

INFORMATION YOU CAN USE

CRM for Higher Education



Recruit and retain the right students.
Give constituents stellar service.
Improve operational efficiencies.

INFORMATION YOU CAN USE

Are you attracting and recruiting the right prospective students? Are you maximizing fundraising efforts? Do you have strategies and programs in place to engage and serve your entire community of students, parents, faculty, alumni, and neighbors? Do you view your relationships with students as short term, or are you building lifelong connections?

Oracle's PeopleSoft Enterprise CRM for Higher Education combines student relationship and integrated service management in a solution that makes it possible for you to achieve your enrollment goals and deliver consistent, superior service to your academic, administrative, and external constituents. It improves operational efficiencies and maximizes every dollar spent. Most importantly, PeopleSoft CRM for Higher Education provides you with the information, insight, and tools that will help you foster loyalty and develop lifelong relationships with your students.

Implement Successful Recruitment, Retention, and Fundraising Strategies

From community colleges and trade schools to the largest public research institutions and for-profit universities, institutions of higher learning are finding themselves dealing with increased competition for students and funding, as well as a growing demand for better services and more convenient access to them.

To successfully recruit, retain, and create long-term loyalty, colleges and universities have to view each student as an individual and take a personal approach to meeting their individual needs. Every interaction you have with an applicant, student, parent, alumni, and sponsor must be managed for maximum success. If you can do this successfully, the results are the kinds of high-value, lifelong relationships that are your ultimate goal.

Exceed Recruitment, Retention, and Fund-Raising Goals

Whether you need to increase enrollment numbers or attract and retain students who have specific academic profiles, a successful recruitment and retention strategy is a major focus for most institutions. The process of recruiting new students is costly and time-consuming, making it imperative to identify, attract, and recruit the right ones.

Just as important is retaining as much of the existing student population as possible by preventing “at-risk” students from transferring to another school or dropping out altogether. Institutions must be able to quickly identify which students are at risk, understand the reasons why, and do what they can to prevent them from leaving.

Once students have graduated, the competition for alumni contributions can be fierce. Developing institutional loyalty can have tremendous implications in terms of alumni contributions, endowments, and volunteer time. Higher learning institutions understand that they have a limited opportunity to foster this kind of loyalty and that they must make the most of every interaction.

Maximize Interaction

PeopleSoft CRM for Higher Education helps you achieve your recruiting, retention, and fund-raising goals with a solution that addresses the entire student lifecycle. We help you identify and reach out to prospects, students, and alumni and to capitalize on your interactions with each of these audiences.

Because the solution is integrated with Oracle’s PeopleSoft Enterprise Student Administration, you can leverage the suspect, prospect, and applicant data already contained in Student Administration—for example, GPA and SAT scores—for recruiting initiatives. Then, you can capture responses to outreach interactions such as e-mail and Web-based surveys and pass the data back to Student Administration for application processing.

Student Lifecycle Marketing

Attract New Students

You can use Oracle’s PeopleSoft CRM for Higher Education throughout a student’s lifecycle, beginning with proactive programs to attract new students. During that crucial early period in the recruitment process—when students are putting together their college wish lists—it’s important to keep your institution’s name and image foremost in their minds.

With this solution’s robust segmentation and personalized content, you can meet the challenge. We make it possible for you to design and execute multiwave initiatives that communicate the right messages to prospective students, based on their demographic, geographic, and academic profiles. You can also use this information to do proactive, personalized follow-up that establishes a relationship before a student even enrolls.

Student Lifecycle Marketing

Engage Your Students

When students are admitted to your institution, our relationship management solution improves their entire experience. You can use PeopleSoft CRM for Higher Education to promote events, activities, and services that will engage and involve students and strengthen your relationship with them. You can use each student's profile information to identify and inform that person of various academic and on-campus programs based on their interests and preferences. You can also survey students, faculty, and parents to gain information on satisfaction, interest in new programs and services, and more.

We can help you identify students who are considered to be at risk and enhance your ability to retain them. Once an at-risk student has been identified, you can automatically trigger business processes and alerts to appropriate staff to keep that person connected through supported programs.

"No matter what it is called, who does it, or where in the institution it is being done, universities are engaging in marketing."

