

6 REASONS TO MODERNIZE YOUR CRM

HOW UPGRADING YOUR CRM CAN HELP
INCREASE EFFICIENCY AND SUPPORT
STUDENTS

TARGET 



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INTRODUCTION

A CRM is a powerful tool for higher ed that helps drive recruitment strategy and admissions communication. Because CRM solutions integrate with already existing platforms on campus, like websites and social media, they allow universities to have a better view of prospective students' behavior, so that they can be nurtured and prioritized accordingly. With a CRM, you're also able to measure the ROI of admissions efforts and track patterns in student activity to drive further engagement and conversion. It takes the burden off internal team members so that they can focus on what really matters: the students, both current and prospective.

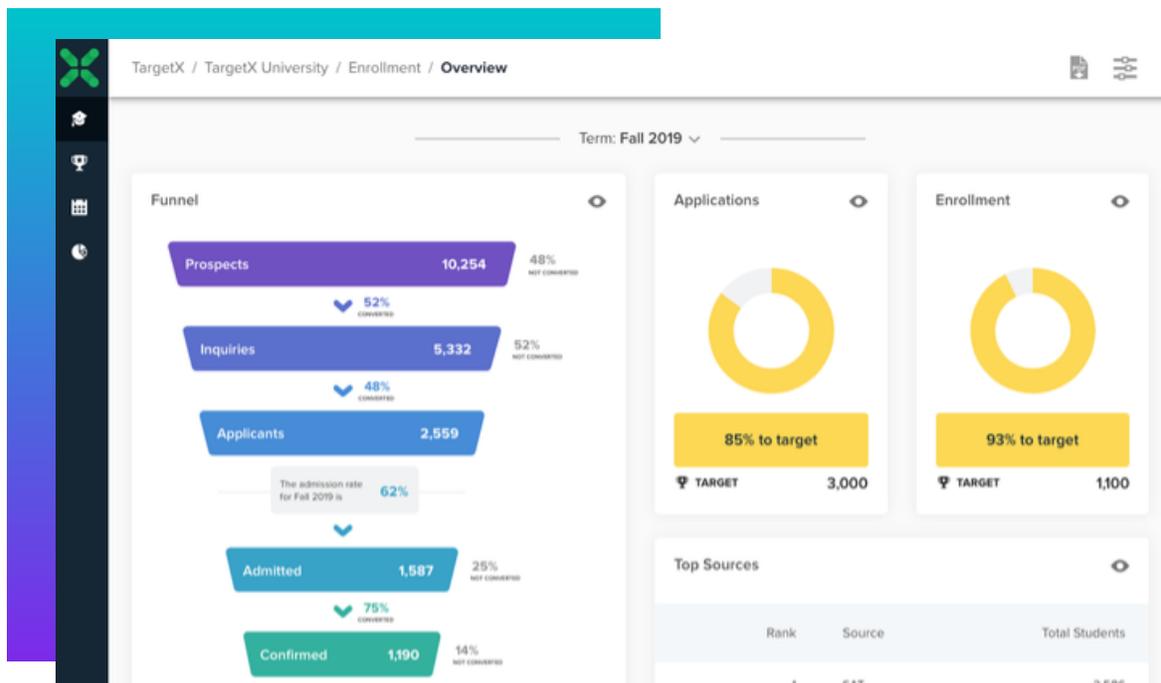
And, when it comes to recruiting and retaining students today, especially in the wake of COVID-19, having a robust CRM is critical. Many institutions already have systems in place and have had them for years now. However, an outdated CRM system is more likely to slow you down than speed you up, which is almost doing more harm than good. This is especially true today with students looking for frequent communication and reassurance from their schools and looking for true value in the schools they choose.

In this guide, we'll walk you through the six benefits of modernizing your CRM and the power that a truly scalable solution can have on your campus.

1. ACCESSIBLE AND ROBUST DATA

Before CRMs were prevalent on college campuses, it was common for Enrollment Managers to rely on their IT teams to provide reports, which was not only time consuming and inefficient, but often resulted in large data dumps that had to be manually manipulated. Once CRMs were introduced, it became easier to obtain reports, but it was still incredibly difficult to pull consistent data. This often leads to siloed or hard to access/organize information that would otherwise be beneficial to most or all of your teams across campus. A modern system means more relational data, giving you the tools you need to see the student lifecycle as a whole picture, rather than just a single image. They provide true insight, rather than simply raw data. What's more, dashboards allow Enrollment Managers to see how effective their activities are without manual Excel files. This will help keep your office organized, and your students on track to graduation.

Taking it a step further, truly modern CRM systems will allow you to pull data across various objects and funnel stages and visualize it through dashboards that can be configured to your unique needs. Gone are the days of exporting your data to Excel.



