



SQUIZ

The college's guide to building a transformative digital strategy

Improve the student experience, empower your team, and future-proof your college.



Squiz Digital Experience Platform

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Introduction

Digitalization and the need to adopt student-first customer experiences within the Higher Education (HE) sector has become critical.

Led by changing student expectations, competition, and evolving technology; universities and colleges must embrace wider customer experience trends to ensure that they can build relationships with both prospective and existing students.

But how can colleges innovate to deliver these personal, retail-like digital experiences that will drive recruitment and nurture life-long relationships?



Students and the customer experience challenge

Many of the challenges that HE institutions face have a commonality just below the surface.

- Competition for top students amongst colleges and universities is intensifying;
- Institutions are finding drop-out rates stubbornly high;
- Students are demanding more value from the ever-growing financial investment that a degree represents
- Some colleges reliance on attracting high-fee paying out-of-state and international students doesn't work when travel is not an option
- Many institutions struggle to maintain relationships and engender support from their alumni because they don't have the modern infrastructure to do so.

The common thread? They're 'experiential' problems which begin at the recruitment process and stretch beyond graduation.

Common higher ed challenges



Competition for top students



High drop-out rates



Demand for value in ROI



Loss of high-fee paying out of state and international students



Maintaining alumni support

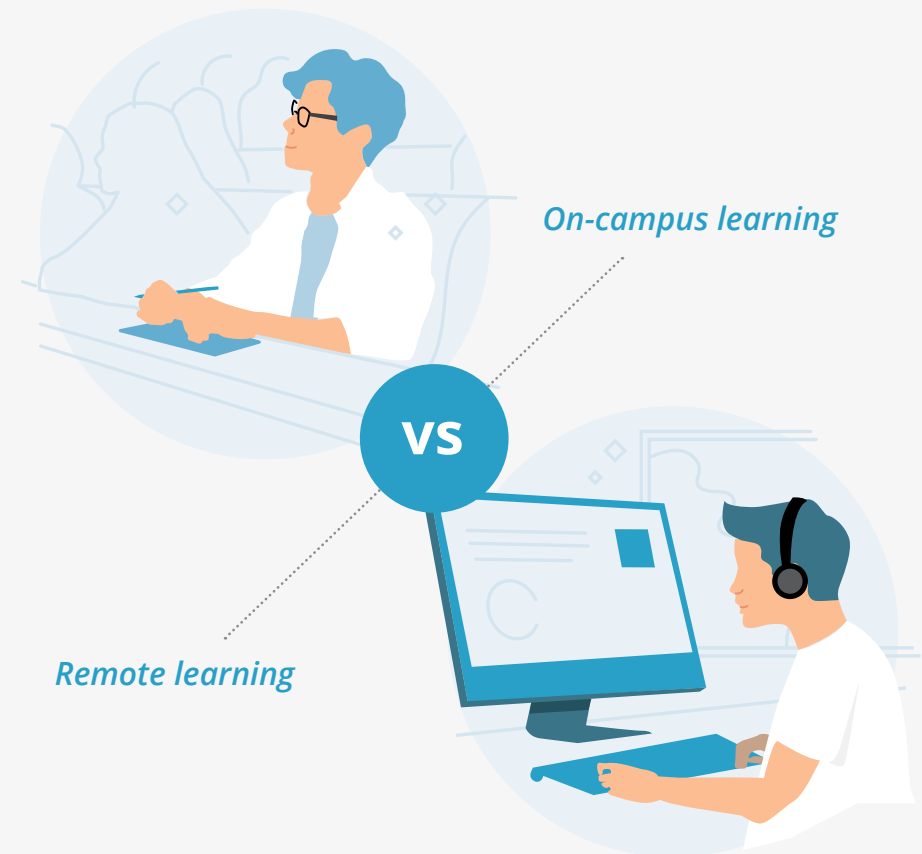
An institution's value proposition is a case of 'show, don't tell': they need to convince prospective students that they have the right courses, facilities, student community, vocational opportunities, lecturers and the most progressive outlook on student welfare.

They deal in complex, rational, big-ticket purchase decisions that confer a sense of 'brand ownership' on the buyer who, in return, expects a level of experience and service worthy of the time and investment involved.

