Edified

Education Industry Experts

The Value to the Sector of Student Recruitment Systems Automation: Recruitment Partner CRMs to Provider Admissions Systems

(IF ONLY THESE SYSTEMS COULD TALK)

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Prepared for **StudyLink Connect** by Edified

Contents

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Executive Summary

Through collaborative research StudyLink Connect sought to understand and quantify the potential efficiency savings of integrating agent customer relationship management (CRM) systems with provider application systems through StudyLink Connect's Recruitment Partner API and to quantify the value of these efficiencies to the sector.

This was achieved by surveying and observing frontline counselling staff (referred to as counsellors in the report) as they processed applications to determine the time taken to complete required tasks through the applicant journey to enrolment. The applicant journey is divided into five stages:

1. Research and Counselling Stage

2. Submit Application Stage

3. Manage Application Stage

4. Manage Decision Stage

5. Manage Enrolment Stage

Agency owners, managers and leaders (referred to as managers in the report) were also surveyed to determine their perspectives on how efficient their current processes are as well as understanding any barriers to implementing an API integration. They were generally positive about the efficiency of their existing processes, but as the application progressed through the journey their perceptions of efficiency decreased; this correlates with increased interaction with provider systems and processes and eventually third-party systems and processes at the Manage Enrolment Stage, e.g. visa applications.

The research found that on average applicants submit 4 applications and receive 2.7 offers. Exchanging data between a recruitment partner system and an education provider system using an API resulted in considerable efficiencies.

Measure	Current Situation	Probable Scenario	Optimal Scenario
Number of work tasks per application	40	25	24
Time taken to submit one application	7 hours, 22 minutes	4 hours, 34 minutes	4 hours, 10 minutes
Number of applications a counsellor could submit in a year[1]	270	438	480
Time taken to complete tasks for an applicant	39 hours, 19 minutes	24 hours, 23 minutes	22 hours, 13 minutes
Number of applicants a counsellor can service in a year*	51	82	90
Commission value of a counsellors work in a year[2]	$255,000	$410,000	$450,000

[1] Based on one FTE = 2000 hours a year. 8 hour working days for 250 days of the year.

[2] Based on 75% conversion from applicant to enrolment and a commission average of $5,000 based on 14–15% of the average tuition fee of $34,300 (StudyMove, 2020). See 4.1.1

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The most time-intensive parts of the student application process are "qualifying the student meets course requirements and arranging and preparing student GTE checks." To complete these tasks takes 10½ hours per applicant, accounting for 36% of the total time in the current situation (rising to nearly 50% if the Optimal Scenario is achieved post API integration), because these tasks are repeated multiple times. The time taken to complete all the tasks in the Research and Counselling Stage is not directly impacted by the API. Improvements in this step can be made by including structured and detailed program information in an API. This would also help improve the matching of applicants with the best program for their needs.

As the application moves through the process, tasks become increasingly transactional which is where the API helps to significantly decrease the time taken to complete a task. Essentially the API facilitates the transfer of information and data already held in the agent CRM into the provider's application system, thereby reducing the need for manual entry. Agency managers identified this advantage of integration, also noting that it would reduce error rates.

The report presents hypotheses on how the time saved by the API might be repurposed, including the improbable scenario that 100% of the efficiencies would be allocated to processing more applications resulting in the value of a single counsellor's annual work rising from $255,000 to in excess of $400,000. However, it is improbable that 100% of the time would be spent solely on processing. The report surmises that it is more likely that time will be redistributed across a range of higher value tasks, including:

- spending more time counselling and matching students to institutions - improving quality
- working on marketing and new initiatives - new markets segments
- increased capacity to better manage workflow bottlenecks in peak periods - better service

The implications of these findings for the sector are significant and benefit providers, agents and prospective international students alike.

More time spent researching and counselling to find a best fit provider and program

More complete applications with fewer errors

Less chasing documents and faster decision and processing turnarounds

Reduction in manual updates and quicker management of decisions

Receiving offers earlier allowing more time for visa processing and planning

A greater number of better prepared and matched students enrolling with providers

Increased income (tuition fee / commission)

Improved student retention rates and fewer student compliance issues

Stronger, more trusted agent and provider relationships

Happier students with a higher propensity to recommend both their agent and their provider

Better outcomes for students

■ Student benefit   ■ Provider benefit   ■ Agent benefit

The benefits align well with manager perceptions of the benefits of implementing an API integration between their CRMs and provider admission systems, however 44% of the managers see their own understanding of API integrations as the major barrier to an integration. Of equal concern to them are the resources required to set-up and maintain an API. The length of time to integrate was also seen as a significant barrier by 39% of manager respondents.

The research did not evaluate the resources required to maintain the StudyLink Connect Recruitment Partner API, but pilot integrations undertaken by StudyLink Connect with 6 agents suggested that 200-400 hours of expert time is required to have the Recruitment Partner API functioning. The report calculated that a resources breakeven point - the length of time taken for the efficiency gains to incorporate the time taken to integrate - could be as little as 11 weeks (optimal scenario for 200 hour integration time) after which the efficiency gains are fully realised. This includes 8 weeks (200 hours) of integration work and 3 weeks in which the efficiency savings of one counsellor would sum 200 hours.

However, it is likely that most agents, allocating one expert person to implementation would begin to fully realise efficiencies (pass their breakeven point) between 13 and 26 weeks (probable scenarios for 200 and 400 hour implementations respectively).

An API integration using StudyLink Connect offers an agent access to multiple providers with a single integration. An alternative approach requiring integrations with each individual provider could result in a longer ROI timeframe.

1. Background

In 2006, StudyLink was at the forefront of digital recruitment, yet the market wasn't quite ready. After a long journey of navigating the different systems and processes of their partners, StudyLink created a platform for managing data between recruitment channels and education providers. This platform, StudyLink Connect, offers a partner portal for recruitment partners to submit and manage applications to multiple education providers, from one place. However, it still requires managing data between partner's own systems and StudyLink Connect. In response, StudyLink has developed application program interfaces (APIs), to allow recruitment partners to integrate their systems and platforms into StudyLink Connect which can eliminate re-keying and facilitate a seamless and real-time exchange of data with education providers throughout the admissions process.

Through their stakeholder engagement, StudyLink found that recruitment partners and providers:

- perceive systems integrations as time consuming and costly, and
- a lack of clarity over the potential efficiency gains realisable from systems integrations.

A series of definitions are provided in appendix one to assist the reader.
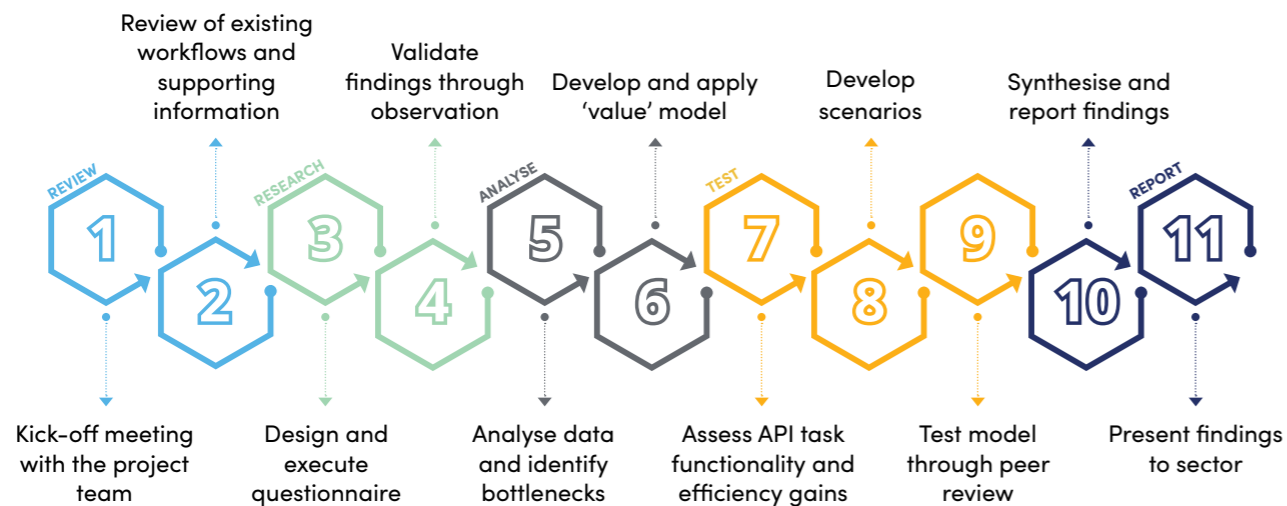
1.1 PROJECT OBJECTIVES

