Communicating with Students

Calling Customers to Action!

Ben Rutter, Funding Information Services Account Manager

Session Content

In this workshop we will review the programme of our contacts with students to encourage them to take actions necessary for them to fully access student finance and be prepared for payment arrangements when they start or return to their higher education course:

Specific focus will be placed on:

- The Student Finance England (SFE) and Student Finance Wales (SFW) communication plans undertaken for academic year (AY) 2022/23 and into AY 2023/24

- Enhancements to the information, advice and guidance (IAG) offer and customer application experience

- Targeted messages and promoting 'Call to Action' resources to students and sponsors

- A review of the AY 2022/23 application cycle with identified areas for action

- Applicant engagement behaviour and information needs

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Communication Delivery, Reach and Content
Academic Year 2022/23

Communication Delivery Results: July to September 2022

Across the July to September period for the 2022/23 academic year, a focused timeline was implemented and followed to ensure students received **the right messages at the right time**:

- **July** – Approved reassurance for students, Approved reassurance for sponsors, Eligibility emails

- **August** – Payment readiness, Confirmation of Registration, Forced Non-Means Tested (FNMT) reassurance

- **September** – Ready for payment, Forced Mon-Means Tested (FNMT) reassurance

Email Subject	Volume	Open Rates (Average)	Clickthrough (Average)
Approved Reassurance (Student)	330,000	83%	11%
Approved Reassurance (Sponsor)	373,000	81%	2%
FNMT Reassurance	36,000	82%	3%
Eligibility (Multiple)	23,000	78%	17%
Ready for Payment	887,200	86%	16%
Confirmation of Registration	140,500	88%	14%

Message Reach and Content: July to September 2022

Whatever the driver for the email going out, we made sure the core messages and associated sub messages within each one **were consistent** throughout all of our communications:

Message Reach and Content:

- **1.8 million** targeted communications sent between July and September

- More students and sponsors **knowing how to self-serve** using enhanced online account functionality

- More students 'ready for payment' **than ever before**

- Embedded sub messages **consistent throughout**

- Repeated sends for **niche categories** (Bank Details, National Insurance Numbers etc)

- Push to get students to minimal **funding secured**

Subject	Sub-Messages Detail Provided
Reassurance	• That their application was on track • That a minimum amount of loan was available to all • Payments were on track
Self-Serve	• How to check status and progress • How to make a change if required
What Happens Next	• Step-by-step guide to what happens when they start their course, including registering • A heads up on what to expect next from us (i.e. an email or text follow ups or confirmation)
Expectation Setting	• Being consistent about 6-8 week processing timeframe • Advising the customer that our phone lines are very busy and directing them to a page of online guidance

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Enhancing the Customer Journey: Research to Apply

SFE Campaign Page: A One-Stop IAG Hub

The SFE Campaign Page has been rebranded into '**Everything You Need To Know About Student Finance**' and continues to be the main microsite/centralised HUB for our information delivery strategy:

The SFE Campaign Page: Points of Note

- Home of everything student finance

- Embedded walkthroughs and links to guidance pages

- Call to Action banner to support 'on-time' and 'applying late' students

- Review performance and iterate as we learn from data/customer behaviour

- Design improvements, including photography, text and SFE dual wave style
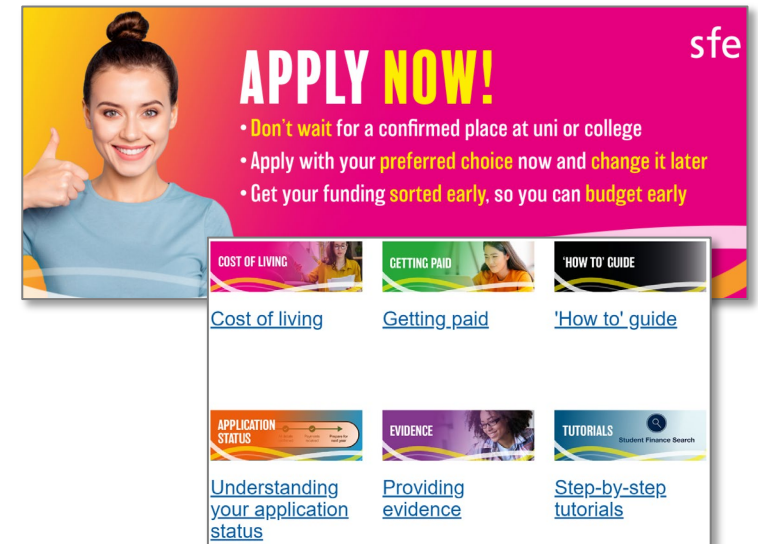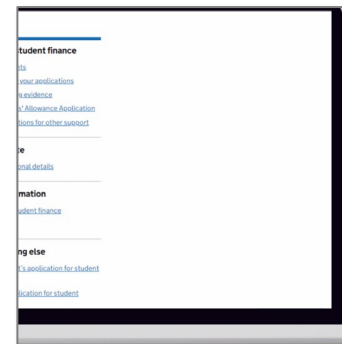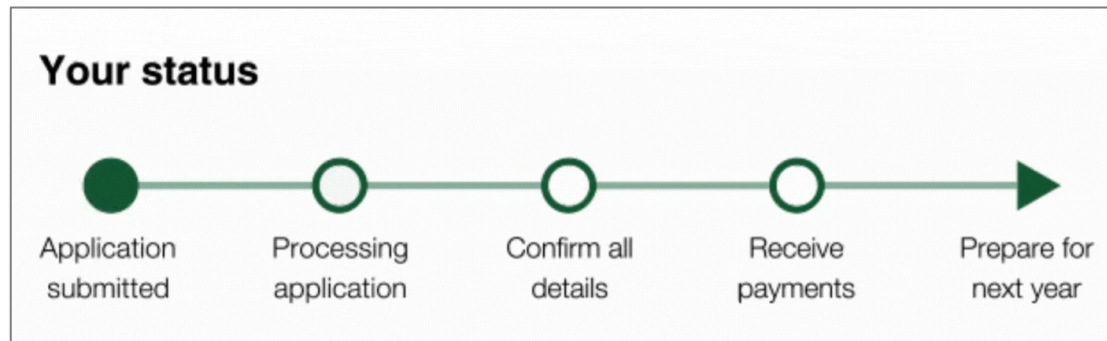

The SFE Campaign Page had **122,798 total views** over September 2022
Compared to **42,899** total views in September 2021

Account Self-Service Functionality (CEM)

Since **February 2022**, **SFE students** have been able to use our improved Customer Engagement Management (CEM) system, Salesforce:

- Salesforce was introduced **for SFW students in July 2022**

- Students can visually **track the progress of their application**, upload evidence and use the other self-serve benefits

- Salesforce introduced **new communications channels** for customers, Chatbot and Live Chat

To support this enhanced functionality, we created a ['How To' Guide](#) on GOV.UK, social media posts promoting the self-serve benefits and a series of [walkthrough videos](#):

Online Accounts: Common Questions Function

In August 2022, we introduced a **new online account feature** for SFE customers called '**Common Questions**' where students can access the answers to some of the most commonly asked questions:

Common Question article topics and functions include:

- Help with evidence

- Questions about payments

- What does the status of application mean

- How to upload evidence

- How to update university, college or course details

- Help with supporting an application

- Students can leave feedback on articles, which we react to by either editing or creating new articles
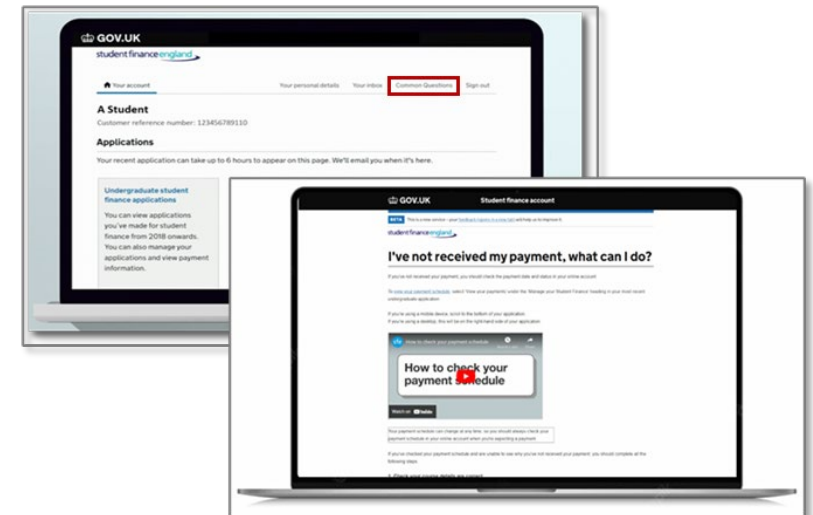
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Right Message, Right Time, Right Channel

