STRATEGY FOCUS SERIES

# Assessing the State of CRM Adoption Amongst Higher Education Institutions (Strategy Focus)

CRM uptake is sprinting towards the tipping point

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## DATAMONITOR VIEW

### *CATALYST*

As shifting demographics and advancing globalization drive higher education institutions to compete more aggressively with one another to recruit and retain the "right" students, institutions will increasingly invest in CRM solutions as a tool to help differentiate themselves in the market.

### *SUMMARY*

To the chagrin of many industry analysts, the adoption rate for CRM solutions amongst higher education institutions has remained relatively sluggish. Yet, in recent years, the combination of shifting demographics and advancing globalization, in a context of continued budget austerity, has renewed the market's interest in this solution area and is rapidly making it a mission-critical application. However, as institutions often require specific functionality and these requirements are prone to vary across geographic regions, it is important for vendors to assess the status of CRM in higher education in order to determine whether investing in the development of a market-specific solution is warranted. This brief will explore the following arguments:

- The pump is primed for CRM in the higher education market;
- Stakeholders from across the institution benefit from using CRM;
- Geography strongly influences the rate of CRM adoption amongst institutions; and
- The global higher education market supports a diverse array of CRM vendors.

## ANALYSIS

### *The pump is primed for CRM in the higher education market*

To the chagrin of industry analysts, the growth rate for CRM in the higher education market has remained sluggish. Yet, in recent years, the combination of shifting demographics and advancing globalization, in a context of continued budget austerity, has renewed the market's interest in this solution area. The extent to which this combination drives uptake, however, depends upon how well vendors tailor their solutions to unique institutional needs and contexts. Consequently, vendors should assess the status of CRM in higher education in order to determine whether investing in the development of a market-specific CRM solution is warranted. As the underlying factors driving and inhibiting CRM's uptake influence what solution functionality institutions will find most compelling, it is important to understand them well.

#### A gathering storm will drive the more pervasive institutional adoption of CRM

A myriad of forces are coming together that will propel the rapid adoption and expansion of CRM in the higher education market. After years of languishing as a "middle of pack" priority for institutional IT investments, a changing higher education landscape is driving CRM up the ranks for budget priority. The combination of unfavorable demographic shifts in the secondary school population and increased globalization of the higher education market is escalating the level of competition amongst institutions to recruit and retain the "right" students. As a result, finding tools and strategies for managing student relationships more effectively is rapidly becoming a matter of survival for many institutions. Unfortunately, these developments are unfolding in a context of relative budget austerity for higher education, which will require any new programs or initiatives to be funded through increased productivity or efficiency in other areas of the institution. As CRM enables institutions to resolve the dilemma of providing more and better service while holding costs relatively constant, Datamonitor believes that CRM will move quickly from a nice to have solution in higher education to one that few institutions could afford to do without.

#### Powerful factors may impede the more substantive adoption of CRM

While there is considerable reason to be optimistic about the future of CRM in higher education, significant challenges to its widespread adoption remain, and if left unaddressed, will hinder many institutions from implementing CRM more substantively or even at all. Experience suggests that introducing a solution with considerable buzz and hype surrounding it in the corporate sector into a highly conservative market, such as higher education, will be difficult under even the best circumstances. As much of higher education still questions what value CRM offers and how it differs from existing applications, it would be naïve to suggest that introducing this solution area into higher education will be straightforward. Further complicating this challenge is the lingering uncertainty, for many institutions, around whether their IT infrastructures are prepared to support yet another solution, particularly as creating a 360° view of the student experience depends upon data integration across multiple applications. In the end, however, Datamonitor anticipates that the tremendous institutional need to support student relationships across the entire student lifecycle will outweigh these challenges and quickly position CRM as a mission-critical application for the higher education market.

#### CRM is positioned to break free from its emergent status in higher education

While institutions, for the most part, have historically perceived CRM as only an emergent solution, recent changes in the higher education landscape are driving its more rapid uptake and re-positioning it as a mission-critical application. There are two institutional changes prompting this shift in CRM uptake. Early adopters are expanding their existing CRM implementations to support the entire student lifecycle, while a growing number of institutions are taking their first steps by installing point solutions in specific departments. In either case, the number of institutions using and relying on CRM is increasing dramatically. Over the short-term, these changes will continue to support a competitive landscape comprised of a large and diverse set of CRM vendors. Yet, as the market matures, the competitive landscape will become increasingly segmented, particularly in those higher education markets seeking to support relationships across the entire student lifecycle. In order to navigate these changes successfully, vendors will need to consider closely whether the opportunity size in different higher education markets outweighs the entry cost.

