HELOA

Session Title:	1.1 How a CRM Tracks the Student Journey from First Touch to Firm Accept
Speaker(s):	Andy Speed – Head of Business Development at Student CRM
Chair:	Mike Long
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Speaker/Institution Bio/Information:	Background is previously in Marketing and Recruitment
Overview/Aim of session:	Do you know exactly what happens between a prospective student's first click or face-to-face interaction and their final decision to accept? This practical workshop explores how universities and colleges can use CRM systems to track and optimise the entire student recruitment journey. From the first outreach moment, whether online or in person, through to application and acceptance, we will show how using CRM tools with AI-driven insights can reveal hidden patterns in applicant behaviour. By mining deep institutional data behind each student's interactions, recruitment teams can identify drop-offs earlier and tailor comms strategies that improve conversion. These insights must be built into the CRM itself, using institutional memory and granular action tracking to ensure every engagement is meaningful, timely and fully informed. Attendees will leave with clear, actionable ideas for using CRM and AI together to power smarter, more effective student recruitment.
Workshop Content	• Student journeys are long and fragmented – student journeys and behaviour are difficult to predict. • Our teams all interact with students with different ways. • We know that attrition pre-enrolment occurs – around understanding where and how that happens.

What do we mean by 'the student journey'?

- First touch – enquiry – engagement – application – offer – firm accept (3 pre-application, 3 post-enrolment)
- Is non-linear, people go back and forward – even post application

What is a CRM really for?

- CRM is not just a database its institutional memory, shared context across teams, a decision support system and system-of-record
- Difference is useability, tool to do more work and be better at everything – isn't just an excel, access database etc. Should be proactively doing stuff with and for you.
- Should be sharing context across teams, should be supporting decision making process

We throw data away by ignoring it

- In your CRM – enquiries and outcomes, event/open day attendance (ticket scans), email sends, opens and clicks, form submissions and responses, real time engagement score, likelihood to enrol
- Actively used by teams (bare minimum) – 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 and next actions/tasks, priority/risk tags and warnings

A lot of the data we have isn't making it in, for example – the qualitative

Engagement over time

- Ability to engage students helps identify lapsing students,
- You don't have ability to manage all these students; systems should help support with this.

Insight generally arrives too late

- Often there is panic at the last minute internally, but the clues were all there – for example, application submitted but disengaged. If they're in

	the pipeline, there should be ways of utilising the data etc to track, understand and predict. ● At the time it often becomes obvious, we're out of time and it's all gone wrong. **AI driven insights** ● Surface the entire background and history instantly, so your team doesn't have to dig. You should be able to get the data quickly and easily, to be able to do that off the back of it.
Case Studies/Examples:	**N/A**
Scenarios/Roundtable discussions:	***Exercise: map one real student journey*** ● Goal – map a real student journey, sport where insight would change action, and pick the top moments to fix next cycle. ● One journey stage per note – short phrase only. ● Daw a face: happy/neutral/unhappy
Questions and Answers:	***Examples from the session exercise:*** ● *First touch* – speaking to someone in person at the fair, but not gathering data – but is this is a missed opportunity for engagement? Also, if we're asking for too much information, are they going to actually fill it in? ● *Enquiry* – example more specific, regional – may have gone to a regional event with specific questions related to that, but we have no specific regional information that can be sent out. General information that is being sent out to students will all be the same regardless of where they are coming from within the UK. ● *Engagement* – signed up to an Open Day but didn't come. Insight of who didn't come and following up, but rather than a CRM email – could these come through personalised messages? ● *Application* – difficult for personalisation to get through when students are getting information from multiple places (e.g. UCAS). We think being able to provide more personalised information and guidance would be better – we want to try to do this but it's something we're struggling with.

	● *Offer* – with offer holders it can be tempting to look at numbers rather than individuals and, at larger institutions, it's often for it to be handed to another team. ● *Firm accept* – they have firm accepted but don't enrol. What to put in place to bridge that? How do we make it more personal? How saturated are they in terms of communications at that point.
Summary **Key takeaways:**	**Key takeaways: simple actions you can try** ● Run one small test – e.g. 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 on suggested next step – staff decide.