Richard Krachenberg, Ph.D., *"Bringing the Concept of Marketing to Higher Education"*
Journal of Higher Education, May 1972

Personalize Your Communications

PeopleSoft enables you to develop in-depth profiles that contain relevant demographic, preference, and behavior data. You can use these profiles to segment and deliver personalized, ongoing communications with every one of your constituencies. For example, you can use profile information to identify and target the most qualified applicants, at-risk students, and potential contributors.

Then, you can create personalized approaches to achieving your desired goals with each audience. Our comprehensive solution lets you develop relationships with your constituents through relevant, interactive dialogs that play out over time, rather than one-way blasts of information with limited opportunity for response. We enable you to leverage the most cost-effective and appropriate communication methods, including e-mail, Web, chat, direct mail, or the phone.

Gain Insight into Performance

When you have completed specific initiatives, you can use our comprehensive analytics solution, which provides you with insight into your performance. With analytics, you can evaluate the effectiveness of programs, target lists, channels, and messages based on user-defined metrics.

With PeopleSoft CRM for Higher Education, all these factors work together, helping you develop the network of relationships that is critical to building successful lifetime student loyalty. The results are increased tuition and contribution revenues, lower costs for recruiting and fund-raising, better efficiencies, and higher student and alumni satisfaction.

Exceed the Service Expectations of Your Constituents

By their very definition, higher-education institutions are “student-centric” organizations that encompass a wide range of student outreach and counseling activities, such as admissions, academic advising, financial aid, job placement, and more. From the institution’s point of view, these activities support three important goals: student retention, maximizing student performance, and cultivating loyalty. As such, it is essential that each interaction be a success in students’ eyes.

As important as this is, it’s just one component of a comprehensive strategy to build successful lifetime student relationships. Institutions must also take into account a number of other constituents, including parents, faculty, staff, alumni, sponsors, and the surrounding community. Even though their needs are diverse, each of these groups requires the same consistent, high-quality, positive experience.

Increase Constituent Satisfaction

PeopleSoft CRM for Higher Education contains a number of features that ensure successful interactions that will help you reach your service goals. Our integrated service management solution combines support, field service, self-service, and help desk capabilities across multiple methods of communication. Because it operates across a single platform, information is shared and business processes are automated throughout the institution.

As a result, every interaction with every constituent is consistent, no matter where it takes place—including campus offices and support centers, and via self-service vehicles such as the Web. When contacted, service staff members have instant access to a true 360-degree view of each constituent relationship that encompasses interactions, transactions, correspondence, and tasks. Armed with this information, they’re able to deliver targeted, personalized service based on individual profiles, needs, and preferences.

Improve Staff Effectiveness

For faculty and staff, our service management solution is designed to streamline operations while improving their effectiveness at their jobs. Features such as fully automated and consolidated IT and human resources help desk capabilities make it easier to manage internal support and service requests. Web-based self-service capabilities, available through our comprehensive portal solution, make life easier by automating a variety of administrative tasks that were previously offline, inconvenient, and time-consuming.

This combination of features and functionality not only raises satisfaction but also improves productivity and lowers costs. Your institutional systems provide the same levels of consistency, ease of use, and convenience as those in the private sector—which is what your internal and external constituents have come to expect.

Student Lifecycle Marketing

Connect with Alumni

Once a student graduates, PeopleSoft CRM for Higher Education helps you promote alumni programs that can generate contributions, gifting, and endowments. We can help raise visibility of specific financial and volunteer opportunities, based on alumni profile information, and help you target the right alumni for the right opportunity. You can promote your continuing education programs by identifying those who are likely to have high levels of interest in specialty, evening, and weekend courses. At a time when there is heavy competition for alumni dollars and involvement, your ability to keep former students informed and engaged will be enhanced.

Automating and Integrating Constituent Support

With Oracle's PeopleSoft CRM integrated support, help desk, and field service management solutions, colleges and universities can extend and improve support to students, parents, alumni, staff, faculty, and the community. They can:

- Increase staff and faculty productivity through automated processes that include branch scripting, skills-based routing, and automatic notification and escalation
- Deliver more relevant and effective solutions, decrease service times, and increase first contact resolution rates through troubleshooting guides and a central knowledgebase
- Provide convenient and consistent service with integrated, multiple methods of communications, including e-mail, chat, phone, and fax
- Improve on-campus field service operations and quality through comprehensive service order management and efficient delivery
- Monitor service delivery and constituent satisfaction through access to real-time analysis, reports, and key performance indicators

“Budgetary shortfalls and competitive pressures are changing the way higher education works to attract, retain, and serve students. PeopleSoft’s new CRM solution for higher education promises to help institutions successfully manage these pressures by building stronger relationships with prospects, students, parents, alumni, and sponsors.”

