



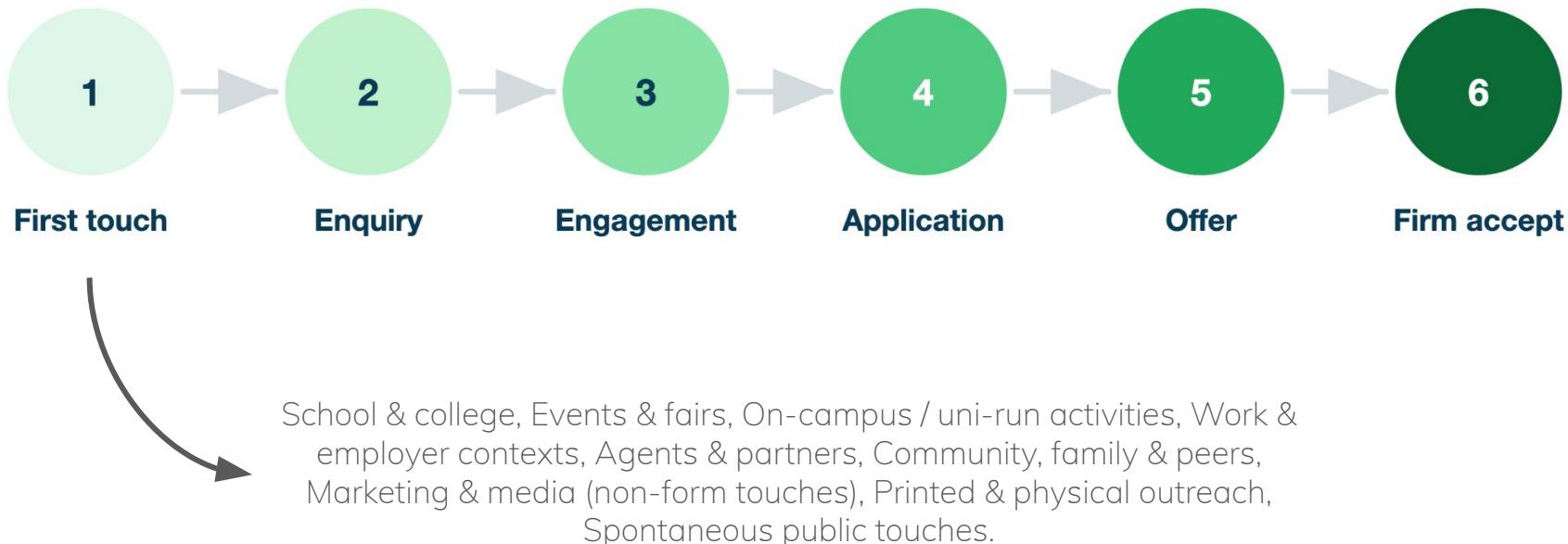
# How a CRM tracks the Student Journey from First Touch to Firm Accept

(Any CRM + AI can decrease your drop-offs)

# What we're here to fix

- Student journeys are long and **fragmented**
- Teams interact with the same student, but don't **share** context
- Drop-offs do make sense, but not until **after** the fact

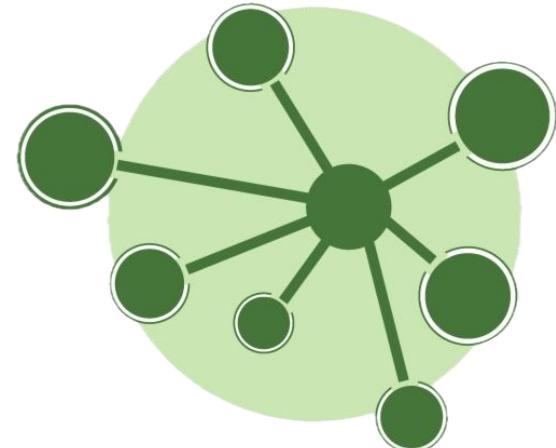
# What we mean by 'the student journey'



# What a CRM is really for

Your CRM is not just a “database” -  
it's your:

- institutional memory
- shared context across teams
- decision-support system
- system-of-record (SOR)



# Session roadmap

## Walkthrough

Walkthrough of a typical CRM journey from first enquiry to firm accept, showing touchpoints and insights.

## Exercise

Group mapping task to identify drop-offs, insights, and quick tests.

## Discussion

Synthesis of findings; discuss AI implications and prioritise next steps.

## Takeaways

Simple, testable actions to implement immediately and measure success.

# A typical first interaction

School & college, Events & fairs, On-campus / uni-run activities,  
Work & employer contexts, Agents & partners, Community, family &  
peers, Marketing & media (non-form touches), Printed & physical  
outreach, Spontaneous public interactions.

