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Empowered Interactions: Delivering a Competitively Differentiated Student Lifecycle Experience

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Introduction

These are challenging times for institutions of higher education. A pervasive culture of information and choice is making it more difficult than ever to effectively recruit, retain, and advance students across their highly individualized lifecycles. Constituents are demanding greater attention to their personal needs. If they don't have a sense that you know who they are—and if they don't have a sense that you care—they're going to go elsewhere.

To compete successfully, colleges and universities must therefore adopt best practices that enable them to consistently interact with their diverse constituencies in a highly personalized manner. At every touchpoint across the student lifecycle, staff members must understand who they're talking to, what that person's current state of affairs is, and how best to satisfy the need that is being expressed. Only through such empowered interactions can institutions deliver the kind of differentiated experience required to attract applicants, retain active students, and maintain quality relationships with alumni.

This white paper describes how educational institutions around the world are taking advantage of evolving customer experience and customer relationship management (CRM) technology to deliver highly personalized, competitively differentiated student experiences across the recruitment, retention, and advancement lifecycle. It highlights the eight core capabilities that enable these institutions to successfully meet—and even exceed—the expectations of today's highly demanding constituencies. Further, it outlines the tangible benefits these institutions reap by consistently satisfying their constituents in this way.

Satisfying Constituents in a Culture of Choice

Institutions of higher education have to satisfy multiple constituencies to survive and thrive in a marketplace where other institutions are actively competing for those same constituencies. The importance of this satisfaction is greater now than ever before because today's constituents have more choices—and a greater inclination to exercise that choice.

These constituents are highly adept at gathering information from multiple sources via multiple communication channels. They are easily turned off by disappointing personal experiences. In addition, they see little reason to remain loyal to any organization that they don't believe is meeting their needs.

Colleges and universities also have to be more diligent in maintaining strong relationships with their constituencies across the entire student lifecycle. Gone are the days when incoming freshmen could automatically be expected to someday become contributing alumni. If they're not happy with their experiences from day one, they might not even stay for their sophomore year.

In fact, the student lifecycle presents a whole spectrum of relationship management challenges from start to finish.

Recruitment Challenges

The choice of a college or graduate school is one of the biggest decisions an individual can make. It's an expense for which the student may have saved for years; many will even go into debt. For the undergraduate in particular, choosing a college presents a whole range of issues with which the student may be unfamiliar: academic programs, financial aid, housing, healthcare, and other campus services—as well as the nature of the surrounding community. Parents may be intensively involved in the process as well. A slow answer or no answer to any of their questions may be as problematic as a "wrong" answer.

Often a potential applicant will have particular concerns, which may range from accommodation of physical handicaps to specialized courses of study. An institution must offer highly personalized responses during the recruitment process if it is to seat a freshman class with a high caliber and diversity of students. Many students are applying to multiple institutions so, in addition to providing answers, institutions need to respond in a more compelling way than other institutions that the prospective student is considering.

Retention Challenges

Once students begin attending an institution, there is no less need to provide a personalized, responsive experience. In fact, the delivery of such an experience can become even more complex as students become engaged in all the aspects of campus life: using services, eating in the dining hall, running up bills, participating in academic programs and student activities, using the student shuttle, encountering problems, and gaining a clearer picture of what they ultimately want to accomplish with their education. Students who don't feel their needs are being met, who don't get enough help with their problems, or who are not sufficiently challenged may drop out or transfer to another institution that looks more attractive—whether or not they will, in reality, be any better off there. No student paying tens of thousands of dollars in tuition wants to be treated like a number. That's why colleges and universities have to understand all of their students as individual human beings with their own personal preferences, goals, and expectations. Further, that understanding has to inform every interaction that the institution has with each of its students.

Advancement Challenges

It becomes even more challenging to maintain strong relationships with constituents once students leave an institution and are no longer engaged with its various services and departments on a daily basis. Once students become alumni, it takes even more effort to gain visibility into their current state of affairs and to drive interactions with them. This visibility can be particularly important when it comes to fundraising, because people can be very sensitive about how they are treated by organizations that are asking them for financial donations. At the same time, institutions may need to become more aggressive about pursuing these relationships than in the past. This is because alumni may wind up with historical ties to a greater number of different institutions as they transfer with greater frequency and receive more post-graduate education. Alumni relations departments must therefore evolve their operations accordingly if they are to successfully compete with other institutions vying for the mindshare and disposable income of the same constituents.