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SFE: Peak Period Communications

Throughout the peak application submission and processing period it is essential that our communications and social media posts deliver the facts and messages that **SFE** students and sponsors need. Examples include:

- **Clearing:** Step-by-step tutorial for changing course details after going through Clearing

- **Forced Non-Means Testing (FNMT):** Reassurance for late applicants, we only award the minimum so they have some money for the start of their course

- **Payment:** Infographics and stories to promote confirmation of registration/enrolment is required

- **Reactive:** Facebook Live sessions targeted at sponsors unable to support an application
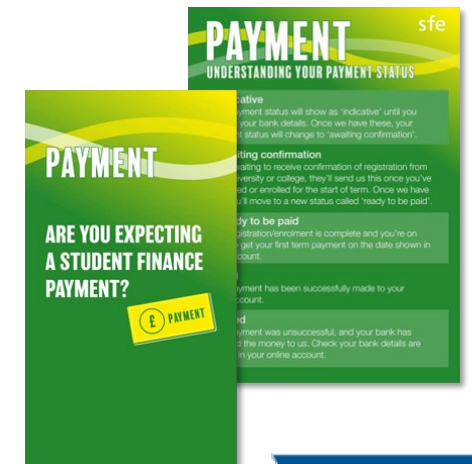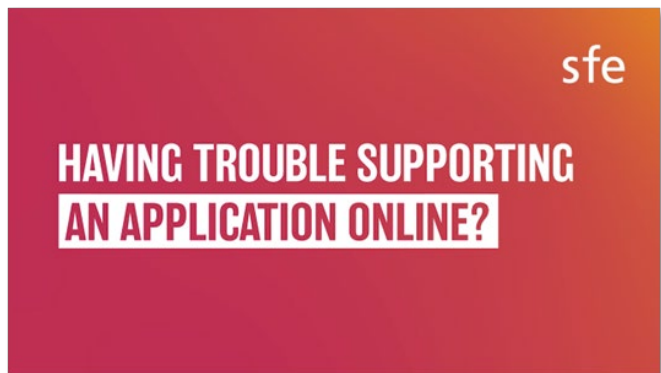
SFW: Peak Period Communications

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Throughout the peak application submission and processing period it is essential that our communications and social media posts deliver the facts and messages that **SFW** students and sponsors need. Examples include:

- **Payment:** Infographics and stories to promote confirmation of registration/enrolment is required

- **Did You Know?:** Social media series to debunk some common student finance myths

- **Post-Deadline Reassurance:** Reassurance for late applicants, we only award the minimum so they have some money for the start of their course

- **Self-Serve:** Salesforce (CEM) came later for SFW, so we pushed the benefits of the new self-serve features and functions during peak periods
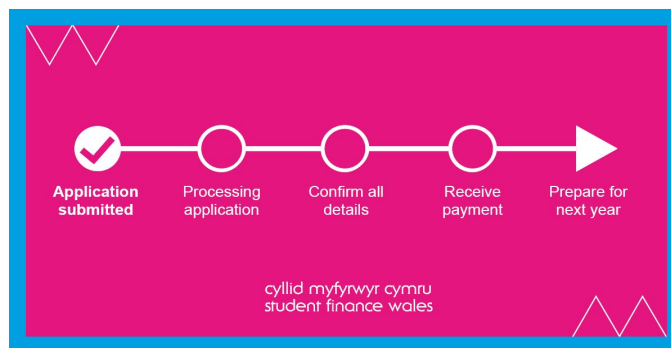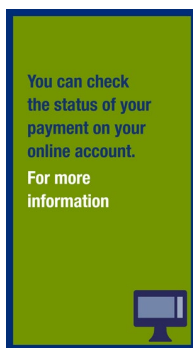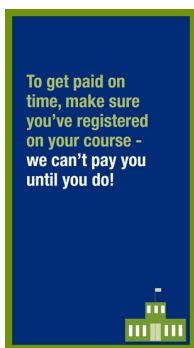
New Communications: Meeting Information Needs