StudyLink commissioned Edified, to undertake research that would quantify the value (time and cost savings, business benefits and opportunity costs) of current processes used by agents and other recruitment channels to submit and manage applications against the value of using StudyLink Connect's Recruitment Partner API. Specifically, StudyLink seeks to:

- Quantify the value of current processes used by education agents to submit and manage applications
- Identify process bottlenecks and context switching between systems
- Determine the potential efficiencies of data integration between an education agent CRM and an education provider application system
- Quantify the value of these efficiencies to the sector.

The StudyLink Connect and Recruitment Partner APIs are explained in more detail in appendix two.

1.2 APPROACH

Edified developed a rigorous approach to gain this insight:

Review of existing workflows and supporting information

Validate findings through observation

Develop and apply 'value' model

Develop scenarios

Synthesise and report findings

REVIEW
RESEARCH
ANALYSE
TEST
REPORT

1 2 3 4 5 6 7 8 9 10 11

Kick-off meeting with the project team

Design and execute questionnaire

Analyse data and identify bottlenecks

Assess API task functionality and efficiency gains

Test model through peer review

Present findings to sector

2. Methodology

Through research and analysis of their own systems, StudyLink had already identified the tasks involved at every stage of the workflow. The workflow was tested qualitatively with education agents by StudyLink.

Working closely with StudyLink, Edified developed two quantitative surveys targeting business decision makers and frontline counselling staff.

2.1 COUNSELLING AND APPLICATION WORKFLOW

RESEARCH AND COUNSELLING STAGE	SUBMIT APPLICATION STAGE	MANAGE APPLICATION STAGE	MANAGE DECISION STAGE	MANAGE ENROLMENT STAGE
1. Review provider website – possible study choices 2. Collect documentation from applicant 3. Create record in CRM 4. Upload documents to CRM 5. Certify documents 6. Confirm student academic eligibility 7. Collect evidence of funding 8. Verify access to funding 9. Arrange and prepare student for GTE[3] interviews 10. Check visa history 11. Meet additional provider requirements 12. Check for gap history and related documents	13. Find provider's course application form 14. Complete provider's online application form fields 15. Upload documents from CRM to Provider application system 16. Check application is complete 17. Submit application 18. Update CRM that application has been submitted inc. time stamp and application ID	19. Respond to requests for further information – collect and update CRM 20. Update status in CRM with date stamps, e.g. waiting for offer / info required 21. Respond to requests for further information – move data from CRM to provider system or email	22. Update status in CRM and attach offer 23. Update status in CRM – no offer / rejection and advise student 24. Upload signed offer acceptance in CRM 25. Send/upload signed offer to provider 26. Send payment information to applicant and update CRM 27. Update CRM with confirmation of payment 28. Send/upload confirmation of payment to provider 29. Check provider has received payment and issued Certificate of Enrolment (COE) for visa application 30. Non-accept – send/upload/advise provider 31. Non-accept – update CRM	32. Confirm Overseas Health Cover (OSHC) requirements and pay for cover 33. Add OSHC details to CRM 34. Send/Upload OSHC cover details to provider 35. Visa confirmation – update status in CRM 36. Send/upload visa confirmation to provider 37. Arrival information – update status/details in CRM 38. Send/upload arrival details to provider 39. Update student commenced/passed census information in CRM and notify student 40. Reconciling commission payments
Communicating back and forth with provider	Communicating back and forth with provider	Communicating back and forth with provider	Communicating back and forth with provider	

[3] GTE: Australian universities are required to determine whether a student will be a Genuine Temporary Entrant to Australia across a range of criteria. Failure to do so can impact their ability to recruit from some countries or in serious cases, prevent them from recruiting international students.

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2.2 AGENT LEADERS, MANAGERS, AND OWNERS SURVEY

To gain a general overview of operations and systems, and an understanding of perceived barriers to automation, research was conducted among 21 business decision makers (referred to as 'managers' from hereon) from a range of agencies. The quantitative and qualitative research each included over 50 lines of inquiry and occurred between July and August 2021.

21 respondents

1 aggregator agent

76% recruiting from multiple countries

What geography does your company represent?

Global	33%
Multiple regions	33%
Region specific	10%
Country specific	24%

Only 5% of the responding agencies did not use a CRM or similar system to house prospective student data.

The survey asked business leaders to rate the efficiency of their operations across the workflow stages and their perceptions of the barriers, potential efficiencies, and the advantages of having a system integration between their CRM and provider application systems. A complete set of questions is provided in appendix three.

2.3 AGENT FRONTLINE COUNSELLING STAFF

Up to 30 counselling staff (referred to as 'counsellors' from hereon) from a range of agencies participated in a 15 minute online quantitative survey designed to calculate the time taken to complete each student counselling and processing task through the applicant journey. We also asked them to detail the frequency of task repetition.

Up to 30 respondents

Mix of admissions staff and counsellors

2/3 work with student applications globally

Half in Australia, others from India, China, Bangladesh, Indonesia, Malaysia, Philippines, Taiwan

A complete set of questions is provided in appendix four.

2.4 DATA CLEANING AND VALIDATION

The collated survey responses were 'cleaned' to ensure data quality. Analysis of the counsellor survey data revealed some outliers which biased the overall averages. A 'trimmed average' was applied by deleting the lowest 5% and highest 5% of non-missing values. This was the agreed approach rather than subjectively removing outliers or using a median value which hid some of the variability in responses.

StudyLink undertook further observations of counsellors across two agencies and tested initial data findings multiple times to verify the authenticity of the average time allocations per a task.

2.5 MAPPING THE STUDYLINK CONNECT API FUNCTIONALITY AGAINST WORKFLOW TASKS

Once the data had been synthesised, StudyLink staff evaluated every task against the StudyLink Connect Recruitment Partner API functionality to determine how much of a task could be automated. This was based on their pilot integrations between six agency CRMs and StudyLink Connect Partner Portal. The pilot integration also provided StudyLink with information on the resources required to facilitate the automation.

2.6 THE IMPACT OF COVID-19

Despite Covid-19 significantly disrupting the international education sector, agents are still busy. Australia's response to the crisis has involved closing their borders. Some students have taken up online provision with a view to moving to Australia when borders reopen, but many students have deferred entry or made alternative arrangements; the significant increases in numbers seen in the UK and Canada suggest that some students have chosen alternative markets. The findings of this research remain valid in both the covid and normal operating environments.

3. Research findings

The research found that managers are confident in the efficiency of the processes that are more within their agency's control. However, as the process increasingly interacts with provider systems and processes, they believe the degree of efficiency declines. The graph below illustrates their views on the efficiencies through the different process stages.