The relationship between an institution and its constituents is constantly changing as the student lifecycle unfolds. The things recruiters and admissions officers do to engage the attention of a high school junior are very different from those that fundraisers do to secure an endowment from a wealthy retired alumnus. There are, however, commonalities as well. Whatever the constituent's state of affairs, institutions need visibility into that state if they are to be effective. They need to know who they are talking to. They need to know the date and outcome of the last interaction they had with the constituent, as well as the one before that and the one before that. They also need a good "macro" view of their collective constituent interactions so that they can detect trends and pinpoint shortcomings in their strategies and tactics. Finally, they have to accomplish all of this interactive excellence within budget constraints that are often quite daunting.

So how exactly can institutions of higher education best satisfy their constituents in this culture of personal choice and information overload? How can they empower their constituents and their staff so that both can have the information they need—where and when they need it? How can they most cost-efficiently conduct their ongoing "conversations" with their constituents to optimize both short- and long-term outcomes?

Although the answers to these questions may vary to some degree from institution to institution, certain core capabilities have emerged as essential for satisfying constituents in today's rich, multichannel communication environment. By acquiring these capabilities, colleges and universities can greatly improve their ability to recruit, retain, and advance constituents across the student lifecycle. They can also achieve significant competitive advantages over other institutions that fail to do likewise—and that are therefore less able to meet the expectations of prospective, active, and former students.

Eight Core Customer Experience and Customer Relationship Management Capabilities for Higher Education

Every institution of higher education is different. Each one has its own structure, programs, policies, culture, and strategies. However, there are certain common principles that determine the quality of a constituent's experience with any institution. The attributes of a great constituent experience are essentially constant and measurable, regardless of the particular characteristics of the institution. These attributes include the ability to get consistently fast, accurate answers to questions and to get service that is polite and highly personalized; the ability to use whichever communication channel is most convenient at any given time; and support with timely, relevant notifications and reminders. In other words, the delivery of a great constituent experience is a matter of treating every constituent well every time you interact with them—regardless of how, when, or why that interaction takes place.

Although improving the quality of interaction may at first glance seem to be an abstract concept, experience demonstrates that there are actually specific, concrete steps institutions can take to maximize it. Experience also shows that specific, concrete benefits result from taking these steps.

In fact, there are eight core capabilities that colleges and universities can acquire to ensure that their interactions with constituents are of sufficient quality to cumulatively produce a positive experience across the recruitment/retention/advancement lifecycle. The capabilities are typically acquired through implementation of customer experience best practices and technology, which are then adapted as appropriate to accommodate an institution's specific structure, programs, policies, culture, and strategies.

Step 1: Create a "Knowledge Foundation"

Every interaction with a constituent entails an exchange of knowledge. Knowledge may flow to the constituent, from the constituent, or in both directions. Either way, the quality of this knowledge exchange directly affects the quality of the constituent experience.

A robust knowledge foundation is therefore essential for delivering a positive constituent experience. Unfortunately, many institutions have struggled to create such a knowledge foundation. That's because knowledge is often scattered across the organization—or locked away in the heads of subject-matter experts. Knowledge is also often inadequately managed over time, so it becomes out of date and inaccurate. For example, parents and students are looking further and further ahead to plan for financing college, but changes in loan programs can be significant from one school year to the next. If the loan program information is not kept current, they will assume that the posted information is accurate, and problems that could have been avoided can occur.

Many institutions, however, have overcome these obstacles so that they can provide both constituents and frontline staff with knowledge that is consistently accurate, up to date, and relevant to their immediate needs. One way they typically accomplish this is by becoming intentional about building a knowledge foundation that is sufficiently comprehensive. Such a knowledgebase usually includes the following:

- Customer data such as students' personal demographics and academic histories
- Real-time process knowledge such as the status of a prospect's application or a parent's question about a billing item
- Program knowledge, including academic, athletic, and extracurricular offerings
- Institutional knowledge such as admission policies and campus regulations
- Competitive knowledge about other institutions' offerings and performance
- External knowledge about scholarships and loans, affirmative action rulings, and graduate school requirements
- Analytical insights necessary for continuous improvement of the constituent experience—such as complaint trends and survey results

To facilitate the creation and ongoing management of this broad knowledge foundation, successful institutions are now also leveraging artificial intelligence (AI) technologies such as adaptive clustering and fuzzy logic. These "self-learning" technologies make it much easier to continually optimize the relevance, organization, searchability, comprehensiveness, and "freshness" of the knowledge foundation.