Peter Stokes, Executive Vice President, Eduventures Student Lifecycle Marketing

Improve Operational Efficiencies and Maximize Budgets

In an unpredictable economy, tuition levels and contributions from alumni and corporate sponsors decline, budgets are either cut or remain static, and the pressure is on to remain financially profitable. It's far from an ideal situation in the best of times, but when institutions are also faced with the need to expand their outreach and services to students and other constituents, doing more with less can seem impossible.

One of the greatest challenges to overcome is operational inefficiency. Today's institutional environments are built on manually intensive, inefficient, and disconnected business processes. Left as is, this situation makes it impossible to create the kind of connected, lifecycle approach that fosters lifelong relationships with students.

For faculty and staff, the manual nature of many administrative activities can lead to an inordinate amount of time and effort required to locate information or to accomplish routine tasks. Eliminating these obstacles through more efficient administration improves productivity, cuts costs, and frees faculty to concentrate on activities, such as research, that improve the stature and reputation of the institution.

Using PeopleSoft CRM for Higher Education is the way to balance the seemingly conflicting goals of increased services at lower costs. We make your operations more efficient and productive through a configurable enterprise solution that automates end-to-end business processes, provides access to critical data, and allows you to leverage that data across the institution.

Oracle's PeopleSoft CRM solution feature industry-specific functionality and a configurable and extensible framework—which lead to easier integrations, quicker implementations, fewer customizations, and reduced maintenance and training. As a result, you enjoy a lower cost of ownership.

“We’re dealing with individuals’ lives in big ways, and we feel it’s incumbent on us to treat those relationships with care and dedication. PeopleSoft enables us to open a dialog and continuously engage students—and make the relationships we have with our students positive.”

Andy Drefahl, Manager of CRM, DePaul University

PeopleSoft CRM for Higher Education features a no-code-on-the-client architecture, industry-specific functionality, and a configurable and extensible framework—all of which lead to easier integrations, quicker implementations, fewer customizations, and reduced maintenance and training. As a result, you enjoy a lower cost of ownership.

We help you further cut costs by making it possible to provide services to students, faculty, staff, and alumni through the most cost-effective methods—including e-mail, Web, chat, mail, or the phone. Based on their needs, our self-service portal can put a number of tools in the hands of your constituents, such as answers to common questions, status of specific requests, and access to on-campus information. As the cost of providing service drops, the productivity of your service staff rises.

When programs are in place, our real-time analytics help you measure your success in achieving institutional goals. By tracking key metrics, such as cost per applicant, prospect-to-applicant yields, retention rates, and response rates to fund-raising efforts, we create actionable insight. You’re able to spot success or failure early and make midcourse corrections when necessary.

Build Lifelong Relationships

Oracle’s PeopleSoft Enterprise CRM for Higher Education enables institutions of higher learning to maximize their budgets while developing successful high-value, lifelong student relationships. At the same time, we enable you to deliver superior service to your academic, administrative, and external constituents. When even a modest increase in student recruitment, retention, and alumni giving can reap significant financial results, it’s an investment that’s worth making.

Our solution features a no-code-on-the-client architecture, industry-specific functionality, and a configurable and extensible framework—all of which lead to easier integrations, quicker implementations, fewer customizations, and reduced maintenance and training. As a result, you enjoy a lower cost of ownership.

Getting Return on Your Investment

When you implement Oracle’s PeopleSoft Enterprise CRM for Higher Education, you gain access to a number of tools that improve your operational efficiencies and lower your costs. Our solution is designed to streamline your efforts and improve results across all your recruitment, retention, and fund-raising activities, including:

- Higher “brand” awareness with prospective students
- Higher response rates to outreach initiatives
- Higher application and enrollment rates
- Higher tuition and contribution revenues
- Lower recruiting and fund-raising costs
- Quicker close on gifts and contributions
- Better program targeting and rollout
- Increased student satisfaction levels
- Higher student retention rates



ORACLE®

Oracle Corporation

World Headquarters

500 Oracle Parkway
Redwood Shores,
CA 94065
U.S.A.

Worldwide Inquiries

Phone
+1.650.506.7000

Fax
+1.650.506.7200

oracle.com

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