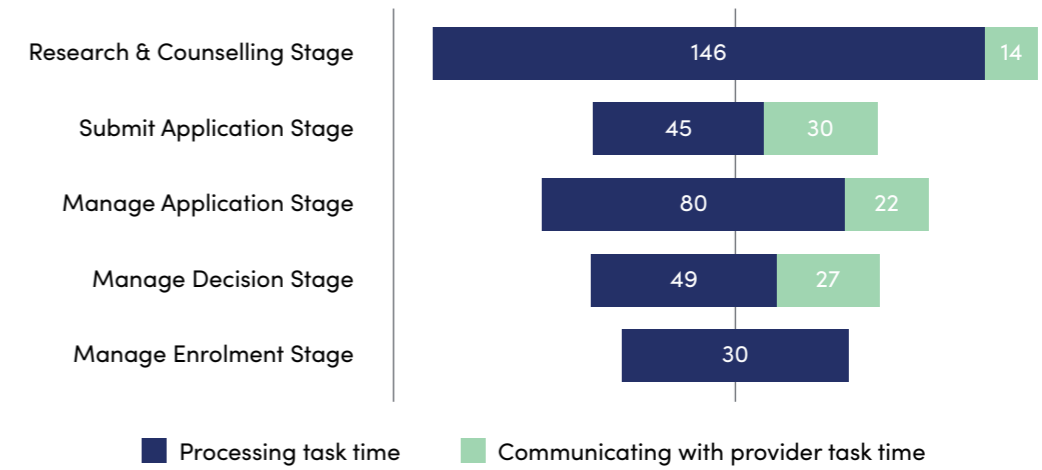**Average of Managers rating Stages as Highly or Very Efficient**

The counsellor survey found that at 2 hours, 40 minutes per application, the 'Research and Counselling Stage' is the most time consuming stage, accounting for 36% of the total time to process an application. Many of the tasks in this stage are repeated multiple times for each applicant, so the total time spent per applicant is actually 9 hours with a further 1½ hours spent communicating back and forth with providers to verify information and check that they are correctly advising the applicant. The average time taken to complete a single task in this stage is 12.2 minutes.

The counsellor survey also found that the 'Managing Application Stage' is a time consuming stage, primarily because of task repetition; each student submits on average 4 applications, so most tasks need to be completed, or partially completed, 4 times.

To help explain the research and compare the various tasks and stages, most of this report will use the time taken to complete a task for one application. The time taken to complete each stage per application can be presented as a recruitment funnel.

Time in Minutes to Complete Each Stage

Somewhat in contradiction to the managers' perceptions, the average time taken in minutes to complete a single processing task per application, gradually decreases through the funnel stages.

Average Time in Minutes to Complete a Task

This is because the tasks become increasingly transactional through the different stages. The 'Research and Counselling Stage' emphasises relationship building, advisory and information gathering tasks whereas tasks in the 'Manage Enrolment Stage' tend to involve the input of a single or small cluster of data points, e.g. send/upload visa confirmation to provider.

3.1.1 MANAGER PERCEPTIONS OF THE BENEFITS AND CHALLENGES OF SYSTEM INTEGRATION

The main advantages of integrating systems perceived by managers are the reduction of human errors and wasted work, particularly in relation to the rekeying of data into two systems - the agency CRM and the provider application system. They also felt that it would increase the transparency of, and access to inform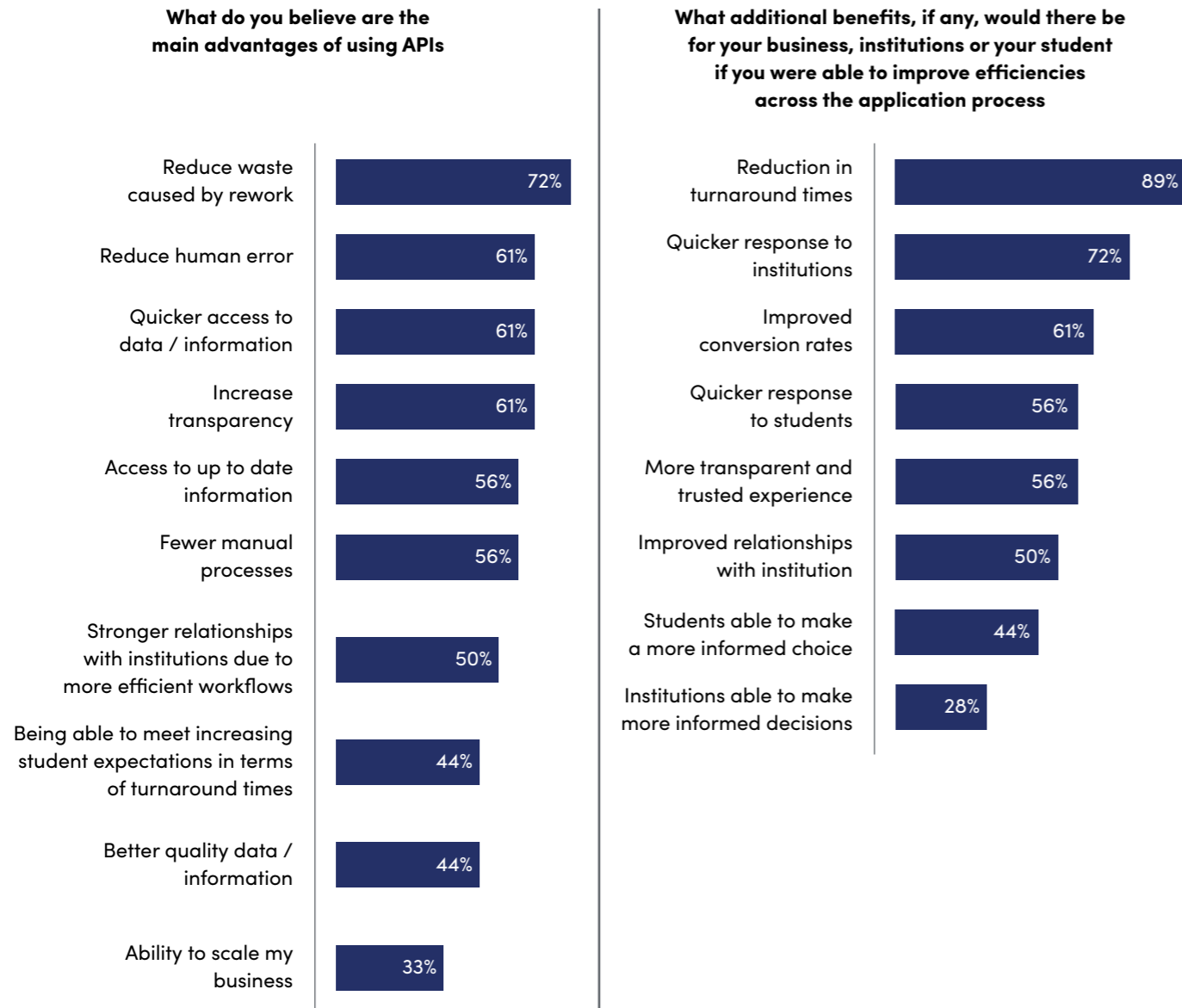ation and data about an applicant's status. In turn, they felt that this would reduce the application processing turnaround time, resulting in, quicker responses from providers and potentially to increase applicant to enrolment conversion rates.