Often, for example, a very large percentage of constituents' questions can be addressed with a relatively small number of answers. A properly automated knowledge foundation will track which answers these are—even as they change over time—and make sure they're the ones most immediately available to constituents. It will also identify gaps in content so that they can be filled immediately.

Every institution's "knowledge profile" will be different, of course. But the establishment of a comprehensive and relevant knowledge foundation is a key first step in delivering quality experiences across the entire constituent lifecycle.

Step 2: Empower Constituents with Self-Service

Great self-service is an integral component of a great constituent experience. With self-service, constituents can find the information they need on the Web from a mobile device or via an interactive voice response (IVR) system, instead of having to wait and engage with your next available staff member. Additionally, this is often the way the Millennial Generation and nontraditional students prefer to access services and information. Institutions are able to be more efficient and provide what students perceive to be better service. With the right kind of knowledge foundation and associated best practices, colleges and universities can achieve self-service rates of 85 percent or higher. Some have even achieved rates as high as 98 percent for specific topics. The benefits of self-service for both constituents and educational institutions are considerable:

- Immediacy of service means that constituents don't have to wait on the phone or keep checking their e-mail for a reply.
- 24/7 online answers allow constituents to get help anytime and from anywhere.

- Well-crafted text, graphics, and other content and well-placed hyperlinks can be provided to make answers abundantly clear to constituents.
- Broadly scalable services meet the need when there are big spikes in inquiries—with little, if any, incremental cost.
- Pressure is taken off other channels so that frontline staff members can spend more of their time on issues that truly require their personal attention.
- Rich insight is acquired by tracking what types of answers constituents are looking for every day.
- Huge amounts of money are saved by radically reducing phone and e-mail workloads.

There are several keys to successful self-service. One is obviously a knowledge foundation accessible as self-service that is complete and well-aligned with constituents' actual information needs. However, self-service can be extremely effective even with a fairly limited amount of knowledge content. That's because a large percentage of constituents' questions typically revolve around a relatively small set of issues. Many institutions quickly achieve good results with a small but well-focused set of answers and then build from there.

Another key is ease of use. In the case of Web self-service, it's best to give constituents several ways of finding the information they seek—including keyword searches, natural-language queries, and browsing by category. It's also a good idea to maintain a "Top Answers" list of the most commonly sought answers and to place it in a prominent position on the site. Such a list will ensure that the maximum number of constituents find what they need with a single click of the mouse.

In the case of IVR, ease of use can best be achieved by allowing constituents to navigate the system via both touch-tone inputs and through the spoken word. In fact, today's speech recognition technology enables the same kinds of searches on the phone that constituents perform on the Web.

The institutions that are most successful with self-service are also diligent about managing and fine-tuning their self-service systems. They review keyword reports to see if there are any topics for which their content is currently inadequate. They solicit feedback from constituents to see if content needs to be improved in any way. They also drive traffic to their self-service systems by featuring them prominently on their Website, mentioning them in their "on-hold" messages, and referring to them in their printed product manuals.

In addition, it's important to make it easy for constituents using self-service to quickly escalate their problem to a human being. Otherwise, they feel "trapped" in the system and will therefore become less likely to use it again in the future. With the bulk of student inquiries answered through self-service, staff members are more readily available to address these more-complex issues.

Step 3: Empower Frontline Staff

Constituents don't want to hear someone say "I'll transfer you" or "Let me give you another number" when they call. They want their questions answered and their problems solved. For that to happen, frontline staff members must be equipped with the knowledge they need to treat constituents the way they want to be treated. They have to be given full visibility into the "state" of the constituent at the time of the interaction. Without this knowledge, they won't be able to offer the personal attention that constituents expect. In fact, when problems arise, they may even aggravate the situation by saying or doing the wrong thing.

The knowledge empowerment of the frontline staff requires more than just a great knowledge foundation—although that knowledge foundation is an absolute prerequisite. However, it's also important to be smart about getting the right knowledge to people when they need it. Too much information can be as problematic as too little, because information overload can make it difficult for staff members to immediately locate the specific knowledge they need to best handle a constituent interaction in real time. So it's essential to structure access to information based on the requirements of each interaction.