The vast majority of students today are tech savvy, digital natives who have never known a time without broadband, let alone a 56kbps dial-up modem. This means that the experiences they desire (no matter the purpose or when) is informed by wider trends, their large social networks and the knowledge of the large financial investment that they're making.

At present, few HE institutions are effectively considering a student needs or identifying students that need extra support in a remote learning environment. Instead, they continue to take an approach that is largely dependent on on-campus learning, with tech reflective of their internal, departmental structures.

It's critical for HE institutions to integrate the digital and in-person experiences and find ways of creating personal and emotional connections with students that evolve.



Digital: the students 'preferred choice'

Student expectations today are digital, informed by retail businesses that are 100% mobile. The advancement of 'mobile' and the 'app-ification' of experiences has driven this change, irrevocably shifting expectations; the 16 and 17 year-olds of today expect polished digital experiences at every stage of interaction and anything less is rubbish. Even older adult learners expect Amazon-esque digital experiences.

The pandemic has only accelerated the rift between those that had a head start on digital and those who are falling behind.

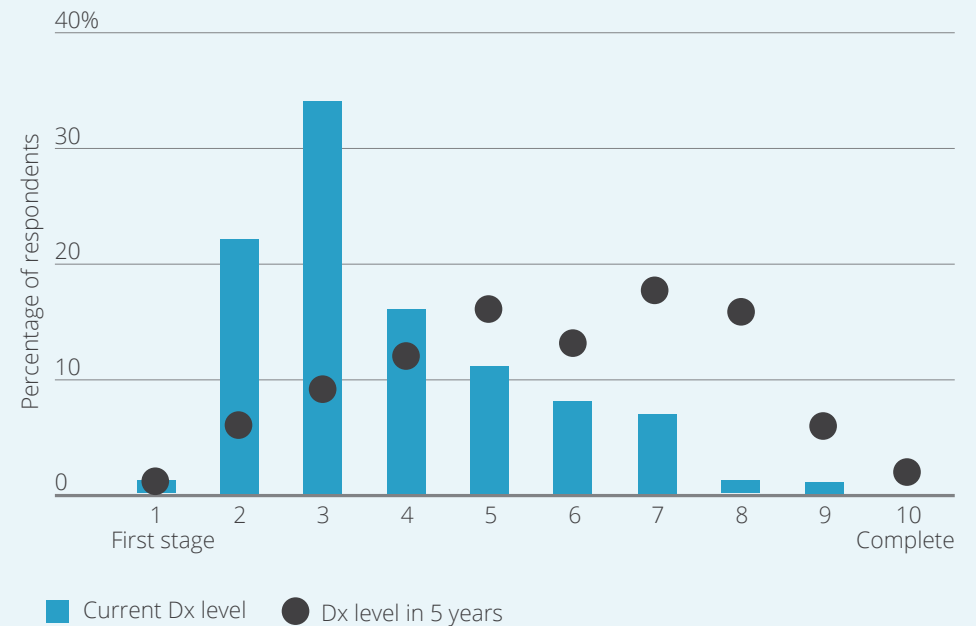
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When will we get to Dx

The importance of Dx has increase over time and is only expected to increase in importance in coming years.

While a majority of respondents (84%) think that their institution is in the earliest stages of Dx today, they also predict a dramatic shift toward Dx in the next five years, underscored by a growing rift between those that have a head start today and those that are already falling behind.



