



## Improve Student Services , and Manage Communications with Microsoft Business Solutions–CRM

Smaller budgets, increasing enrollment, and new reporting standards make it difficult for educators to respond to student needs and ensure full compliance with government regulations. Administrators, department heads, student services managers, and alumni relations managers need tools to track and report information to multiple departments.

Administrators need easy access to reports containing current, accurate information about student and alumni interactions, enrollment, and financial status. They also need the assurance that confidential information will be kept secure and made available only to authorized viewers.

Schools need the ability to communicate with the district office, and universities need to coordinate efforts across admissions, student records, and financial aid departments. Microsoft® Business Solutions for Customer Relationship Management can help educational institutions meet these needs cost-effectively.

### Track student requests and alumni donation history, maintain accurate records, and centralize information

Microsoft CRM, built on Microsoft .NET-connected technologies, allows educational institutions to collect and share information to improve student services. Student and community requests can be tracked to ensure follow up and enable quick resolution. Financial and enrollment data can be more easily maintained by multiple departments to support strategic analysis and planning.

Microsoft CRM enables educational institutions to:

Maintain centralized records. One student record that can be easily updated by any department enables school

districts and universities to keep student information current. Redundant data entry is eliminated, reducing errors and improving collaboration. Department managers gain a more accurate and complete view of each student or alumnus, so personnel can respond to their needs appropriately and build lasting, loyal relationships.

Ensure efficient student services processes. Assign, manage, and resolve student issues successfully with automated routing, queuing, and escalation of requests, along with case management, communications tracking, and auto-response e-mail.

Understand student, community, and alumni needs. Microsoft CRM includes reports that let you identify common student, alumni, and community support issues, track and evaluate needs, and measure service performance. Employees can analyze information, identify trends over time, and adjust budget priorities to meet changing needs.

Share information easily. Identify top donors or students with the most urgent needs to prioritize service delivery, provide a complete view of each individual, and maintain accurate contact histories. Microsoft CRM builds accurate case records that can help lower the cost of compliance and satisfy reporting requirements.

Customize, scale, and integrate easily with Student Information Systems. Configure user interfaces and workflow processes, customize the solution to fit your institution's needs, and scale the installation to meet changing requirements. Microsoft CRM integrates with other Microsoft Business Solutions applications, eliminating redundant data entry and streamlining business processes.



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Microsoft CRM also integrates with Student Information Systems, including SCT PowerCampus and STI's solution for primary and secondary schools. Track tuition bills, payments and other transactions, assess late fees, and communicate easily with students or parents using familiar Microsoft e-mail and mail-merge capability. Our solutions offer customizable student billing systems that enable flexible rules, payment plans, and account web access.

Microsoft Certified Business Solutions Partners offer integrated, customizable applications that allow schools and universities to connect departments and suppliers to improve efficiency and reduce costs.



## Solutions that meet the unique needs of school districts and universities

Educational institutions are facing new demands to demonstrate and document efforts to improve performance, customize interaction with school or university systems, and increase services delivery. Microsoft CRM gives administrators the information and insight they need to monitor trends, record progress, and pull timely, customized reports.

Microsoft CRM enables schools and universities to centralize student information management using familiar tools and cost-effective technology. Microsoft CRM easily integrates with legacy systems, extending the value of technology investments, promoting adoption, and reducing the learning curve.

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Departments can easily share information, enabling coordination of services and rapid response to newly identified needs. Case history tracking supports rapid problem resolution by prompting follow up information and automatically alerting staff when action needs to be taken. Built-in tracking and reporting tools improve communication and reduce the burden of reporting requirements.

Microsoft CRM can help your institution:

- Improve student services and increase satisfaction by tracking and responding quickly to issues
- Analyze trends in student requests and alumni donation patterns to identify opportunities for improvement
- Ease departmental and physical boundary barriers to promote information sharing, collaboration and coordination of efforts
- Reduce cumbersome processes to improve student services, increase departmental efficiency, lower costs and free time for other school business
- Enable access to current student or alumni case histories from Microsoft Outlook<sup>®</sup> or the Web
- Integrate seamlessly with Student Information Systems and enable better tracking of student billing, payments and other transactions
- Enhance administration management to track the career progression of faculty throughout their tenure

Today's students expect the convenience and efficiency of technology-driven services. Microsoft CRM provides the foundation for effective student services delivery and alumni relations management. Implementing Microsoft CRM provides a foundation for improving the quality of student services and alumni relations, boosting productivity and efficiency, and meeting the challenge of serving more students with fewer resources.

For more information about how Microsoft CRM can help your district or university, visit [www.microsoft.com/education/CRM.aspx](http://www.microsoft.com/education/CRM.aspx).

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