

T R I B A L

University of Aberdeen revolutionised their student engagement & conversion process

CHALLENGE

With manual enquiry management processes, no performance measurement and no follow up communication with enquirers, Aberdeen University needed to update their processes to ensure they were able to attract and recruit the best students.

SOLUTION

A CRM developed specifically for HE to improve student recruitment, integrated with the student management system and delivering more effective marketing, enquiry management, admissions tracking and open day management.

Megan McFarlane from the University of Aberdeen explains how her team have revolutionised their student engagement and conversion processes by digitally transforming the way they do their jobs.

Founded in 1495, the University of Aberdeen is Scotland's third and the UK's fifth oldest university hosting 15,000 students from 130 nationalities. Aberdeen is rated as Scotland's safest university-city and the second most affordable student city in the UK. Winners of The Times Scottish University of the Year status in 2019 and placed [5th in the UK for student satisfaction](#). Aberdeen are regular winners of the [Heist Awards](#), winning bronze for best use of Data and Insight in 2021, silver for best Postgraduate Student Recruitment Campaign in 2020 and awards in 2019. Aberdeen offers a broad curriculum featuring well-established strengths in theology & divinity, life & physical sciences and medical research.

As with all institutions, attracting and recruiting students is a challenging task and one which the University has revolutionised over the past 2 years. In her 30 minute presentation Megan McFarlane, Head of Engagement and Conversion at the University took to the stage to showcase what she refers to as "our amazing new CRM system".

Megan began by outlining the systems and processes they used pre-CRM and why they needed to upgrade these. The previous system was very manual with an arbitrary enquiry allocation and resolution process, no performance measurement and no follow up communication with enquirers. Citing the decision to centralise the engagement and conversion function as critical, this was arguably the most challenging part of the whole process, spending a considerable amount of time and effort "selling" this to other department heads internally.

With an agreed plan in place it was time to select the right technical platform. Aberdeen was familiar with Tribal's Solutions, from its support of an existing CRM implementation, and it was obvious that this would facilitate the required level of pro-active engagement processes including marketing, enquiry management, open day management and subsequent integration to the student information system. With Microsoft Dynamics 365 at its core, the Tribal's Student Marketing and Recruitment solution delivers the HE-specific functionality required to deliver effective enquiry management and admissions tracking.

In a 3-phase approach, the University has digitally transformed its enquiry handling and broader student recruitment support all on schedule and within budget. The quantifiable benefits which they are working towards include:

- A positive impact on recruitment targets.
- Reduction in application drop-off rate.
- Positive impact on Online Education revenue.
- Cost savings through automated call campaign capability.
- Staff savings as a result of automation.
- Enhanced data insights and customer experience.
- Better decision making through improved Business Intelligence.

In addition a number of anecdotal benefits are evident, which support the service staff are able to provide. These include:

- CRM is the most powerful tool the team have.
- It provides a 360 degree view of interactions increasing our comprehension of the customer.
- This is a live view of constantly changing data which enables an agile response.

- Visibility includes all successful touchpoints in the student journey.
- Enables more data-focused and evidence-based decision-making.

Both internal and external awards have been won by the project team in recognition of their achievement. In the HEIST Awards 2021, the University achieved the bronze award for the best use of data and insight. The judges' commented "This entry provided a detailed plan of action which led to strong results and had a positive impact on the university, achieving objectives for both the short term and their longer-term approach. Well done University of Aberdeen."

Megan enthusiastically says of her workplace:

"In this room we handle all incoming enquiries to the University in our amazing new CRM system. We also manage all outbound communications and conversion projects. One of the biggest benefits of the CRM system is the ability to see all enquirer, applicant and engagement data in one place. This allows us to put our energies into the right projects. These digital advances have allowed us to enhance the personal service we are known for."

To find out more about how Tribal's solutions based on Microsoft Dynamics 365 and the Power Platform can support your institution, [click here](#).