organizations. Whether you are managing communications regarding an upcoming referendum or recruiting internship opportunities for students, you can use CRM software to see everything in one place.

Maintain a single, consistent relationship with external parties—no matter which of your faculty or staff members they interact with—by tracking written and verbal communications for more efficient, relevant conversations. Learn what works and what doesn't to adjust your interactions over time and make sure you're using only the most effective methods and conversations.

# I need to track information, processes, and communications about and with students

Your students are the most important aspect of your school, and their ability to access the resources they need, to know what help is available to them, and to make use of those resources is critical. Relying on outdated or inefficient processes can put a greater burden on the students than is necessary.

Using CRM software, your school can track all interactions with students to ensure adequate progress toward graduation and lower the dropout rate. You can integrate it with your existing student information system (SIS) to facilitate central management of all student records and supplement the information you already have. With a CRM solution that works hand in hand with your SIS, you can expand the service you provide students and increase response rates through visibility and automation.

## CAREER SERVICES

Students want a robust education that helps them progress to an accomplished and fulfilling career. Early exposure to career options and opportunities aid in that progression.

The ability to see more data and communicate more clearly with students allows you to track their academic and work-related activities across departments. This ensures consistent conversations with companies that offer internships to students and, eventually, the dream jobs they hope to land. From there, you can also monitor interviews and acceptances for accurate student success metrics.

## ATHLETICS

Being a successful student is no small task, and being an athlete in addition to one's studies is a huge undertaking that can affect academic performance. Effectively managing the services supporting the student can greatly increase their success rate.

When you pair your CRM system with your SIS, you can manage your recruiting efforts, your school's NCAA compliance, students' athletic eligibility, and their academic progress. Most importantly, however, you can use your CRM system to help guide students with their class, practice, training, and tutoring schedules to ensure success on and off the field, court, or track.

# I need to replace or extend my student information system

Detailed student information plays a critical role in your ability to keep students engaged, advise them on choosing the best classes and degree programs for their future, and intervene early if there are warning signs around academic performance. Schools require the ability to capture and organize accurate information about students to deliver appropriate just-in-time services that aid in degree completion.

Outdated systems can be replaced and incomplete systems can be augmented to ensure that your faculty and staff have the right information to provide help to students, increasing your retention and graduation rates.

## REGISTRAR AND ADVISING

For your students and their families to ultimately become a long-term part of your constituency, it's imperative that the students first graduate. That means supporting them every single step of the way. With the right CRM system, you can track students' progress toward degree completion by analyzing their grades, GPA, class schedules, prerequisites, transfer credits, contact information, demographics, and assigned support staff. Effortless online communications and the ability to send and track messages keep students at the center of your mission.

## STUDENT RETENTION AND EARLY INTERVENTION

With a powerful way to manage all student interactions, you can proactively identify at-risk students and help them progress toward graduation. You can automate alerts for students who display warning signs of failure before problems become serious—in addition to manual alerts from faculty or advisors.

When you connect your CRM with your SIS, you'll be even better equipped with data to see degree performance and advancement, leading directly to more graduations and more successful alumni to add to your list of donors over time.



# I need a flexible ticketing system

A flexible ticketing system is crucial to any educational undertaking. Ticketing gives IT, student services, facilities maintenance, residence life, and other help desk agents the ability to track, escalate, and resolve issues and requests that come up.

Integration with other systems offers consistent data to improve the experience for administrators and students alike, such as by automatically populating fields with accurate contact information based on a student ID number or email address. A knowledge base helps to augment the efficiency of the system, allowing for self-service resolution.

## TECHNOLOGY HELP DESK

Students will have many reasons to contact a help desk, from device troubles to network issues. The ability to resolve issues quickly and efficiently is key to keeping students engaged and focused on their studies.

With a robust ticketing system, you can track tickets from open to close, including approval processes. You can also use it to help manage self-service capabilities and as a convenient knowledge base. Learn which issues are the most consistent so you can ensure that your knowledge base and self-service resources are addressing the ones that come up the most. Plus, adopting a flexible ticketing system will help you increase visibility because you can escalate tickets between departments whenever necessary, so that no student falls through the cracks.

## STUDENT SERVICES HELP DESK

Student services, including financial aid, registrar, bursar, residence life, and food services, receive a constant stream of requests from students. With a ticketing system that you can rely on, you can see all student interactions and requests, then ensure proper assignment and quick resolution.

If an issue involves multiple departments, the student services help desk allows the student to submit a single ticket in one place instead of spending time going to multiple departments to facilitate coordination. The single clearinghouse for issue resolution also allows schools to better understand interdepartmental connections and redundancies in order to improve efficiency. A flexible system allows student services to take advantage of all of the functionality that the technology help desk enjoys, while still enabling features specific to student services.

# I need to track information, processes, and communications about and with faculty

Student success is built upon the foundation of engaged and supported faculty members. They're your front line when it comes to making sure students get what they need. With a reliable CRM system, you can not only manage educators but also all the staff members who work with students—including financial aid officers, advisors, and teaching assistants—to ensure engagement of the proper individuals when resolving an issue.

Furthermore, you can improve faculty performance by tracking performance evaluations and student surveys. Streamline hiring and retention by keeping track of your adjunct faculty's employment and skills to better identify individuals who resemble your top-performing educators.

## ADJUNCT FACULTY MANAGEMENT

Find talented instructors and keep the best ones you have. By using a powerful CRM system, you can track recruitment of adjunct faculty members, including which organizations they came to you from, helping you find the best people. Foster continued student success by conducting surveys and adjusting class schedules.

## PERFORMANCE EVALUATION

By including responses using student surveys, observations, and more in your faculty evaluations, your school can assess the abilities of teachers—their strengths and their potential weaknesses. Through the CRM system, you can also activate notifications and remediation processes for any faculty members who aren't meeting minimum requirements.

## HUMAN RESOURCES

As a vital part of any large-scale organization, human resources can be made easier with the right CRM system. Track educators' tenure information, job openings, and applications, along with current employee information. Manage your faculty and staff engagement or status changes, and automate onboarding and separation procedures across multiple departments and systems.

# The right CRM solution for your school

Educational institutions are often large, complex organizations with many moving parts. Your delicate relationships across a vast network of different constituents require constant attention and care to strengthen and cultivate them. Ultimately, maintaining this network of relationships serves the students by helping you to provide them with a world-class education that they can take with them into a broad, enriching career.

The best tool is one that allows you to keep what is working and improve what is not. A flexible system that delivers results, is easily manageable, ensures your data stays private and secure through HIPAA and FERPA compliance, and requires little user training will be the most successful.

Ensure success throughout the entire student life cycle. Microsoft can help your school create optimum student results and elevate your school's performance.

Schools around the world have already improved their students' success with Microsoft Dynamics 365.

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