



Powering personalised
student engagement:

WHY UNIFYING DATA AND TECHNOLOGY IS CRITICAL TO THE FUTURE SUCCESS OF UNIVERSITIES

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INTRODUCTION

The Australian higher education sector has experienced significant change in recent years. Hybrid learning, the shift towards non-linear education and rising demand for highly skilled workers are just some of the trends shaping academic operations, learning and innovation.

At the same time, universities and institutions are grappling with rising operational costs, rapidly evolving technology, decreased funding and fierce competition for new enrolments.

In the current landscape, the significance of the student experience has never been more pronounced. For universities, finding ways to attract and retain students, build loyalty, and foster life-long learning is a top priority for enhancing business value.

The student experience encompasses a wide array of interactions and touchpoints, from academic and administrative processes to social and extracurricular activities. As a result, the integration of digital systems and processes has emerged as a pivotal factor in supporting the delivery of user-centric experiences across the campus and online.

[Institutions are investing heavily in technology](#) to ensure they can meet strategic goals while supporting student success. Digital systems, when thoughtfully implemented, streamline multi-point interactions – providing students with personalised and seamless access to services, and staff with consolidated data on students.

Enhancing experiences across the entire student journey relies on Information and Communication Technology (ICT) as an enabler, to help institutions meet the evolving needs of students and staff – from academic success to supporting health and wellbeing. Through integrated systems and unified data, institutions can closely align digital and business strategies to achieve operational success while delivering more positive student experiences.



CONNECTING DIGITAL LANDSCAPES

For most universities, the rapid evolution of technology has necessitated the swift adoption of new systems, platforms and ways of working to maintain a competitive edge.

However, as universities have implemented new infrastructure, their ICT departments face an increasingly fragmented IT landscape of technical debt, siloed data and legacy systems. As a result, many struggle to support growth ambitions with outdated or soon to be obsolete legacy IT and point solutions.

Increasingly, university leaders are looking for more simplified, integrated solutions that can streamline operations, data and processes to provide a more connected and seamless experience for students, staff and the entire university community. By [addressing technical debt as part of the digital strategy](#), ICT departments can improve their institution's resilience to change.

One of the most effective ways is by consolidating disparate systems into a cloud-based Customer Relationship Management (CRM) solution, such as Salesforce.

Enhancing institutional efficiency and effectiveness

Modern CRM solutions function as more than just a system of record. Through connecting platforms and processes, ICT departments can help institutions achieve their strategic goals by adopting a centralised system of engagement – improving the flow of information between teams, partners and, most importantly, with students.

Across all stages of the student journey, cloud-based CRM systems enhance operational efficiency and effectiveness. By centralising data, automating processes and providing actionable insights, these systems enable institutions to deliver a high-quality, personalised experience to students, alumni, staff and partners.

This not only improves outcomes but also strengthens the institution's relationships, reputation and competitiveness.

Advantages include:

- **Unified student information:** A platform approach to managing student information and institution operations provides a unified view of each student, enhancing visibility and the ability to manage student information more securely and astutely.

SUCCESS IN ACTION

A university-wide source of truth for a major Australian university

A major Australian university recently implemented a campus-wide source of truth to improve the student experience and become future-ready. By migrating from legacy technology, the university gained a competitive edge through enhanced operational efficiency, improved student engagement, and the ability to leverage data-driven insights for strategic decision-making.

[Read case study](#)



- **Data-driven decision making:** When information is connected, institutions can make better decisions at all levels, from daily operations to long-term strategic planning. Universities can then identify trends, forecast future needs, enhance student experiences, and optimise resource allocation – improving overall institutional performance.
- **Flexibility to scale:** A modern, cloud-based solution offers the flexibility to scale and support future growth. This allows institutions to easily adapt to changes in student demographics, technological advancements like generative Artificial Intelligence (GenAI), and evolving educational trends, enabling agility and responsiveness to new opportunities and obstacles.
- **Better operational continuity:** Resilient IT infrastructure ensures better operational continuity, providing uninterrupted educational services and managing administrative functions even during moments of disruption or adaptation. This continuity is crucial for maintaining the quality and reliability of educational services, student experience, and administrative efficiency.

