



CRM in Schools

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Date: 20 March, 2007

What is CRM?

- Strategy designed to help your people *Find*, *Keep* and *Grow* successful relationships



What can CRM do for you?

- ✓ Community-centricity
 - Centralised information & insight
 - Establish consistent communications & connections

- ✓ Streamline processes
 - Strengthen student, marketing & pastoral care initiatives
 - Synergise groups, teams & departments

- ✓ Work better together
 - Help departments & committees collaborate



Do we need a CRM system?

- ☑ Aligns with your administration
 - Tailored programs & services
 - Achieve growth

- ☑ Aligns with your culture
 - Shared, yet secure access to information
 - Cross group/departmental barriers

- ☑ Aligns with your people
 - administrators, educators & committees



How do we find the *right* system?

- ☑ Ease of use, easy to adopt
 - Organisations have struggled with adoption
 - Incomplete picture of school performance
 - Leads to creation of other systems

- ☑ Flexible system design
 - School & user needs are always changing
 - Integration to existing systems
 - Total Cost of Ownership



Typical Issues for Schools

- No single database for pre-enrolment, current students & alumni
- Targeting prospective students is difficult
- Managing and measuring events is difficult
- Fundraising
- Lose track of past students
- Managing pastoral care issues
- Managing community relationships

CRM - the solution to many problems

“How can I make developing mailing lists easier?”

“Where are my current students coming from? Are they new families or current families?”

“Where did I put the details of that prospective student who contacted me?”

“How are my enrolments looking for future years?”





















“Was my open day a success?”

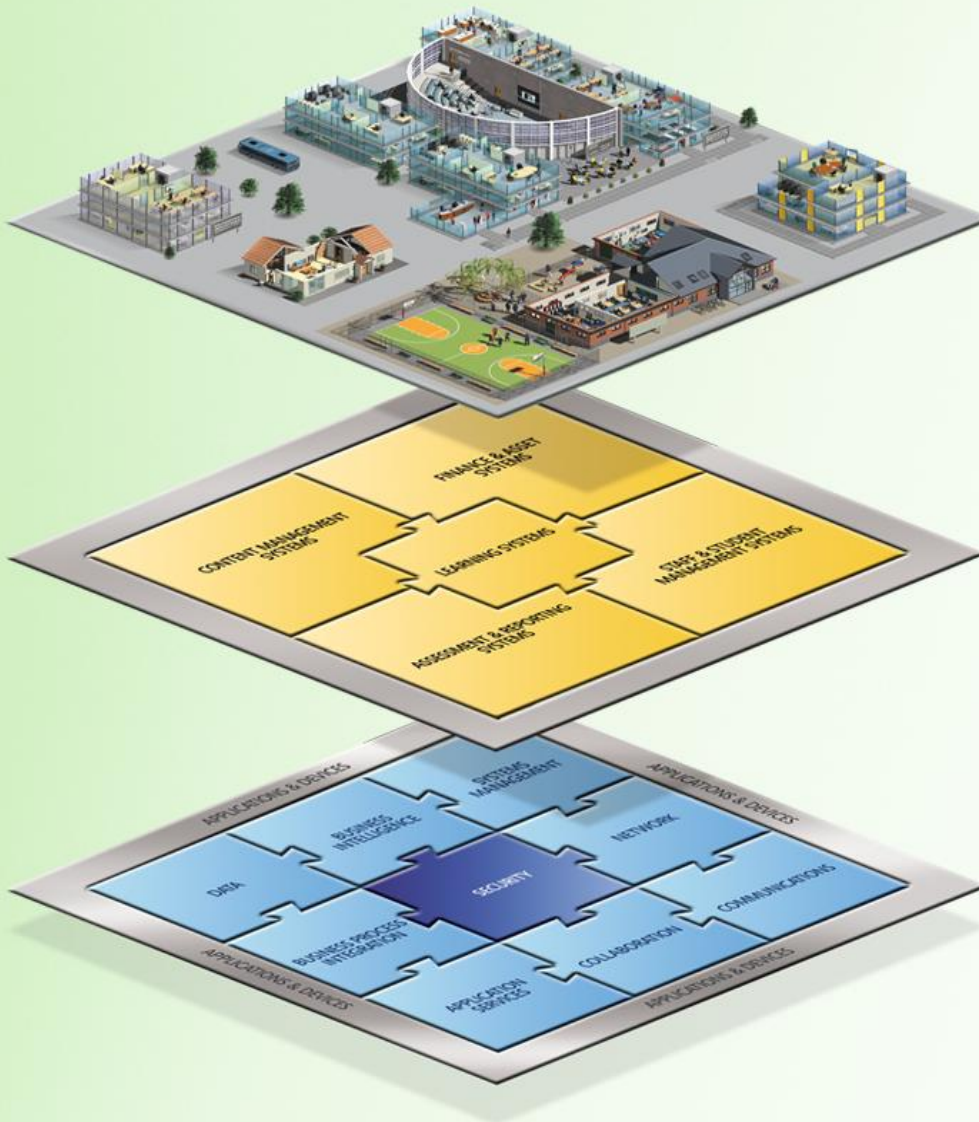
“Where am I getting the most enquiries from and why?”

