



Building lifelong connections and transforming education experiences

The higher education landscape in Australia has evolved dramatically in recent years, with the COVID-19 pandemic and recent cost of living pressures impacting student enrolment and retention rates. While the pandemic caused its own set of challenges for universities, it amplified enrolment and retention trends already being felt by the sector.

Fortunately, the latest in CRM technology, AI and automation are helping institutions address these challenges, reimagine what's possible and support the next generation of experiences for learners throughout their lifetime.



TOP TRENDS AND OPPORTUNITIES

The fierce competition for new students

Enrolments in bachelor degrees have fallen by 12% in less than a decade, primarily due to financial barriers, the rise of the gig economy and a shift towards non-linear education. This has resulted in a fierce competition for new enrolments between universities.

To recapture the attention of prospective students, institutions will need to support a long-term vision for enrolment with personalised engagement strategies. This includes regularly engaging their customer base with new and exciting learning offerings to create lifelong learners.

Institutions will need to better leverage their data to drive early engagement with prospective students - so that they not only attract the best and brightest, but also more diverse and equitable student populations.

Keeping students on the path to graduation

A positive student experience contributes to student success and higher retention rates. It's an area of focus for all Australian higher education providers, and according to the latest QILT Student Experience Survey, an area with room for improvement.

Building a foundation of belonging has become the new battleground, making it critical to increase connections and improve the student experience – especially as more people choose to learn online. While improving student wellbeing and employability support are top of mind, expectations are also changing around seeking flexible learning options and a personalised academic experience.

Predictive and Generative AI will play a key role in the future in helping universities be more responsive to student needs and keep students on the path to graduation – and beyond. For example, it can help identify “at risk” students so that universities can proactively engage with them before it's too late.

Unlocking the value of data

Finding better ways of working and communicating with students, alumni and donors comes down to how universities use their data and existing systems to create more engaging experiences.

However, many educational institutions have found balancing growth ambitions with outdated legacy systems and point solutions increasingly difficult, with current processes involving cumbersome and manual stitching of data from multiple sources to track student experience.

Universities must focus on creating a holistic view of student data (Student 360) so that teams can be better informed to build deeper connections, maximise engagement and deliver impactful support.

Achieving fundraising goals

Universities rely on donations to support scholarships, projects, and life-changing research, and so helping students thrive and advancing cutting edge research is at the centre of fundraising goals.

And yet, with federal grants decreasing per student in recent years and philanthropic revenue also in decline, universities need to find new ways to deepen their engagement with government, industry and alumni to meet and exceed their fundraising goals.

This requires universities taking a more data-driven and streamlined approach to fundraising, such as leveraging in-depth biographical, demographic and relationship data to craft fast and effective fundraising campaigns.



SOLUTIONS

Providing holistic, data-driven support from application to graduation

Customer Relationship Management (CRM) solutions are instrumental in transforming higher education institutions into data-driven organisations capable of delivering exceptional student experiences. By centralising and unifying student data, these platforms provide a comprehensive view of the student lifecycle, enabling institutions to:

- **Enhance student recruitment and enrolment:** Precisely target prospective students with personalised messaging, streamline the admissions process, and optimise conversion rates.
- **Improve student retention and success:** Identify at-risk students early on, deliver timely interventions, and provide tailored support.
- **Foster alumni engagement and fundraising:** Cultivate strong relationships with alumni, optimise donor stewardship, and secure increased philanthropic support.

- **Optimise operational efficiency:** Automate administrative tasks, improve collaboration among departments, and make data-driven decisions to enhance resource allocation.

Furthermore, CRM systems can be integrated with other systems, such as learning management systems (LMS) and financial aid platforms, to create a holistic view of the student journey.

This connected ecosystem enables institutions to gain deeper insights into student behaviours, preferences, and outcomes, leading to more effective strategies for student success.