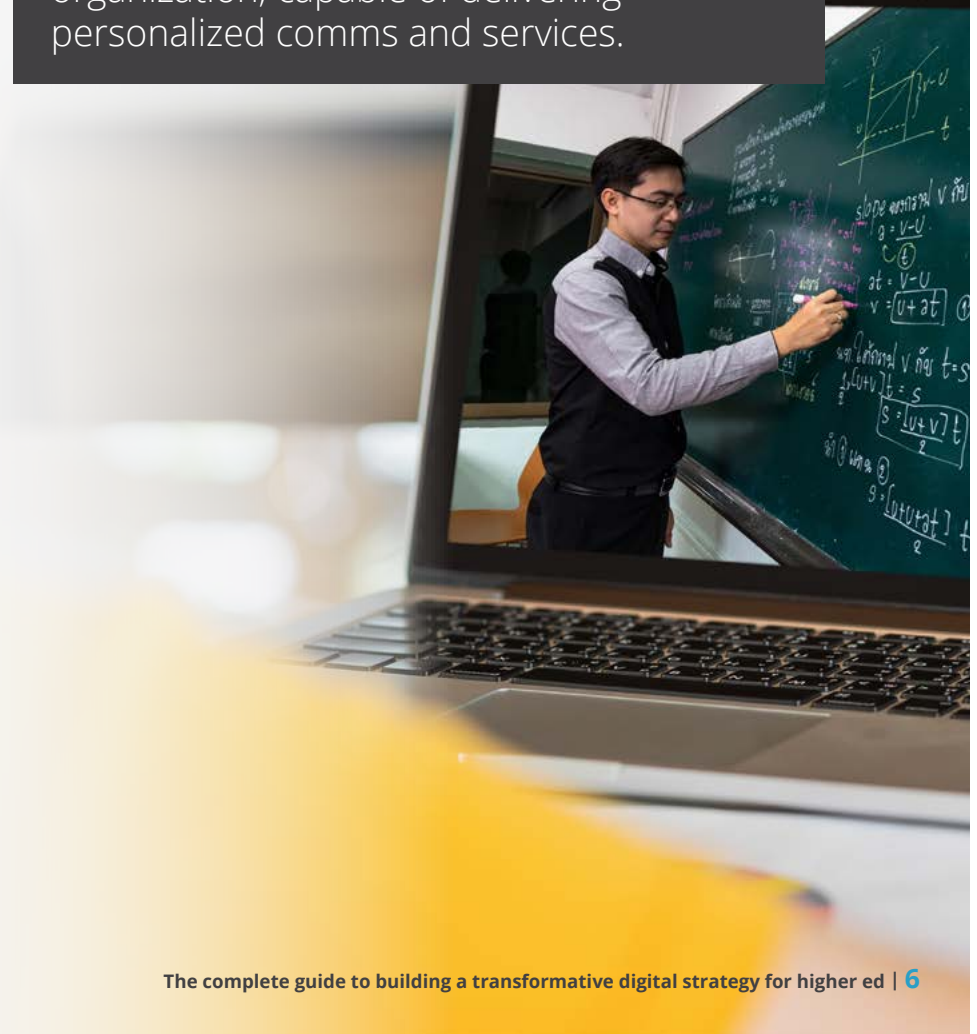
Source: Educause

How technology strategy can transform your college:

- The personal experience you provide during recruitment and the degree can form a competitive differentiator
- Engagement that meets individual needs throughout the entirety of their courses will reduce costly drop-out rates and increase lifetime student value
- By delivering intuitive, effective user experiences that meet individual needs, you'll reduce the strain on existing services
- Channel-shift to efficient, cheaper channels will reduce overheads
- Ongoing engagement will build relationships that last a lifetime and ensure that your 'brand' is favorably promoted and supported
- You'll be able to adopt modern marketing techniques and personalize every interaction (improving student acquisition)
- It'll automate mundane tasks and increase efficiency, reducing costs and improve staff satisfaction
- Adoption will enable you to generate tangible, quantifiable results
- Presents an opportunity to improve infrastructure and create a scalable framework for future growth and development.

So how can colleges deliver this?

Through developing transformation strategies that create integrated technology frameworks across the organization, capable of delivering personalized comms and services.



The problem with the current strategy

Few organizations have a transformation strategy, and even fewer a good one.

Ever since the digital revolution, technologies have been adopted by organizations in a piecemeal approach, leading to technology landscapes within our organizations that consist of disparate, unintegrated systems.

This range of systems and the inability to form cohesive, cross-organizational strategies has caused gaps to appear in the student journey.

The common problem with HE institutions' current strategies is that they're approached in the wrong way, with goals that are coherent to the way that they already operate, without looking at the increasingly 'disrupted' marketplaces they are now competing in.

These limited strategies often fail to achieve solutions to long-term issues, instead focusing on current 'problem = solution' goals in their current structures without properly exploring what could be achieved with a forward looking, holistic plan.

So what's going wrong?

Three common missteps:

1

Strategies are devoted to technologies, not organizations.

Modern solutions, such as CRM, can appear to be silver bullets, but implementing a new technology alone is 'one-eyed' solution because it can't create cohesive, organizational change. Instead, it'll create integration problems with personnel, processes and systems.