In line with their IAG needs, timely, targeted and themed communications are issued across our online platforms to deliver messages to students. Examples of **new proactive and reactive** communications posted include:

- **Did You Know?:** New social media series to debunk some common student finance myths

- **Post-Deadline:** Facebook Live session to promote the post-deadline reassurance messaging

- **Change of Circumstances:** Social media posts to highlight the affect that moving house could have on student finance

- **Reactive Posts:** Reacting to seasonal events and events in the annual application timeline
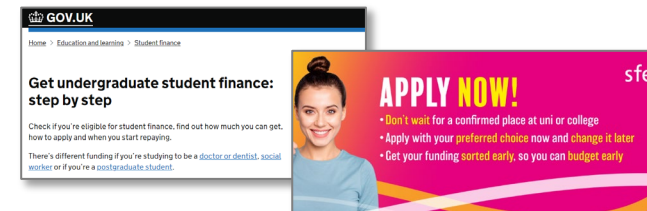
SFE: Promoting Resources to Students

Raising awareness of **SFE** online guidance, resources and self-serve account management functions can help and encourage students to make **on-time and right first time** applications:

- As a valued delivery partner you can play an integral part in achieving this objective, so please share our IAG materials with the students and sponsors you support, particularly during peak application submission times

GOV.UK Student Finance Step-By-Step Guide:
- www.gov.uk/get-undergraduate-student-loan

SFE Campaign Page:
- https://studentfinance.campaign.gov.uk

SFE 'How To' Guide:
- www.gov.uk/guidance/student-finance-england-how-to-guide

SFE Payment Guidance Page:
- www.gov.uk/guidance/getting-your-first-student-finance-payment

SFW: Promoting Resources to Students

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Raising awareness of **SFW** online guidance, resources and self-serve account management functions can help and encourage students to make **on-time and right first time** applications:

- As a valued delivery partner you can play an integral part in achieving this objective, so please share our IAG materials with the students and sponsors you support, particularly during peak application submission times

Student Finance Wales Homepage:
- www.studentfinancewales.co.uk
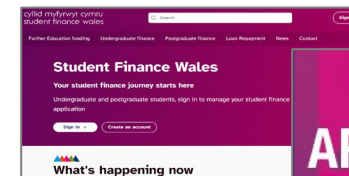
SFW Campaign Page:
- www.studentfinancewales.co.uk/discover-student-finance

SFW 'How To' Guide:
- www.studentfinancewales.co.uk/how-to-guide

SFW Payment Guidance Page:
- www.studentfinancewales.co.uk/payment

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Social Media: Like, Follow, Share

Sharing our **social media content** via your own channels, websites and direct communications provides the opportunity to make sure that students are aware of the latest SFE and SFW news, updates and stories:

f facebook.com/SFEngland

▶ youtube.com/SFEFilm

f facebook.com/SFWales

▶ youtube.com/user/SFWFILM

🐦 twitter.com/SF_England

🐦 twitter.com/SF_Wales

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Application Review: Academic Year 2022/23

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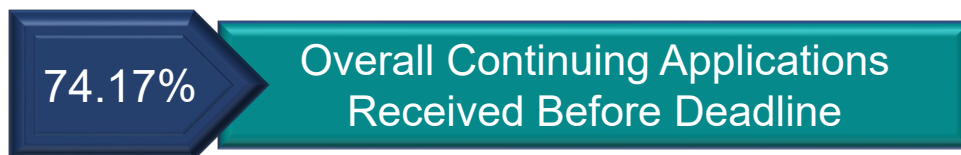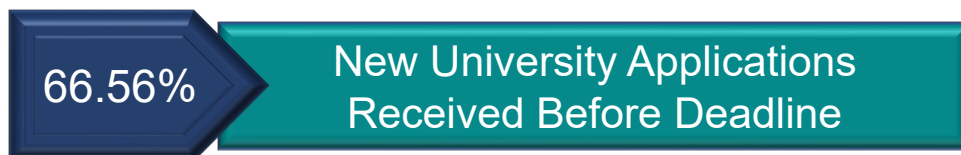# On-Time Application Submissions AY 2022/23