2. USABILITY AND ACCESSIBILITY

“Mobile-friendly” is a thing of the past. If your system isn’t mobile-first, it’s only slowing you down and creating roadblocks for current and prospective students. Students today expect a first-class, seamless experience from your website to the application process with over 84% of prospective students starting their college applications right from their phone. Anything less can deter them from requesting information or completing their applications. An updated CRM gives students the best chance at completing their applications on time and in full.

However, it’s not only students being held back by a mobile-unfriendly system. With a mobile CRM system, your admissions team can run their department from the palm of their hands, which is more important than ever given the current shift to remote work and fully virtual experiences all around.

Finally, today’s CRM systems are useable with screen readers, and will meet or exceed the accessibility guidelines necessary for your university or your state, whether that’s WCAG 2.1, or other requirements.



3. TRULY OMNI-CHANNEL COMMUNICATION

While some institutions are working with outdated software, some are working without any CRM in place at all. Instead, they're using things like their Student Information System (SIS) as a one-stop shop. However, this becomes a problem when it comes to student communication. Your SIS contains all of your school-specific metrics, as well as any data relating to students, and while it does play a large role in the maintenance and transference of information across campus, an SIS simply informs larger messages and engagement strategies. Since an SIS can't message outward, it plays no role in student-facing recruitment and enrollment activities, and admissions offices are forced to export data to siloed tools for emails, texting, mailings, and more.

A robust CRM, however, allows your institution to have everything from email, print communication, and tele-counseling all channeled through one shared system, so that every student interaction is accounted for and can be put to use by your team.



4. APPLICATION PROCESSING

Automate your entire application review process from start to finish. While legacy systems are somewhat digital, balancing between an SIS and paper files, modern CRMs are built for scale. Does your institution have multiple applications across different programs or even campuses? Streamline the review process with automated admissions decisions, route to the correct departments, and come away with fewer edits than ever before. With everyone working separately, this kind of seamless transition is critical to making sure students receive their decisions in a timely manner.



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“THE NEAT THING ABOUT THE CRM IS THAT IT HELPS MANAGE THE EVENT, MANAGE TRAVEL, AND MANAGE COMMUNICATIONS. THE PHASE BY PHASE APPROACH ALLOWS YOU TO STOP AND THINK AT EACH PHASE OF IMPLEMENTATION.”

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Jay Murray

Associate Vice President for Enrollment Services
Western Connecticut State University

5. SECURITY AND CONFIGURATION

Configure your CRM so that it works best for your school's needs, without relying on a call to your vendor *or* internal IT team. This is especially important when it comes to permissions across departments and teams. Some legacy systems only offer “can” versus “cannot” access permissions, whereas a modern CRM offers not only nuanced security options, but allows you to control when, where, and how your staff can access the sensitive data housed in your CERM. For example, a CRM should prevent student workers from accessing other students' data while off-campus or from their cellphones.

In addition to closely monitoring permissions and workflows throughout your institution, newer CRMs allow for more granular territory management. This allows territories to be managed more efficiently, as well as insights into how each territory is performing toward defined goals. And most importantly, modern CRMs provide intuitive, drag-and-drop tools for configuration, which make updates quick and easy without having to rely on your IT team.



6. SCALABILITY AND EXTENDABILITY

Working with a system that is designed to grow as your needs grow is not only the easier option, but the more affordable one. Many older systems were built with the intention of helping a school run just one section of students, like undergrad or grad. This means that a new platform would need to be implemented in order to successfully recruit and retain students across different sections, which can be both expensive and time-consuming, often involving resources whose time could be better spent focusing on students. Investing in a CRM that can manage multiple sections in one place from the start is the most efficient way to scale; this way, you can evolve over time and as needed.

However, it's not just about getting your campus connected to the same CRM platform, it's also important to ensure that all the technology on campus is connected and talking to each other. Today's CRMs are built to integrate with other technologies across college campuses. Single-sign-on, and more recently Zoom, are two of the more vital integrations, especially considering the virtual world we're now living in. A connected campus leads to a more well-rounded student experience, which is more important than ever.



ABOUT US



TargetX is reimagining the student experience with CRM solutions that span the student lifecycle. Built on the Salesforce platform – the worldwide leader in customer relationship management – TargetX offers comprehensive solutions for recruitment, admissions, and student success. TargetX helps over 350 higher ed institutions meet and exceed their enrollment and retention goals and, with world-class implementation and support teams, is a true partner for success. With its 20+ years of innovative technology and higher education expertise, TargetX is the most trusted CRM provider in higher education. To learn more, visit targetx.com.