Several factors will determine what information to make available to each frontline person at any given time. In a decentralized environment, for example, each department has its own information needs. Those working in the bursar's office need different information than those doing academic counseling. Information will also often be specific to the constituent or may be related to an ongoing issue. Frontline staff members should therefore be able to quickly view the "thread" of all previous interactions relating to that issue—even if some of those interactions were conducted with other people or via other communication channels. Institutions need to provide information and service in the same way that students perceive the institution. Students think in terms of the *institutional* experience, not the *departmental* experience.

Different modes of presentation are more suitable for different types of information. So, in addition to ensuring the relevance of the information on the computer screens of the frontline staff, it's important to determine how to optimally present that information. Typical examples include tabular data, dashboards, onscreen alerts, and integrated "drill-down" access to back-end systems. For example, a student may walk into a specific department or the student center for advice about changing his major. With a unified desktop, all the student's information can be viewed on one screen, and the interaction can be captured so that the next department or person who serves the student can view the complete history.

All of these considerations underscore the importance of implementing knowledge-driven applications that facilitate delivery of relevant content to the desktops of the frontline staff. The more empowered frontline staff members become, the more effectively they can respond to constituents' needs. This translates directly into improved constituent satisfaction and reduced operating costs.

Step 4: Unify Communications Across Channels

An important element of a great constituent experience is choice. This choice includes the freedom to use whichever communication channel is most convenient at any given time. Today, constituents can communicate by phone, e-mail, the Web, chat, fax, "snail mail," and in person. They will use these different channels at different times for different reasons. According to *Educating the Net Generation*, an e-book published by EDUCAUSE, 93.4 percent of students surveyed owned their own computer, all had access to the internet, and 82 percent owned cell phones.[1] As a result, they are very likely to use these communication channels to access institutional information and services. The quality of any institution's constituent experience will therefore only be as good as its weakest communication channel. It will also be largely contingent on how well those multiple separate channels are unified into a single ongoing conversation with the constituent.

The growing tendency of constituents to use multiple communication channels presents several challenges to institutions of higher education. One of these is to provide consistent information across all channels. It is very problematic when the information a constituent gets on the phone is at variance with what is posted on a Website. In fact, some constituents will even keep asking the same question in different ways until they get the answer they want—even if that answer doesn't reflect the institution's official policy.

The best way to address this challenge is to leverage a common knowledge foundation across all communication channels. In other words, the answers that get inserted into e-mail replies or given to students over the phone should come from the same source as Web self-service content. This way, all information given to the public will be accurate, clear, up to date, and consistent.

Use of a common knowledgebase across all channels also improves efficiency and speeds an institution's response to changing circumstances—because all information is added, deleted, and revised in a single place, instead of being administered separately in multiple repositories.

With multiple communication channels, it can be difficult to achieve in-depth visibility into constituents' problems and preferences. For example, constituents may use the phone to address certain types of issues and use the Web to address others. In such a situation, over-reliance on phone incident reports may draw inordinate attention and resources to a problem that is experienced by a relatively small number of constituents—while missing a much more common problem that constituents are trying to solve via self-service.

The solution for this challenge is to consolidate feedback reporting across all channels into a common system. This unified feedback ensures that the constituents' voices are heard, regardless of how they choose to speak at any given time about any given topic.

In addition, constituents will jump from channel to channel in the course of a single incident. For example, a transfer student may submit a question via e-mail, ask a question through a social channel, and then follow up with a phone call when he or she needs further clarification or wants to ask a related question. Those follow-up phone calls can be frustrating for the constituent if the person answering the phone doesn't have immediate access to the previous e-mail exchange. People don't like

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[1] *Educating the Net Generation*, Diana G. Oblinger and James L. Oblinger, EDUCAUSE, 2005.

having to explain their problems twice. Students believe in the mythical "permanent record" and are often surprised when they learn that it doesn't exist. Further, such redundant conversations also reduce staff productivity.

To deliver a great constituent experience in a multichannel world, it is therefore essential to manage communication "threads" in a unified manner across communication channels. Everyone interacting with a constituent should be able to see all relevant previous exchanges with that constituent, regardless of which channels were used. The information about those previous exchanges should also be as rich as possible. That way, a staff member can deal appropriately with a constituent who claims to have submitted a form via e-mail a week ago—but who actually only did so the day before yesterday. The staff will also be better prepared to deal with a constituent's emotions or special sensitivities if they can see notations from another staff member about a previous interaction.