2

Strategies are put together by individuals (or small teams) in an ivory tower. Even if they're brilliant, it's going to be impossible for them to suggest strategies that will work for an entire organization. If created this way, regardless of how good it is, it'll come up against resistance within the organization. Invariably, this will lead to concessions and compromises and, as a result, the strategic, transformative plan will be diluted and fail to achieve real change.

3

Strategies are designed for the business – not the 'customer'.

Strategies need to be developed with the students, staff and stakeholders at their core, only then can you design new products, services and delivery methods that will meet their needs and your revenue goals.



What's needed is an awakening to the fact that a 'digital strategy' is about much more than digital: it's really customer, business and growth strategies all rolled into one.

We need an evolution in the way that we approach a 'digital strategy'; they need to become a 'Digital-First, Student-Centric Strategy'. This endeavor needs to take into account all of the organization's key stakeholders and functions, built with a laser focus on the needs of students and staff, (both academic and non-academic), informed by wider digital trends.

Knowing there's a problem is a start, but a lack of understanding about where disruption is occurring is a challenge.

This leads us to the fundamental problem: many institutions aren't currently in a position to create such transformative change because they are too invested in what they're currently doing today. As such, they lack knowledge of what really has staying power.

How to adapt to 'digital-first, customer-centric' thinking

People don't think in terms of silos; they expect the outcome of one interaction with your organization to be consistent with, and to inform, the next.

What this means for the adoption of transformation strategies is that they need to be approached in way that puts student journeys at its core, focusing on providing new ways of cross-departmental working.

In today's world, technology strategy is the route to evolution, exploring the opportunities that now exist in the modern HE sector, brought about by technology.

They're road maps, not prescriptive documents, that define activities for a given year. Yes, the initial transformation will detail the technologies, staff and processes that will need to be adopted to revolutionize the organization, but it's the first step in a journey to prepare the institution for the future.

The focus should be relationship building and the journey that students, staff and alumni take with your college; from unknown prospective student to a long-term, active member of the alumni – it's about the formation of trust and conferment of ownership.

This begins the first time they visit your website, look at your twitter feed, read an email, see an advertisement, or speak to someone on the phone.

You need to create an integrated plan that will enable you to gather and share insights about your 'customers' across the organization, allowing each part of the institution to react in the best possible way: from recruitment to student success to alumni engagement.

Not only will you deliver an incredible experience and create advocates, you'll automate processes, reduce repetition and cut overheads, as people will stop replicating work and begin collaborating, potentially finding space to innovate, too.

The 4 steps to creating a transformation strategy



Decide what the key priorities are and what you want to achieve, for whom, how, and why

Discovering the right configuration of systems, people and processes that will fulfill the goals outlined during the research phase.

Detail how the systems and internal human processes will interconnect, as well as when you'll be in a position to release them.

Ensuring the system is secure, works effectively and that it can develop to meet changing needs and demands.

Phase 1: Research

There are many strands that need to be closely examined and pulled together to create the right transformative digital strategy, so the research phase needs to be carefully considered.

For each area, you must decide what the key priorities are and what you want to achieve, for whom, how, and why.

Students: past, present and future

It's essential to start with your students (both existing and prospective) as the aim should be to enable your organization to service their needs better.

First things first: who are your customers? What do they do and where are they? Form personas based on their characteristics, and for each persona ask:

- What's the typical journey that they go through? What are their main touch-points with your organization and how does that inform that relationship?
- Where are there currently gaps in their journey and experience?

- What do they want from you? Not just the service, but the information that you're giving them and how you're doing it.
- Why are they speaking to you and not your competitors?
- Are you effectively engaging with them on an ongoing basis, dependent on their status and what you know about them?



Existing data can be very useful in determining where there are problems with current user journeys. Things to look out for include:

- Are there particular online patterns?
- Does your call or support centers have a large number of tickets around one issue?
- Are there dramatically different satisfaction rates between departments, services and communication channels?
- Does one of your web properties have a very high bounce rate?
- What content is converting best?
- Which emails are getting the best clickthrough rate and responses? Why?

Your CRM, Marketing Automation and Analytics software may already hold the answers to these and similar questions, enabling you to highlight areas of particular concern that will need addressing and what's working well already.

