

Case study:

De Montfort University



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“There are advantages right across the organisation and the potential benefits are immense.”

John Shelton, Head of the Business System Group, De Montfort University.

Overview

De Montfort University was formed in 1992, from a range of institutions, including Leicester Polytechnic and the Charles Frears College of Nursing and Midwifery. The University has two campuses in Leicester, around 3,000 staff and more than 20,000 students. Annual turnover is around £132.5 million.

The University is acknowledged as a leading institution for professional, creative and vocational education.

A £50 million investment in first class facilities is currently underway across the organisation.

As part of that process, the University is upgrading its student records system to the latest version of Agresso QLS V4. The University management also realised a first-class CRM system was needed to help manage student records and communications, streamline income generation and improve a range of processes.

A pilot scheme to evaluate Agresso’s CRM offering focused on one part of the offering – the business centre module for the enterprise department.

This pilot was a huge success and the University decided to purchase a site license and roll out the entire Agresso CRM system, including the recruitment, alumni and student services modules.

The business centre module was set to go live by January of 2008, with the full implementation expected to be complete by September of 2009. The Agresso CRM system could potentially be used by hundreds of users once it is fully up-and-running.

John Shelton, Head of the Business System Group for the University, says: “We chose the business centre to be the first stage of the project because it can be implemented as a stand alone module. It doesn't need to be integrated with student records, which we are in the process of upgrading to the latest version – Agresso QLS V4. In this way, we opted for a controlled implementation process.”

The Need

John Shelton says a modern CRM system is vital if the University is to compete effectively for student numbers and raise additional incomes.

“For universities today, a CRM system such as this is an essential business tool,” he says.

“Students today pay thousands of pounds for their tuition and they expect better service as a result. Universities are competing with each other more and more as student numbers fall. The Agresso CRM system will make us better able to compete with other institutions when it comes to attracting students.”

“It is all about knowing more about our audience and improving the student experience.”

“What we need is a CRM system that can cover a multitude of processes around the institution. We did not have just one specific requirement. We were looking for a holistic package of services.”

“There are advantages right across the organisation and the potential benefits are immense.”



The Benefit

De Montfort University cites the following benefits from using Agresso:

Improved income generation

The University maintains a huge range of contacts with business and research organisations, many of which are important sources of additional funding. Management of communications with these organisations needs to be improved, and the CRM system will deliver significant benefits. Mr Shelton says: "At the moment we could have six different business development managers all contacting the same organisation and none of them would be aware of what the others are doing. That doesn't present a professional image. The business centre module will help us prevent that sort of thing from happening. It will also give us a holistic view of all the people we are dealing with, and allow us to take advantage of some important cross-selling opportunities between faculties."

Targeted marketing

The Agresso CRM system will also greatly improve marketing targeted at attracting new students. Mr Shelton says: "We will be able to track a student from their very first enquiry, perhaps as a 16 or 17-year-old. It will allow us to be proactive about recognising types of students and keeping them better informed. It will allow much more targeted marketing. We will be able to monitor the impact of marketing efforts, such as a particular television campaign. We will also be able to track numbers at open days and other events. It will allow us to be much more customer focused.

We will be able to deliver targeted marketing and a better service to students as a result."

Better insight

The case management capabilities of the Agresso CRM system will make it possible for the University authorities to gain a complete view of a particular student, their history and requirements. If they need to see a councillor, for example, the notes and outcomes from the meeting can be recorded and stored securely for future access. Mr Shelton says: "There will be a central repository of information and we will have a total picture of our students. It will be able to integrate with student records, allowing us to keep track of a student from first contact with us through to alumni stage."

Better services for students

The student services module will enhance the University's ability to meet the needs of particular students. It has a disabilities function for example. This will enable the University to extend and improve existing services such as wheelchair access to facilities. Lecturers who are planning field trips will be able to easily determine the scale of facilities that will be required for disabled students on a particular trip.

An enhanced student experience

Mr Shelton says the new Agresso CRM system and the enhanced communications and case management capabilities that it brings will

ensure that students enjoy a better all-round experience at the University.

He says: "They will notice the difference even before they arrive at the University thanks to more targeted marketing and communications. We will be able to keep them better informed about events and activities that are relevant to them." He continues, "We will also be able to deliver enhanced support to students throughout their time at the University and once they have graduated."

Reporting transformed

The creation of true business intelligence and management insight will be greatly enhanced by the implementation of the CRM system. Mr Shelton says: "Before we moved to the Agresso QLS student records system we had 14 different student record systems in place that didn't talk to each other. It is always difficult trying to report across an organisation of this size when there are so many different systems in place. Having one, centralised CRM package will allow us to remove a lot of the satellite systems and databases that are scattered throughout the organisation. We will be able to bring them all together in one centralised system. We will be able to perform trends analysis to look at issues such as demographics and ethnicity. This will transform reporting and business intelligence across the University."



Agresso is the leading supplier of business systems to the UK Higher Education sector, with an expanding customer base of over 200 Education establishments across the UK and Eire. Within Agresso CRM, Agresso has developed Education specific business applications to uniquely meet the immediate needs of an institution without the need for development normally associated with other CRM systems. The Agresso CRM applications include:

- Alumni
- Business Centre
- Campaigns and Marketing
- Disabilities
- Schools Liaison
- Student Support
- Student Enquiry and Recruitment

Agresso CRM is an integral part of the Agresso Business World suite which also includes:

- Agresso Finance
- Agresso Student
- Agresso HR and Payroll
- Agresso Award Management
- Agresso Academic Database

Evidence across the sector shows that Agresso's shelf-life is exponentially longer than competitive solutions, whose lack of post installation agility leads to huge budget overruns and increased ongoing costs.

Existing Higher Education customers of Agresso CRM and Agresso Students include:

Agresso Students

Bishop Grosseteste University College Lincoln
British School of Osteopathy
Buckinghamshire New University
Canterbury Christ Church University
Central School of Speech and Drama
Dartington College of Art
De Montfort University
Glasgow Caledonian University
Institute of Cancer Research
Institute of Education
London South Bank University
Manchester Metropolitan University
Ravensbourne College of Design and Communications
Roehampton University
Rose Bruford College
Royal Academy of Music
Royal College of Music
Royal Northern College of music
St Marys University College
Swansea Metropolitan University
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University of Lincoln
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Agresso CRM

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Enquiry line: 01275 377205

T: 01275 377200

F: 01275 377201

info@agresso.co.uk

www.agresso.com

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CS(H)11UK

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