## *Stakeholders from across the institution benefit from using CRM*

Adopting a CRM solution to support the management of student relationships provides considerable value to higher education institutions. While the prevailing perception of CRM has been that it is a corporate sector tool for sales force automation with only limited application for higher education, this opinion is changing quickly as competition increases amongst institutions to recruit and retain the right students. Identifying how institutions are likely to use CRM contributes to a vendor's ability to realize advantage from the expanded usage of this solution area. Datamonitor, therefore, recommends that vendors understand the following characteristics of CRM implementations in higher education:

- Higher education's existing usage of CRM will set the stage for more substantive, future adoption;
- There are multiple targets for CRM within higher education institutions; and
- Creating a 360° view of the student experiences drives an institution-wide CRM implementation.

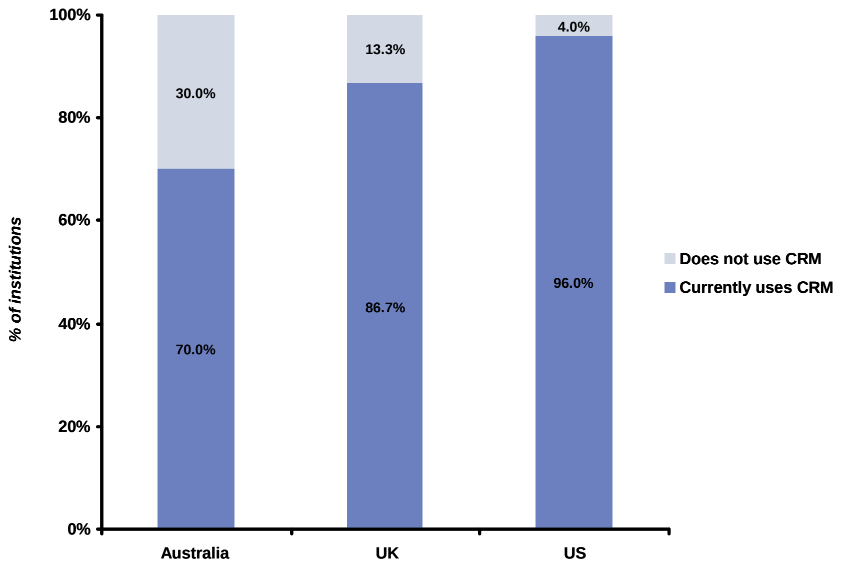
### Higher education's existing usage of CRM will set the stage for more substantive, future adoption

A strong foundation for CRM already exists in the higher education market. Driven by the broad uptake of strategic enrollment management (SEM) strategies over the past decade, many institutions have adopted applications, similar to CRM in many ways, to support specific processes, such as campaign management, in distinct departments. It is important to note that institutions typically do not identify these applications as CRM solutions. Datamonitor's research has consistently found that response rates for using CRM are typically much lower when respondents are asked if they use CRM as compared to when they are asked if they use a specific CRM solution, such as Azorus or RecruitmentPlus. These findings suggest that institutions identify more closely with solution names and SEM than with a horizontal solution area. Nonetheless, if one considers these solutions to be an important first step towards implementing CRM then a significant installed base already exists in the higher education market. A recent Datamonitor study found that 70% of institutions in Australia, 86.7% in the UK and 96% in the US reported that they currently use a solution in some capacity. Consequently, when constructing a strategy to target a prospective client, vendors should determine whether the institution recognizes itself as using CRM and where it is on the CRM adoption curve.



**Figure 1: There is broad uptake of CRM in the higher education market**




Source: Business Trends - Education Technology H2 2007 (DPTC0005) DATAMONITOR

## There are multiple targets for CRM within higher education institutions

An institution's initial CRM adoption is rarely the result of a top-down initiative or mandate. Instead, an individual department, such as admissions, student services or alumni affairs, purchases the solution and as it experiences success, interest grows in a more widespread adoption from across the institution. As a result, there are often multiple entry points for CRM within higher education institutions. Many vendors find these departmental targets especially attractive as they often have a significantly shorter sales cycle and offer a strategic foot in the institutional door. Intelliworks, for example, decided to focus on programmatic implementations of CRM, oftentimes executive MBA programs, as this strategy enabled the more rapid creation of an installed base and the ability to cite some of the most prestigious US institutions amongst its clients. This market entry approach, however, poses a number of potential risks. While there are multiple targets within an institution, the specific needs and requirements of a CRM solution will vary, at least to some degree, across different departments. The alumni affairs office, for example, may not perceive a tool, purchased by the admissions office, as being relevant to it. Vendors should also be mindful that their institutional beachhead could, in fact, be priming the pump for another vendor to win the institution-wide contract. A cabinet-level decision-maker may feel that it is imprudent to standardize on a solution used solely by the admissions office and instead, will invest in a more established, and oftentimes horizontal, CRM vendor. In order to mitigate these risks, after the initial implementation has occurred, vendors should continue campaigning actively within the institution, in order to cultivate a broad base of support across multiple departments and levels of the institutional hierarchy.