Internal

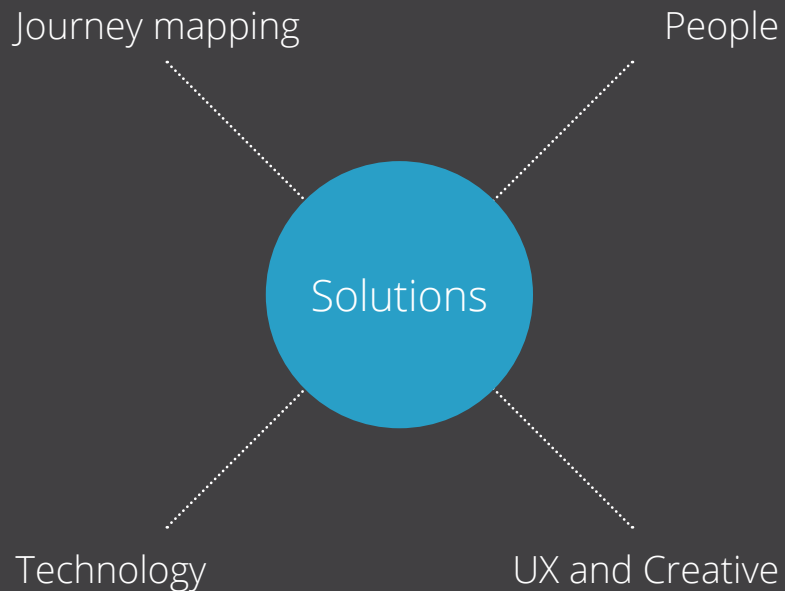
Casting a light on the way that you address your various users and how you deliver your multitude of services is essential, as your staff (academic and non-academic) will be central to the way that your strategy is delivered.

Each department communicates with students at different stages within their lifecycle, as well as through different channels. It's therefore essential that, to be able to deliver a seamless experience, the next team is able to pick-up where the last team left off and have the necessary tools to deliver the continuity in service that they're looking for.

This involves ensuring that the framework that exists around the customer journey (the data you're collecting, the processes that exist to pass it between departments, the content that they're imparting etc.) is enabling your employees to deliver a consistent, on-brand message, that isn't repeated or delivered to them in the same way regardless of whether they're a long-time supporter or new prospect.

Phase 2: Solutions

Finding the right solution is about discovering the right configuration of systems, people and processes that will fulfill the goals outlined during the research phase, fitting together the different parts (including legacy systems) to create a complete ecosystem that can service those needs and that can be developed as your organization does.



The best way to go about putting a plan together is to map the customer journey that you want to create for your students, informed by the research you've just done.

Knowing what kind of experience you want to be able to deliver means that you'll develop an idea of the systems and processes that you're going to need to put together to deliver them.

A simplified example of a customer journey map is below.

| | Unknown | Awareness | Education | Validation | Selection |
|---|--|--|---|--|---|
| What are they doing? | <ul style="list-style-type: none"> Keyword research/ exploring Looking for knowledge | <ul style="list-style-type: none"> Realize you're of interest Don't know institution | <ul style="list-style-type: none"> Learning about your courses/ institution Benchmarking | <ul style="list-style-type: none"> Know that they're interested in applying Looking for validation | <ul style="list-style-type: none"> Ask for service Looking for subjective |
| Where are they? | Website Social sites Third-party sites Receive email Makes call Download app Friend Receives call | 2 Visit website 3 Research 4 Fill contact form | 5 Look at Twitter 6 Research 7 Ask for Prospectus | 8 Email sent with prospectus 9 Click-through to content 10 Asks friends 11 Receive call from admissions team | 12 Email follow-up 13 Downloads university recruitment app 14 Applies |
| How can we judge the experience? | <ul style="list-style-type: none"> Web page views Content looked at Advert response rates | <ul style="list-style-type: none"> Landing page conversion Popular content Click-throughs | <ul style="list-style-type: none"> Click-throughs Email response rate Call outcome | <ul style="list-style-type: none"> Email response rates Content viewed Action/conversion | <ul style="list-style-type: none"> Keyword research Need help |
| Who responsible? | <ul style="list-style-type: none"> Comms/ Marketing Web team Admissions team | <ul style="list-style-type: none"> Comms/ Marketing Web team Admissions Team | <ul style="list-style-type: none"> Comms/ Marketing Web team Admissions team | <ul style="list-style-type: none"> Comms/ Marketing Web team Admissions team | <ul style="list-style-type: none"> Comms/ Marketing Web team Admissions team |

People

Nothing will work unless your team, the people actually responsible for delivering the experience, is working in harmony.

