



## Major Australian University

An integrated CRM and marketing automation solution to support improvements in student experience.

Industry:

Solutions:

Education

Education Cloud

Marketing Cloud

Service Cloud

Streamlining student engagement to encourage lifelong learning, this major Australian university turned to Simplus to align the university around a Salesforce 360-degree customer record, to drive a better user experience.

**Ranked among the world's top universities, this university is one of Australia's leading research and teaching institutions.**



## THE CHALLENGE:

The university competes with other universities and non-traditional education providers when trying to attract new and returning students, both domestic and international. Lead times for recruiting international students can extend to 18 months, requiring a well-coordinated campaign.

To support these efforts, the university needed to significantly improve how stakeholders experience and engage with the university – including a more targeted and coordinated approach to digital outbound communication.

Managing such a large number of enrolments and engagements over the years had left many current and former students with multiple records spread across disparate systems. The university needed a system that could provide a single view of students which consolidated ageing systems across areas such as recruitment and admissions, particularly for international students.

The university also needed to improve the effectiveness of internal and external stakeholder engagement efforts, including better understanding the impact of digital communication on business outcomes.

These challenges were made more difficult due to reliance on dozens of disparate legacy systems within the university, which created significant integration difficulties and increased technical debt. The solution needed to integrate with some legacy systems, while replacing others.

The fact that many students engage with the university across a range of roles beyond the classroom further complicated the challenge, says the Simplus Account Executive.

“A current student might be completing a Master’s degree while also working for the university, plus they might engage with the organisation in other ways from guest lecturing to being an alumnus and giving back to their university,” he says.

“All of this creates a very complex relationship which can become increasingly difficult for people to navigate when the university has such a fractured view of them – creating friction and frustration with the potential to jeopardise that relationship.”

### Migrating functionality without disrupting service

It was vitally important that the implementation did not interrupt the university’s operations at key times of the year, requiring a range of migration “blackout” periods that ensured that different platforms were available for different departments.

Migrating active functionality from existing systems into the new system was broken into several releases, in order to prioritise some functionality while minimising business disruption and ensuring continuity of customer engagement.

After setting up the new environment, this began with migrating university staff across to the new Salesforce CRM system to create, view, edit and import prospective student records. This was enhanced with the ability to capture leads from the university website and landing pages.

With this came the migration of records, activity and engagement logs, campaign metadata and custom data objects to Salesforce Marketing Cloud. This allowed the university to execute campaigns in the new and existing platforms in parallel, ensuring the migration of active campaigns and customer journeys without disrupting them.

## THE SOLUTION

The university identified the need for an integrated Customer Relationship Management (CRM) and Marketing Automation (MA) solution, to support an improvement in customer experience and marketing.

Along with driving functions across student leads, partnerships and organisations (including opportunity management), the solution also needed to streamline campaign management, marketing tasks and workflows to increase operational efficiency and revenue growth.

To achieve this, the university turned to Simplus and Salesforce, with a two-year staged rollout of solutions including three major releases. The solution combines Salesforce Education Cloud, Service Cloud and Marketing Cloud.



Phase 1 encompassed a small-scale implementation of CRM and MA platform foundations, with a particular focus on prospective international students. The foundations were built from components that were designed to be reusable and scalable, to support the smoother implementation of subsequent phases. Key functionalities included omni-channel marketing campaigns, lead management and scoring, single customer view and scoring, enquiry management, appointments, and reporting.



Phase 2 extended initial outcomes to additional student cohorts and continuously improved the foundation capabilities. Phase 3 scaled the outcomes through the prioritisation of backlog across the organisation.

“During each phase it was crucial to respect the blackout periods specified by each department, such as recruitment, marketing and communications.

This required a lot of planning to ensure that the university’s customer journeys and engagement weren’t interrupted, in order to maintain the flow of enrollments and other engagements.”

**ACCOUNT EXECUTIVE, SIMPLUS**





## THE OUTCOME

The university is now equipped to proactively engage with prospective students at the appropriate times to optimise conversion. As a result, it has achieved significant improvements in how prospective students experience and engage with the university, improving the recruitment experience for all parties.

A 360-degree view of the student experience, thanks to the Salesforce CRM, includes the history of every event, application, course, enquiry, appointment, communication, request, contact preference, grant, and donation. This allows the university to make more data-driven strategic decisions and improve effectiveness when engaging students.

At the same time, Salesforce Marketing Cloud enables a more targeted and coordinated approach to outbound communication, ensuring stakeholders only receive relevant communication in order to improve the quality of engagement.

The university has also benefited from better operational efficiency through systems and process improvement, enhancing both staff experience and productivity. This includes cost efficiencies through the minimisation of duplicated digital communication spend and resources.

A single 360-degree view of the student has provided the institution with an overview of the existing relationships, which underpins more engaged and strategic partnerships going forward, says Simplus' Account Executive.

"University Staff can now understand who is talking to whom, and who is the custodian of a partnership," he says.

**“Bringing together that once fragmented view of students not only streamlines engagement, it also creates new opportunities to forge a fruitful ongoing relationship with those students.”**

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

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