FORRESTER Total Economic Impact™ study on Salesforce ROI

Salesforce provides education institutions with an enterprise-level CRM platform to capture 360-degree views of constituents throughout the entire lifecycle, across prospective and enrolled students, faculty and staff, alumni and partnerships.

Salesforce recently commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment from deploying Salesforce for Education. Forrester interviewed 10 representatives with experience using Salesforce for Education across seven higher-education institutions in the United States, the United Kingdom, and Australia. Forrester aggregated the results into a single composite institution to gauge what Salesforce could deliver.

Report finding:

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



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.



ATTRACTING PROSPECTIVE STUDENTS AND BOOSTING ENGAGEMENT

Recruitment is one of the most important phases in the student lifecycle because it sets the foundation for a student's education journey and shapes initial perceptions of the institution. Today, IT decisions are being driven by [strategic goals](#) to attract a diverse range of students to build enrolment pipelines and ensure a steady stream of tuition fees – essential for maintaining and improving education offerings and infrastructure.

International student trends

In recent years, there have been significant [fluctuations](#) in the enrolment of higher education students due to COVID-19 related restrictions, with border closures in 2020 and 2021 leading to a substantial decrease in the number of international students studying in Australia.

However, data from 2022 and 2023 indicates a strong return of overseas students following the reopening of borders. Economic data released in June 2024 by the [Australian Bureau of Statistics](#) acknowledges that 0.2% GDP growth was driven by a rise in exports from education-related travel services, driving international student expenditure.

With international students being a key revenue stream for the nation and universities, the Government's proposed plan to [cap international student numbers](#) for leading universities will only exacerbate the fierce competition for new students.

Domestic student trends

In 2022, the number of both commencing and total [domestic student numbers](#) declined. This trend continued into 2023, although at a slower rate. The Australian Government Department of Education cautiously speculates that "the decline in domestic student numbers may reflect the high cost of living in 2023 as well as strong labour market conditions."

Unfortunately, overall enrolments in bachelor degrees have fallen by 12% in less than a decade ([2016 – 2022](#)), increasing rivalry between institutions to attract new students. To recapture the attention of prospective students, institutions will need to support a long-term vision for enrolment with personalised and targeted engagement strategies.

SUCCESS IN ACTION:

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

One major university recently sought help after facing fierce competition in attracting both domestic and international students, with international recruitment campaigns taking up to 18 months to see results. The reliance on numerous legacy systems posed integration challenges and increased technical debt. By developing an integrated CRM and marketing automation solutions, the university is now equipped to execute targeted recruitment campaigns and optimise conversion.

[Read case study](#)



Leveraging data to drive outreach and early engagement with prospective students on a platform that integrates all touchpoints will not only attract more eager students, but also more diverse and equitable student populations.

Optimising admissions and enhancing student engagement

An integrated CRM and marketing automation solution such as Salesforce can attract more prospective students with clear, personalised, and timely communication that makes the admissions process more efficient and user-friendly.

In a recent study, [only 15% of prospective students reported receiving information tailored to their interests. Meanwhile, 84% of those who did receive personalised communications said it increased their interest in the institution.](#)

By providing a personalised and cohesive recruitment experience, institutions can:

- **Streamline the admissions process** and optimise conversion rates to efficiently connect institutions with students, families and staff.
- **Automate routine tasks** to reduce the administrative burden for faculty, staff and students.
- **Enhance the overall student experience** from initial inquiry to enrolment.

FORRESTER Total Economic Impact™ study on Salesforce ROI

Report finding:

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



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.





Building a foundation of belonging to keep students on the path to graduation is a critical aspect of the student journey. Student retention is a key area of focus for all Australian higher education providers because [student success is now evaluated on a variety of factors, beyond completing a degree](#).

