

CONSTITUENT RELATIONSHIP MANAGEMENT: PEOPLESOFT CRM 9.1 FOR HIGHER EDUCATION



PEOPLESOFT CRM 9.1 FOR HIGHER EDUCATION IS THE ONLY END-TO-END SOLUTION FOR CONSTITUENT RELATIONSHIP MANAGEMENT

FEATURES

- Comprehensive event planning, management and results analysis
- Service center for higher education
- Constituent 360-degree view

BENEFITS

- Improve recruiting results with tools that enable more precise, personal interaction
- Reduce event costs while improving their effectiveness
- Manage constituent relationships in a holistic and actionable approach

Colleges and universities continue to experience unprecedented challenges: increased expectations from their constituents for flexibility and access to learning, information and services; an uncertain and changing economic and regulatory environment; and pressures to reduce costs and streamline processes. To be successful in this environment, higher education institutions have found they need to change the way they manage relationships across the entire constituent lifecycle. Oracle's PeopleSoft Enterprise Customer Relationship Management Release 9.1 for Higher Education provides institutions with new and enhanced capabilities to meet all these needs and more.

How can I Maximize my Institution's Recruiting Effectiveness and Increase Conversion Rates?

With more than 2.5 million students matriculating for the first time each year, a significant increase in the number of returning students and lifelong learners, and heightened global competition for students; the role and responsibility of admissions and enrollment personnel in higher education has become increasingly critical to the success of an institution. As a result of these factors, the recruiting process is starting earlier, lasting longer and requires more targeted and personalized communications and interactions. PeopleSoft CRM 9.1 for Higher Education provides recruiters with more of the tools they need to manage relationships and contacts with prospects to improve their chances of success.

With PeopleSoft CRM 9.1 for Higher Education recruiters can:

- Transform constituent information into a deep understanding of individual needs and interests during the recruiting process
- Capture and grow prospect interest by differentiating your institution through targeted, relevant, one-to-one communications across multiple channels including email, web, events, SMS, print and more
- Produce more and higher qualified candidates using a higher education-specific prospect and inquiry management process

Enhancements to Better Manage Suspects and Prospects

Search / Match Capability identifies potential duplicates when suspects and prospects are imported to CRM in bulk using prospect student import. Staff can review results and determine whether or not a new ID should be created.

Lead and Opportunities now captures the zip code of the last school attended, institution, career, program, and plan so specialized recruiters can be assigned for more targeted interactions.

These enhancements provide an end-to-end recruiting solution that allows your institution to track your prospective students throughout the recruiting process to ensure that all communications and interactions are accurate and targeted.

Event Management

PeopleSoft CRM 9.1 event management is a complete solution for planning and executing a wide range of virtual and in-person events and provides a full-featured, self-service solution that supports online registration, venue capacity checking, wait-listing, early bird pricing, and credit card integration.

With PeopleSoft CRM event management you can:

- Reduce event support costs
- Deliver accurate and timely responses to participants
- Measure event success and drive follow-up actions

Event 09/11/2009 5:49:56PM PDT

Save Refresh Search Clone Notification Personalize

Event Name Spring Recruiting Event 1 Status New
 Start Date 02/19/2016 End Date 02/20/2016
 Venue Lexington Event ID EVT000000010004

Event Sessions Team Resources Participants Tasks Costs Metrics Communications

Go To Select One...

Audience Load Audience

Participants Summary Customize Find View All First 1-18 of 18 Last

Participants Address Payment Info More Info

	Last Name	First Name	Invited	Response	Response Date	Response Time	Attended	Future Event
<input type="checkbox"/>	360 Brown	Lawrence	<input checked="" type="checkbox"/>	Registered	02/14/2016			<input type="checkbox"/>
<input type="checkbox"/>	360 Dewey	Jo	<input checked="" type="checkbox"/>	Declined	02/12/2016			<input type="checkbox"/>
<input type="checkbox"/>	360 Glass	Dorothy	<input checked="" type="checkbox"/>	Registered	02/14/2016			<input type="checkbox"/>
<input type="checkbox"/>	360 Clark	Elmore	<input checked="" type="checkbox"/>	Registered	02/14/2016			<input type="checkbox"/>
<input type="checkbox"/>	360 Charteris	Heron	<input checked="" type="checkbox"/>	Waitlisted	02/14/2016			<input type="checkbox"/>
<input type="checkbox"/>	360 Frommer	Margaret	<input type="checkbox"/>	Declined	02/14/2016			<input checked="" type="checkbox"/>
<input type="checkbox"/>	360 Miller	Savana	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Day	Deborah	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Richards	Melissa	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Downing	Denise	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Estleman	Stephen	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Dreyer	Sybil	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Cannell	Robert	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Ling	Hsu	<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>	360 Dietz	David	<input type="checkbox"/>					<input type="checkbox"/>

Check All / Clear All

Delete Mark as Invited Mark as Attended Mark as No Show Add Participant

Save Refresh Search Clone Notification Top of Page

Event management provides end-to-end support for recruiting events

The tools provided in PeopleSoft CRM event management that make it possible for you to produce successful events from start to finish are:

Event Planning supports creating roll-up campaigns, individual event and campaign financial tracking, approvals, session management, and participant lists so you build the right program and audience for your event.

Event Invitation and Registration helps you manage the pre-event process including the invitation, participant registration and payment, send reminders, and update participants on wait-list status, venue changes, directions, etc. After the event, you can also update no shows and new prospects.