In academic year 2022/23 only **63.61% of new student applications** were submitted before the set 'on-time' deadlines, meaning there could be a risk of their funding not being ready for the start of their course:
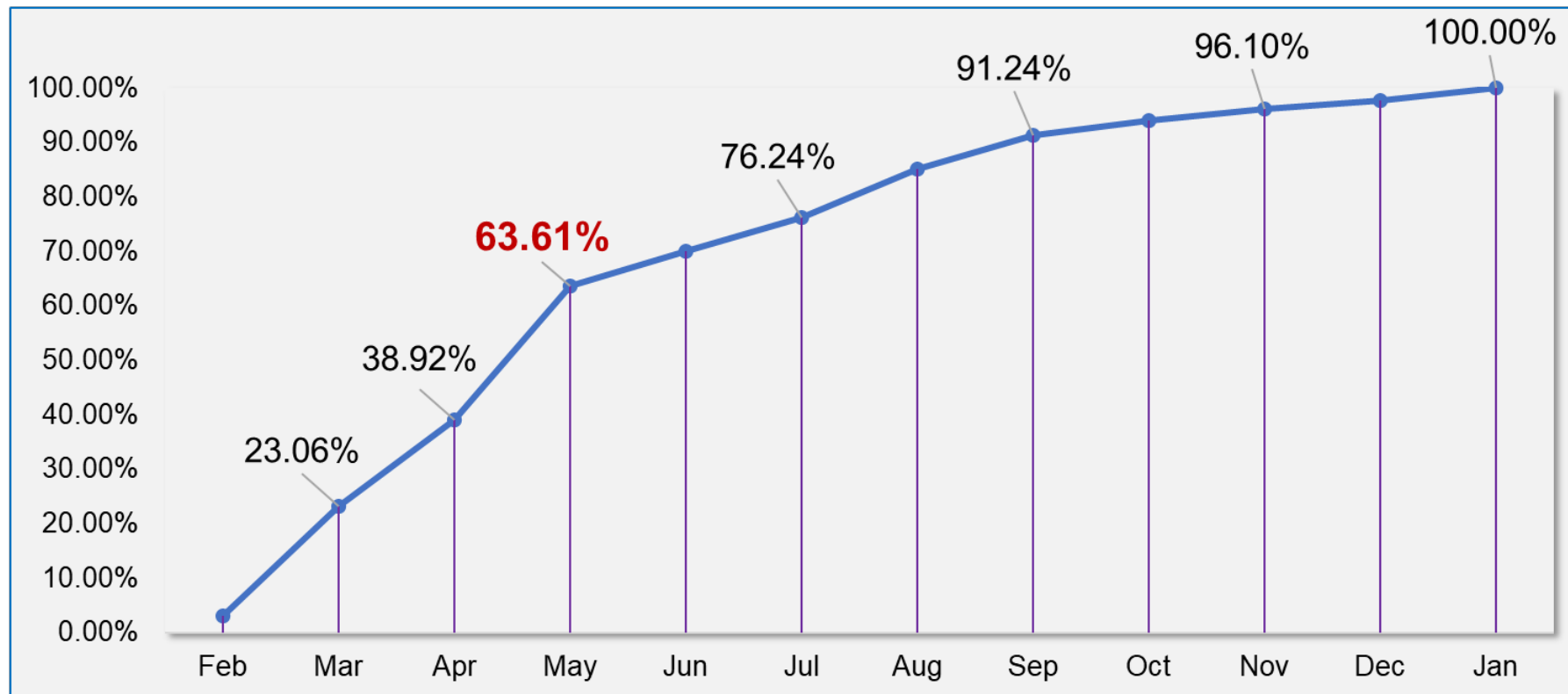
Review of AY 2022/23 Applications: Areas for Attention