# We throw data away by ignoring it

## In your CRM

- Enquiries and outcomes
- Event / open-day attendance (ticket scans)
- Email sends, opens & clicks
- Form submissions & responses
- Realtime engagement score
- Likelihood to enrol

## Actively used by teams

- Contact record (name, phone, email, school / employer)
- Personal context (subject interest, parental influence, funding notes)
- Application → offer → acceptance status

## Not used

- Whole student history and likelihood
- Assigned owner & next actions / tasks
- Priority / risk tags and warnings

# Engagement over time

- Measure the Ins and Outs
- Identify lapsing students
- Silence is also a signal

Last In

**93 days**

15 Sep 2025, 11:01

Engagement

**-153**



Rule Name	Direction	Score ▲
No new inbound activity from the Student was detected in the last 90 days in the SDB app	In	-10
No new inbound activity from the Student was detected in the last 60 days in the SDB app	In	-10
A User withdrew an Application in the APS app	On platform	-10

# Where insight usually arrives too late

Common pattern:

- Application submitted but disengaged
- Offer holders ghosting you
- You're out of time

# Institutional memory in practice

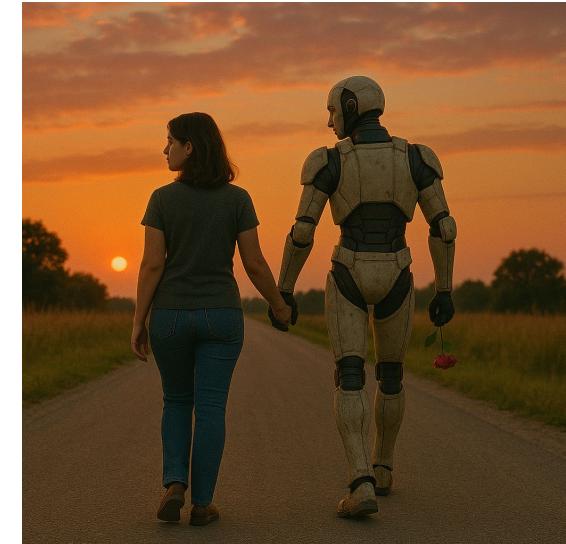
## Example narrative:

- Student enquiries
- Attends event
- Goes quiet
- Applies anyway

Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 84 points)	02 Jun 2022, 17:47
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 81 points)	02 Jun 2022, 17:47
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 78 points)	02 Jun 2022, 17:47
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 75 points)	02 Jun 2022, 17:46
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 69 points)	02 Jun 2022, 17:46
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 72 points)	02 Jun 2022, 17:46
Recipient has opened the Touchpoint Engagement (IN) Score Rule (ID:474) - "The Student opened an APS/APV touchpoint email" (3 points added, new engagement score = 66 points)	02 Jun 2022, 17:46

# AI-driven insights

- Surface the entire background and history instantly, so your team doesn't have to dig.
- Save hours every week.
- Speed up response times dramatically.
- Strengthen the relationships your team builds.



# Exercise: map one real student journey

**Goal:** map a real student journey, spot where insight would change action, and pick the top moments to fix next cycle.

# Materials + team roles

- Postcard Post-its + marker pens (one each)
- Write one journey stage per note - short phrase only
- Draw a face: happy / neutral / unhappy (example next slide)
- Roles: Presenter, Scribe



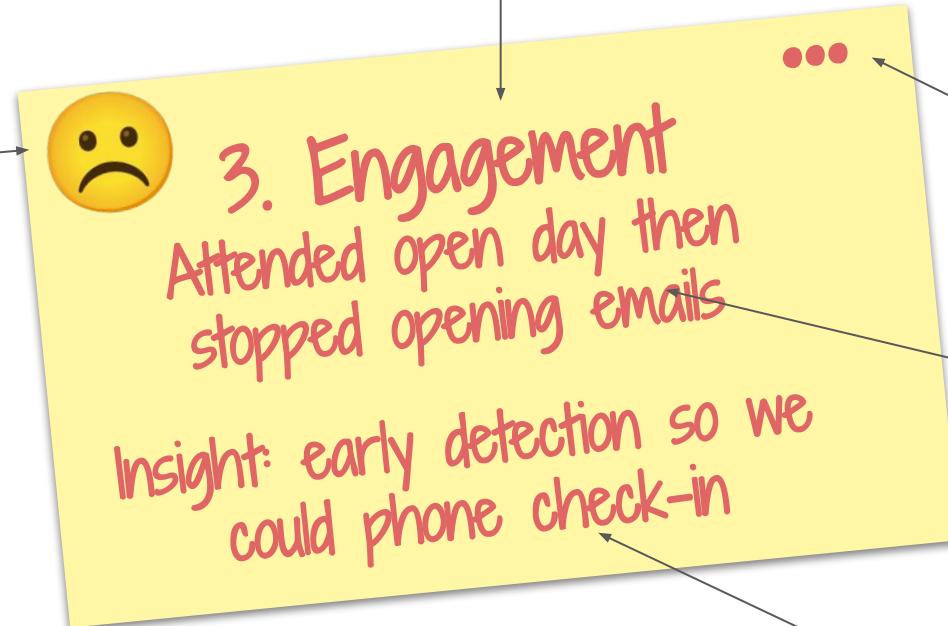
# This exercise will reveal

- Where students disengage quietly
- Where teams work without context
- Where decisions currently rely on gut feel