### Creating a 360° view of the student experiences drives an institution-wide CRM implementation

The decision to standardize on a single CRM solution is driven, at least in part, by the institutional desire to create a comprehensive view of the student experience that persists across the entire student lifecycle. At the most basic level, the long-term value that CRM offers higher education is the ability to inform the creation and delivery of more effective services to students by leveraging a larger set of student data, including both transactional data from the SIS and ERP, as well as interactional data from multi-channel communications' tools. For example, institutions would be able to use information about a student's experience during recruitment to guide the creation of an individualized strategy to retain him or her, and over time, utilize information about subsequent interactions to further refine this strategy and inform the development of an effective alumnus, -a relationship. Without question, this is an ambitious goal for any institution. As a result, the path towards creating a 360° view of the student experience is likely to be an incremental one, starting in a single department or focusing on a specific stage of the student lifecycle. Datamonitor, therefore, recommends that vendors design their CRM solutions to scale upwards easily and in a cost-effective manner in order to facilitate the execution of institution-wide implementations. Adding a new department to an existing installation should require only an incremental cost, in terms of both time and money. Vendors will find that this approach encourages, rather than dissuades, institutions from expanding their CRM implementation.

## *Geography strongly influences the rate of CRM adoption amongst institutions*

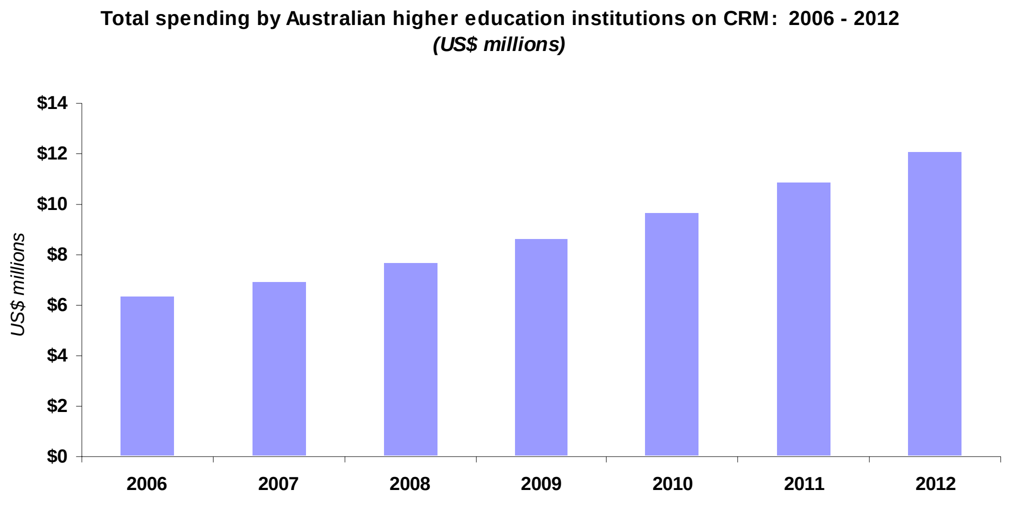
Continued spending growth on CRM solutions offers an attractive return on investment for vendors seeking to enter the higher education market. The growth rate and opportunity size, however, varies considerably across the three most technologically advanced higher education markets, namely Australia, the UK and US, and as a result, vendors must weigh the costs of entering each of these markets individually against their potential benefits. In order to calculate this comparison accurately, Datamonitor suggests that vendors understand the following characteristics of CRM spending in global higher education market:

- Capturing the international student market will drive Australia's more widespread adoption of CRM;
- Changes in the UK institutional landscape will contribute to CRM spending growth; and
- The increasing popularity of institution-wide CRM implementations will drive US spending growth.

