UCL Academic Manual

Chapter 1: Student Recruitment and Admissions Framework

Annex 1.1.9

Student recruitment communications and the CRM policy and procedure

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Policy and Good Practice

1. UCL uses a Client Relationship Management (CRM) system as an integral part of its student recruitment operations. The CRM is managed centrally by MarComms.

2. Good practice in student recruitment means keeping in touch with prospective students at key points from enquiry to enrolment, and at each stage providing them with valuable information to help them in the decision making process.

3. Student Recruitment and MarComms keep in touch with all prospective students by sending out student recruitment communications. These are distinct from transactional emails sent out by the Admissions Office which are functional emails dealing with specific stages of the application process.

4. Student recruitment communications are sent by email via UCL's central Client Relationship Management (CRM) system. At time of writing this was *Radius by Campus Management,* but this will be replaced by a new Microsoft Dynamics solution sometime in the next 12 months.

5. In line with GDPR guidelines, student recruitment communications are sent only to prospective students who have actively given their consent to be contacted.

6. There are three categories of subject-specific or general student recruitment communication sent out by Student Recruitment and MarComms: enquirer; departmental application acknowledgement; conversion. These are sent out to enquirers, applicants, and offer holders respectively.

7. The number of student recruitment emails sent to enquirers should, where possible, be limited to seven.

8. The CRM system is intended to be a central repository for all prospective student enquirer data.

9. The Data Sharing Agreement, written by Legal Services, and signed by UCL and Campus Management, specifies that use and disclosure of Personal Data shall be in accordance the Data Protection Act and the Human Rights Act 1998. Therefore, Personal Data should remain within the CRM system and should not be exported.

10. The CRM system is used to send both automated and manual email communications to prospective students and offer holders as part of the student recruitment process.

11. The CRM team in MarComms provides training and guidance to enable faculties and their departments to directly access *Radius by Campus Management* in order to create their own email content.

12. Good practice when creating student recruitment emails includes the following:

   - emails should be personalised;
   - emails sent via the CRM should be targeted and specific to the individual. This helps to maximise the relevance of the information contained within the email and helps to ensure that value is provided to the recipient;
   - they should provide engaging copy setting out customer value proposition for the institution or department;
   - they should drive traffic to the institution or department website;
   - they should include testimonials or student views;
   - they should carry the signature of a named individual in the department or Head of Department;
   - they should use hi-res images unique to the department (rather than using UCL stock images, e.g. the portico); and
   - they should provide links to short, high value video content.
   - Emails should be image rich and text light
   - Emails should contain one call to action.

13. Copy for enquirer, application acknowledgement, and conversion emails relating to relevant academic subjects and departments is written by Faculties, with Student Recruitment supplying data targets for Radius.

Enquirer emails

14. Enquirer emails are sent out to all enquirers. Enquirers are prospective students who have expressed an interest in UCL by submitting their data, but who have not yet made an application.

General enquirer emails

15. The general enquirer emails are sent out to all enquirers irrespective of the subjects they are interested in studying.

16. Enquirers receive a series of three emails:
    - Thank you for your interest in UCL (+24 hours after registering their interest).
    - Application information (+7 days after registering their interest).
    - Fees and funding information (+14 days after registering their interest).

17. The content of these emails differs according to the level of study that the enquirer is interested in.

18. Copy for the general enquirer emails is written by Student Recruitment and MarComms.

Subject-specific enquirer emails

19. The subject-specific enquirer emails are sent out to enquirers who have expressed an interest in a specific subject of interest. They are sent out in addition to the general enquirer emails.
    - Subject-specific enquirer emails (+3 days after registering their interest).

20. The content of these emails differs according to the level of study that the enquirer is interested in.

21. When submitting their data, enquirers are given the option to express an interest in a subject of interest, rather than a department. Enquirers can select up to three subjects of interest.