Minimising attrition by improving the student experience helps maintain revenue pipelines, promote alumni relations and fundraising, and support institution reputation and rankings.

[Where digital transformation was an enabler for virtual learning during COVID-19 related restrictions](#), effort has shifted to leveraging data systems to monitor student health and wellbeing across a hybrid campus.

[In 2023, the success rate for domestic students commencing a bachelor reached a high of 86.2%. This marks the first time since 2009 that the success rate for domestic students surpassed that of overseas students](#), indicating the soundness in the adoption of data-driven strategies driving future success.

“Keeping up student retention measures in second and third years is our biggest challenge. We experienced a large exodus of students from second and third years during the pandemic, putting attrition at 10% higher than our normal range. This showed us that students need lots of support throughout all their years at university, not just their first year.”

Professor Jennie Shaw, Deputy Vice Chancellor and Vice President (Academic), University of Adelaide

Streamlining communication and collaboration

Institutions can achieve significant improvements in student engagement and retention with a CRM by fostering a collaborative environment where students feel connected and supported throughout their academic journey.

With a 360-degree view of the student, universities can streamline their institution's wellbeing services so that staff can identify at-risk students early on and offer personalised and timely intervention – improving student satisfaction and retention rates.

A student-centric approach ensures institutions not only meet the immediate needs of their students, but can protect privacy and confidentiality between administrators. It also offers autonomy to students in managing their specialised support appointments – ensuring that important information is shared promptly and efficiently.

For example, [The University of Sydney](#) prioritised developing a system that provides a comprehensive view of students and their needs, allowing for integrated and holistic support. The integrated booking system has transformed incident reporting and case management, improving confidence in both students and administrators.

By leveraging CRM technology throughout the student journey, universities can:

- **Gain a complete view** of each student's journey, enabling institutions to undertake personalised and timely interventions with automated alerts and communication.
- **Personalise interactions and streamline processes** to enhance student satisfaction, contributing to a positive institutional reputation and higher enrolment rates.
- **Make meaningful connections and build long-term relationships** with their communities and alumni network, opening the door to donor stewardship and philanthropic support.

“From the point of referral and throughout the entire period of care, we want to put the right information in front of the proper practitioner when they need it, so they can make healthy decisions about how to interact with and care for the student in front of them.”

Dr Benjamin Wilkes,
Head of Student Wellbeing,
University of Sydney

[Read case study](#)



[FORRESTER Total Economic Impact™](#) study on Salesforce ROI

Report finding:

15% increase in retention with Salesforce

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.

DEEPENING LIFELONG RELATIONSHIPS WITH STUDENTS



Maintaining strong connections with alumni has become increasingly important as universities navigate a series of financial challenges amidst economic volatility.

Decreased public funding, declining enrolment rates, constraints on tuition fees and financial strain from campus upgrades to maintain competitiveness have put a strain on revenue, limiting future investment opportunities in ICT initiatives.

At the same time, operational costs have increased. A [2023 report](#) released by the NSW Auditor-General found that combined expenses increased by \$1.4 billion in NSW, with nearly 50% of this relating to higher employee-related expenses. Universities' combined expenses are now greater than pre-2020 levels, with operational costs 35% higher than in 2009.

Not only can alumni play a vital role in supporting academic journeys and lifting graduation rates, but they can also help bridge financial gaps as institutions look to diversify their income streams. Alumni who still feel engaged and valued by their university are more likely to lend financial support. Sustaining a sense of belonging also helps encourage lifelong learning and ensures the university remains top of mind when alumni seek upskilling or further studies.

SUCCESS IN ACTION:

Unlocking a \$10 Billion+ Opportunity

Using a centralised data-led strategy for Corporate Relations, University of Technology Sydney changed how it worked with strategic partners, strengthening its partner network across the university.

