

COMPANY CASE STUDY

# THE UNIVERSITY OF BUCKINGHAM



## COMPANY BACKGROUND

The University of Buckingham is a non-profit private University with a student base of approximately 2,700 students. The University offers bachelor's degrees, master's degrees, and doctorates through five "schools" (or faculties) of study.

Pragmatiq and The University of Buckingham worked together to move the university away from a legacy excel-based system to a centralised, cloud-based solution.



### CHALLENGES

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- › Previously maintained a disparate, legacy Excel-based system
- › Excel spreadsheets were also used to manage certain elements of the student process
- › Difficult to manage relationships and correspondence with stakeholders
- › Strain on the International Recruitment team
- › Challenges around the lack of mobile capability
- › Limitations with the reporting functionality in previous set-up
- › Staff would work outside of the systems to achieve their objectives



### SOLUTION

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- › Implemented Microsoft Dynamics 365
- › Established a website integration
- › Leveraged integration with Microsoft Bookings
- › Built functionality to manage funding opportunities
- › Established an integration with Outlook
- › Created dashboards, views, and charts to provide greater insight into key metrics
- › Implemented standard capabilities of Microsoft Dynamics 365 Marketing
- › Leveraged the native Dynamics 365 mobile and tablet apps



### BENEFITS

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- › Improved access to data
- › Optimised student experience
- › Improved student engagement process
- › Enhanced communication
- › Improved reporting
- › Platform for future growth

## CHALLENGES



The University of Buckingham previously maintained a disparate, legacy Excel-based system that was cumbersome and time-consuming to manage. Excel spreadsheets were also used to manage certain elements of the student process. As a result, data visibility was poor, and it was difficult to manage relationships and correspondence with stakeholders.

Most of the students who apply to The University of Buckingham are international students, and there is an element of relationship building with prospects before they choose to apply. To sort through applicants, the University screening process aims to separate unqualified or uninterested students from those who are likely to process an application. Previously, this was a manual and inefficient process, and put a significant strain on the International Recruitment team.

Correspondence with students was also manual and lacked a human touch. Email generation and communications tracking were highly inefficient, and it was difficult to get an overview of all the interactions a student has been having with the University.

The University of Buckingham also faced challenges around the lack of mobile capability with the previous set-up. The legacy system lacked the ability to capture data outside of the university, which was a challenge for data capture during events where new potential students could be logged and then followed up with by Marketing.

From a fundraising perspective, The University of Buckingham used a legacy solution, alongside various spreadsheets. This lacked cohesiveness and meant that managing fundraising activities could often be a challenge.

Due to the disparate nature of data, there were limitations with the reporting functionality available to staff. Tracking of key metrics (such as conversion rates) was difficult to ascertain, and the University required deeper insight into business and stakeholder data, to make informed decisions and improve the process where required.

Finally, workload management of staff was complex and the functionality within previous systems was difficult to use. As a result, staff would work outside of the systems to achieve their objectives. The University of Buckingham required a system that could support staff with managing the volume of enquiries and applications, providing a better experience for both staff and students overall.

To overcome the above challenges, The University of Buckingham required a system that supports three key areas: Applicant Management Process, Core Stakeholder Management, and Marketing Communications.



## SOLUTION



To overcome the above challenges that the University of Buckingham faced, Pragmatiq implemented Microsoft Dynamics 365; a fit-for-purpose CRM solution that provides a single view of students, alumni, donors and other stakeholders. Additionally, all interactions and communications can be tracked, ensuring relevant data is available to users in a centralised database.

One of the key elements to be supported was the student engagement process and the ability to track the application journey for each person. We established a website integration to allow prospects to fill out an enquiry form demonstrating their interest, on the University of Buckingham website. Following this, a record is automatically created in Dynamics 365, allowing staff to view it and manage the process internally. Continuing that process, staff can easily schedule a meeting with the prospect directly from the system, through an integration with Microsoft Bookings. This saves manual admin time around the back and forth communicating availability and the booking invite is sent automatically.

Within Dynamics 365, functionality was also customised to manage funding opportunities for new projects and track project expenses.

To enhance productivity, we established an integration with Outlook. This ensures staff can easily leverage email templates to standardise correspondence, alongside the ability to track communications against records within the system.

From a reporting perspective, dashboards, views and charts were created within the system to provide greater insight into key metrics and overcome reporting challenges that the University previously faced. In future, Microsoft Power BI could be introduced to provide more comprehensive insights into data and to support decision-making across the organisation.

Standard capabilities of Microsoft Dynamics 365 Marketing were also leveraged to support regular communications with alumni, current student, partners, and other stakeholders.

Finally, as a cloud-based CRM, users are also able to capture data on-the-go, such as at events, by leveraging the native Dynamics 365 mobile and tablet apps.





## BENEFITS



Through the implementation of our solution, the following benefits were realised:

- **Improved access to data** – By implementing Microsoft Dynamics 365 CRM, users can gain a single view of students, alumni, donors and other stakeholders, alongside tracked interactions and communications. As a result of centralising information in one place, users reduce time searching for information and can conduct their daily tasks more efficiently.
- **Optimised student experience** – The system enables The University of Buckingham to better manage the volume of student enquiries and applications they receive, providing a better experience for students overall.
- **Improved student engagement process** – Dynamics 365 improves the student engagement process by providing a simplified and streamlined business process to track the application journey and other relevant information, for each student. The University of Buckingham can use this data to make more informed decisions and better understand where to focus their efforts.
- **Enhanced communication** – By integrating Microsoft Bookings with Dynamics 365, admin time is reduced as users no longer need to manually manage appointments. A better student experience is also provided, due to the automation. Additionally, Dynamics 365 provides a platform to manage and send stakeholder communications, and can be leveraged across more areas in future.
- **Improved reporting** – By centralising operational data and providing improved reporting capabilities, The University of Buckingham can gain greater insight into their data and vastly improve decision making abilities.
- **Platform for future growth** – Dynamics 365 provides a stable platform to build on and can be customised to suit new requirements. In future, The University of Buckingham could extend the system to support other departments or processes in the organisation.



“Right from the start, Pragmatiq were extremely helpful and worked with us to design and develop a CRM system that suited our requirements.

Throughout the process, the team were responsive, engaging and worked hard to understand our organisation and unique processes. I was particularly impressed by the teams expertise and professionalism, and we now have a solution that supports various departments within the University and enhances the overall student experience.

I would highly recommend Pragmatiq and I'm confident that when we require any further support, Pragmatiq will be able to provide it.”

**DEAN JONES – PARTNERSHIPS AND OUTREACH MANAGER AT THE UNIVERSITY OF BUCKINGHAM**



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