



STUDENT EXPERIENCE COMPANY

SPECIALISTS IN CUSTOMER EXPERIENCE MANAGEMENT FOR HIGHER EDUCATION

WHITE PAPER: BEYOND THE NATIONAL STUDENT SURVEY

Thoughtful and
effective ways to
improve student
experience in
higher education

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01: INTRODUCTION

STUDENT
EXPERIENCE IS
NOW CENTRE
STAGE

Higher Education is facing unprecedented change. The recent Government White Paper “*Success as a Knowledge Economy*” puts Student Experience centre stage and promises a new era of transparency. But like any vision, the Government’s ambition comes with inbuilt pitfalls, gaps and risks that must be managed intelligently.

HEIs CAN
TRANSFORM
THEIR STUDENT
EXPERIENCE BY
LEARNING FROM
COMMERCIAL
BEST PRACTICE

HEIs will need to manage within the new Teaching Excellence Framework with integrity and honesty in order for it to benefit either students or the institution. By pulling on commercial best practice, many HEIs will be able to transform their student experience. However, in doing so **HEIs will need to understand where customer experience excellence from major brands translates into student experience and just as importantly where it does not.**

THE STRUCTURE
OF THIS WHITE
PAPER

The core of this White Paper is in three sections. ‘Section 02: Where are we now?’ describes the Government White Paper and the mechanisms for measuring student satisfaction. Section 03: ‘What HEIs can (and can’t) learn from the commercial world’ examines which elements of commercial best practice customer experience management are transferable to higher education and which are not. Section 04: ‘Guiding principles for HEI action’ suggests a high level framework for strategically managing student experience.

02: WHERE ARE WE NOW?

“Success as a Knowledge Economy”, comes at a time of great change in Education. Although Brexit adds uncertainty, the sector is bigger, more global, more market led and (in the UK) more internationally competitive¹ than ever before.

There are pressures and pent-up discontinuities too. The student loans system is a machine whose dials are flashing amber, if not red². A third of students in England think they’re getting poor value for money (“rip off” is the most common phrase they use in our proprietary research). There are also gaps between students’ employment expectations and outcomes. The World Economic Forum noted in 2014 that:
“Many current graduates are discovering that despite their academic qualifications ... they lack the specific technical and professional skills demanded by the ever-changing jobs market.”³

There has been a great focus on the use of technology to enhance student learning. But the fundamental way that Higher Education is done still looks very similar to thirty years ago. Education hasn’t yet experienced its Uber moment; but that’s not to say that innovators aren’t striving to create new educational business models that may fundamentally change the relationship between educated and educator.

THE WHITE PAPER IN A NUTSHELL

Against this backdrop, the purpose of “*Success as a Knowledge Economy* is to rebalance ‘the relationship between teaching and research’ in universities and to put ‘teaching at the heart of the system’.

The Teaching Excellence Framework (TEF), is the management and control system for achieving this. **TEF essentially breaks “excellence” into three measurable components: 1) teaching quality 2) student experience and 3) employment outcomes.** There is a strong policy direction to link these outcomes to tuition fees.

Student experience is at the heart of TEF. The de facto measurement tool for this is the National Student Survey, a 22 question survey tool that elicits final year students’ satisfaction in six areas: Assessment & Feedback, Academic Support, Organisation and Management, Learning Resources, and Personal Development.

The NSS is a widely recognised source of HE public information data and it is not new. NSS data are published annually on the Unistats website which enables prospective students to compare courses at different institutions.

TEN FLAWS OF THE NATIONAL STUDENT SURVEY

HEIs have been commenting for years on the limitations of the NSS as a survey tool; what follows is our view of the ten most significant problems from an experience management perspective.

Ultimately, how you design a survey instrument or customer experience measure depends on its purpose. There is no perfect instrument. What matters is that purpose and design are intelligently aligned. The NSS's stated purpose is to power national rankings and to give students a collective voice⁴.

However, the NSS largely fails if you judge it as a tool for either driving student-centred change within HEIs or for improving admissions loyalty or retention (other than through better rankings).