[Read the Case Study](#)





Another important source of revenue is through industry relationships, which can offer significant financial support through sponsored research, grants, and donations, as well as internships and career placements.

[Industry R&D](#) now represents a 'significant source' of revenue for the higher education sector. Initiatives like creating industry innovation labs and offering co-location on campuses also present new revenue opportunities for universities, as well as the ability to share costs.

Fostering stronger alumni and industry relations

Building robust relationships with alumni, industry and government is crucial for the financial health of universities and institutions. Having a long-term strategy to connect with alumni and provide valuable tools and resources for them will inspire ongoing support and contributions.

CRM systems play a pivotal role in facilitating alumni and industry partnerships by personalising engagement, managing stakeholder relationships and providing insights into student and alumni data.

Benefits of CRM include:

- **Foster deeper relationships** by personalising engagement and leveraging multiple communication channels.
- **Boost fundraising productivity** by leveraging in-depth biographical, demographic, and relational data to craft effective fundraising campaigns, while using dashboards to track your key fundraising metrics.
- **Facilitate mentorship** by pairing mentors with mentees who share similar interests to help students' academic and career advancement.

CASE STUDY SNAPSHOT:

Improving gift spend planning, tracking and reporting

To support revenue diversification, a leading Sydney university has created a planning and tracking tool to streamline its gift management process – improving reporting, governance and spend plan cycle times.

[Learn more about the solution](#)



[FORRESTER](#) Total Economic Impact™ study on Salesforce ROI

Report finding:

12% productivity lift for administrative and academic teams

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.

CONCLUSION



In an era of unprecedented change for universities, student needs too are evolving, with belonging, connection, wellbeing and career support all being critical factors impacting a student's overall education experience.

As institutions strive to meet the evolving needs of their faculty, research and student communities, it has never been more critical for digital and business strategies to be intertwined to achieve operational and student outcomes. To unify student data and siloed systems, many universities are turning to CRM platforms, like Salesforce, which are flexible and scalable to grow with their needs.

With cohesive data and aligned digital technology driving personalised and targeted communications, ICT departments can empower faculty and staff to exceed enrolment goals, foster lifelong student relationships and boost fundraising.

[Learn more](#) about how Infosys | Simplus partners with universities to maximise institutional business value using Salesforce.

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TOP USE CASES ACROSS THE STUDENT JOURNEY

Connected CRM platforms, like Salesforce for Education, offer a pathway to achieve strategic goals – providing the tools, automation and insights to streamline operations, personalise student interactions and drive institutional growth.

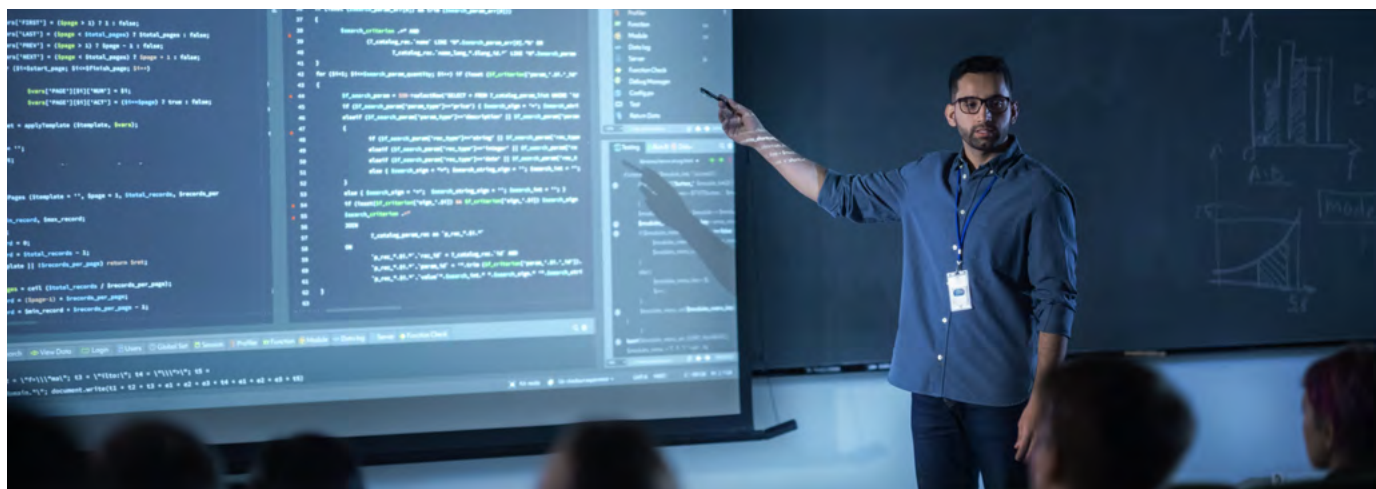
Here is a summary of the top use cases for CRM across all phases of the student lifecycle – from recruitment to enrolment, retention and alumni relations – using Salesforce Education Cloud, the #1 CRM platform:

Student recruitment

Target prospective students with personalised messaging, marketing automation and seamless inquiry forms.

- **Marketing automation** – Create a strong first impression with marketing automation that dynamically adapts to student behaviour.
- **Multi-channel communication** – Use different engagement channels to reach potential students, including social media platforms, webinars and in-person events.
- **Social media integration** – Push more prospects to the top of recruitment funnels via paid advertising campaigns, content that shares student success stories.
- **Event management** – Offer a combination of live and online events that focus on local high schools, such as customised campus visits and virtual tours and livestream Q&As.
- **Agent relations** – Give users a central place to focus on application reviews, see critical tasks and take important next steps.





Admissions & enrolment

Boost conversion rates by streamlining enrolment and admissions processes while building stronger relationships with prospective students.

- **Customisable applicant portal** – Support applicants with a full-service recruiting and admissions portal that helps find answers quickly.
- **Application management** – Offer applicants a flexible experience that enables users to start an application and save to complete later, as well as use auto-fill to ensure information doesn't have to be entered twice.
- **Program planning** – Track the completion status for every applicant with helpful icons that automatically update as key tasks are completed.
- **Connected onboarding** – Increase admissions yield and empower admissions counsellors with automated onboarding journeys that deliver maximum impact with minimal effort.
- **Offers & enrolments** – Identify strong prospects, take the guesswork out of who is likely to apply and receive alerts when it's time to take action.

Student success & wellbeing

Increase retention by strengthening engagement and supporting wellbeing, including identifying at-risk students early on and delivering timely, holistic support.

- **Unified student records** – Unify disparate student data into one location to gain a 360-degree view of every student.
- **Student portal** – Give students one place to manage their academic and career journeys, allowing them to quickly interact with staff.
- **Targeted outreach** – Build targeted outreach campaigns to specific student populations who need additional support, personalise the communication with student data and based on real-time behaviour.
- **Enquiry & case management** – Triage students' needs using case management functionality and automate the distribution of cases so they can deliver impactful, fast support to students in need.
- **Student support & wellbeing** – Track and promote student support programs and the services they provide, like career readiness, tutoring and wellbeing, for students to self-discover and enrol in.

Advancement, alumni & partner relations

Cultivate strong relationships with alumni, secure increased philanthropic support and optimise operations to meet the goals of your institution.

- **Alumni relations** – Manage and engage with alumni from your educational institution in a single centralised location.
- **Fundraising campaign insights** – Leverage in-depth data to craft effective fundraising campaigns and launch campaigns quickly to alumni.
- **Donation management** – Create customisable dashboards to track your key fundraising metrics and incoming pledges.
- **Financial reconciliation** – Bridge advancement transactions with finance for accurate and efficient financial management.
- **Industry & research partnership** – Manage relationships with industry partners for student placements, apprenticeships and collaborative programs as well as sponsored research, grants and donations.

For more information, contact marketing@simplusanz.com

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