What do you believe are the main advantages of using APIs

Reduce waste caused by rework	72%
Reduce human error	61%
Quicker access to data / information	61%
Increase transparency	61%
Access to up to date information	56%
Fewer manual processes	56%
Stronger relationships with institutions due to more efficient workflows	50%
Being able to meet increasing student expectations in terms of turnaround times	44%
Better quality data / information	44%
Ability to scale my business	33%

What additional benefits, if any, would there be for your business, institutions or your student if you were able to improve efficiencies across the application process

Reduction in turnaround times	89%
Quicker response to institutions	72%
Improved conversion rates	61%
Quicker response to students	56%
More transparent and trusted experience	56%
Improved relationships with institution	50%
Students able to make a more informed choice	44%
Institutions able to make more informed decisions	28%

However, they share some common concerns, particularly around the initial and ongoing resource requirements to set up and manage the integration. 44% indicated that they lacked knowledge of API integration. Cost was not seen as a barrier by most.
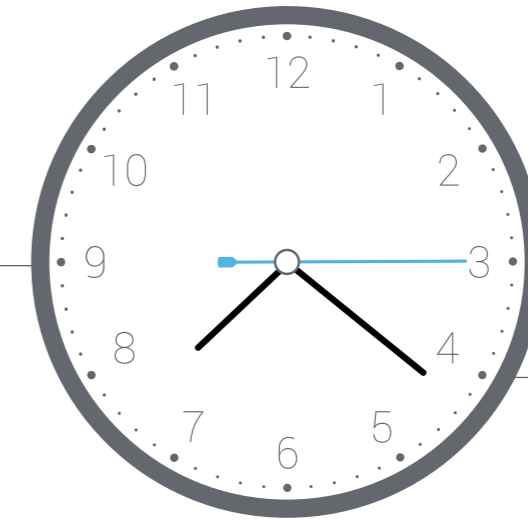
RECOMMENDATION FOR STUDYLINK
Educating agent managers on how an API integration works and the resources required to set-up and maintain the API could decrease or remove perceived barriers to integrating systems.

3.1.2 THE CURRENT SITUATION (BEFORE-API)

It takes
7 hours, 22 minutes
for a counsellor to process a single application for an Australian provider

Filling in a provider's application form takes on average
16 minutes

- Research and Counselling accounts for 36% of the total time spent processing an application
  – Qualifying a student meets course requirements takes 18 minutes and is repeated, on average, 6.2 times per applicant
  – Arranging and preparing for a student's GTE (see footnote 3) checks takes the longest time of any task (20 minutes) and is repeated 4.1 times per applicant

One applicant usually submits
4 applications
and receives **2.7 offers**

Based on a model where a counsellor works 2,000 hours a year[4] and focus their entire time on application processing they could process:

Over
270 applications
a year for circa
68 applicants

51 enrolments
at Australian providers

These findings assume a normal operating environment where students are able to travel.

[4] 250 working days per year at 8 hours a day, 7.37 hours to process one application and 4 applications submitted per applicant. 75% conversion of applicant to enrolment where 10% receive a visa rejection and 15% do not travel for other reasons, such as deciding to study in a different country

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3.2 EFFICIENCY GAINS THROUGH RECRUITMENT PARTNER API INTEGRATION

The API integration has little impact on the 'Research & Counselling Stage' for the reasons outlined in section 3.3, but results in significant efficiencies through the remaining stages where data is taken from one system and keyed into another. The arrows in the diagram below illustrate the passage of information between systems. Before integration this is linear and manual, but after integration it is bidirectional and automated.

| Agent CRM student data/ documents | ▶ | Counsellor looks up and manually updates | ▶ | Provider application and admission system | ▶ | Provider application and admission system student status update/request | ▶ | Counsellor looks up and manually updates | ▶ | Agent CRM |

BEFORE RECRUITMENT PARTNER API INTEGRATION

AFTER RECRUITMENT PARTNER API INTEGRATION

| Counsellor | ◀▶ | Agent CRM | ◀▶ | StudyLink Connect RECRUITMENT PARTNER API | ◀▶ | EDUCATION PROVIDER ADMISSIONS SYSTEM |

StudyLink reviewed every task and conservatively estimated the probable and optimal percentage of a task that would be facilitated by the automated communication between the agent CRM and the provider application and admission system, in this case, StudyLink Connect. These were built out into probable and optimal scenarios.

3.2.1 PROBABLE SCENARIO

The probable scenario assumes that the data and documents being captured by an agent in their CRM are a good match to the fields and document requirements of Australian providers, but with some discrepancies. This might be because an agent would only gather certain information for specific programs or institutions, or they do not store all student file information inside the CRM, for example, keeping some paper files. While the use of CRM or related systems among surveyed agents was high, not all agents operate paper free.

3.2.2 OPTIMAL SCENARIO

The optimal scenario assumed that there was a very close fit between the agent CRM and application system fields and document requirements, allowing for a greater degree of integration.

3.2.3 CONTEXT SWITCHING

In addition to considering the degree to which the API can transfer data and documents, StudyLink also considered the impact the API would have on context switching. As the 'After API integration' graphic illustrates, the counsellor is now only working in one system – the agent CRM – for most process tasks. While this may seem like a subtle change, once you consider the maintenance of multiple logins, having multiple screens open at once and the different field labels in the systems, it is clear that there are context switching efficiencies.

3.2.4 STUDYLINK CONNECT RECRUITMENT PARTNER API EFFICIENCY SAVINGS
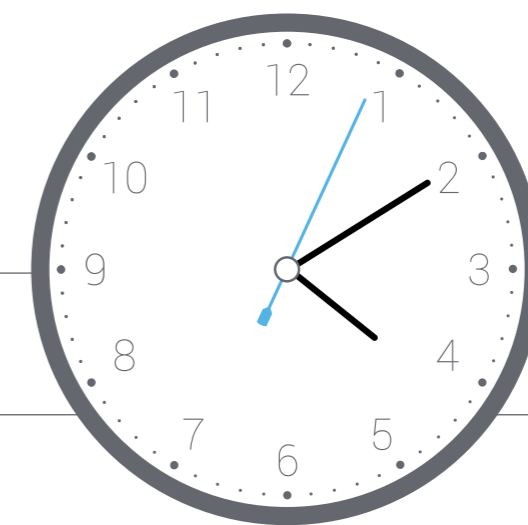
	Total task time per stage before API (minutes)	Probable Scenario Efficiency Gain	Optimal Scenario Efficiency Gain
Research & Counselling Stage	160	0%	0%
Submit Application Stage	74	60%	76%
Manage Application Stage	102	67%	73%
Manage Decision Stage	76	61%	70%
Manage Enrolment Stage	30	26%	29%
TOTAL	**442**	**38%**	**43%**

3.2.5 THE FUTURE SITUATION (POST-API)

The time taken to process a single application is reduced to:

The Research and Counselling Stage is not currently affected by the StudyLink Connect API, therefore now accounts for a greater proportion of the total time spent processing an application

- 58% in the probable scenario
- 64% in the optimal scenario

Filling in a provider's application form down from 16 minutes to

4 minutes

(probable) or is completely automated (optimal)

4 hours, 10 minutes in the optimal scenario

The time taken to process a single application, is reduced from 7 hours, 22 minutes to

4 hours, 34 minutes in the probable scenario

The task efficiency savings of the StudyLink Connect Recruitment Partner API are covered in more detail in sections 3.3 to 3.7.

3.3 RESEARCH AND COUNSELLING STAGE

The 'Research and Counselling Stage' comprises twelve process tasks and communication back and forth with the provider which is counted as an additional task.

