

Using CRM Data to Align Customer Service with Strategic Goals

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**In one year…**

**20% reduction in front counter traffic**

**38% reduction in incoming phone calls**

**Introduction**

Review the operations of the one-stop shop at WSU

Demonstrate how WSU uses a CRM to collect data

Discuss the benefits of using a CRM in a one-stop shop

**Learning Outcomes of this Session**

Understand the benefits of using a CRM to make data-driven decisions and promote process improvements

Learn how to use a CRM maximize the effectiveness of a one-stop shop

See how WSU developed a culture of accountability and collaboration

**WSU at a Glance**

WSU is an urban university with 30,000 students: 2/3 undergraduate, 1/3 graduate

370+ undergraduate, graduate and professional programs, including med and law schools

Centralized undergraduate admissions and student services

Banner (Ellucian) ERP

Salesforce CRM

**Why a Student Service Center (SSC)?**

Fall 2010 student survey results

Desire to bring financial aid phone service in-house

Consolidate customer service across enrollment management departments

**Vision for the Student Service Center**

Make customer service a priority

Create a central location for access to resources, problem-solving, information, and document intake

Collect and analyze data to identify issues that inhibit student success – policies, procedures, forms

Collaborate with other departments to re-engineer processes and improve communications

**Structure**

WSU opened one-stop shop (SSC) Oct. 2011

Aligns and consolidates existing student services into an enrollment management framework:

* Undergraduate Admissions
* Student Accounts Receivable
* Registrar’s Office
* Office of Student Financial Aid

**Operations**

General information, but not operator services

Assessment and resolution of problems

Document intake and distribution

Assistance with self-service applications (Pipeline, Blackboard, STARS)

Limited transactions

**Staffing of SSC**

**Contact Volumes**

Telephone calls – average 500 calls daily

Front counter – average 150 visits daily

Emails – average 100 incoming daily

**Benefits of One-Stop Shop**

**Students:**

Single point of contact in a central location

Serve as a student advocate to resolve problems across EM departments

**Enrollment Management Departments:**

Ability to focus on services that require their unique expertise

Coordination of communications with students

Improved workflow

Consolidation of staff

**Getting Started on a CRM**

Salesforce Foundation – 10 free initial licenses

Base system easily configured

Vast add-on product ecosystem

Robust APIs for ERP integration

Tools for continual improvement

**The Many Ways we use the CRM**

Contact database for prospects, applicants and students

Documenting interactions with students

Tracking contact reasons

Recording and monitoring campaigns to track effectiveness

Timekeeping

Live chat

Chatter

Customer service surveys

Calendars

Dashboards

Reports - performance measures, accountability

Professional development

**Data Collection - Contacts**

Name, student ID and demographic information

Student type: prospect, applicant, admitted, enrolled

ACT information (purchased or submitted)

Cases, activity, opportunities, engagements, campaigns, and registration status

**Results**

**COLLABORATION ! ! !**

Improvements in financial aid processes that resulted in shorter processing times and reduced delays in awarding financial aid

Improvements to the UG admissions application that reduced errors and questions about admissions status

Development of proactive messaging to educate students about processes

Revision of the student eBill to increase understanding of account balances

**Calling Campaigns**

Campaigns will be administered through Salesforce, which provides superior tracking, measurement and reporting capabilities on the details of campaigns:

* Number of calls made per campaign
* Number of prospects/students reached
* Number of calls made per caller
* Call results
* Type of follow-up information requested
* Call recipients who acted after contact

**Purpose of Calling Campaigns**

Measure the influence of campaigns on increasing the yield rate

Overlay calling campaigns with recruitment efforts to improve yield

Measure the effectiveness of wellness checks on increasing enrollment

Build relationships with current students to improve retention

Calling Campaign Report

Customer Service Survey

Survey Data

Timekeeping

Hourly Assignments

Performance Measures

Communications Calendar

Chatter

Data Feedback Loop

**Summary**

Each office involved needs to be willing to take a fresh look at "how things have always been done"

Partner offices need to ask questions and become curious about their data trends

Individuals need to commit to reviewing the data for continuous improvement

Requires a change in mindset from reactive service to proactive service

The payoff is increased student satisfaction with a goal to higher yield and retention rates (ROI)

**Vision for the Future**

Accountability through transparency

Re-engineer back office processes to be invisible to students

Reduction in incoming case volume

“Paperless” processing

Move to proactive student outreach

Use Salesforce to create more call campaigns/ “wellness checks” for our students

Improve retention and graduation outcomes

Investigate new ways to support recruitment engagement for new prospects

Questions?

Thank You!

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