Student Relationship Management

- SRM is the use of technology to assist in improving student enrolments and relationships with key people e.g.
 - Students – past, present, future
 - Parents
 - Local business community
- It does this through:
 - Improving communication lines
 - Managing critical contact information
 - Creating seamless information sharing across the organisation.

How SRM can help you

	Prospective Students	Current Students	Past Students	External Contacts
Building and maintaining relationships with key people				
Tracking and managing communication to these key people				
Tracking and managing events				
Tracking potential new students and creating better visibility of student intake				
Managing and tracking pastoral care				
Building relationships with businesses and the community				

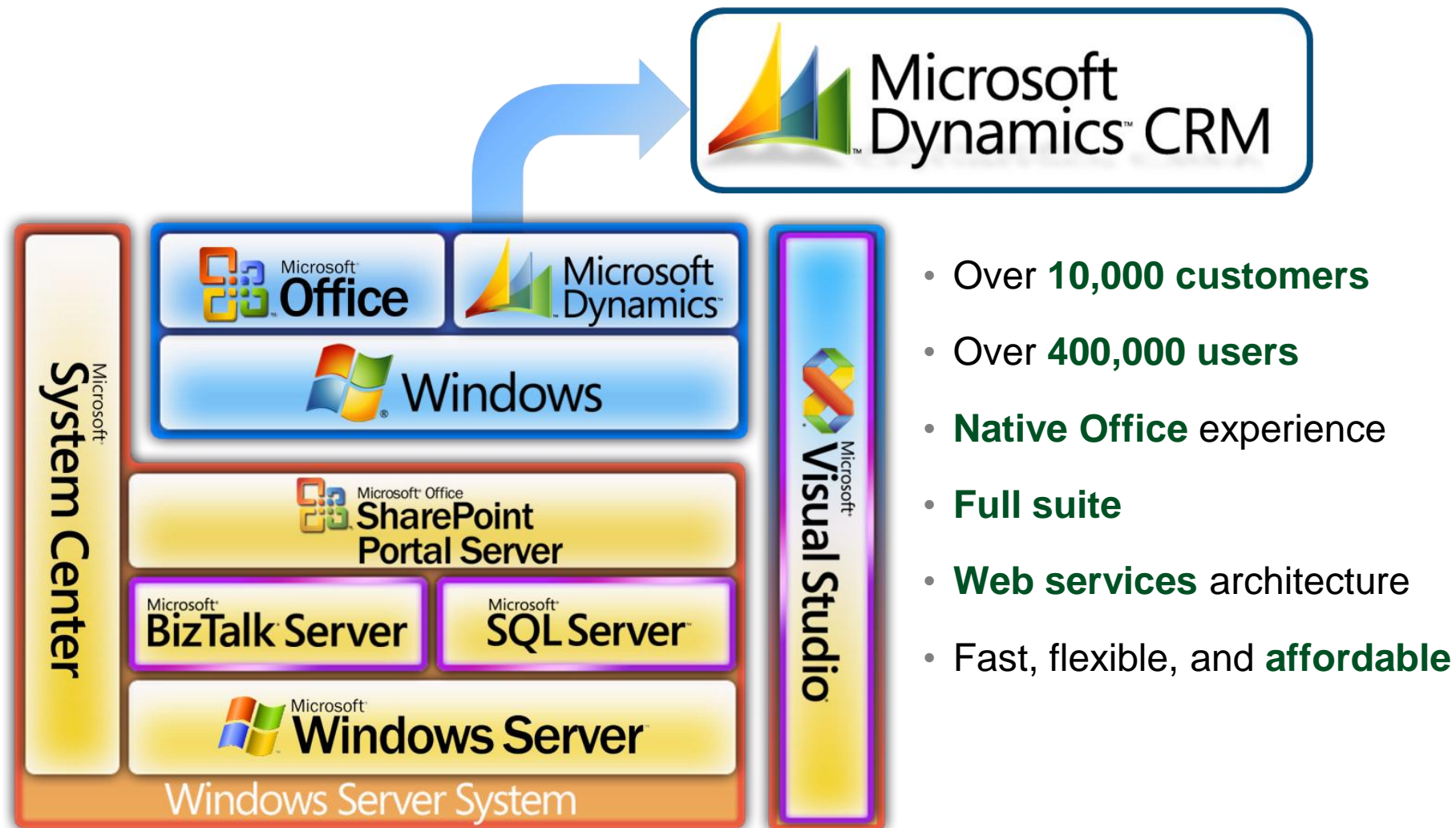


21st Century Learning

Innovative Applications

Enabling Platform

Microsoft CRM



Works the Way You Do

The easiest, most natural way to use CRM

- Native Outlook folders and command bars
- Contact, calendar, task, and e-mail synchronisation
