



Managing confidential student cases at Flinders University

Flinders University was on a path to delivering a greater student experience with Microsoft Dynamics 365 when it hit a stumbling block, so it called on KPMG to unlock a crucial enhancement.

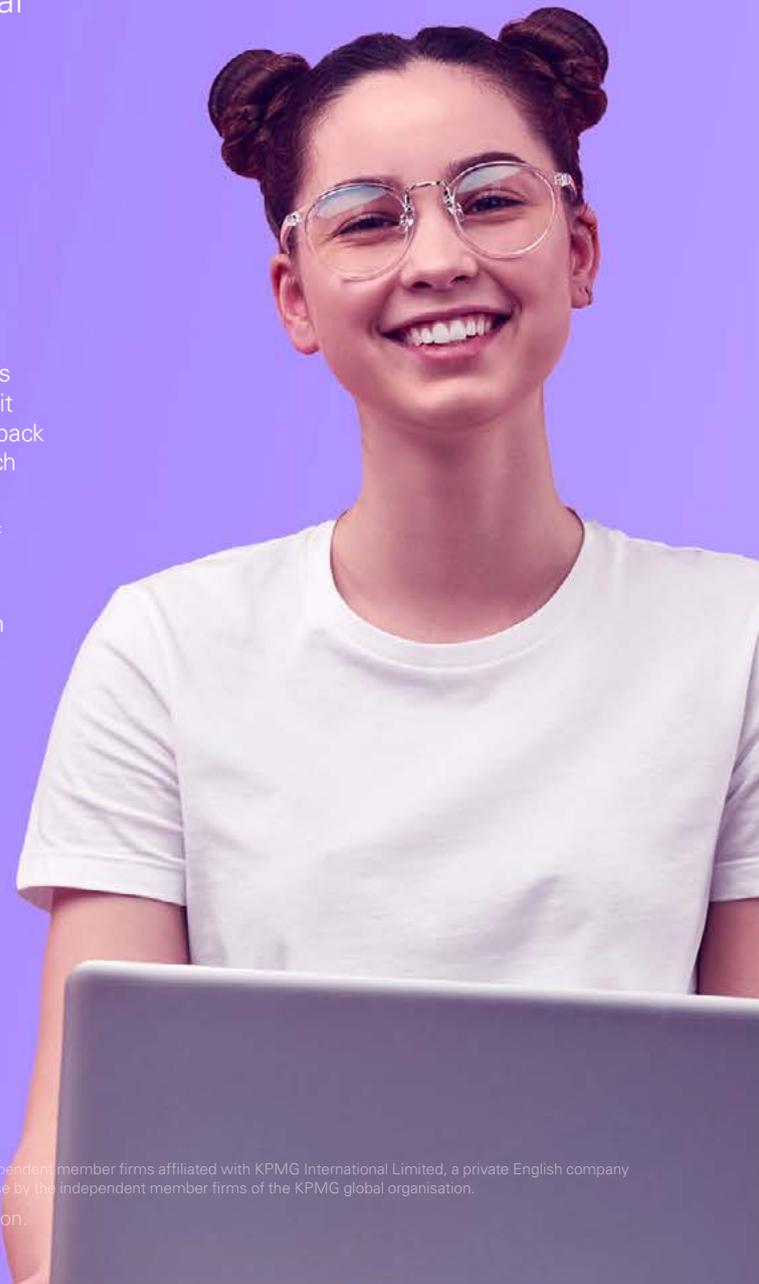
The university sector in Australia has faced particularly complex challenges during the COVID-19 pandemic, such as needing to swiftly transfer to online teaching and learning, or managing the impacts of the reduction in international students. This environment has seen universities need to become more innovative and agile, and to deliver an optimal customer experience journey for students.

Flinders University in Adelaide had this objective front of mind, setting out to make sure every interaction with its students was as efficient and seamless as possible. To support this strategy, it implemented a Microsoft Dynamics 365 transformation for its back office and student services, which set the foundation for a much more intuitive, data driven and connected operating model.