### Capturing the international student market will drive Australia's more widespread adoption of CRM

Australia has recently embarked on an aggressive campaign to recruit more international students to its higher education institutions. The combination of being located *within* the rapidly growing Asia – Pacific region and having some of the most prestigious institutions in the world, positions Australia well for competing with other countries, such as the UK and US, to recruit a larger percentage of the international student market. If the institutions are comparable, many students from India, China and Japan are likely to find studying in Australia to be an attractive option to the UK or US, given its shorter distance from home. Recognizing this advantage and the attractive revenue source that international students represent, Australian institutions are developing recruitment strategies tailored to the specific preferences and needs of these students. CRM will be an important part of executing these strategies, as institutions will need to develop virtual or entirely internet-based relationships with international students who are unlikely to make an on-campus visit. Although Australia is a small market, Datamonitor forecasts that CRM will grow rapidly from $6.9 million in 2007 to $12.0 million in 2012 with a compound annual growth rate (CAGR) of 11.0%. As Australian institutions often have centralized IT spending models and adopt enterprise-class solutions more readily than other markets, increased CRM spending is particularly good news for large, horizontal vendors. The recent opening of a Sydney office by SunGard Higher Education, however, may represent a potential shift in a competitive landscape towards higher education-specific vendors. Nevertheless, continued growth in the Australian higher education market is likely to attract other vendors over the near- to mid-term.

**Figure 2: Total spending by Australian higher education institutions on CRM, 2006 – 2012**

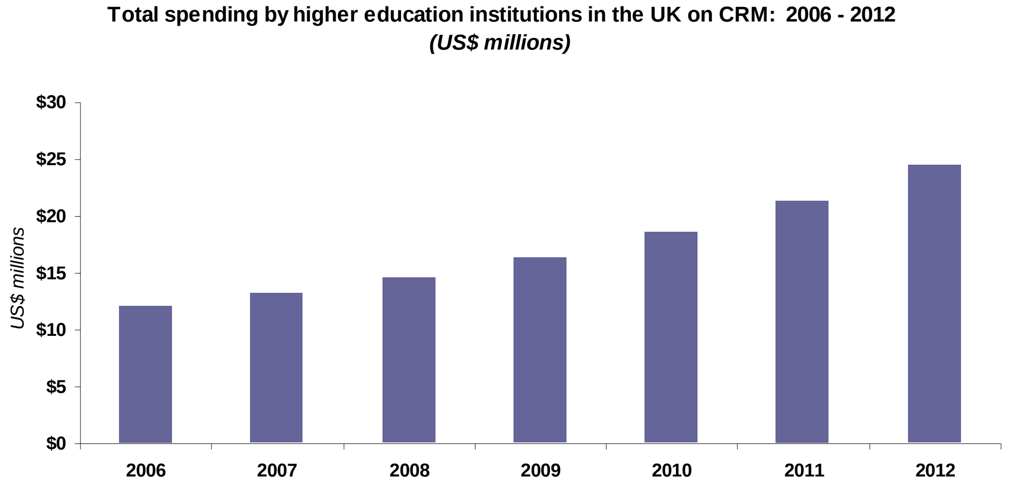



Source: Global Higher Education Spending on CRM, 2007 – 2012 (IMTC0098) DATAMONITOR

## Changes in the UK institutional landscape will contribute to the CRM spending growth

In response to a looming funding crisis for its higher education system, the UK instituted “top-up” or tuition fees for students. Although these fees are relatively nominal in comparison to those charged by US institutions, their introduction sparked considerable public uproar, with many suggesting that the fees would reduce overall enrollment in higher education, particularly amongst under-privileged students. While the impact of top-up fees continues to be debated, at this point the impact on enrollment has been far less dramatic than previously predicated. In fact, UCAS, the central agency through which university applications are processed, reported that 494,842 students applied to UK higher education institutions in 2007, represented a 5.3% increase over the preceding year. Unfortunately, however, the introduction of top-up fees has not solved the funding crisis and as a result, many institutions are calling for the ability to increase these fees. In early 2007, then Prime Minister Tony Blair, hoping to encourage the creation of US-style endowments, introduced a policy where the government would match individual donations to higher education institutions. In a context of increasing tuition fees, the importance of managing student relationships more effectively will grow, particularly if institutions wish to take advantage of this policy and enlarge their endowments through alumni donations. As CRM is likely to play a central role in executing these goals, Datamonitor anticipates that spending on CRM solutions in the UK higher education market will grow briskly from $13.3 million in 2007 to $24.5 million in 2012 with a CAGR of 13.0%. As UCAS manages the application process, it is important for CRM vendors to understand that the UK market differs from others, as the leading driver for spending growth is retention and development rather than recruitment.

