STUDENT CRM

Tracking the Student Journey

Key CRM Insights

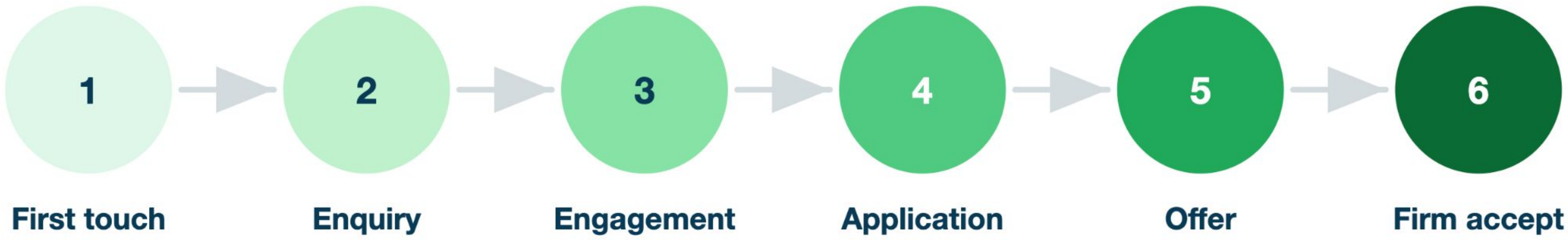
Supporting handout from the HELOA 2026 workshop:

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

Presented by Dom Yeadon, Student CRM

Handout

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.

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Introduction

Welcome

Thanks for attending the workshop. This handout shares a few practical tools to help you take the next step - turning CRM ideas from the session into small, testable actions.

You'll find:

- A journey-mapping template to replicate today's group exercise
- A data capture checklist to review how your CRM supports recruitment
- A one-page test plan for running a simple CRM-powered trial
- More information

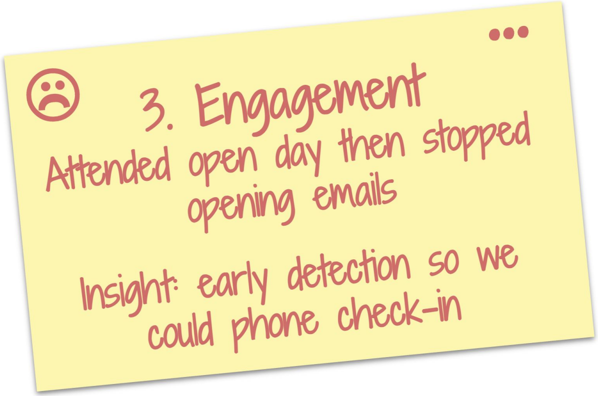
If one test, insight or reminder in here **sparks action at your institution**, it's done its job.

Journey-Mapping Template

Use this visual exercise to map a real student journey, uncover weak points, and generate ideas for small but meaningful improvements.

How to use it:

- Start with one real student - not a generic process
- Write one stage or interaction per Post-it (e.g. “Open day – positive”, “Offer sent – no reply”)
- Add a face to show how that stage felt for the student or team
- Use a dot ● to highlight moments where earlier insights/actions could have helped



Tip: Include first interactions from outreach teams (e.g. school visits, fairs, careers talks), not just formal enquiry or application stages.

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Data Capture Checklist

Use this to review what your CRM is collecting - and what actually gets surfaced and acted on.

Usually captured in CRM:

- Event registrations and ticket scans
- Email activity (opens, clicks, replies)
- Form submissions and surveys
- Applications, offers, accepts
- Course interest and year of entry
- Enquiry scores and contact data

Often captured but underused:

- Source of first interaction (e.g. UCAS fair, school visit)
- Drop-off indicators (e.g. inactivity after offer)
- Next actions or owner notes
- Personal context (e.g. funding, commuting distance)
- Risk flags or engagement scores
- One-line summaries of each contact

Ask yourself: Are we collecting this? **Are we using it?** Is it visible at the right time?