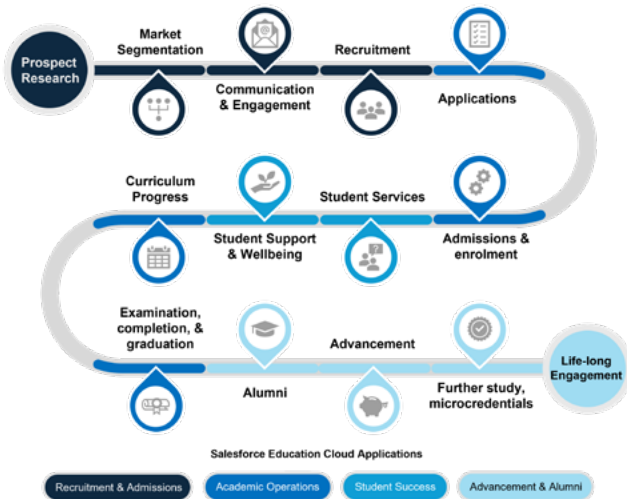
By embracing CRM technology, universities can position themselves as student-centric institutions that prioritises personalised experiences, data-driven decision-making, and long-term relationships with their communities.

Our end-to-end university transformation services

	Business Transformation Services	Student Recruitment	Admissions & Enrolment	Student Success / Student Wellbeing	Advancement / Alumni / Partner Relations (B2B)	Online Learning
Use Cases	Strategic Roadmap, Business Value Drivers and Capability Mapping, Process Re-engineering, Future State Definition	CRM, Marketing Automation, Multi Channel Communication, Social Media Integration, Event Management, Agent Relations	Student & Application Portal, Application Management, Program Planning, Offers and Enrolments	Student Portal, Enquiry Management, Student Management, Student Support & Wellness	Donor / Alumni Relations, Advancement, Industry and Research Partnership	Short Courses, Microcredentials, Lifelong Learning
Solutions / Product	Future State Solution Blueprint and Roadmap aligning to Salesforce Education Cloud capabilities, Technology Assessment, High Level Design	Education Cloud, Sales & Service Cloud, Marketing Cloud, Event Management App, Digital Engagement, Scheduler	Education Cloud, Service Cloud, Admissions Connect, Experience Cloud, Scheduler	Education Cloud, Experience Cloud, Service Cloud, Scheduler	Education Cloud, Marketing Cloud, Sales Cloud, Advancement ISV	Education Cloud, Sales Cloud, Marketing Cloud, Commerce Cloud, CPQ

SALESFORCE EDUCATION CLOUD AND THE STUDENT LIFECYCLE

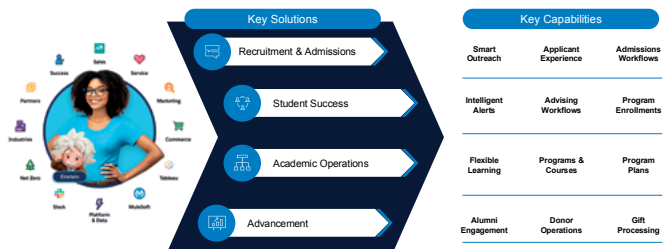
Elevate the education experience with Salesforce Education Cloud, the #1 AI CRM for learner and education institution success.



Salesforce Education Cloud helps institutions address multiple needs and achieve their academic and organisational goals through a single, integrated platform – from achieving greater efficiency across operations, to enabling and promoting student success, and fostering stronger alumni engagement to drive revenue.

Predict key trends, save time with intelligent automation, and be one step ahead of constituent needs with Education Cloud apps for recruitment and admissions, student success, academic operations, and advancement and alumni relations.

- **Recruitment and admissions** – Create more meaningful relationships with holistic data and tailored applicant experiences. Save time with automated application reviews and a single platform to connect with students, families and staff.
- **Student success** – Seamlessly connect the student experience and increase retention with a flexible, integrated platform. Power holistic advising, strengthen student engagement and streamline services to help students reach their goals.
- **Alumni relations and fundraising** – Advance the mission of your institution with an innovative and connected platform. Engage alumni, streamline fundraising and optimise operations to drive an institution-wide strategy.
- **Communications, marketing and engagement** – Deliver more efficient and personalised marketing and communications across your institution to boost engagement and build lifelong relationships.
- **Lifelong Learning** – Deliver a modern storefront experience that surfaces relevant courses, programs and degree offerings to students to attract and retain lifelong learners. Easily manage corporate partnerships and measure program performance.




CUSTOMER SUCCESSES

Discover how we've partnered with tertiary institutions to deliver value throughout their digital transformation journey.