After using the system for a period of time, Student Services staff realised that the way it was set up was potentially impeding the safe and secure management of Confidential Support Cases. These cases could concern matters such as a student's health and wellbeing, or any queries they may have regarding staff misconduct, or an academic performance issue, for example.

Flinders University needed a more robust set up to protect the privacy of students, while carefully enabling access to these case files for the staff who absolutely needed it.

KPMG has extensive experience in both understanding the unique processes and needs of the university sector, as well as with the technical capabilities of Microsoft Dynamics 365. This combination led Flinders University to engage KPMG to review its Microsoft Dynamics 365 environment, then make corrective changes for a more secure management of Confidential Support Cases.



Exploring the potential

Before focusing on technical solutions, KPMG took a step back and considered the student experience journey holistically. They measured how students interact with the university against its aspirations for offering an optimal student experience, to see what was mature and what needed improvement.

The team then reviewed Flinders University's Microsoft Dynamics 365 environment, to see what functions of the technology were being used well, versus which functions should be optimised. Based on their findings, they developed a roadmap towards unlocking solutions in the software that would help the university to meet its aspirations.

Challenge with confidential support cases

Next, KPMG turned specifically to the issue of confidential support cases, looking at the challenge from both the student position of lodging information, and the back-office steps of receiving that information, managing it, and acting on it.

The setup that the Flinders University was using had a flat security structure, which meant that more people could see details of a confidential file than was necessary. They needed to reconfigure the set up to deliver greater security structures around back-office access to the files.

The team utilised their knowledge of the software to ensure that each student had a 'core student record' that was widely available across the back office, but that the various inputs to that record were only visible to the exact staff that needed to see them.

For example, the scholarship office would only see what was applicable to scholarship administration needs, the alumni office to their needs, or the health and wellbeing teams to their needs.

KPMG implemented the technical corrections to activate this, while also making sure that this information was simple and secure for students to enter via their online access portal.

Alongside this, KPMG designed and developed a new Confidential Support Case data entity, which provided the ability to capture, track and manage confidential cases raised by students, so it was easy to monitor progress. Testing and learning were key throughout each step, to make sure it was intuitive and secure, before going live.

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Targeted improvements

While it is common for the KPMG team to undertake large-scale, end-to-end technology transformations with Microsoft Dynamics 365, in this case the team focused on a very targeted optimisation of the software for a very specific and important need.

The project showed that a small reconfiguration can have a powerful impact and can add value to a larger overall technology investment. It also showed that an overarching plan of what an organisation would like to do with Microsoft Dynamics 365 can be brought to life in appropriate stages, or when needs and budgets allow.

Bringing skills to the table

In addition to KPMG Higher Education Management Consulting specialists, KPMG brought a diverse array of expertise from across the business to the engagement.

For example, KPMG's Customer, Brand & Marketing Advisory team explored the student customer experience journey with the university, as well as the brand image and communication style of the university, helping to inform the future roadmap.

Technical and functional consultants were key to bringing the changes to the Confidential Support Cases structure to life through the Microsoft Dynamics 365 technology. Meanwhile, other KPMG expertise included project management, user experience testing and change communications – all working collaboratively for the best client outcomes.

The teams also worked closely with stakeholders at Flinders University, although in a different manner than usual due to COVID-19 travel restrictions. Instead of working under one roof in Adelaide at the university, the entire project was delivered remotely online. However, with aligned objectives and constant communication, the same level of success was achieved. The team members commented that it was so collaborative it was like there was no differentiation between Flinders University and KPMG staff.

Small change, big difference

As a result of KPMG's involvement, Flinders University now has a clearer roadmap of how it can work towards its desired student experience, and how it can systematically unlock the capabilities of Microsoft Dynamics 365 to support this. Importantly, it solved the challenge around the security and management of Confidential Support Cases, which not only lifts the student experience, but helps staff to better manage the cases and arrive at better student resolutions.

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October 2021 730734164MC