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One-Page Test Plan

A simple, focused format to trial a CRM-powered improvement. Keep it small, short and measurable.

Choose a test idea:

- **Reactivation call test** - Find 50 students who attended an event but have gone quiet. Call or message them. Measure re-engagement after 7 days.
- **Context capture trial** - Ask team members to add a one-line context summary after each student interaction for 2 weeks. Audit a sample: did it help follow-up?
- **AI nudge pilot** - Use CRM-native AI to flag 50 students showing a behaviour change. Review the one-line reason and suggested action. Track re-engagement.

Pick one outcome to measure:

- % re-engaging
- Application or acceptance uplift
- Team time saved

Keep it short: **Limit to 4 weeks**. Then review and decide whether to scale it.

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Insights from the Room

During this session, teams mapped real student journeys using Post-its. These will be anonymised and turned into a short insights pack, including:

- Common fragile stages
- Notes from the room (anonymised)
- Suggested quick wins and next steps

Delivery: this PDF report will be sent by email within one week of the workshop.

Handout

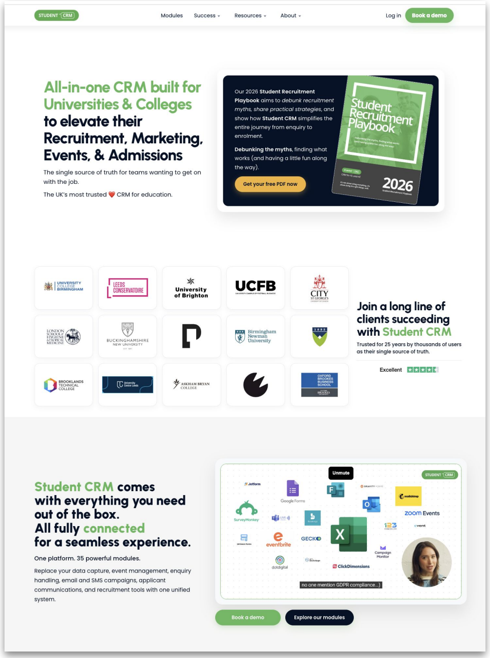
Follow-on support

Want a bit of help turning this into action? Just ask.

We've been helping recruitment teams across the sector for over 25 years - and we've seen what works (and what doesn't). If you're thinking, "We could try this but I'm not sure where to start", you're exactly who we want to help.

And if your team wants to test something, we're happy to:

- Suggest a starting point based on your map
- Share relevant best-practice tips
- Jump on a quick call or send a checklist to help shape it
- There's no charge, no sales pitch - just ideas that might save you time and improve conversion.

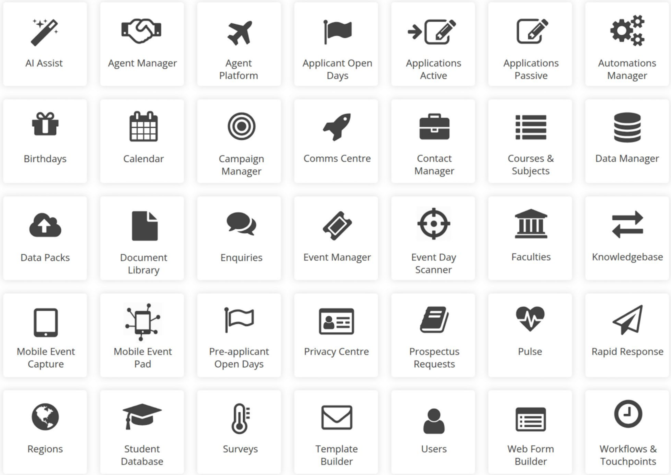


The UK's only modular student recruitment CRM designed specifically for universities and colleges.

Student CRM helps teams enrol more students by unifying data, automating processes, and delivering measurable results.

Each module in Student CRM is designed to do one thing brilliantly, while working seamlessly with other modules across the platform.

Together, they create a connected system that builds a complete student journey, visible to every team in real time.



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