A revision of the NSS is underway; some fairly minor question changes are proposed for 2017⁵. In our view, these changes do not alter the following fundamental problems:



PROBLEM 01: NSS IS NOT LINKED TO STRATEGY

The NSS tests satisfaction, with 22 different elements of the education experience. But the **NSS doesn't ask which of those elements are more or less important to students**. Therefore, the NSS is not really a suitable tool for informing strategic priorities or programmatic choices.

PROBLEM 02: NSS IS NOT LINKED TO RELATIONSHIP OUTCOMES

In the commercial sector, one of the most widely used measures of customer experience is the willingness of customers to recommend to others. This is a classic relationship outcome measure. Relationship outcomes are also used in parts of the US education sector. For example, the Best Colleges ranking uses the percentage of alumni who give back as one of its six key measures⁶. **These measures are important because commercial studies have found that they are strongly predictive of business performance⁷**. The NSS does not include any relationship outcome questions.

PROBLEM 03: THE NSS IS NOT LINKED TO INSTITUTIONS' BRAND PROMISES

Students' experiences happen within the envelope of expectations created by the Institution's brand marketing. Managing brand expectations and experiences is a central pillar of best practice experience management. You only have to look at the rise of value based retailers such as Aldi & Lidl and their impact on the market share of seemingly impregnable retail brands in the UK to see how expert expectation management can influence perceptions of value for money and quality. The NSS does not elicit students' perceptions of institutions' brand promises.

PROBLEM 04: THE NSS EXCLUDES THE VIEWS OF MANY STUDENTS

PROBLEM 05: THE NSS IS SUBJECT TO BEHAVIOURAL BIAS

PROBLEM 06: THE NSS DOES NOT DIRECTLY ADDRESS STUDENTS' BURNING ISSUES

The NSS does not record undergraduate experience in the first and second year. In 2013/14 the average undergraduate drop-out rate by end of first year was 6%, with wide reported variation around the mean (ranging from 1.5% to 19%).⁸ **Students who drop out before the final year may be especially dissatisfied, but by definition, the NSS does not capture their views.** Additionally, the NSS does not consider the views of postgraduate students.

University of Reading research found that **students consistently give Black and Minority Ethnic lecturers lower NSS rankings**⁹. Other research found that **female lecturers consistently receive lower NSS evaluation scores** than their male counterparts¹⁰. **Art & Design subjects may also be routinely punished by the NSS** due to their inherently more ad hoc feedback approach and explicitly less structured courses¹¹.

In 2015, 34% of students felt that their course was poor or very poor value for money¹². **But there is no question in the NSS that directly elicits students' feelings about value for money. Nor does the NSS directly address the question of contact time.** This, despite HEPI/HEA research findings that students who receive less than 10 hours of contact time per week are significantly less satisfied¹³

PROBLEM 07: THE NSS IS NOT IMPLEMENTED WHEN THE EXPERIENCE HAPPENS

In recent years, the commercial world has invested heavily in understanding consumer experience in real time, connected to when a specific 'customer journey' or experience is consumed. This gives more authentic, specific, meaningful and actionable insight. By contrast, the NSS is implemented in a designated period in the final year. This makes it extremely difficult to determine drivers of (dis)satisfaction.

PROBLEM 08: THE NSS DOES NOT ELICIT STUDENTS' VIEWS ON THE RANGE OF TEACHING APPROACHES AVAILABLE

As an example, Digital technology is creating many new opportunities for presenting and curating information, for interactive learning, for peer learning and development, for personalizing course components and for increasing communication between educators and educated¹⁴. **Generation Z (people born after 1995) are digital natives. They are so hooked into the digital world, that *some studies suggest they find it easier to talk online than in person.***¹⁵ Yet the NSS fails to address their satisfaction with institutions' digital learning resources. The closest it comes is Question 17: *"I have been able to access general IT resources when I needed them"*.

PROBLEM 09: THE NSS IS WIDELY PERCEIVED AS EXTERNALLY IMPOSED

One of the golden rules for successful customer experience driven change is that the programme and measurement has to be internally co-created. Without internal debate and challenge, leadership and employees don't buy into the process. There is a widespread lack of acceptance of the validity of the NSS and so a reluctance by individuals to act on its findings.