3.3.1 THE SURVEY FINDINGS
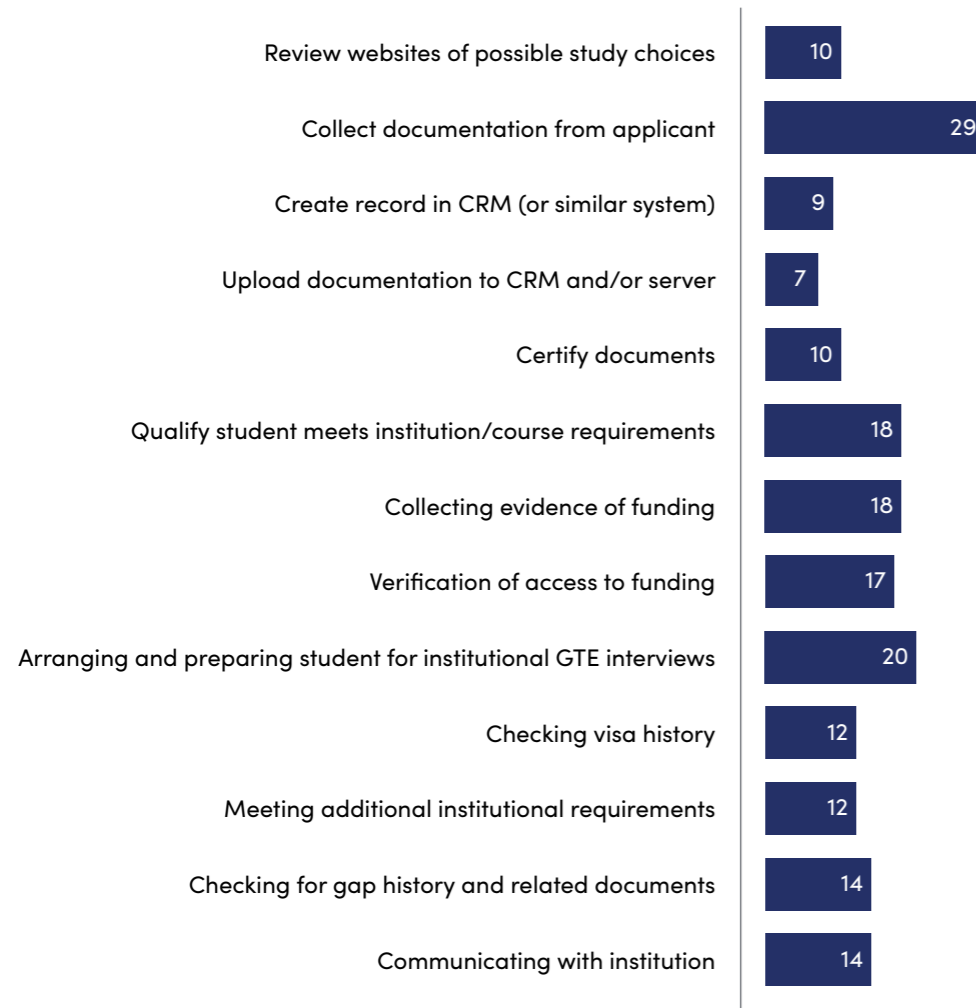
2 hours, 46 minutes
of task time per application

14 minutes of communication
time per application

10½ hours total
time per applicant

**Research & Counselling Task Time
(per application in minutes)**

Task	Minutes
Review websites of possible study choices	10
Collect documentation from applicant	29
Create record in CRM (or similar system)	9
Upload documentation to CRM and/or server	7
Certify documents	10
Qualify student meets institution/course requirements	18
Collecting evidence of funding	18
Verification of access to funding	17
Arranging and preparing student for institutional GTE interviews	20
Checking visa history	12
Meeting additional institutional requirements	12
Checking for gap history and related documents	14
Communicating with institution	14

As highlighted in the introduction, managers saw this stage as the most efficient, probably due to the lack of process interaction with provider systems. Counsellors are spending time advising the applicant, gathering information and finding best-fit providers and programs that build the information foundations for applicant processing through the stages. But even at this early stage, counsellors are spending one third of their time interacting with university information systems and processes, that is, 50 minutes spent reviewing provider websites, verifying the student meets provider requirements and meeting additional provider requirements for Genuine Temporary Entrant (GTE) screening.[5]

The most time consuming tasks (bottlenecks) were:	Time taken to complete	Number of times task done
Collecting documents from the applicant	29 minutes	1
Arranging and preparing student for institutional GTE interviews	20 minutes	4.1
Collecting evidence of funding	18 minutes	4
Qualify student meets institution/course requirements	18 minutes	6.2

3.3.2 THE IMPACT OF THE API ON THE RESEARCH & COUNSELLING STAGE

At present the StudyLink Connect API does not address the identified bottlenecks or other tasks at the 'Research & Counselling Stage', however, the functionality of the existing StudyLink Connect suite is likely to have already reduced the average time taken to complete some of the tasks. The 'one application portal to many providers' and the 'no pass without complete' functionality has trained provider agents on

- which documents to collect – collecting documents from the applicant and meeting additional institution requirements; and
- what the entry criteria are for different courses are - qualifying student meets institution/course requirements.

The agent portal also provides a central repository of information for agents on the providers so reducing the need to communicate with the provider. The effectiveness of the suite is reliant on the information provided by the provider; the more well curated information a provider uploads into the agent portal specifically related to the tasks in this stage, the less time the agent spends context switching between platforms and searching provider websites for answers. As such, there may be opportunities to improve efficiency at this stage through better and more targeted curation of course and GTE requirements and information.

RECOMMENDATION FOR STUDYLINK
StudyLink should extend the Recruitment Partner APIs to include structured program information so that efficiencies can be gained at the Research and Counselling Stage.

RECOMMENDATION FOR PROVIDER
Make structured program data, including fees and entry requirements available for distribution via an API. This will enable the recruitment channels to improve the discovery and matching process.

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[5] GTE screening is a process providers recruiting international students to Australia are required to undertake as part of their sponsorship of the student under the current student visa scheme. Providers have different requirements and task their education agents with gathering and providing the relevant documentation and evidence. More information can be found on GTE at https://immi.homeaffairs.gov.au/visas/getting-a-visa/visa-listing/student-500/genuine-temporary-entrant

3.4 SUBMIT APPLICATION STAGE

The 'Submit Application Stage' comprises six process tasks and communication back and forth with the provider which is counted as an additional task.

3.4.1 THE SURVEY FINDINGS
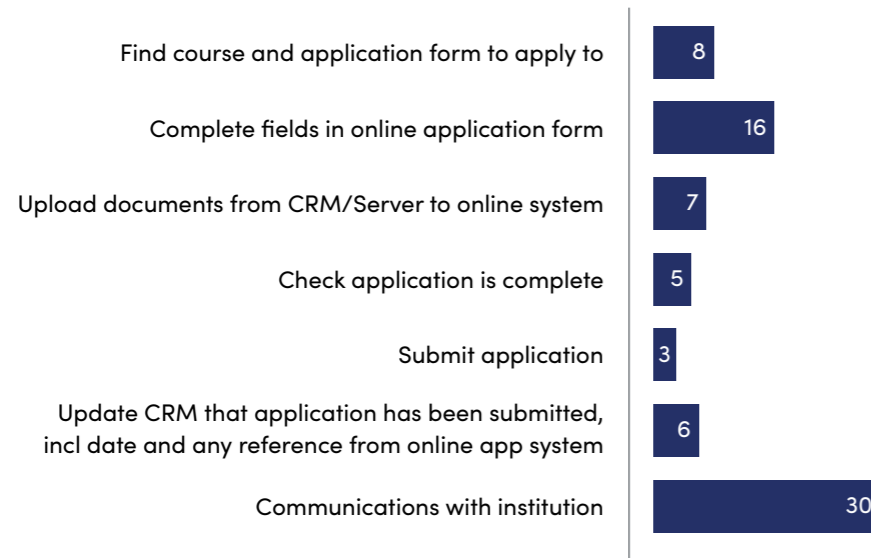
45 minutes
of task time per application

8.2 minutes of communication time per application

3½ hours total time per applicant

Submit Application Stage Task time
(per application in minutes)

