Student Relationship Management

Rhodes College
Relationship Management Team

RMT
March 14, 2008
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Change History

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<thead>
<tr>
<th>Author</th>
<th>Date</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Amy Oakes</td>
<td>3/14</td>
<td>Initial version</td>
</tr>
<tr>
<td>Jay Eckles</td>
<td>3/17</td>
<td>Changed CRM to SRM; took pass at some specific objectives and more detailed stakeholders list</td>
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Description of current process

When representatives from many of our student services offices met in February 2006 to determine the flow of communication with students, we found that we were inconsistent. We asked of ourselves which offices were asking which students for which information at what times and what those offices were doing with that information. We discovered gaps and contradictions in our relationships with our students and parents to the effect that we showed that, figuratively, the right hand was unaware of the left, and we showed that our promise of the value of the student attending a small institution “where everyone knows your name” could be an empty promise. Thus, there is a need to better monitor and control the relationship of the institution to the student, increasing the ability to provide individual and personal communication and service to all students in order to assist the student in achieving student lifecycle goals.
Project Scope

Objective
The goal of this system is to create a way to document and maintain, in a shared resource, the data and information we gather on students. By utilizing a SRM, Student Services will have the ability to act more consistently in providing personal and individualized services to students. In the absence of a centralized system, individuals will act independently to meet student needs, resulting in a loss of overall efficiency. Thus, effective SRM is a requirement as we move into a new structure and culture for delivering services to students.

Educational institutions are changing how they operate and interact with their students. Students have come to expect highly personalized service and feedback in real time. The use of a SRM system will improve our communication practices and refocus our efforts on improving the quality and consistency of our service to students.

Specific objectives:
- To present a unified front as an institution to any given student; we want the student to perceive Rhodes as a single institution versus a collection of many offices.
- To manage institutional communication with students; we need to know what we’ve communicated to them, when we’ve done it, how we’ve done it, and what the communication plan is for that student or group of students in the future.
- To identify and manage the phases of the student life cycle, including the labeling of student population segments and the association of goals and communication plans with those segments and students within them.
- To capture and share (with appropriate individuals) information about Rhodes’ relationship with each student that is not captured by Banner. For example, we want to know if a student is raising “red flags” in multiple areas that might not otherwise merit attention individually but collectively represent a problem for the student.
- To capture and display dashboard indicators measuring the effectiveness of communication plans and consequently the institution’s relationships with students.

Stakeholders
- Counselors/Advisors (including faculty and staff)/Coaches
  o Producers and consumers of student information
- Enrolling and Financing team
  o Producers and consumers of student information
  o Implementers of communication plans for students pre-enrollment.
• Student Organization Development, Student Development and Academic Services, Out of Class and Post-Baccalaureate Activities teams
  o Producers and consumers of student information
  o Implementers of communication plans for students during enrollment.
• Alumni Affairs and Development
  o Producers and consumers of student information
  o Implementers of communication plans for students post-enrollment.
• RMT
  o Charged with monitoring institution’s relationships with students
  o Developers of communication plans
• OMT
  o Charged with operationalizing and monitoring service delivery in context of student life cycle defined by RMT
• Communications
  o Maintainers of the “Rhodes brand”
• Information Services
  o Responsible for provision and integration of information systems

**Preliminary Project Schedule**
<use this section to define the project schedule in as much or as little detail as is appropriate.>

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activity/Milestone</th>
<th>Participants</th>
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**Future work**
<use this section to define any requirements or other work that must be done in future iterations of the project but are not applicable to the current iteration.>
Requirements
<use this section to define the requirements for the project>

A. Requirements Section A

  1. Requirements Item A. 1.

Design/Implementation

<use this section to describe the manner in which the requirements have been or will be implemented.>

Technology

Units

<use this section to document the individual units that make up the implementation of the system. If using an Object Oriented methodology, include a class diagram here.>
Glossary

<use this section to define any terms that may not be familiar to those likely to read this document.>

**RMT** – Relationship Management Team – group within Student Services Reengineering tasked with defining how Rhodes as an institution should relate with each of its students.

**SRM** – Student Relationship Management; analogous to the industry term Customer Relationship Management. A system for managing the relationship between an institution and its students.