PROBLEM 10:
THE NSS SURVEYS
ALL STUDENTS
ON A ONE SIZE
FITS ALL BASIS

Students are not a homogenous group and their needs are of course heterogeneous. But the NSS does not differentiate. It is a blunt, one size fits all instrument. A more enlightened approach would develop separate instruments for discrete clusters of students with similar needs, motivations, behavioural and attitudinal traits.

The NSS has a part to play but by making it a central pillar of performance both the Government and HEIs that rely on it risk unintended and undesirable consequences at a time when the pressure to find more meaningful links between performance and perceptions is at its greatest. For a variety of reasons organisations have a habit of measuring what can be measured. The trick is to measure what matters – and this is not always a quick fix. Here is where learnings from the commercial sector may have a key part to play.



03: WHAT HEIs CAN (AND CAN'T) LEARN FROM THE COMMERCIAL WORLD

If they didn't already know it, HEIs are sailing on commercially choppy waters. A tide of change surrounds their traditional existence as globalisation, tuition fees, rising expectations and a host of other technological and socio-economic forces alter the nature of the relationship between educator and educated. They have not been here before.

Both the Government and many HEIs are reaching for a silver bullet in the race for rankings. Leading brands have been developing and executing customer experience strategies ever since they discovered Maslow's hierarchy of needs. Yet in turning to an industrial era approach to managing quality under TEF the Government may be missing a central and massive irony.



Whilst it is true that (customer) experience has developed as an indispensable tenet of business practice (accelerating in importance as the digital economy has altered the way we interact), it does not follow that established marketing strategy and practice for measuring and managing customer worth, translates automatically into the relationship between HEI and student.

Some of it does and much can be learned from brand leaders – but by no means all. This is because student experience as currently defined within TEF reflects a producer centric view of the world: make a product based on what you think consumers want, then push it hard by telling people how it meets their values and aspirations.

But the world has moved on. Commercial thought leaders have labelled 2016 the “Year of Emotion.”¹⁶ This marks a departure from old world ideas of push marketing where customer insight and data are used to drive propositions often in an increasingly frantic series of promotions. Today’s experience leaders tend to design their products and services around much more sophisticated and deeply understood customer needs, motivations and behaviours. They understand the limits and flaws of endlessly surveying their customers – as Henry Ford famously said; “If I had asked people what they had wanted they would have said faster horses.”

So what do HEIs do? Hold their hands up in despair and frustration at the fact that they are being driven towards yesterday's solution to tomorrow's problem? Fortunately, simply because a problem is difficult does not mean it cannot be solved – academics know this more than most. But to address it we need first to understand it.



04: GUIDING PRINCIPLES FOR HEI ACTION

From experience, we believe that there are six guiding principles that HEIs need to debate as part of the mobilisation phase of an effective student experience programme.

Collectively, they cover the why, who, how and how much of any student experience intervention.



PRINCIPLE 01: ASK WHY

Beyond rankings (albeit a legitimate and important goal in itself), **understanding the purpose of improving student experience is key.** To do this, start with some naïve yet powerful questions: What do we want to be known for? How do we differentiate our institution? These are all fundamental and powerful drivers for creating an effective and meaningful “voice of the student” capability. Unless we understand how we are generating perceptions of value and worth from today’s students, how can we adapt and follow the strategy that takes us to the students of tomorrow?

PRINCIPLE 02: ASK WHO

“Who are your students?” is an important question because design for everybody is design for nobody. To design excellent experiences, Institutions need to define who their students are (and who they want to attract). Many HEIs use traditional segmentation to do this (for example, ‘international’, ‘first generation’, ‘non-traditional’, ‘commuter’ and so forth).

Unfortunately, this type of geo-demographic segmentation is often inadequate for student experience design. This is because it does not coherently cluster students around their needs, motivations, attitudes and behavioural traits.

PRINCIPLE 03: NSS IS THE SCOREBOARD, IT'S NOT THE GAME

The NSS is necessary, but it is not sufficient for understanding, managing and improving the quality of student experience.

To manage this proactively, HEIs need to understand the behaviours, needs and motivations of their students as they progress along key journeys in their academic experience. The opportunity here is to inform and shape policy in ways that cannot be achieved by following the NSS alone. The NSS may tell us we have a temperature – it does not identify the pathogen that is causing it to rise.