Step 5: Actively Listen to Constituents

To provide constituents with a great experience, it's essential to know what they want—and to find out what they do and don't like about how they're being treated now. Unfortunately, most institutions only ask their constituents what they're thinking periodically. These "batch mode" surveys can be useful for planning or for getting a general sense of constituent satisfaction. But there are several reasons that surveys alone are insufficient for optimizing the constituent experience:

- **They don't capture feedback at "the moment of truth."**
  If something is threatening a constituent relationship, it should be discovered immediately—not six months after the fact.
- **They don't drive immediate corrective action.**
  Institutions that respond quickly to problems as soon as they occur often wind up building relationships with constituents that are stronger than they would have been if the problem had not occurred.
- **They don't generate sufficient response rates.**
  Surveys typically only generate single-digit response rates. When constituents are asked for feedback in the context of an active interaction, on the other hand, response rates can be in the range of 30 to 40 percent.

These higher response rates provide much richer insight into what constituents are thinking and feeling. For these reasons and others, it's much more effective to integrate the capture of constituent feedback into every interaction—and to implement real-time response and escalation mechanisms that ensure rapid response to that feedback.

This can be done in several ways. For example, a simple set of questions can be e-mailed automatically to constituents after certain types of interactions. These "minisurveys" can also be offered on the Web or via IVR.

It's important to note that there is a natural human tendency to avoid negative feedback. In fact, many institutions will use the fact that 95 percent of their constituents' feedback is positive to minimize the importance of dealing with the other 5 percent. But there are lots of good reasons to pay close attention to that 5 percent. 5 percent is actually a lot of constituents to potentially alienate, and this is why it is a significant amount:

- That 5 percent can adversely influence a much larger number of friends and associates.
- The complaints registered by that 5 percent may provide insight about problems being experienced by the much larger number of constituents who simply don't choose to complain.
- Those complaints are the best indicators of what needs to be fixed in order to deliver a competitively superior constituent experience.

Ultimately, it is the willingness to really care about any constituent's dissatisfaction that differentiates merely good institutions from great ones. So, while it's certainly reasonable to feel good about high constituent satisfaction scores, that good feeling must never translate into complacency.

Dissatisfied Constituents: Taking Action

There are numerous ways to ensure that appropriate action is taken when a constituent is dissatisfied. For example, workflow rules can be put in place that automatically notify the appropriate manager whenever a constituent gives any interaction a low rating. That manager can then initiate whichever steps are necessary for both resolving the immediate problem and addressing its root cause—so that it doesn't happen again.

Finally, the feedback loop should be closed by letting constituents know that action has been taken on their input. This can be done by informing constituent populations about changes made in response to their collective input, as well as by notifying individual constituents about outcomes driven by their personal feedback. This kind of ongoing conversation gives constituents a strong sense of control over their educational experience, rather than simply being on the receiving end of a courseware delivery system created with little concern for their needs and preferences.

Step 6: Break Down Internal Barriers

Many colleges and universities are highly decentralized; various departments and campuses operate very independently from each other. This decentralization offers many advantages when it comes to decision-making, innovation, and the delivery of services. But it can pose challenges when it comes to the creation of an optimized constituent experience. That's because constituents don't necessarily know exactly how an institution has segmented its operations. They may not be aware that extracurricular activities are run by separate organizations on each campus, but that parking is managed by a single universitywide security department. As a result, they don't always know exactly which office to contact for their particular issue. It may also be a hassle for them to have to contact five different offices to address five different issues.

Institutions of higher education must therefore begin to break down these departmental walls wherever they undermine the quality of the constituent experience—without compromising the functional independence of their various operating units. Essentially, this step entails viewing the constituents' experience from their point of view outside the institution, rather than remaining locked into a strictly internal perspective.

What interactions will constituents experience over the course of a given process? Who will they deal with at each stage of that process? What will the constituents expect that person to know or do? By answering these questions, institutions can get past the limitations of their organizational charts and design seamless, satisfying experiences for their various constituencies across all stages of their lifecycles.