 **The University of Sydney**
Student Support & Student Wellbeing

Salesforce CRM transforms incident reporting and case management at University of Sydney

 **A major ATN university**
Admissions & Student Experience

How Simplus improved the student experience and created a future-ready university by delivering a university-wide source of truth.

 **A Group of 8 Australian university**
Student Recruitment

An integrated CRM and marketing automation solution to support improvements in student experience during the entire recruitment phase.

 **The University of Technology Sydney**
Partner Relations

By organising a centralised, data-led strategy for partnerships, Simplus transformed the operations and relationship landscape for UTS Corporate Relations.

A PROVEN RETURN ON INVESTMENT

Forrester Total Economic Impact™ (TEI) study on Salesforce Education ROI

Salesforce recently commissioned Forrester Consulting to conduct a TEI (April 2023) study and examine the potential 3 year return on investment from deploying Salesforce for Education.

KEY ROI FINDINGS



Improved student experiences and revenue protection – Salesforce for Education allows institutions to communicate clearly and personally with students on topics like financial assistance and enrolment. It also builds digital resource centers to promote academic health for students, provides a single point of entry for student inquiries, and improves usability across the student lifecycle, helping to boost retention.

15% increase in retention with Salesforce



Increased productivity and resource allocation – With centralised information and greater data visibility, Salesforce empowers faculty and staff to maximise productivity and drive successful outcomes. Easier queue navigation and utilisation of email automation for drip campaigns boosts administrative speed and efficiency.

12% productivity lift for administrative and academic teams



Integrated systems and achieved cost savings – Consolidated technology tools and solutions via a centralised CRM solution drives savings by avoiding superfluous licensing and the reallocation of IT resource efforts to maintain the old systems.

\$1.6 million saved over three years by avoiding legacy environment upkeep (study composite)



Lifted enrolment rates – Salesforce enables institutions to follow up promptly with prospective students and gain visibility into conversion rates, as well as assess prospect interest through email engagements and records of on-campus visits. It also increases enrolment in hybrid and online learning and better guide students through the application process.

5.5% increase in post-pandemic return-to-school enrolment



Revenue growth – In Year 2 of the study, the composite deploys its fundraising use case with Salesforce, and launches it in Year 3 of its investment. The composite preserves alumni information, optimises relationship management, gauges donor interest, and audits for effective fundraising approaches to guide its campaigns toward greater success. In Year 3, that translates to \$179,000 in additional funds raised, or a 10% increase.

10% increase in fundraising through improved alumni & donor engagement (study composite)

ABOUT SIMPLUS

Simplus has extensive experience working with education institutions to connect disparate data and systems - empowering faculty and staff to exceed enrolment goals, foster lifelong student relationships and boost fundraising with the #1 AI CRM platform.

We are Salesforce Summit Partners and experts in implementing Salesforce for education, providing a complete set of solutions covering everything from recruitment and admissions to student success, academic operations, and alumni engagement.

With our deep knowledge of Salesforce combined with Infosys global insights and resources, we bring best-practice understanding to deliver highly effective solutions that help you protect and generate revenue, achieve greater operational excellence, and enrich student and staff experiences.

Simplus offers a full range of services, including advisory, implementation, change management, training, and ongoing support, to help you maximise the effectiveness of your transformation journey.

Our ability to provide end-to-end solutions is a significant strength that differentiates Simplus. Through our long-term partnerships, we enable you to navigate and maximise the effectiveness of your transformation journey.

We have successfully shaped and delivered transformational roadmaps with universities and these programs of work require focus and tight management of the core transformation elements. No matter where you are in your transformation, we can partner with you and assist you in your journey to provide lifelong learners experience and enable a connected environment both on and off campus.

CORE TRANSFORMATION ELEMENTS



Planning – Ensure your business goals and strategy aligns with Salesforce Roadmap and provides the ROI.



Solution Evaluation – Explore existing custom solutions and impacts in leveraging out of the box capabilities.



Single / Multi Org – Consideration on preserving or consolidation and take advantage of the data model updates.



Migration Path – Migration approach and the cost associated with it.



Change Enablement – Define the change and training strategy and enable agile execution across business units. Ensure active engagement at leadership and champion groups.



Operating Model – Define a standardised and scalable operating model. Including target process architecture design and ways of working.

Learn more about how Simplus partners with education institutions to maximise the value of Salesforce.

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