Analysis and Follow-up provides a number of metrics so you can measure the success of the event and initiate follow-up communications and surveys to evaluate ongoing interest or suggestions for improvement.

How can my Institution Improve Retention Rates and Simplify Service Delivery?

You already know the cost of recruiting a student is far higher than retaining one. So once you have recruited and enrolled the best set of applicants, you want to ensure that you retain them. PeopleSoft CRM 9.1 for Higher Education has several new features that will help you deepen relationships with your students by capturing and accessing all the information you have about an individual so you can more proactively and effectively resolve problems or issues.

New features and enhancements in PeopleSoft CRM 9.1 to support student retention include:

- Service Center for Higher Education
- Constituent 360-degree View

Retention programs such as satisfaction surveys, personalized communications, and targeted retention events for virtual or face-to-face interaction can all be tracked and managed through CRM 9.1.

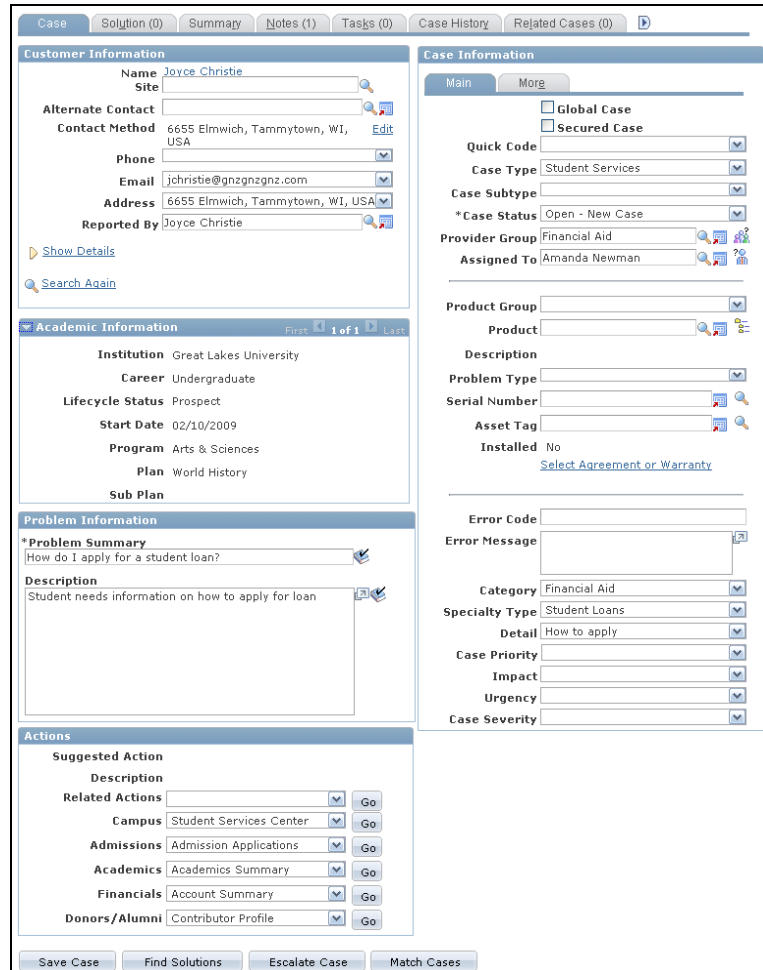
Service Center for Higher Education

Service satisfaction levels for issue resolution are an important factor in student retention. Providing outstanding service, reducing costs, and streamlining service-delivery will help your institution differentiate itself by creating a positive user experience.

The service center for higher education is a one-stop-shop constituent contact center for both IT and general campus issues. It leverages a strong, multi-channel contact foundation that includes self-service, case management, issue diagnosis, and knowledge management. The center also includes a powerful workflow engine for rapid, consistent inquiry resolution across channels. Most importantly, relevant constituent information is embedded within each case so agents can view information they need to better understand the constituent, anticipate the

constituent’s service needs, and provide the appropriate level of service.

To resolve constituent inquiries, the contact center agent often needs to access or update information for that constituent in CS. For example, if a student has a question regarding his or her course enrollment, the agent needs to access that information in CS. To make access to CS seamless to the agent, the service center for higher education delivers predefined action links. Action links are similar in concept to favorites in your web browser, providing a drop-down list of various pages in CS grouped by category. Over 45 action links are delivered and grouped into the categories of campus, admissions, academics, financials, and donor/alumni.



The service center for higher education is a one-stop-shop for constituent contact

Constituent 360-degree View

In higher education, relationship management typically starts from the initial recruiting process and extends through alumni relations. During this lifecycle, a constituent may have multiple roles, participate in various activities, and have many interactions with an institution. In order to effectively manage this dynamic relationship with a constituent, you need all this information consolidated and summarized in one place so you can access and take appropriate action.

PeopleSoft CRM 9.1 for Higher Education delivers a powerful constituent 360-

degree view that enables a holistic, actionable view of a constituent. In addition, the information is configured so it is relevant to the information needs and role of an individual staff or faculty member—the marketer, recruiter, advisor, IT help desk agent, and others at your institution can see exactly the information they need to successfully interact with each and every constituent or group of constituents. Likewise, information can be secured to deny access to individuals who do not have appropriate authorization.

Summary

Oracle's PeopleSoft Enterprise CRM 9.1 for Higher Education provides institutions with new and enhanced capabilities to manage the full constituent lifecycle more effectively than ever before.

Contact Us

For more information about Oracle's PeopleSoft Customer Relationship Management 9.1 for Higher Education, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.



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