# Example Post-it

happy,  
neutral,  
sad

journey stage



add dots to  
indicate  
urgency

where they  
disengaged

what insight  
could help you  
with



# Team reflections

Per team:

- Each team: 90s - share:
  - a. top flagged stage,
  - b. why,
  - c. one small next step
- I'll call out: common stages, mixed faces, easy wins

# Room share

- Which stages are fragile?
- Which insights are missing?
- What is blocking action to fix?



# Where AI helps in your CRM

## Practical examples:

- AI-powered student summary (all student history data ever)
- 20X enquiry processing (whilst increasing engagement)

**AI Assist from Student CRM** what's this? X

1. Country of birth  
2. Nationality  
3. Current country of residence

Also please tell us:  
- Whether you managed to view the checklist video/slides we previously sent, and if any links didn't work for you.  
- Which course(s) or campus you're interested in (so we can give tailored guidance).  
- Any immediate barriers (documents, funding, visa, accessibility) you'd like help with.

If you prefer, I can send a plain one-page checklist or we can book a short 10-15 minute call to walk through the steps together. If a call works, tell me some times that suit you and we'll arrange it.

Kind regards  
Enquiries Officer  
New Forest University  
<https://www.newforestuniversity.co.uk>

PS — A very short call and a one-page checklist usually makes the process straightforward and stress-free; we'll keep it simple.

 This took 10.48 seconds Conversation ID: 12962

Ask me something... 0 ↑

 Personality: Enq Officer (with a PS) Reasoning: Faster reasoning ID: 16 Dec 2025, ID12962

AI Assist can make mistakes. AI Assist doesn't make your data available to anybody else.

# What this changes - culture, practised

## From firefighting - proactive focus

Day-to-day: prioritised call lists, short triage sessions, fewer surprise issues

Small test: 4-week trial - daily 30-minute triage + top-25 “open-day then quiet” call list

## From fragmented memory - shared institutional memory

Day-to-day: one-line context on every touch, named owner, searchable notes

Small test: require a 1-line context for event records for 2 weeks; audit 20 recent records

## From generic comms - context-aware conversations

Day-to-day: explainable nudges, one-line reason for flags, short staff script for calls

Small test: pilot 50 explainable nudges (flag + one-line reason + suggested next step) and measure re-engagement

# Key takeaways: simple actions to try

- **Run one small test:** (4-week phone check-in for 50 open-day attendees.)
- **Make CRM “the memory”:** capture one-line context at every touch so engagement is up-to-date.
- **Use simple AI insights:** flag behaviour change, show a one-line reason, and give one suggested next step - staff decide.

# Sharing the room's learning

**I'll collect every group's Post-its, anonymise them and create a short pack and share on LinkedIn.**

- I'll gather all Post-its at the end of the session.
- I will anonymise everything - no names or identifying details will be included.
- What you'll receive: a concise, themed summary, the raw anonymised Post-its, and a one-page practical checklist of suggested small tests.
- I'll post anonymised highlights on LinkedIn within 4 days.
- Opt-out: if you prefer any note not to be shared, mark that Post-it with a small X now or tell your Presenter before we collect them.

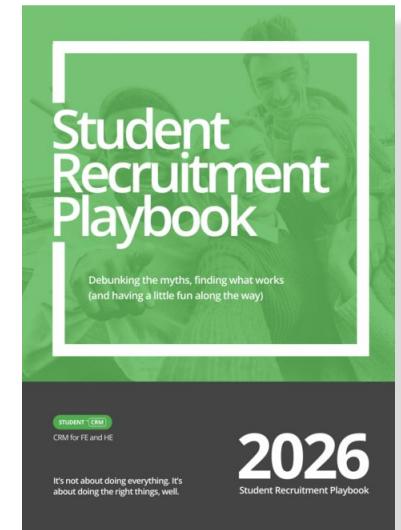
**Purpose: so you can quickly share today's insights with your colleagues and turn them into action.**



# Follow-on resources

- Digital handout “Tracking the Student Journey - Key CRM Insights”
- Webinar invite

<https://www.student-crm.co.uk/aia-demo-page>



# Wrap-up and Q&A

- Practical takeaways and next steps for optimising CRM use at your own institution.
- Any questions?