To make TEF a force for good, **HEIs need to think and act strategically about student experience.** HEIs need to deeply understand their diverse students' needs, motivations, feelings and attitudes. They then need to **describe in actionable detail the experiences they want to evoke** for different types of student. This experience blueprint should include rational, emotional, subconscious, and psychological factors.

Doing this offers a powerful set of drivers for league-table performance, academic reputation, brand awareness, admissions and educational success. But it is also about timeless educational values that put students and learning at centre stage.

PRINCIPLE 04: LINK THE EXPERIENCE TO AUTHENTIC AND RELEVANT INSTITUTION VALUES

Higher Education is a commitment like almost no other. A typical undergraduate commits three years or more at an often formative time of their life. Tuition fees are often up to £27k with average living costs a further £12k per year¹⁷. For this, students are buying new experiences, transformed life chances, personal development and an often lifelong community of friends, peers and alumni.

Ever since marketers discovered Maslow, **consumer society has promised self-actualisation for buying the right car, the right clothes or the right brand of beer.** Watch a Nike advert and you'll learn nothing about trainers. You'll see great athletes. **How ironic then that higher education, the ultimate self-actualisation product, is often marketed without deep focus on underlying values.** Marketing a course for its "global view" is short sighted unless the student experience truly reflects that global promise.

Institutions need to learn two key lessons. First, they need to become obsessive custodians of their institutional values, basing their course marketing on authentic, distinctive and relevant values. Secondly they need to link those institutional values to the emotional and rational experiences they provide to students.

PRINCIPLE 05: CHOOSE THE METRIC TO FIT THE OPPORTUNITY OR PROBLEM

HEIs need to start with the issues or opportunities that they are faced with and find ways to measure performance against those. These may vary depending on a wide variety of contexts – for example London based Universities may face a similar set of challenges which are both distinct from provincial HEIs and demographically specific.

One size does not fit all and the answer may demand more original thinking than simply picking an off the shelf metric such as Customer Satisfaction (CSAT), or Net Promoter Score (NPS) from the commercial world. These may have a part to play but lifting existing KPI scorecards from industry is not a substitute for understanding which relational and transactional measures are going to help inform different aspects of the interactions students have with the organisation.

PRINCIPLE 06: BUILD THE CAPABILITY FOR DESIGN AND EXECUTION OF STUDENT EXPERIENCE

HEIs need to be able to **describe in actionable detail the experiences they want to evoke** for different types of student. This experience blueprint should include rational, emotional, subconscious, and psychological factors. The blueprint must also link to the HEI's brand and value proposition. This in turn requires an honest articulation of institutional heritage, purpose and values. Lastly, **HEIs need to be able to actively manage and govern their experience vision across the whole institution.**

05: CONCLUSIONS

In summary the Higher Education Sector is poised. Far reaching changes in regulation, in technology, in the economy and in the relationship between students and educators are creating the classic conditions for disruption.

HEIs have the opportunity to capture and own Student Experience and make it work for them or see regulators force the agenda. The next few years may witness a revolution in thinking and practice as HEIs rise to this challenge, control their own destiny and break the habit and addiction of rankings.

Or it may see increases in command and control from Governments determined to force the agenda of managing what HEIs are for. Time will tell which will find a way to master their futures.

As one key observer commented recently
“Surveys do not simply ask questions, they also direct responders towards a particular train of thought”¹⁸



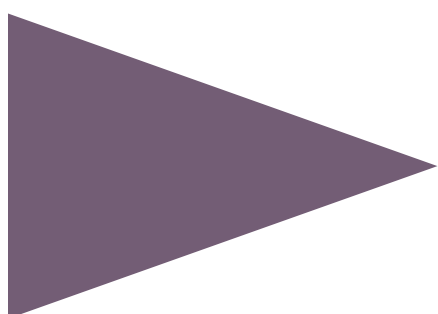
06: OUR SERVICES

Students are more than simply “customers”, but academic institutions are wrestling with many of the same “customer” experience issues as commercial organisations. We help HEIs with:

1. Understanding students’ rational and emotional needs, motivations, behaviours and attitudinal traits.
2. Designing student experience blueprints and visions.
3. Identifying the drivers of student satisfaction and diagnosing failure points.
4. Mapping, improving and transforming student journeys to increase satisfaction.
5. Designing and implementing strategic student experience measurement systems.
6. Designing and delivering student experience programmes.
7. Workshop, facilitation and expert consulting around student experience design and delivery.
8. Mobilising and educating faculty and staff around student experience management.