There are obviously many processes to consider, from changing majors, to enrolling in a year of study abroad at an allied institution, to disputing charges on a term bill. Allowing students to fall through the cracks in departmental handoffs through processes has a detrimental impact on their level of institutional satisfaction and on the likelihood that they will persist through to graduation. These processes can be supported with appropriate technology and business rules to ensure that constituents have a satisfying experience—even though there may be multiple handoffs between departments that otherwise operate independently of one another.

Keep in mind that these processes should be designed from the perspective of the constituent. It's not the constituent's job to figure out how to do business with the institution; it's the institution's job to figure out how constituents want to do business with them. Institutions that think in these truly constituent-centric terms will clearly differentiate themselves from those that don't.

Step 7: Talk to Constituents

A great constituent experience isn't just about listening. It's also about saying the right things to constituents at the right time. Many institutions struggle to do this. They often broadcast inadequately targeted messages to large numbers of recipients—in the vain hope that at least some of the constituents for whom the message is relevant will see it. Unfortunately, this "shotgun" approach, in addition to being highly inefficient, actually makes it less likely that recipients will pay attention to future messages. This is true especially when institutions are struggling with the fact that students often forward their university e-mail to a Google or Yahoo account where it is automatically put into an infrequently read folder.

Institutions face a threefold challenge when it comes to communicating with their constituencies:

- **Segmentation.** Information should only be delivered to those constituents for whom it is relevant. That relevance may be based on one or more constituent attributes—such as gender, course of study, or where they are in the student lifecycle.
- **Personalization.** Communications with constituents should feel personal. This personalization can include anything from the individual's name to their projected year of graduation. The key is to make sure customers never feel like they are just another number in your database.
- **Context.** Every interaction with a constituent should take place in a particular context. These contexts may be related to a process, a time of year, or some level of academic achievement.

These principles of segmentation, personalization, and context can be applied in all kinds of ways to enhance the constituent experience. Messages can be targeted according to demographic attributes.

They can be driven by events such as registration deadlines. They can even be triggered by conditions such as a decline in a student's GPA. Given the right technology and resources, institutions are ultimately only limited by their imagination and insight. Institutions can employ any combination of segmentation, personalization, and context to execute these kinds of programs. For example, a demographically segmented recruitment mailing may include a personalized greeting and acknowledgement of a recent campus visit or off-campus interview.

Several key capabilities are necessary to apply these concepts in practice. These capabilities include list management, opt-in/opt-out controls, collaborative content development, and message testing.

Of course, e-mail is only one of the channels institutions can use to proactively communicate with constituents. Automated voice technology provides another highly cost-effective way to notify targeted constituents about special events, upcoming deadlines, past due balances, and other issues. Institutions can also make use of outsourced telemarketing, direct mail, social networking, and other channels to deliver messages to constituents—depending on factors such as cost and message complexity.

Step 8: Continuously Measure and Improve

A truism of quality assurance is that you can't improve what you don't measure. So to keep improving the quality of the constituent experience over time, it's essential to keep measuring it—and acting on those measurements.

The metrics that institutions apply to their constituent experience may vary depending on their particular objectives and culture. But they will typically include survey results, first-contact resolution rates, self-service rates, and time-based metrics such as hold times for phone calls and turnaround times for e-mail.

To get the most value out of these metrics, institutions should actively apply a variety of best practices for process improvement. These best practices include the following:

- **Communicating goals effectively.** Goals are communicated effectively if everybody on the team understands them and can work toward them. For example, if subjective ratings currently average 3.2 on a 5-point scale, it could be articulated clearly to all frontline staff that the institution's goal is to raise that average rating to 4.0 within 18 months.
- **Making metrics visible.** Visibility of metrics allows all staff members to monitor their individual and collective progress toward the goal. This can be done with graphical desktop "dashboards" and regular periodic e-mails.
- **Rewarding achievement.** Such rewards will positively reinforce desired behaviors. These rewards can include both individual and team recognition.
- **Establishing corrective processes.** Corrective processes are necessary for handling less-than-satisfactory constituent experiences. Such "recovery" behaviors can actually leave constituents feeling better about the institution and its concern for their well-being than they did before the problem occurred.

- **Adjusting goals.** Goals should be adjusted periodically to reflect constituents' changing expectations. Those expectations are likely to rise as institutional performance improves, so success should be followed by a new set of higher goals—rather than by complacency.

