EUNIS 2017: Student-centricity and data openness in a CRM system for higher education

Anssi Kuusela¹, Teemu Ylikoski², Heli Uusipaavalniemi³, Kimmo Pettinen⁴

¹Regional Service Manager; Laurea University of Applied Sciences; Ratatie 22, FI-01670 Vantaa, Finland; anssi.kuusela@laurea.fi
²Director, Marketing and external relations; Laurea University of Applied Sciences; Ratatie 22, FI-01670 Vantaa, Finland; teemu.ylikoski@laurea.fi
³Development manager, ICT; Laurea University of Applied Sciences, Ratatie 22, FI-01670 Vantaa, Finland, heli.uusipaavalniemi@laurea.fi
⁴CIO; Laurea University of Applied Sciences; Ratatie 22, FI-01670 Vantaa, Finland; kimmo.pettinen@laurea.fi

Keywords
Student-centricity, data openness, CRM, partnership management, customer management, process development

1. SUMMARY / ABSTRACT

Higher education institutions battle with conflicting ICT demands: operational pressures drive the need for more detailed information repositories, while the nature of the public educational institute and its duties toward students drive for data openness. This case study describes the design and deployment of a CRM system for a HEI that has brought key customer data at the hands of its students. The system balances between closed data and open data, and centralised vs distributed administration.

Higher education institutions (HEI’s) face new types of challenges in their education processes and in lowering economical situation (Cook 2017) as many other actors in present situation. There is a demand to be economically more effective and in Finland demand to regional development and having strong regional influence are rising higher among many demands. HEI’s are in need to become more publicly accountable and demonstrate added value. In a fast-moving socio-economic, political and technological environment (JISC 2013) HEI’s are facing problems in data management, particularly relating to customer and partnership data to cover the needs based on new growing demands.

While many HEI’s have information repositories for stakeholders or business customers, these seldom cover the entirety of the institution’s footprint. A HEI’s impact results from the sum of its activities, whether with educational partners, business transactions, research programs, or stakeholder issues (Rigo et.al. 2016 p.56 and Lindh 2010 p.4). However, because of the different nature of these fields, it is very difficult to govern an over-arching outlook of the data.

As a result, a CRM is challenging to set up for managing partnerships and customers in a larger scale. The problems appear to exacerate when a system implementation needs to integrate multiple platforms between separate functions in the organisation. There are study processes and business processes alongside which challenges the traditional uniform way of CRM use. Conventionally, CRM is used as a main data resource for business critical processes. Because of the inherent differences between educational institutions and businesses, a different approach may be appropriate. A CRM
project is more than an IT project in a HEI. Our observations suggest it can be more of a cultural change project.

This study describes a practical case that highlights the challenges and possibilities needed to find common processes and solutions for effective CRM use in a HEI. The paper and the project that it describes is part of a change process that has been evolving in the case organisation. Some of the theoretical underpinnings are described in a previous paper (Ylikoski & Kortelainen 2012).

This case study relies on empirical methods as well as earlier research on partnership management in general, in HEI’s and particularly, in regional development in HEI’s. We will raise questions such as “Who is going to be the primary user?”, which are typically not on the critical path in conventional CRM implementations (Van Vugt & Knasys 2015 p.41).

The study is following A.D. de Groot’s empirical cycle (Heitink 1999) using data from earlier CRM-projects in Laurea as well as some other studies concerning CRM implementations in a HEI. This supported with the series of workshops having teachers, students and other actors in Laurea to contribute for the project and the study inside it. When thinking that nearly half of the CRM implementations fail in private sector (Larson 2013) it is no wonder that already in early phase the hypothesis was clear that we should find a new approach to get CRM implemented effectively - even four earlier projects had been failed trying to get CRM-system defined and implemented (Ylikoski et.al. 2015 - 2017). Data from earlier tryouts was valuable to this study and showed clearly that earlier we have had completely wrong approach to CRM in HEI. With knowing the earlier experience it was chosen to do definition of the system from completely new perspective of using CRM in HEI.

The case organisation, Laurea University of Applied Sciences in Finland, relies on a rather unique operational model termed Learning by Development. Most studies include real life projects with businesses and other organisations. In practice, Laurea handles several hundreds of real worklife projects all the time, and more than 90% of those are carried out by the students as part of their studies. (Ylikoski & Kortelainen 2012 and Ylikoski et.al. 2015 - 2017) Due to this approach, worklife partnerships are in the core of Laurea’s strategy. As a consequence, it is imperative to be able to document, manage and utilise the partnership information in an effective way. Hence the need for a new type of CRM thinking.

A typical CRM is designed to support the needs of an organisation’s employees. However, because of the unique nature in this case, we designed the system especially for the student’s needs. While it is important that the staff use the system as well, the students of Laurea are on a critical path in terms of data entry, management, and review. In fact, partnership data responsibilities lie on the shoulders of students. In most cases, partner information is entered and managed by the students.

We are aware that it is far from typical to allow an educational institute’s 8,000 students access to its core CRM. However, in terms of Laurea’s approach and ethos, this is actually quite logical. It is based on a core belief of true cooperation with the student and a high regard for the student’s work. There are practical issues as well. During last decade, Laurea has attempted to implement or build a shared CRM multiple times. These attempts have suffered from the typical employee-centricity where the main responsibility and burden has been on staff. The attempts have not been successful.