For an introductory discussion, please contact:

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07: ENDNOTES

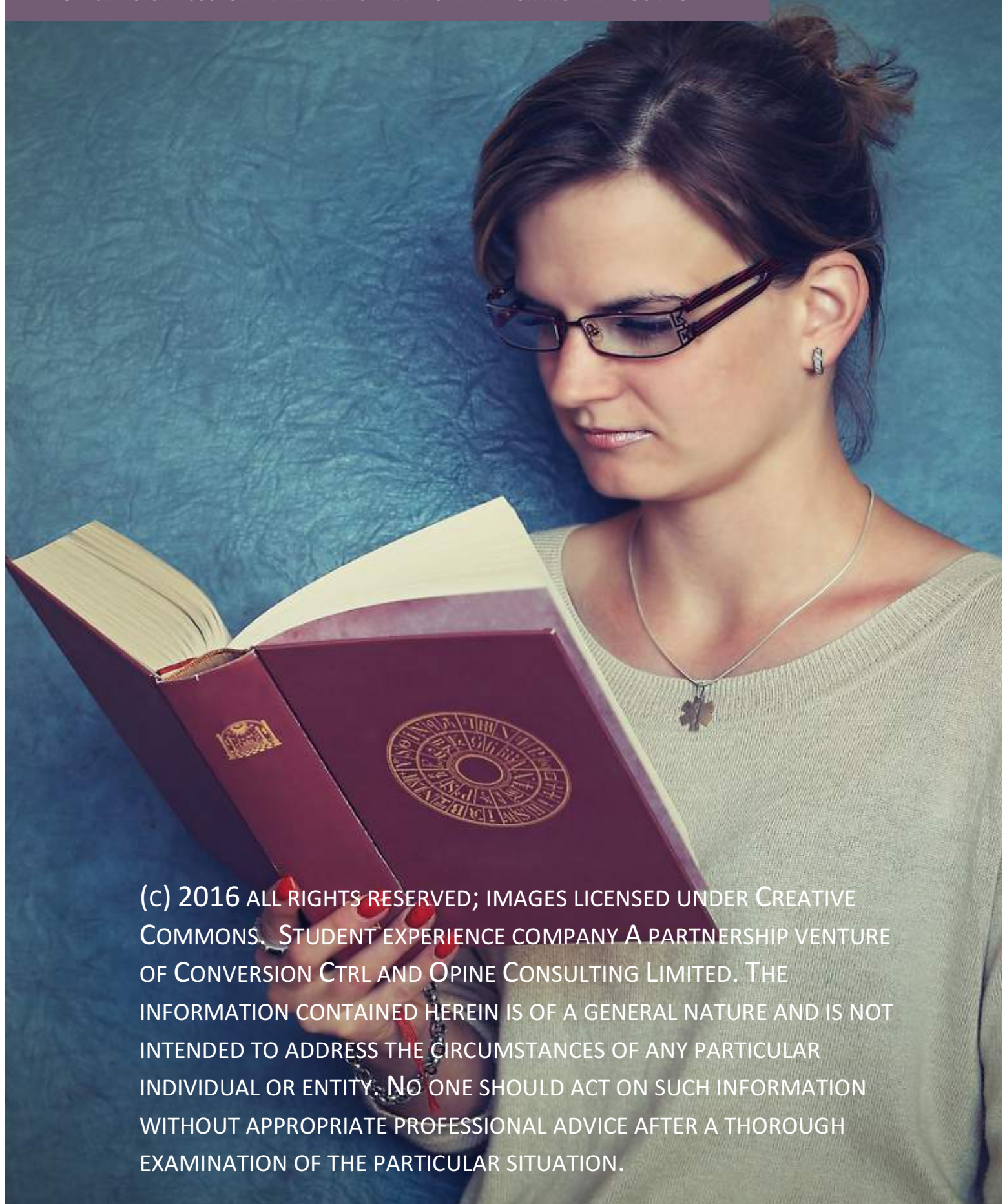
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** The views expressed in this white paper do not necessarily represent those of the University of Bedfordshire Business School.*



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