## Implementing a CRM system in a College

#### Overview

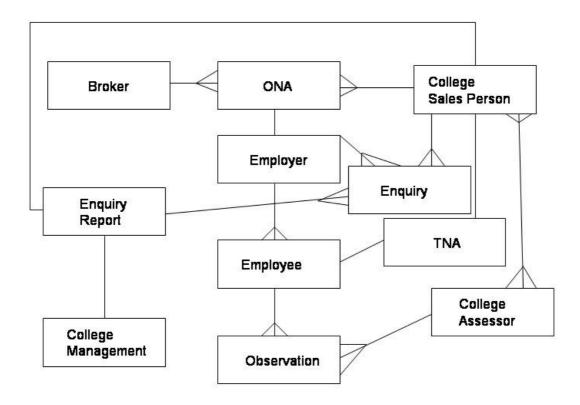
Customer Relationship Management (CRM) systems are about the effective management of activities and contacts with an organisation's customers. In essence it consists of a software system for managing the input of information relating to the entity designated as a customer. The information is stored on a data base and is then reported on by the software extracting relevant information pertaining to each customer. The type of information handled depends on the requirements of the organisation, but typically will hold all contact information and documentation relating to that customer. Uses of the information vary from monitoring of contact activity for account management to analysis of customer purchasing behaviour for suggestive selling. The record of adoption of these systems by Colleges is somewhat chequered, with some successes but also some projects that have stalled or been abandoned. This paper will explore some of the implications for successful implementation of CRM systems in Colleges.

### Scope

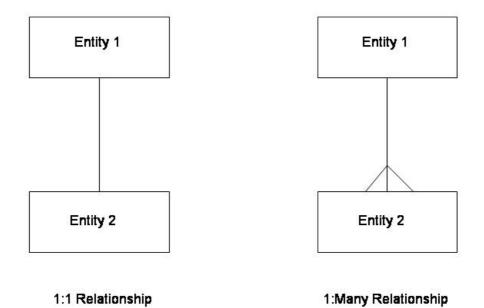
In a College setting asking the question "who is the customer?" does not lead to a straightforward answer. There are many definitions of a customer but most contain the two elements of consumption and consideration i.e. purchasing goods or services. In a College this is a complex landscape, with customers ranging from large scale commissioning from government agencies, such as the LSC, through training contracts with private employers to individuals paying for their own recreational or career development. It is important to recognise this landscape from the start, since many initiatives for implementing a CRM solution have failed simply because the scope and purpose of the project were not defined at the outset of the project and subsequent development stages were not properly land marked. Most software systems based around database management systems can be configured for many functions, and it is very easy to become enamoured with what a CRM is capable of rather than concentrating on its intended use. In terms of the use of CRM systems by Colleges, the main reason for adoption is to manage contact with employers and therefore, at least to begin with, it is wise to limit the scope of the project to perfect this use.

## **Data Structure - Entity Relationships**

Contact information needs to be structured by the entity to which it relates. It is therefore useful to analyse the entities that will be linked through the system, and the type of relationship in terms of a one to one, one to many, many to one or many to many relationship. An example of the type of entities involved in a College employer contact system for Train to Gain is shown below:



# Diagram Keys



It is important to understand the relationships between entities when designing data structures, since the type of relationship and entity will have a bearing on the data captured and the way it needs to be reported.

## **User Requirements**

Another area for possible project failure is the willingness of users to engage with the system. The system will be of little use if information is not input in a timely manner. By consulting with users and analysing the systems they are already familiar with, and the information they require, it will be possible to ensure that it is a simple matter to input the required data. This is particularly important for enquiry handling where the data may need to be input by those who are not part of the department to whom the enquiry relates. Users need to be characterised and have the appropriate training to be able to easily access the system and perform the tasks that are appropriate only to them.

#### **Business Processes**

It is important to map out the business processes and consider very carefully where these processes rely on the processes of other parts of the system. Often a College will have a single registration process for all types of learners, this is often incompatible with the needs of work based learners and therefore care needs to be taken to ensure that where possible any possible duplication of information is avoided to alleviate the administration burden for work based learners who are short of time. In terms of the data input aspects of contact information one needs to be clear what is expected from whom. This is also an important development from the entity relationship diagram. Contact into a College may come from anywhere, and the success of an employer engagement activity often depends on obtaining contact details from other points of contact in the College than the Business Development team. If this is the case, then defining this task as part of the responsibilities of staff ancillary to the Business Development team is essential and will require support from HR and senior managers of other sections.

#### **Culture Shift**

Changing the culture of the College is often the really difficult task and has a big bearing on the success of the implementation. As is the case with most technical implementation projects the success of the system will rely on human interaction. A shift of culture from a transaction based culture, where the focus is on the production process, to a relationship based culture which has as its focus the development and maintenance of long term relationships is significant and may not be possible for all types of organisation. It is however essential for those wishing to engage successfully with employers with whom a relationship will last for many years and will yield many opportunities for repeat business. This shift in culture will only be possible where the principles of the move to a relationship culture are truly owned by the leadership of the organisation.

#### **Technical Considerations**

In terms of the technical aspects of implementing a CRM system, the usual technical issues of platform, security, access and integration need to be considered. It is usual to use a separate server on which to run the application and another to host the data base. It is important to ascertain that the correct licences are procured, for example if using a third party data base such as Oracle. It is also important to consider the extent to which the system is required to be scaled and that the economic consideration in terms of licences is viable. Security and access should always be considered when users may be remote from the organisation or needing to share data with stakeholders external to the organisation. It is fully conceivable that a Business Development executive will want to access data from the system at home or even at an employer's premises. This calls into question the technical issues of user account management and security levels as well as the security of transmission in terms of data encryption. Integration to existing systems whilst having the potential to reduce the amount of keying by drawing down existing personal data on learners can also cause issues of data maintenance and currency. For example, learner details can get corrupted if a CRM Data Base Management System (DBMS) is allowed to update a College Student Record data base from details obtained and updated by Business Development staff but not corroborated by MIS professionals. It is always important to remember the primacy of data bases when looking at new systems implementation and integration and for legal purposes the prime learner record data base is usually part of the MIS function of a College and is the driver for statutory returns such as the ILR. As can be seen implementation of a CRM is not the simplest of projects and the technical requirements to a large extent rely on the particular user requirements. It is therefore very difficult to generalise when advising on required features of a system purchase, but as general guidance the following should be considered when defining requirements from suppliers:

- Ease of Data Input
- Support and Maintenance
- User Training
- User Generated and Customisable Reports
- Integration to Existing Systems

Finally, when considering a purchase it is important to consider the technical requirements for the whole project and whether the College has the technical skills in house or has to involve consultancy. In particular it is important to have a project manager that can appreciate the user requirements as well as the organisational benefits and technical requirements of implementing a CRM system

#### **Conclusion**

The use of CRM systems in colleges can perform the useful function of maintaining records of contact details between the College and the employers with whom it is engaging. If used correctly it can enable effective account management utilising simple functionality to ensure a report of recent contact history is accessed before making any contact, the better to ensure employers have consistent and relevant contact. Utilising this function alone can ensure that the embarrassing situation of employers being contacted by several different people for many different opportunities is avoided. Once again it is not so much the system but the implementation that drives good account management practice and a coordinated

approach to employer engagement. The pitfalls are many however, and rarely due to the technical considerations, but mostly to do with the human aspects of system implementation. Project planning, incorporating training and change management to embed changes, of business process are essential as is the support from the leadership team in promoting the principles of relationship marketing and a whole College approach to contact management.