This paper describes a different approach; one that builds directly on student use and offers support for the core processes of a HEI (Noaman & Ahmed 2015 p.394): education, research, and regional development. It also reverses the transaction. In a traditional CRM, staff are required to enter their customers’ data in the system for shared use. This faces substantial problems in a HEI, where partnerships are often tied to individual research interests and perceived as personal property. By reversing the logic, we are hoping to avoid this downfall and create positive benefits for the staff.

Needs for high quality partnership information management have been constantly growing during last years in Laurea, like in many higher education institutes (Ylikoski et.al. 2015 - 2017). As a part of developing the regional development activity, Laurea’s management decided on acquisition and implementation of a suitable CRM to support partnership management. Because of the particular situation as described above, the system was branded as “PRM”, Partnership Management System. It is intended to cover much more than “just” customers.

The system implementation took place in a time when data openness, shared knowledge and lean six sigma are current topics. These had a substantial impact on the implementation. Partner organisations are not allocated to managers as in many commercial implementations. Although the
information on key persons is available, the system does not inherently limit access. This allows for a
distributed ownership model where multiple persons can be in charge of a partner organisation.
Some sensitive data areas are exceptions.

Students as CRM users has other benefits as well. It offers a great possibility for students to learn to
use and understand CRM in a real production environment. Moreover, basic use is relatively easy due
to a user friendly portal, through which users can access the system. Full scale CRM is also available
when needed for the needs of partnership information management and project management.

The best knowledge to produce and maintain the partner organisation’s basic information is in the
hands of the partner organisation itself. One key theme in the project relates to data openness and
enabling partner’s limited use of the system is on the roadmap, although not implemented in this
phase.

2. REFERENCES

Cook, R., “Studying CRM Software In Higher Education; Constituent Relationship Management
Software Increasingly Makes The Grade”. Retrieved March 3, 2017, from:
http://www.CRMsearch.com/higher-education-CRM.php


https://vwCRMhandbook.pbworks.com/w/page/52081662/Good%20Practice%20In%20Customer%20Re-
relationship%20Management


Laurea University of Applied Sciences (Ylikoski, T., Kuusela, A., Pettinen, Uusipaavalniemi, H.,
Kortelainen, M.) (2015 - 2017), CRM project for Laurea UAS, full documentation and empirical
material. Location: Laurea UAS

in Higher education - Creating a Knowledge-based CRM Framework for Swedish Universities”.

Computer Science 65 (2015) 385 - 395, International Conference on Communication,
http://ac.els-cdn.com/S1877050915029300/1-s2.0-S1877050915029300-main.pdf?_tid=01582d84-
001b-11e7-b3cf-00000aacb35e&acdnat=1488550352_269441d785df2a8c46e610e898006e7e, Available
also: www.sciencedirect.com

Education Institution”. JISTEM - Journal of Information Systems and Technology Management, On-

could save your university millions of dollars”. Retrieved March 3, 2017, from:

Education; The guide to selecting a CRM system for higher education institutions”. Retrieved March 3, 2017, from:
https://www.slideshare.net/MykolasKnasys/CRM-systems-in-higher-educationmain-
report

Ylikoski, T., Kortelainen, M.J., (2012),"A new approach for managing university-workplace
3. AUTHORS’ BIOGRAPHIES

Anssi Kuusela has broad professional background in the field of security and ICT business in managerial and leading positions. Recent years he has been working in Laurea as senior lecturer and Regional Service Manager. He has broad international experience throughout his career. Having been a business consultant and active developer he has acquired broad knowledge on developing and implementing ERP and CRM systems as well as other ICT systems in a variety of organisations. He has also specialized to public procurement.

He has masters level degree in National Defence University and is currently a postgraduate student for PhD in the University of Tampere’s Faculty of Management Administrative Science. https://www.linkedin.com/in/qcla07/

Ph.D. (Econ.) Teemu Ylikoski has a broad background in research and expert positions, in teaching and training, as well as in management. He has worked in marketing planning, market research, advertising, and trusteeship. In addition to having written publications on customer relationships, he has extensive experience in managing partnerships and selling complex services. Teemu earned his Doctorate in Marketing (specifically, consumer online information search) and has several publications on online marketing as well. Teemu is also an entrepreneur, specializing in advertising and PR.

https://www.linkedin.com/in/ylikoski/

Heli Uusipaavalniemi has experience in wide range of IT field including project management and support. Now she works in Laurea as an IT development manager and has a passion to develop better working environments through better systems and infrastructure.

https://www.linkedin.com/in/heli-uusipaavalniemi-638b4111/

Kimmo Pettinen has broad background in ICT development and management in business and in Higher Education Institute. He has Masters degree in Computer Science in the University of Helsinki. He has professional background in ICT management and statistical management duties before Laurea UAS in pharmaceutica industry, in Pension insurance business and in Finnish State Treasury. He has experience on CRM and ERP systems in business as well as in HEI’s.

https://www.linkedin.com/in/kimmo-pettinen-b13b894/