Analysis of application submission levels allows for the identification of any problematic categories, emerging downward trends or specific regions that could benefit from increased focus and support:

From the academic year 2022/23 application cycle, some of these **areas for attention** included:

66.56%	New University Applications Received Before Deadline
45.70%	New College Applications Received Before Deadline
74.17%	Overall Continuing Applications Received Before Deadline

Deadline Day Application Submissions AY 2022/23			
Average Figures		Regions Below Average	
New - University	66.56%	South East	57.33%
New - College	45.70%	London	30.00%
Continuing - University	74.61%	East of England	70.09%
Continuing - College	72.46%	London	55.60%
DSA - University	74.61%	Wales	66.83%
DSA - College	58.25%	Wales	31.55%

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Understanding Customer Behaviour and Information Needs

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Customer Information Needs: Why Do They Call Us?

On-going monitoring of the number of incoming calls received by our Contact Centre provides an insight into student and sponsor information needs and for a review of IAG message delivery on these areas of interest:

What do you think were **the top three call reasons** for the week commencing 13th March 2023?

1.	Evidence	Weekly Calls	%	Total Since Service Launch
		3,856	17%	11,619

2.	Entitlement	Weekly Calls	%	Total Since Service Launch
		3,575	16%	10,734

3.	Information & Guidance	Weekly Calls	%	Total Since Service Launch
		3,194	14%	9,190

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Customer Information Needs: Top 10 Call Reasons

Evidence, entitlement and **IAG** were the three main call reasons and have been a constant at the top of the scale, but what other subjects made **The Top 10 List** of call reasons for the week commencing 13th March?:

| Call Reason	Position	Change	Weekly Calls	%	Total Since Launch
Evidence	1	0	3,856	17%	11,619
Entitlement	2	0	3,575	16%	10,734
Information & Guidance	3	0	3,194	14%	9,190
Status of Application	4	0	2,538	11%	7,803
Payment	5	0	2,525	11%	7,922
Change of Circumstances	6	0	1,903	9%	5,564
Eligibility	7	0	956	4%	2,937
Help with Application Form	8	0	626	3%	1,729
Help with Online Application	9	0	611	3%	1,650
Sponsoring an Application	10	+1	465	2%	983

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Monitoring Application Submission: New Students

Continued review of application numbers received against forecast figures, provides the opportunity to measure student interest, campaign impact and the effect of external factors such as exam periods or public holidays:

SFE New Applications Week of 27th March 2023
19,431 Forecast vs **19,936 Actual**

An opportunity was spotted **to promote early applications** prior to A-Level examinations
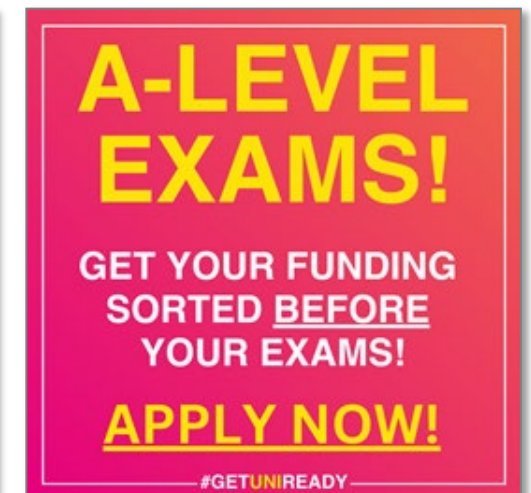
Monitoring Application Submission: Continuing Students

The monitoring of application submission rates and trends extends to returning/continuing students, who also have deadline dates to adhere to and their own need for 'Call to Action' messages and guidance:

SFE Continuing Applications Week of 27th March 2023
32,413 Forecast vs **34,661 Actual**
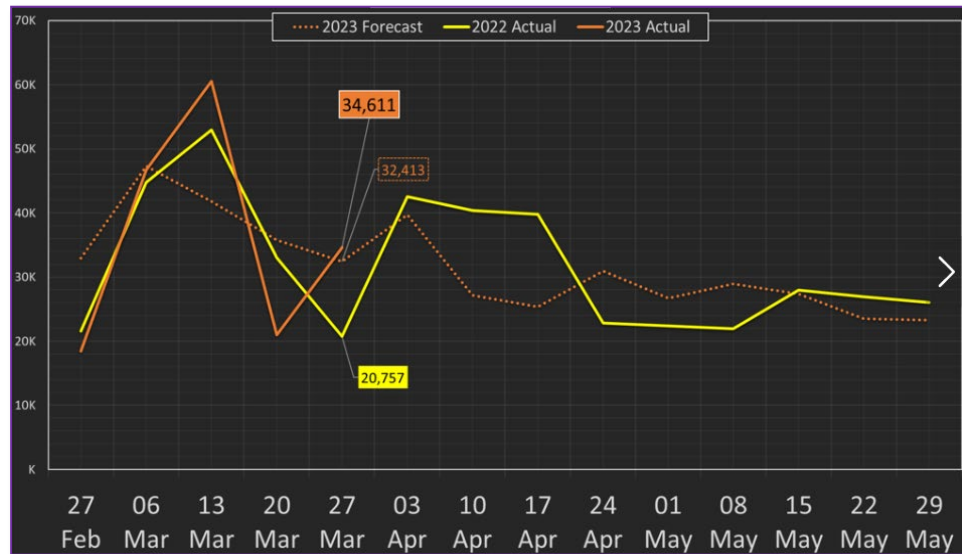
SFW Continuing Applications Week of 27th March 2023
2,199 Forecast vs 1,786 Actual
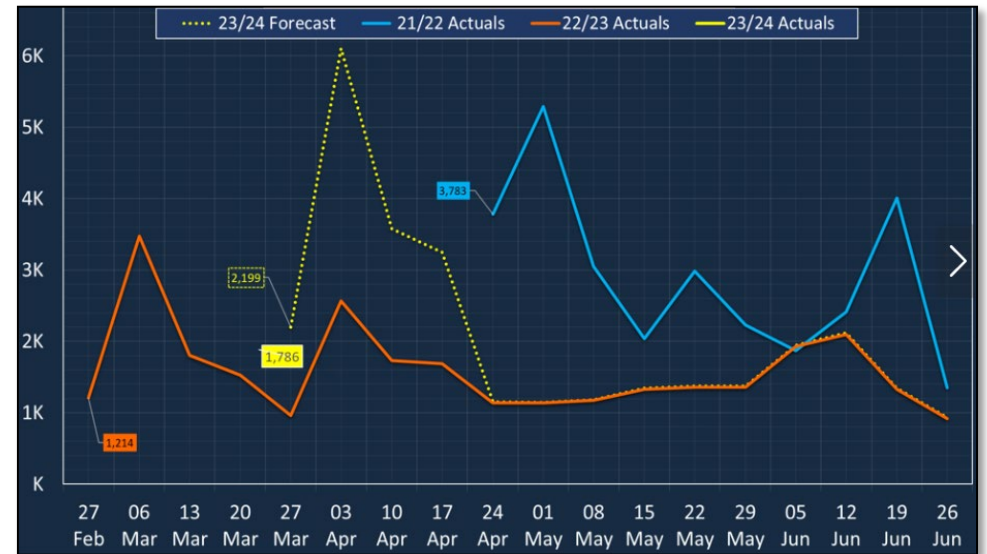
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Group Activity

Group Discussion Points: We Value Your Feedback

1. What could be **the barriers** that prevent students submitting applications before the deadline dates?

   • This can be any factors, including understanding eligibility, entitlement, how to apply or evidence

2. Using the QR Codes or links provided, select one (or multiple) SFE or SFW website/social media channel and search for any **information or guidance on these identified barriers**

3. What actions could be implemented to **encourage more students** to submit on-time applications?

   • This could include a more assertive tone of voice or increased emphasis on the potential for not being fully assessed before course start etc

4. Are there any particular areas of IAG provision that should be strengthened or further resources you would like to see developed **to improve the end-to-end student finance journey?**

Your feedback, experience and opinions can help us progress toward achieving the overall objective of providing the best possible customer experience!

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Questions or Comments

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