**Figure 3: Total spending by higher education institutions in the UK on CRM, 2006 - 2012**

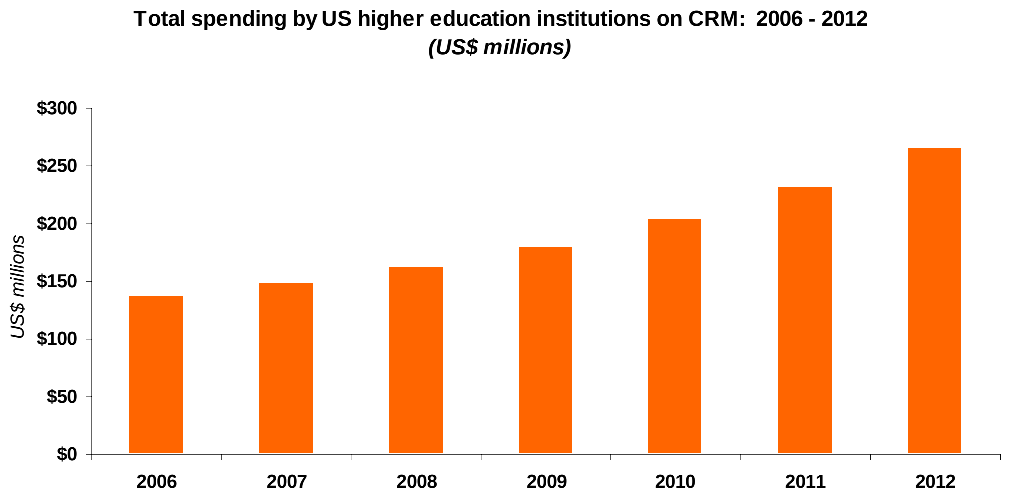



Source: Global Higher Education Spending on CRM, 2007 – 2012 (IMTC0098) DATAMONITOR

### The increasing popularity of institution-wide CRM implementations will drive US spending growth

The transition from using CRM to support discrete departmental processes to implementing it on an institution-wide basis will be an important factor driving spending growth over the near- to mid-term in the US higher education market. With a highly decentralized system for university admission, particularly in comparison to the UK, and an established culture of alumni contributing to the endowment, many US institutions have already implemented CRM on a departmental basis, with the largest percentage using the solution to support recruitment or development. Soaring tuition costs, however, have raised the expectations of many students and their families for more and better services from their institutions. When these expectations exist in a context where the number of secondary school graduates will shift downward in 2010, it is not surprising that improving student retention is a top of mind issue for many institutions. It is more cost effective for institutions to invest in retaining a student than recruiting one to replace him or her. Consequently, an increasing number of institutions are adopting CRM to support student retention, in the same way as recruitment and development. While institutions may initially install multiple CRM applications, the inefficiency, from a resources perspective, and the limited ability to create a comprehensive view of the student experience of this approach will drive many institutions, over the long-term, to standardize on a single solution. Given this reality, Datamonitor forecasts that US higher education spending on CRM will grow rapidly from $148.7 million in 2007 to $265.4 million in 2012 with a CAGR of 12.3%. As mentioned earlier in this report, it will be important for vendors to communicate effectively the ability of their solutions to support the entire student lifecycle on an institution-wide basis in order to realize benefit from the rapid expansion of this market.

**Figure 4: Total spending by US higher education institutions on CRM, 2006 - 2012**




Source: Global Higher Education Spending on CRM, 2007 – 2012 (IMTC0098) DATAMONITOR

## *The global higher education market supports a diverse array of CRM vendors*

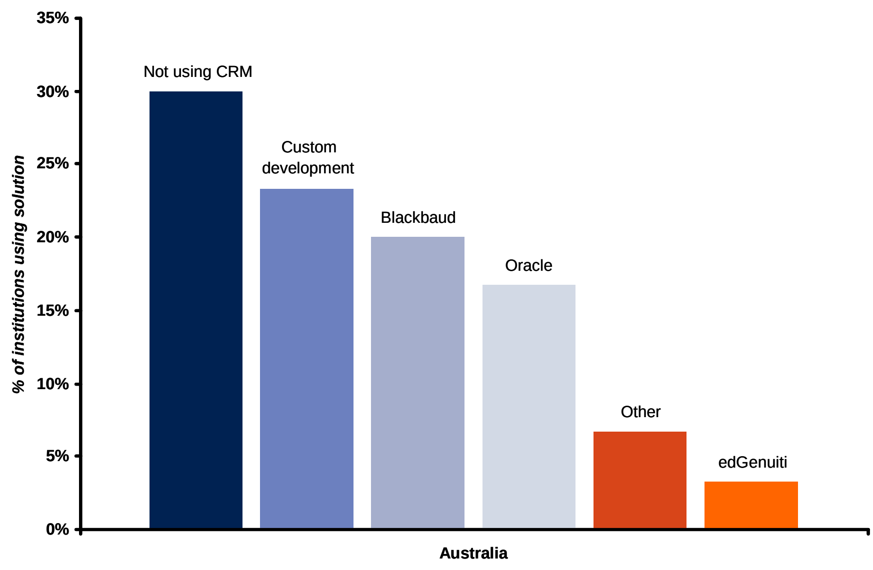
Recognizing the higher education market's attractive opportunity size and growth rate, many vendors have entered the CRM competitive landscape. In fact, institutions reported using 25 different CRM vendors in a recent Datamonitor study. The market's diversity, however, should not infer a "wild west" environment, as established patterns and segmentation have already begun to emerge. This segmentation is particularly evident on a geographic basis, driven, at least in part, by the differing contexts for institutional IT at the national level. As a result, Datamonitor encourage vendors seeking to gain a foothold or establish partnerships internationally, to understand how the CRM competitive landscape varies across the leading higher education markets, including:

- Risks and opportunities characterize the Australian higher education market;
- UK higher education institution choose from a broad set of CRM vendors; and
- There is a cacophony of CRM vendors in the US higher education market.

### Risks and opportunities characterize the Australian higher education market

Characterized by a more centralized IT structure, Australian higher education institutions have historically been able to marshal sufficient resources for investing in custom development projects. The student information system (SIS) Callista is an excellent example of one such project, as it was created at Deakin University and the University of Western Sydney. While the cost of maintaining these solutions is, at least in part, prompting many Australian to move away from an in-house development model for adopting new solutions, a large percentage remains that will continue using this approach. Datamonitor's recent Education Business Trends Survey found that 23.3% of Australian institutions reported using a CRM solution that was developed specifically for them. As they represent the largest group of respondents, after those which were not using a CRM, it is important for vendors to recognize that many CRM opportunities in Australia are likely to be for services and support rather than licenses. However, as 30% of respondents indicated that they had not yet adopted CRM, an attractive "greenfield" still exists for vendors who are able to communicate that their solutions provide value above and beyond what internally-developed solutions could provide. The most commonly cited commercial vendors in the study were Blackbaud with 20% of respondents and Oracle with 16.7%. As Blackbaud focuses exclusively on providing CRM software for fund-raising activities in the non-profit sector and Oracle offers a full-suite of business solutions for multiple vertical industries, these vendors are quite different, but their high number of citations may suggest that Australian institutions prefer enterprise-class applications and have already recognized the usefulness of managing alumni relationships more actively. In the end, CRM vendors seeking to enter the Australian higher education market should recognize that while many institutions have yet to adopt CRM, there is a national proclivity for internal development projects and potent competitors, such as Blackbaud and Oracle, have established presence.