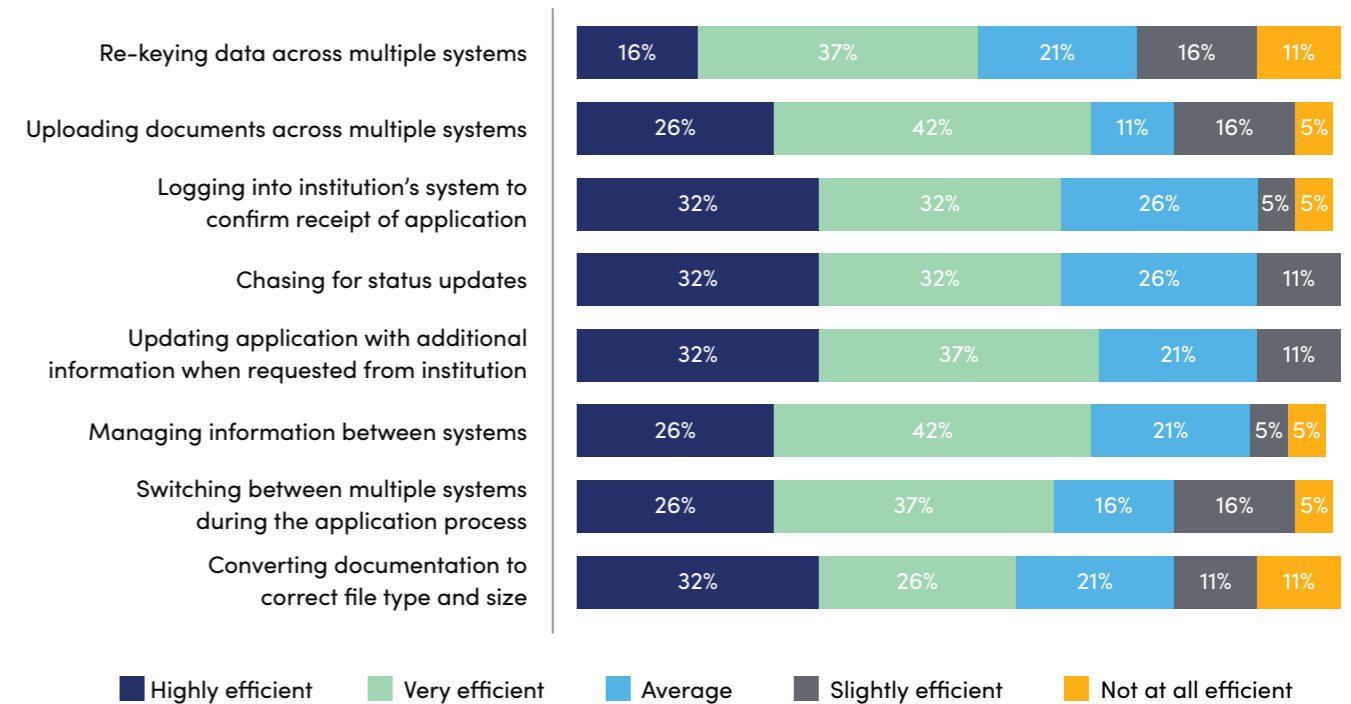| Task	Minutes
Find course and application form to apply to	8
Complete fields in online application form	16
Upload documents from CRM/Server to online system	7
Check application is complete	5
Submit application	3
Update CRM that application has been submitted, incl date and any reference from online app system	6
Communications with institution	30

The bottleneck at this stage is completing the online application which took, on average, 15.7 minutes per application and the need to regularly communicate with the provider. Most of the tasks are repeated 4 times per applicant.

Managers felt the majority (63%) of tasks at this stage were completed in a very or highly efficient manner, but it is worth noting where their concerns lay. The following graph illustrates manager perceptions of task efficiency through the Submit Application Stage.

During the Submit Application Stage, how do you rate the efficiency of the following actions?

Action	Highly efficient	Very efficient	Average	Slightly efficient	Not at all efficient
Re-keying data across multiple systems	16%	37%	21%	16%	11%
Uploading documents across multiple systems	26%	42%	11%	16%	5%
Logging into institution's system to confirm receipt of application	32%	32%	26%	5%	5%
Chasing for status updates	32%	32%	26%	11%	
Updating application with additional information when requested from institution	32%	37%	21%	11%	
Managing information between systems	26%	42%	21%	5%	5%
Switching between multiple systems during the application process	26%	37%	16%	16%	5%
Converting documentation to correct file type and size	32%	26%	21%	11%	11%

- ■ Highly efficient
- ■ Very efficient
- ■ Average
- ■ Slightly efficient
- ■ Not at all efficient

25% reported that 'rekeying data across multiple systems' was slightly or not at all efficient, and 21–22% rated 'uploading documents across multiple systems', 'switching between multiple systems during the application process', and 'converting documentation to correct file type and size', as slightly or not at all efficient.

3.4.2 THE IMPACT ON THE SUBMIT APPLICATIONS STAGE

	Time taken to complete task (minutes)	Probable		Optimal	
		% time saved	Time taken after API	% time saved	Time taken after API
Find course and application form to apply to	8	100%	0	100%	0
Complete fields in online application form - see notes	16	75%	4	100%	0
Upload documents from CRM/Server to online system	7	100%	0	100%	0
Check application is complete	5	100%	0	100%	0
Submit application	3	0%	3	0%	3
Update CRM that application has been submitted, incl date and any reference from online app system	6	100%	0	100%	0
Communications with institution	30	25%	22	50%	15
TOTAL FOR STAGE (per application)	**74**	**60%**	**30**	**76%**	**18**

The actual submitting of the application will always require a counsellor to login to the agent CRM and press "submit application" so it remains unaffected. Some communication between the counsellor and provider as the tasks are being completed is also required, but in either scenario, the API integration significantly decreases the time taken to complete the 'Submit Application Stage' tasks.

The API integration also largely addresses the areas where managers reported some potential inefficiency; rekeying is reduced to close to zero, files and data are transferred seamlessly between the systems and the counsellor is able to complete all the tasks in the agent CRM, so is not context switching between systems. Converting documentation to correct file type and size will depend more on the 'collecting documents from the applicant task' in the 'Research and Counselling Stage'. It is highly probable that providers will require standard file types, e.g. .pdf, .doc, etc. to minimise this issue, and agents need to have clear protocols earlier in the process.

> **RECOMMENDATION FOR AGENTS**
> Standardise the acceptable file types you collect from students in-line with provider requirements to minimise the time spent on this by counsellors.

3.5 MANAGE APPLICATION STAGE

The 'Manage Application Stage' comprises three process tasks and communication back and forth with the provider which is counted as an additional task. As with the 'Submit Application Stage', tasks in the 'Manage Application Stage' are repeated four times because each applicant submits, on avergage, four applications.