22. Although often subjects of interest map neatly onto a department, they sometimes span more than one department, or refer to just part of a department. Therefore at enquirer level, emails cannot be sent on the basis of department, and must be sent according to subject of interest.

23. Copy for the subject-specific enquirer emails is provided by the faculties.

24. Copy must be submitted by faculties using the templates provided by MarComms.

25. The emails are checked and/or updated annually.

26. The call for **undergraduate** enquirer copy is sent out to faculties by MarComms in April, for publishing in August.

27. The call for **graduate** enquirer copy is sent out to faculties by MarComms in May, for publishing in July/August.

28. Examples of the subject-specific enquirer emails, together with guidelines on content, are available at www.ucl.ac.uk/cam/resources (password protected).

Departmental application acknowledgement emails

29. Departmental[1] application acknowledgement emails are sent out to all prospective students who have made an **undergraduate** application, but who have not yet received a decision. These emails are sent out on behalf of departments in order to thank the prospective student for their application, and to provide some information about the department. This is in acknowledgement of the fact that not all applicants would have previously been enquirers and therefore received enquirer emails.

30. Copy for the department application acknowledgement emails is provided by the faculties. Submission of copy for these emails by the faculties is mandated by the Chair of StRAFC.

31. Copy must be submitted by faculties using the templates provided by MarComms.

32. They are checked and/or updated annually. The call for copy is sent out to faculties by MarComms in June, with a deadline of August.

Conversion emails

General conversion emails

33. General conversion emails are sent out to all applicants who have received an offer of admission, but who have not yet accepted the offer. These emails are sent only to offer-holders who have not accepted their offer 14 days after the offer was made.

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[1] Where applicant data is concerned, an application is always associated with a department. Therefore departmental application acknowledgement emails can be sent according to an applicant's department, rather than subject of interest.

- General conversion emails (+14 days after the offer was made)

34. The content of these emails will differ according to the level of study for which the prospective student has an offer.

35. Where applicant data is concerned, an application is always associated with a department. Therefore conversion emails can be sent according to an applicant's department, rather than subject of interest.

36. Copy for the general conversion emails is written by MarComms.

Subject-specific conversion emails

37. The subject-specific conversion emails are sent out to all applicants who have received an offer of admission, but who have not yet accepted the offer. These emails are sent only to offer-holders who have not accepted their offer 18 days after the offer was made.
    - Subject-specific conversion emails (+18 days after the offer was made)

38. The content of these emails will differ according to the level of study that the enquirer is interested in.

39. Copy for the subject-specific conversion emails is provided by the faculties.

40. Copy must be submitted by faculties using the templates provided by MarComms.

41. They are checked and/or updated annually. The call for **undergraduate** and **graduate** copy is sent out to faculties by SRM in August, for publishing in October.

Ad hoc emails

42. Good practice in student recruitment also means using the CRM to send out ad hoc emails to prospective students in order to provide them with additional information. Such emails include:

- Announcements of new programmes
- Invitations to open days
- Invitations to recruitment events including fairs, presentations, and webinars
- Notifications of new scholarships
- Delays to application processing/decision making

43. Departments are encouraged to send these emails via the CRM in order to ensure consistency of style and appearance. This is done by contacting the CRM Manager in MarComms.

Management of registrations for student recruitment events

Good practice in this context means the following:

- Use of the CRM and its associated product *Gecko Forms* to manage registrations for all student recruitment events organised by UCL, e.g. open days; public presentations; webinars
- Sending a registration confirmation to registrants via the CRM
- Sending an event reminder to registrants
- Recording of attendees or participants at the events and ensuring that attendees are recorded in the CRM
- Sending a post event email to attendees
- Sending a post event email to registrants who did not attend

MarComms can create registration forms for Departments and Faculties to manage their events.

Further guidelines, references and resources

UCL Communications and Marketing resources
https://www.ucl.ac.uk/staff/communications-digital-and-marketing

Data Protection Act
https://www.gov.uk/data-protection