It's necessary to decide how you can deliver the services required, such as identifying what information you need to be collect, where it's stored, who it's shared with and what triggers are needed to inform someone that they need to do something.

Technology

By selecting the systems you need, you'll be able to explore how they can fit together and interact. A Digital Experience Platform is the backbone of your interconnected systems.

A DXP combines CRM, Marketing Automation, Search Platform, Cloud, Digital Workplace, SIS and CMS systems to find synergies through integrations.

Practically, this creates a platform, which just about every other system can slot into to create a complete, holistic interface.

UX and Creative

What good is it being able to deliver a great user journey, if it looks terrible and is difficult to interact with for both your staff and students? None.

There are psychology principles that, if followed, will deliver this and provide a structure for the beautiful creative.



UX TIP

43% of users go directly to the search bar on your site. With the rise of search-centric e-commerce experiences, this will only rise. Make sure you take advantage of a search platform that gives your team control of the functionality and look and feel of your site search.

Phase 3: Roadmap

The next part of forming the strategy is about how the system will be rolled-out, putting together a roadmap that details how the systems and internal human processes will interconnect, as well as when you'll be in a position to release them.

In the real world, it's almost certainly impossible to be able to make a totally clean break, releasing a complete, brand new system with everything ready for users to use from the start. The strategy will, therefore, need to detail which system (or collection of systems) will be rolled out and when.



Remember to factor time in for:

- System development
- Testing
- Fine-tuning
- Contingency plans
- Migrating the systems that you want to bring with you
- When and how you'll phase out legacy systems
- Staff training and recruitment, if additional new skills are required
- Multiple-site roll-out (where applicable)
- The cost of each phase (man hours and cost)
- Contingency plans
- How you'll communicate the changes and bring staff along with it
- Overcoming change fatigue and laggards
- What landmarks will indicate that the phase is complete and ready to move to the next one.

A good format for this stage is with a visual roadmap or detailed Gantt chart, showing the waterfall and method of release, as well as the steps within each of the phases.

At the end of each of these phases you will want to ensure that whatever you put in can stand on its own, so should funds or timings need to change, that you're not left with an expensive white elephant.



Phase 4: Governance

The final part of forming a transformative digital strategy is describing what other things are needed to fuel and run it.

Putting the systems together that can deliver an evolving, personalized student journey will require things that need to be considered and developed – the most notable of which is content, but also includes things like your brand strategies.

It'll require someone looking over it, making sure it's working effectively and that can develop it to meet the changing demands of the market and your organization.

Content

To deliver a journey, you'll need a continuous stream of content.

Every component of the student journey needs it, covering each stage of the experience that you've designed and in formats that will meet the channel.

You need to:

- Identify the topics that will play to your audience and the journey you've designed
- Decide what your voice and tone will be
- Create a content framework that can map to your student and service lifecycles
- Work out how you can maintain a flow of new content creation
- Decide how it can be accessed and where

You will also need to put in place a process for renewal. Structured follow-up plans, such as a successional email stream, will need reviewing and the content updating on a regular basis to keep it relevant – you ensure don't want people seeing the same things if they enquire 12 months apart.

Governance

Not everyone should have access to everything, not only for legal and security reasons, but an open shop is at risk from accidental errors that have huge ramifications.

Therefore a comprehensive permission and governance structure should be put in place to ensure that the system and employees can work effectively and that data is secure.

Promotion

There's no point in building systems and services, unless your current and prospective students know about it.

An effective marketing and comms strategy is, therefore, essential and should be thought about in terms of an ongoing campaign that lasts months, not weeks.

Data quality standards

A CRM, for example, is only as good as the information that's being put into it. If people are putting the bare minimum in, aren't updating contact records and are storing information in the wrong fields or format; then the carefully designed, automated follow-up plans that use information in the CRM as cues for activity won't occur.

You will need to develop policies, standards and guidelines that apply to the way all of the systems are used and be in a position to ensure that those rules are being followed.

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Get in touch

Get the insights and tools
essential for success

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