3.5.1 THE SURVEY FINDINGS

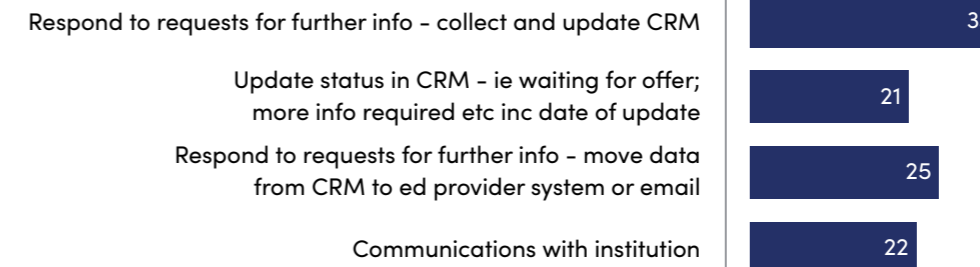**1 hour, 20 minutes** of task time per application

22 minutes of communication time per application
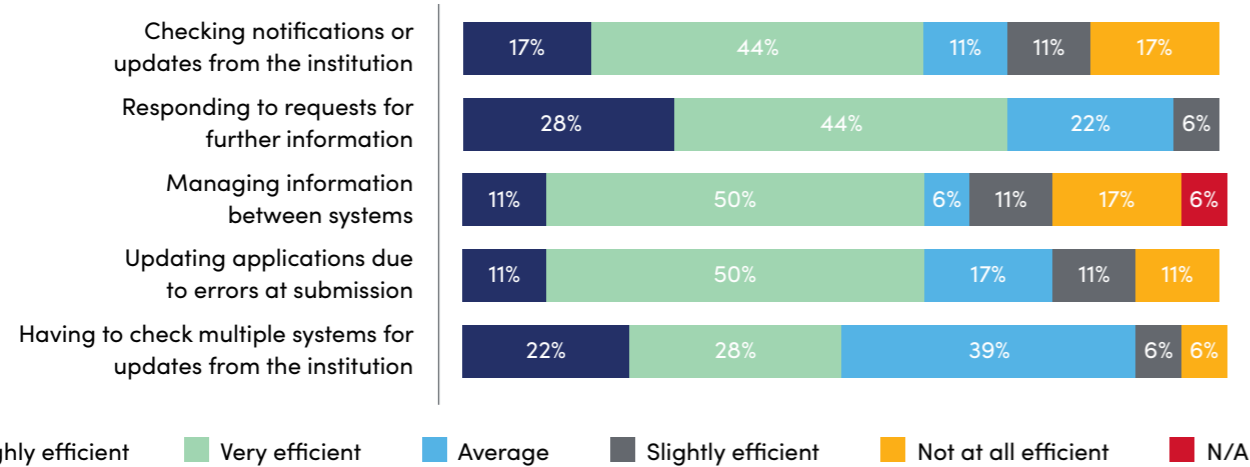
6 hours, 48 minutes total time per applicant

Submit Application Stage Task time (per application in minutes)

Respond to requests for further info - collect and update CRM	33
Update status in CRM - ie waiting for offer; more info required etc inc date of update	21
Respond to requests for further info - move data from CRM to ed provider system or email	25
Communications with institution	22

All the tasks in this stage are time-consuming, and many could be reduced by focussing on getting complete documents and data sets, in the earlier stages.

Managers were generally quite confident in the efficiency of this stage with 61% average of those rating highly or very efficient for task completion, but as with other stages, there were areas of lower confidence.

During the Manage Application stage, how do you rate the efficiency of the following actions?

Checking notifications or updates from the institution	17%	44%	11%	11%	17%
Responding to requests for further information	28%	44%	22%	6%	
Managing information between systems	11%	50%	6%	11%	17% 6%
Updating applications due to errors at submission	11%	50%	17%	11%	11%
Having to check multiple systems for updates from the institution	22%	28%	39%	6% 6%	

■ Highly efficient ■ Very efficient ■ Average ■ Slightly efficient ■ Not at all efficient ■ N/A

28% reported that 'checking notifications or updates from the institution' and 'manage information between systems' were slightly or not at all efficient. 'Updating applications due to errors at submission' also had a fairly low average efficiency rating (22%) among managers.

3.4.2 THE IMPACT ON THE MANAGE APPLICATION STAGE

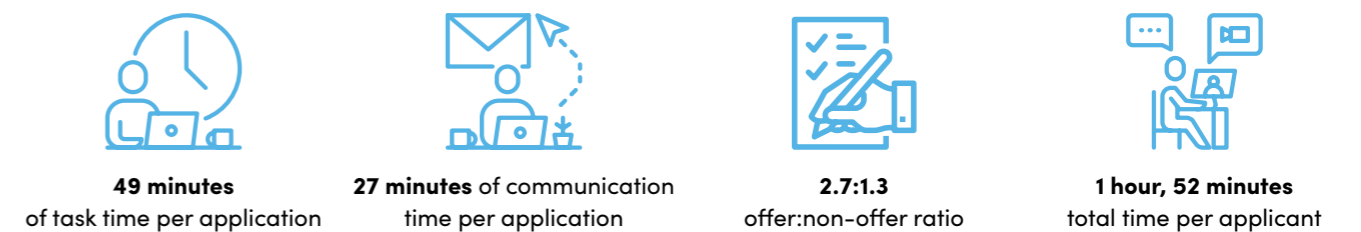|	Time taken to complete task (minutes)	Probable		Optimal	
		% time saved	Time taken after API	% time saved	Time taken after API
Respond to requests for further info - collect and update CRM	33	50%	17	50%	17
Update status in CRM - ie waiting for offer; more information required, etc, including date of update	21	100%	0	100%	0
Respond to requests for further info - move data from CRM to provider system or email	25	100%	0	100%	0
Communications with institution	22	25%	17	50%	11
TOTAL FOR STAGE (per application)	**102**	**67%**	**34**	**73%**	**27**

The StudyLink Connect Recruitment Partner API reduces task times by more than two-thirds in the 'Manage Application Stage' with information passing between systems removing all task time for both 'Update status in CRM - ie waiting for offer; more information required, etc, including date of update' and 'Respond to requests for further info - move data from CRM to provider system or email'. Even with extremely thorough document and data gathering protocols, it would not be possible to completely remove all task time for 'Respond to requests for further info - collect and update CRM', however, the time is estimated to halve as a result of the information being transferred back and forth by the Recruitment Partner API. Similarly, some communication is still required between the two parties to ensure applications are complete and ready for processing.

Providing more detailed admission data and document requirements to education agents, would decrease the time taken to complete the remaining tasks at this stage, but the work required to gather the data and documentation would simply be pushed to elsewhere in the process so it is unlikely it would decrease the total processing time across all stages.

3.6 MANAGE DECISION STAGE

The 'Manage Decision Stage' comprises ten process tasks and communication back and forth with the provider which is counted as an additional task. This stage comprises both the managing of offers and/or rejections, and the managing of acceptance processes up to the issuance of the Certificate of Enrolment (COE) which is used by students to apply for a student visa. Unlike the two previous stages, the tasks are not all repeated 4 times, because some students do not receive offers and they will generally only accept one offer.