- Quick views of relevant information

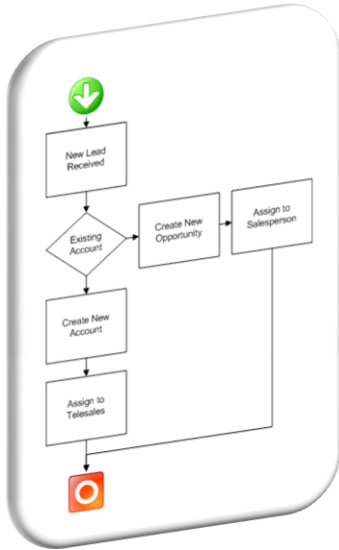
The screenshot shows the Microsoft CRM interface within the Microsoft Outlook application. The interface includes a menu bar (File, Edit, View, Go, Tools, Actions, CRM, Help), a toolbar with various icons, and a main workspace. On the left, there is a 'Mail' pane with 'Favorite Folders' (Inbox, Unread Mail, Sent Items) and 'Mail Folders' (All Mail Items, Mailbox - Administrator, Deleted Items, Drafts, etc.). The main workspace displays a list of accounts under the heading 'Accounts - Microsoft CRM'. A search bar and 'Find' button are visible. Below the search bar, there is a table of accounts with columns for Account Name, Primary Contact, Address 1: Stat..., Owner, and Account ID. The table contains several rows of data, including entries for 'Amazing Bike Company Ltd' and 'Amazing Excellend'. Three blue callout boxes are overlaid on the screenshot:

- Top left: Track activities with a single
- Top right: Share views across your school
- Bottom center: Use Student data right from within Outlook