**Figure 5: A small number of vendors represent the CRM competitive landscape in Australia**

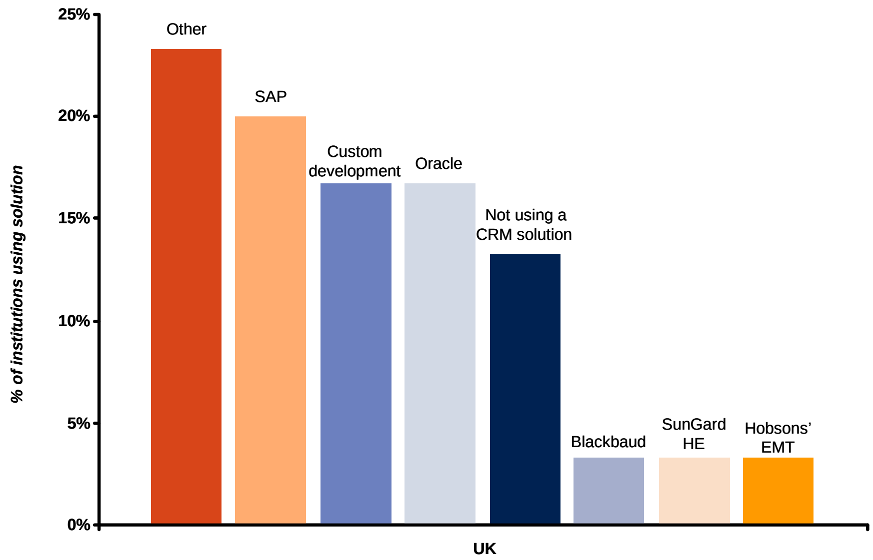



Source: Business Trends - Education Technology H2 2007 (DPTC0005) DATAMONITOR

## UK higher education institutions choose from a broad set of CRM vendors

While the admissions process might be centralized, the purchase and maintenance of technology is highly decentralized amongst UK higher education institutions. Many universities operate as a loose confederation of colleges, each with its own governance model, faculty and endowment. Therefore, it is not surprising that a vibrant array of vendors, from start-up vendors with only a few clients to publicly-traded software vendors with billions in annual revenue, comprise the CRM competitive landscape in the UK. 23.3% of respondents, in a recent Datamonitor study, selected the "other" category when asked which CRM solution their institution used. Leading commercial vendors included SAP with 20% of respondents and Oracle with 16.7%. It is important to note that over time, the predominance of these vendors and those in the "other" category may fade, as many US-based CRM vendors have communicated their intentions to launch a global expansion from the UK. It is also important to note that while it is not as extreme as the Australian higher education market, UK institutions exhibited a strong tendency towards custom development, which is in line with other Datamonitor findings about this market, particularly around learning management systems (LMS). Taking these factors together suggests that the UK higher education market is likely to become increasingly competitive for vendors. In order to navigate these changes successfully, it will be important for vendors to communicate a strong message about how their solution supports retention and development and does it more effectively than an internally developed solution would be able to do.

**Figure 6: UK higher education institutions choose from a broad set of CRM vendors**




Source: Business Trends - Education Technology H2 2007 (DPTC0005) DATAMONITOR



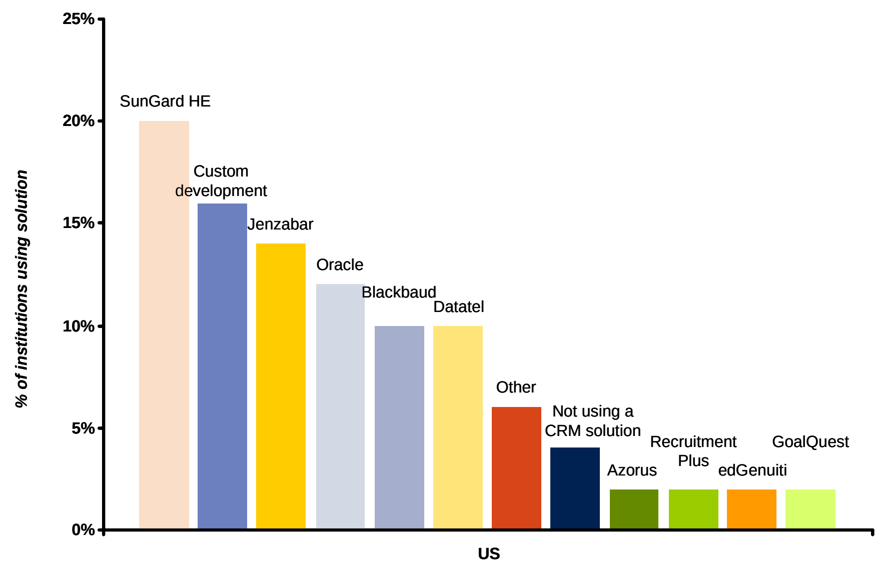
 

## There is a cacophony of CRM vendors in the US higher education market

A thousand flowers bloom across the competitive landscape for CRM in the US higher education market. As higher education institutions in the US use a market-based approach for recruiting students and have an established culture for alumni giving, many vendors have had ample time to develop solutions to support these processes. Unfortunately, the noise created by this vendor cacophony has made hearing a coherent message about CRM's value difficult for many institutions and, in fact, may have contributed to inhibiting the more substantive usage of this solution area. As a result, in order for the US market to meet its growth potential, vendors must advance a widely-accepted definition for CRM and communicate how this solution area offers functionality and value beyond the institution's SIS solution.

Although SunGard Higher Education only recently launched its Banner Enrollment Management Suite, institutions have been using its solutions, for many years, to support relationship management, especially its Advance products, formerly known as BSR, during the advancement phase of the student lifecycle. In a recent Datamonitor study, 20% of respondents indicated that they were using a CRM solution from SunGard Higher Education. Other vendors of note included Jenzabar, Oracle, Blackbaud and Datatel. Interestingly, besides Blackbaud, each of the most highly cited vendors provides a full suite of administrative solutions, potentially suggesting that institutions are more likely to purchase a CRM solution from their SIS provider. Datamonitor believes that this tendency will intensify as institutions seek to develop a 360° view of the student experience that persists across the entire lifecycle. As a result, vendors should anticipate a growing consolidation or "weeding out" of the market as SIS vendors increasingly provide CRM solutions.