It's also useful to benchmark institutional performance against other comparable institutions. It may not make much sense for an institution that is already outperforming its peers in e-mail response times to invest too much time and effort trying to reduce those response times by an additional 20 percent. On the other hand, for an institution that is severely lagging behind its competitors, a 20 percent improvement may not be ambitious enough.

Of course, there are many things that colleges and universities may choose to do to improve their overall constituent experience across the student lifecycle. Some institutions may need to translate their knowledge foundation into other languages to attract overseas and foreign-born students. Others may create online communities and engage in social networking to foster a stronger sense of community among students and alumni. So the preceding eight steps should be viewed as a practical guide based on the experiences of successful institutions, rather than a formulaic recipe for the perfect constituent experience.

The main advantage of these steps is that they provide a proven methodology for breaking a large, somewhat abstract institutional challenge into a series of smaller, readily achievable objectives. By starting with a knowledge foundation and sequentially focusing on the "quick wins" available by acquiring the eight core capabilities listed above, institutions can logically and effectively work toward a strategically important goal: transforming themselves into the kind of institution that applicants are more likely to choose, students are less likely to leave, and alumni will remain more loyal to after they graduate.

The Rewards of Empowered Interaction

An improved constituent experience doesn't just happen. It takes planning, time, and budget. However, experience shows that those investments quickly yield a wide range of important rewards. Those rewards include the following:

- **More-effective recruiting.** Prospective students are more likely to enroll in institutions that give them personalized, responsive attention. By making themselves more attractive to these prospects, institutions can also become more selective about who they admit, thereby maximizing both the quality and diversity of their student bodies. It's not just about being selective; it's about recruiting and retaining the "right" students for your institution—the ones targeted by the institutional mission.
- **Higher retention rates.** When students feel valued and receive the support they need to get the most out of an institution's available programs and resources, they are far less prone to consider transferring elsewhere. This improved retention ensures the continuity of the student lifecycle experience and relieves pressure on both recruiting and admissions. It also helps institutions to execute their institutional mission more effectively.

- **Stronger alumni relationships.** Students who complete their entire education at a single institution—and who continue to be treated as a constituent of that institution after graduation—are more likely to donate, promote, and otherwise support their alma mater on an ongoing basis.
- **Stronger institutional "brand."** Empowered interactions result in higher-quality experiences across all of an institution's various constituencies. These experiences generate positive word-of-mouth advertising and generally improve the perception of an institution's brand. Stronger brands, in turn, enable institutions to attract more students.
- **Better staff allocation.** When constituents can readily get the information they need when they need it, an institution's staff members spend less time dealing with repeat requests, last-minute emergencies, and other distracting hassles. They can therefore spend more time on core tasks that enrich the educational experience.
- **Cost reduction.** The more efficiently and reliably an institution communicates with its constituents, the less money it needs to spend on support services. These budget savings can be used to reduce tuition or fund other critical initiatives.

Simply put, an improved constituent experience is one of the best investments an institution of higher learning can make. The best way to improve the experience is to put in place the technology and best practices that ensure optimum empowerment of every interaction at every stage of the student lifecycle. As the evolving business strategies of the private sector continue to elevate the public's expectations about how they're treated across all communication channels, educational institutions can't afford not to make investments in their constituent relationships. The stakes are too high and the competition is too fierce to postpone action any longer.

Conclusion

Many institutions of higher education are struggling to cope with changes in the environment of secondary education. Constituencies are now steeped in a pervasive culture of information and choice that leads to an unrelenting demand for a highly personalized, targeted constituent experience—or they will go elsewhere for their education.

To best understand who they're talking to, what that person's current state of affairs is, and how best to satisfy the need of each constituent at every touchpoint in the constituent lifecycle, successful institutions implement customer experience and customer relationship management (CRM) technology. Such technology can help them acquire the eight core capabilities—including establishing a knowledge foundation, effectively empowering students with self-service and empowering frontline staff with technology, unifying communications across channels, employing effective strategies for listening to and talking to constituents, breaking down internal barriers, and ensuring continuous measurement and improvement.

Ultimately, the resulting differentiated experience and strengthened institutional brand will attract applicants, retain active students, and help the institution to maintain quality relationships with alumni—while allowing for better staff allocation and reduced costs.

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Empowered Interactions:
Delivering a Competitively Differentiated
Student Lifecycle Experience
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