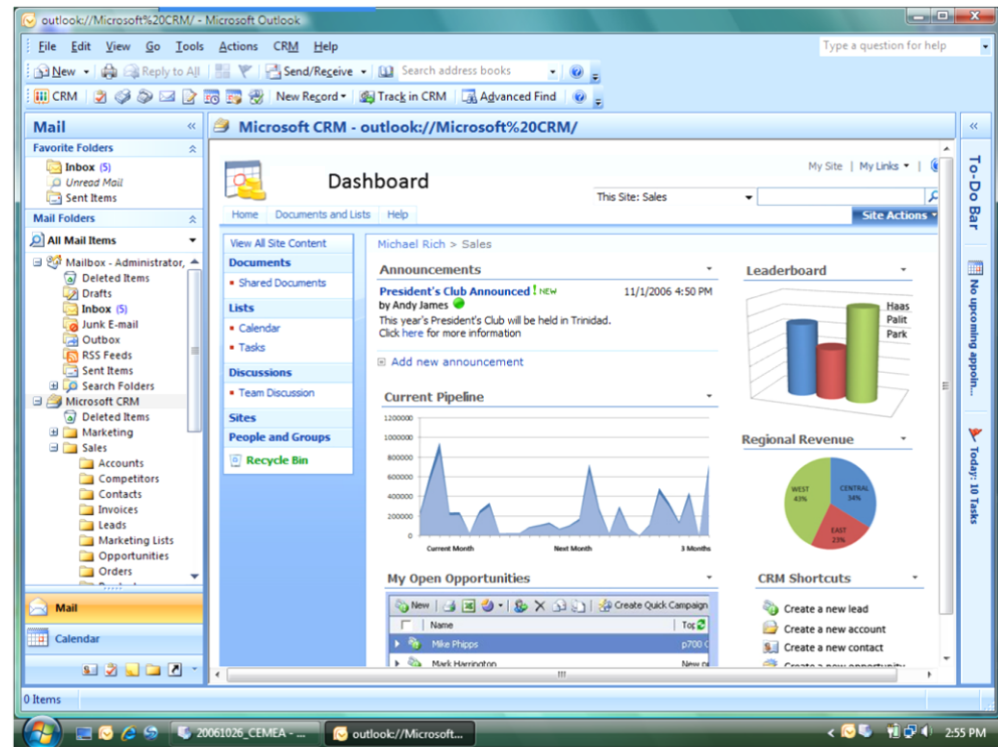
The Windows taskbar at the bottom shows the system tray with the time 2:55 PM and the date 20061026_CEMEA. The Microsoft CRM application is running in the background.

Works the Way Your School Does

CRM that fits your exact needs

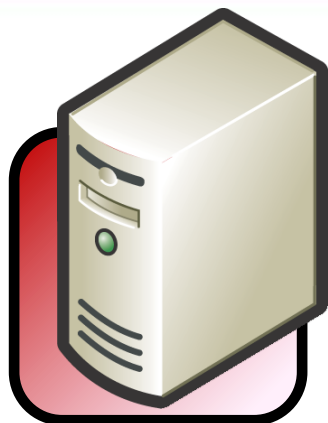


- Create workflows based on standard or custom student data
- Evaluate conditions across multiple systems



- Build composite applications with CRM and SharePoint
- Examine your CRM data in Excel
- Deliver school-wide reports with SQL Reporting Services

Works the Way Technology Should



Flexible deployment

Choose Outlook, browser, or mobile device
Choose to deploy as on-premise or hosted



Standard Toolsets

Relies on common IT tools and skills
Office, SQL Server, Visual Studio, XML ...



Integration and Extensibility

Native Web services / service-oriented architecture (SOA)
Connect multiple systems in real-time

DEMONSTRATION

Conclusion

With CRM you will benefit through:

- A single prospective / current and past student database
- Easy compilation of mailing lists for events & campaigns
- Targeting prospective students based on criteria
- Streamlined event management and tracking
- Transparency on event/campaign success levels.
- Ensure enquiries are managed effectively and efficiently

Thankyou!

Please complete your evaluation forms