**Figure 7: There is a cacophony of CRM vendors in the US higher education market**




Source: Business Trends - Education Technology H2 2007 (DPTC0005) DATAMONITOR

## ACTIONS

### *Future opportunities will arise from both new and expanded CRM installations*

The higher education market offers an attractive set of opportunities for CRM vendors. As spending growth will be driven, at least over the near-term, by new CRM installations and the expansion of existing ones, vendors at both the high and low ends of the market will benefit. The ability to capture both of these opportunities will be difficult, as department-level decision-makers are likely to perceive enterprise-class applications as beyond their reach and cabinet-level decision makers may believe that point solutions are unable to support an institution-wide implementation. As a result, vendors employing a strategy to obtain an institutional beachhead through individual departments must be strategic, from a product development and communications perspective, in order to mitigate the risk of being displaced by a more established vendor when the institution standardizes on a single application. Regardless of this challenge, Datamonitor believes that the higher education market, over the next few years, will offer a sufficient number of opportunities for vendors in both categories.

### *Different higher education markets require different CRM solutions*

As the needs and preferences of higher education institutions are influenced by their geographic location, vendors must tailor their strategies and solutions. A "one size fits all" approach to entering the Australian, UK and US higher education markets will be unsuccessful for most CRM vendors. Each market has its own unique context that influences the extent to which institutions are considering the purchase of a CRM solution, what processes they will use the solution to support, and which vendors they are likely to consider. Taken together, the answers to these questions will have a profound impact on whether a vendor's financial investment to enter a specific new market is warranted. As a result, Datamonitor highly recommends that vendors take the time to evaluate carefully the degree of match between their own solution and the features most highly prized by institutions as well as their chances of navigating the competitive landscape within the context of a specific market's opportunity size. While many vendors are likely to find the Australian competitive landscape, for example, particularly appealing, few will be able to provide solutions that are sufficiently configurable to satisfy this market's appetite for customization without an unjustifiable investment, given Australia's market size, in product development.

### *CRM vendors should prepare for a shifting competitive landscape*

While the competitive landscape for CRM in higher education currently supports a large and diverse set of vendors, the market is maturing rapidly. As a result, cleavages are likely to emerge along product segmentations, such as the distinction between point and enterprise-class solutions, that require vendors to offer best-of-breed applications in order to survive. Moreover, as SIS vendors increasingly offer more robust CRM capabilities, CRM vendors will find themselves competing directly not only with some of the largest organizations in the market, but also with the only vendors that are able to provide seamless integration between their tool and crucial sources of student information. The day that the applications market in higher education is dominated by only a few SIS vendors is a long ways off and given higher education's apprehension about investing too heavily with a single vendor or becoming subject to vendor lock, this day may not in fact ever arrive. In either case, vendors should mitigate their own risks by developing best of breed solutions, cultivating a large and loyal installed base and establishing partnerships with leading SIS vendors to facilitate data integration.



# APPENDIX

## Abbreviations

- CAGR – Compound Annual Growth Rate
- SEM – Strategic Enrollment Management

## Definitions

- **CRM** – A Constituent Relationship Management (CRM) solution is a software application that typically supports the management of interactions between the institution and students, including those at the prospective, enrolled, and alumni stages of the student lifecycle, for such activities as recruitment campaigns, retention, academic advisement, helpdesk support and alumni development.
- **ERP** – An Enterprise Resource Planning (ERP) solution is a software application that supports institution-wide transactions related to human resources and financial management functions, such as payroll, training, time & attending, benefits, general ledger, cash management, and accounts payable & receivable.
- **LMS** – A Learning Management System (LMS) provides features and functionality that support, in an organized way, the delivery of instruction, through a myriad of pedagogical approaches, over the Internet.
- **SIS** – A Student Information System (SIS) solution is a software application that manages and tracks student data and transactions, such as course registrations and grades, demographic and contact information, attendance history and student schedules.

## Methodology

- Industry opinion research – Interviews were conducted with leading CRM vendors.
- End-user research – Institutional technology decision-makers and departmental administrators were interviewed.
- Secondary research – Secondary research sources were used to guide and validate the conclusions of this brief.

## Further reading

Business Trends: Education Technology (DPTC0005, September 2007)

Building an Effective CRM Solution for the Higher Education Market (BFTC1672, August 2007)

Priming the Pump for CRM in Higher Education (BFTC1670, July 2007)

Global Higher Education Spending on CRM, 2007 – 2012 (IMTC0098, July 2007)

Decision Matrix: Selecting a CRM vendor in the higher education market (DMTC2109, June 2007)

Expanding Accessibility to Technology in Education Institutions (DMTC1342, September 2006)

Effectively Managing & Leveraging Data in Education Institutions (DMTC1340, August 2006)

Best Practice with CRM by Higher Education (BFTC1211, December 2005)

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## Datamonitor consulting

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