



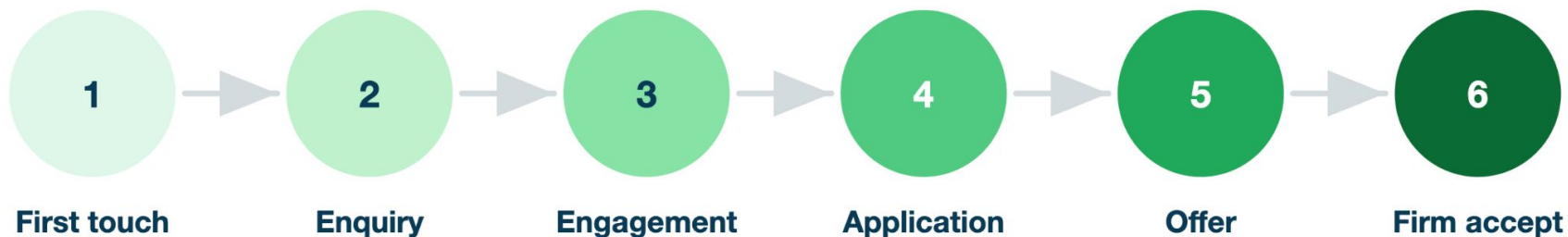
How a CRM tracks the Student Journey from First Touch to Firm Accept

(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'

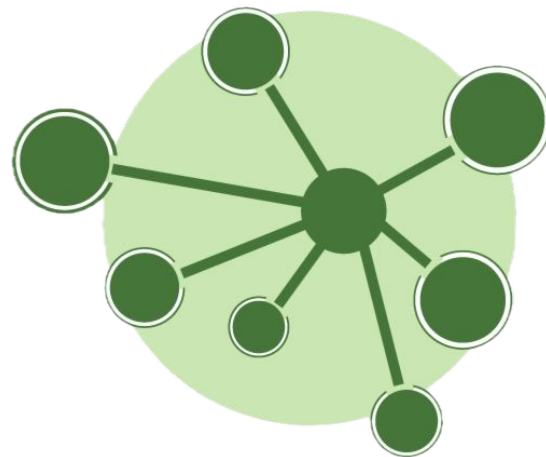


School & college, Events & fairs, On-campus / uni-run activities, Work & employer contexts, Agents & partners, Community, family & peers, Marketing & media (non-form touches), Printed & physical outreach, Spontaneous public touches.

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

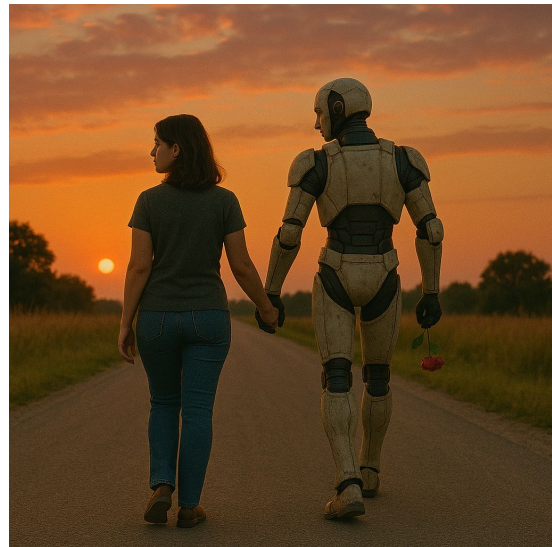
Example narrative:

- 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

3. Engagement
Attended open day then
stopped opening emails

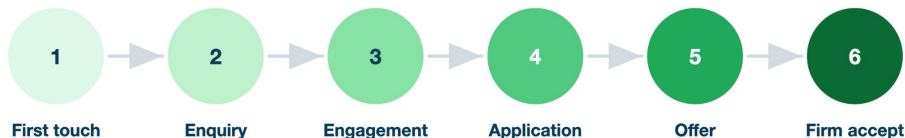


add dots to
indicate
urgency

Insight: early detection so we
could phone check-in

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

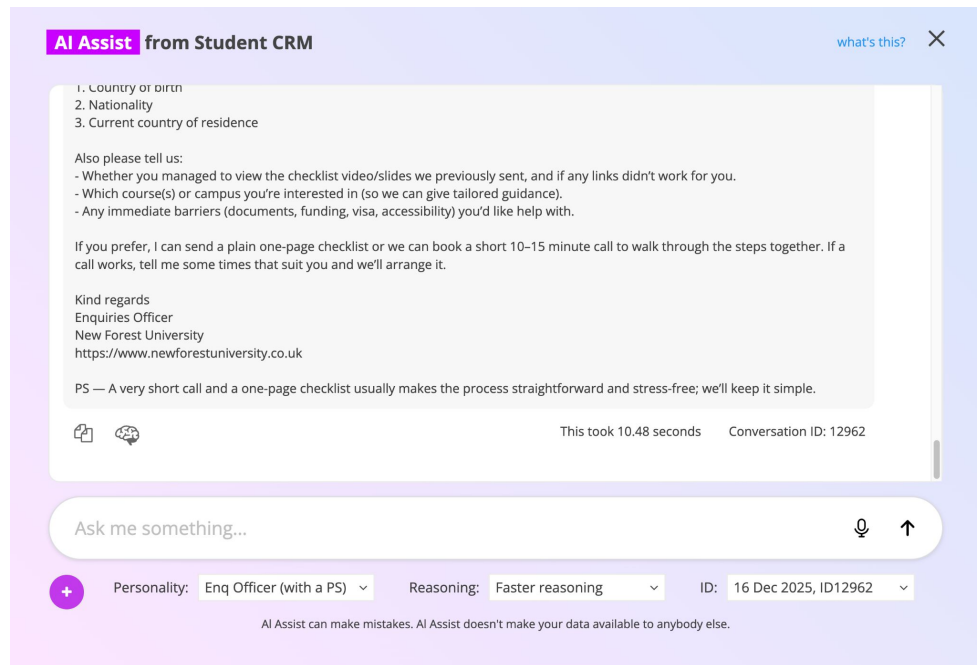
- Which stages are fragile?
- Which insights are missing?
- What is blocking action to fix?



Where AI helps in your CRM

Practical examples:

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



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.



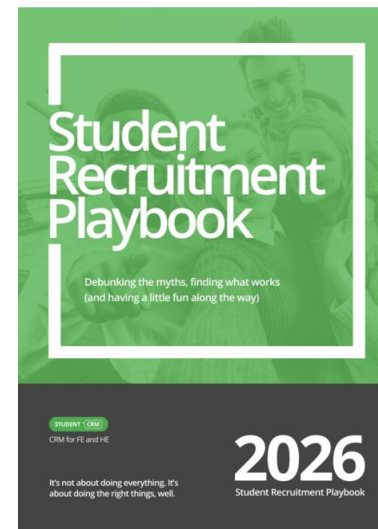
- I'll gather all Post-its at the end of the session.
- I will anonymise everything - no names or identifying details will be included.
- What you'll receive: a concise, themed summary, the raw anonymised Post-its, and a one-page practical checklist of suggested small tests.
- I'll post anonymised highlights 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?