3.6.1 THE SURVEY FINDINGS

49 minutes of task time per application

27 minutes of communication time per application

2.7:1.3 offer:non-offer ratio

1 hour, 52 minutes total time per applicant

Manage Decision Stage Task Time (per application in minutes)
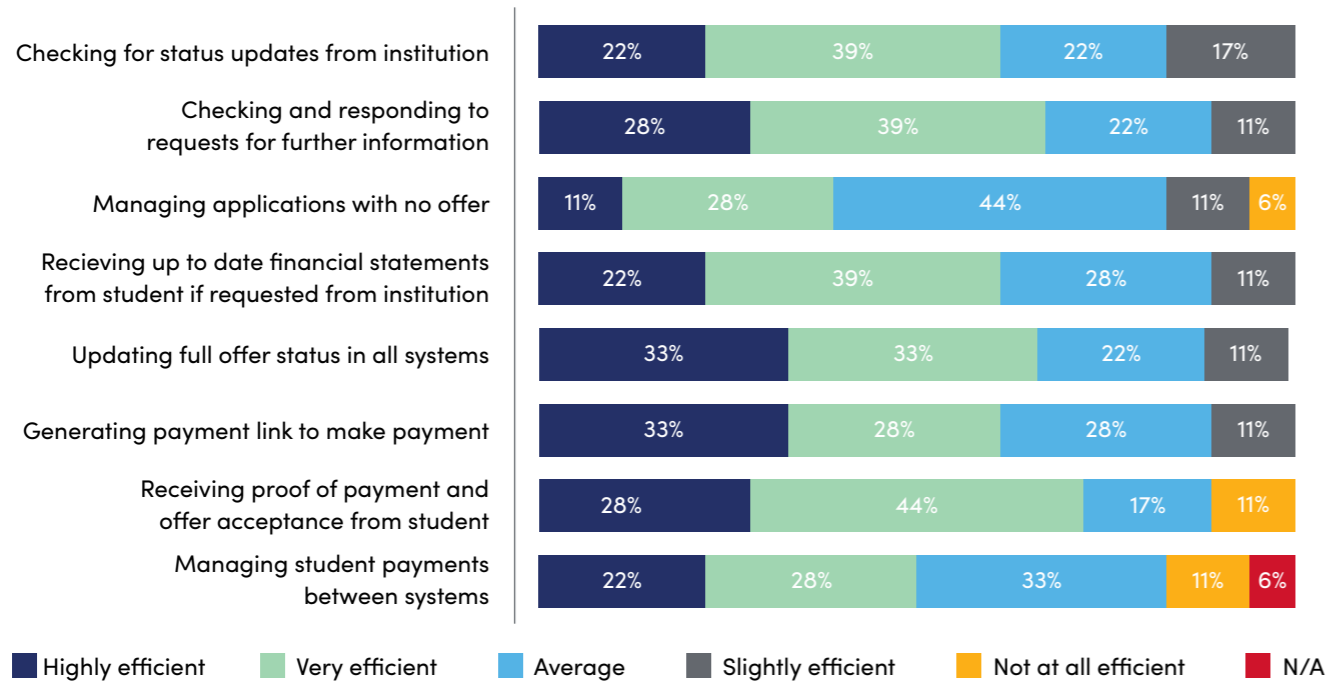
Update status in CRM and attach offer	5
Application with no offer / institution rejection, update status in CRM and advise student	5
Update status and upload signed offer in CRM	4
Send / upload signed offer to institution	4
Send payment information to applicant and update CRM	5
Update CRM with confirmation of payment details	5
Send / upload confirmation of payment to institution	5
Check institution has received payment and they have issued COE	6
Non-accept: Send/upload/advise institution	5
Non-accept: Update status in CRM	4
Communications with institution	27

3.4.2 THE IMPACT ON THE MANAGE DECISION STAGE

	Time taken to complete task (minutes)	Probable		Optimal	
		% time saved	Time taken after API	% time saved	Time taken after API
Update status in CRM and attach offer	5	100%	0	100%	0
Application with no offer / institution rejection, update status in CRM and advise student	5	100%	0	100%	0
Update status and upload signed offer in CRM	4	50%	2	50%	2
Send / upload signed offer to institution – see notes	4	50%	2	50%	2
Send payment information to applicant and update CRM	5	100%	0	100%	0
Update CRM with confirmation of payment details	5	0%	5	0%	5
Send / upload confirmation of payment to institution	5	100%	0	100%	0
Check institution has received payment and they have issued COE	6	100%	0	100%	0
Non–accept: Send/upload/advise institution	5	100%	0	100%	0
Non–accept: Update status in CRM	4	100%	0	100%	0
Communications with institution	27	25%	20	50%	13
TOTAL FOR STAGE (per application)	**76**	**61%**	**30**	**70%**	**23**

The amount of context switching and rekeying tasks required of counsellors at this stage is largely automated by the API so significantly reducing the overall time required to complete all the tasks – a reduction from 1 hour, 16 minutes to between 23 and 30 minutes. Where a counsellor is updating their CRM with new information from the student – e.g. uploading signed offer letter, uploading confirmation of payment to institution – some manual intervention is required irrespective of the API's functionality. At present, the counsellor is doing this, but in some cases there may be an opportunity for students to complete these tasks by uploading required information directly into the agent CRM and the counsellors simply undertake a document verification check.

RECOMMENDATION FOR AGENTS
Consider building 'uploading document functionality' into your CRM via a web form so where appropriate students can upload their own documents. This will help minimise low value administrative work among counsellors.

RECOMMENDATION FOR PROVIDER
Updating the status of an application when there is no offer, including a reason why, will help agents close out the application and save time continuing to process an application that has been rejected. Agents can use the Recruitment Partner API to update the status of their system to indicate an application has been rejected.

Counsellors reported that they have a lot of conversations with the provider to chase decisions and get status updates. At this stage, there are a lot of repeated tasks across the agent and provider systems.

Manager perceptions of efficiency levels remain quite similar to earlier stages with 60% average of those rating task completion as highly or very efficient. However, the positive responses were not uniform across tasks. The graph below shows that there was a significantly higher number of managers reporting that the efficiency of managing applications with no offer, is average.

During the Manage Offers stage, how do you rate the efficiency of the following actions?

We also start to see interactions with third–party systems such as during the managing student payments task which are also perceived as being efficient, but less so than other tasks in the stage.

3.7 MANAGE ENROLMENT STAGE

The 'Manage Enrolment Stage' comprises eight quick process tasks with little to no communication required with the provider. A number of third-party systems are incorporated into this Stage such as OSHC[6] provider systems and Visa Entitlement Verification Online system (VEVO). There is little to no repetition of tasks because the applicant has accepted one offer so the counsellor only completes these tasks once. However, there is more context switching between the multiple systems.

3.7.1 THE SURVEY FINDINGS

30 minutes
of task time per application
and per applicant

0 repetition
of tasks

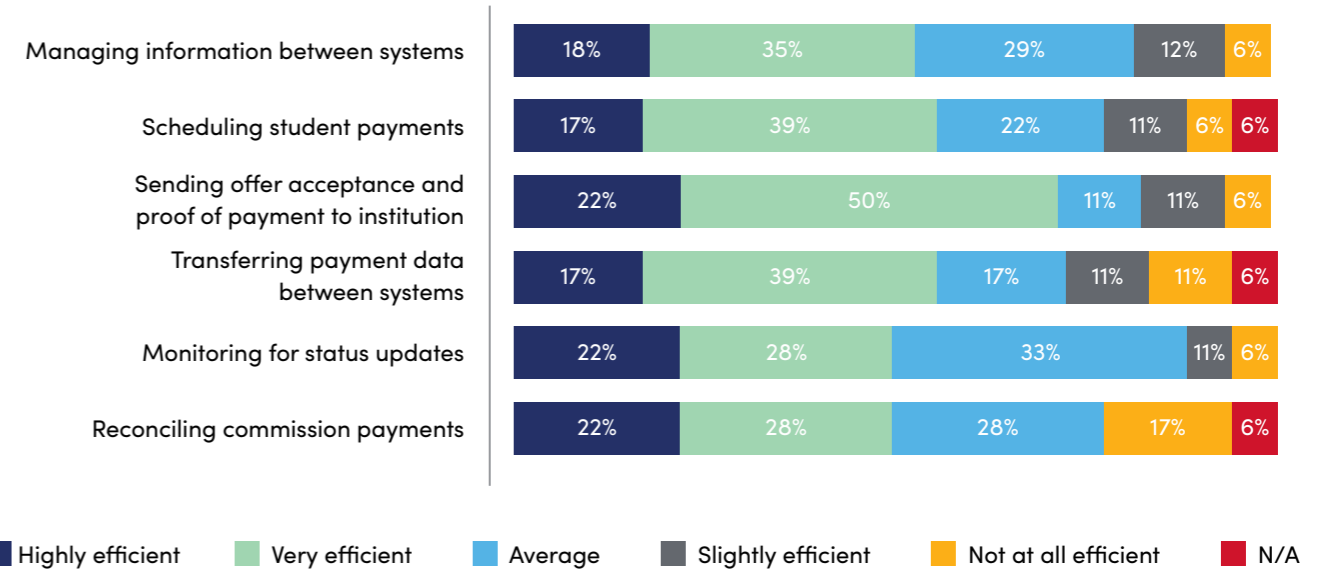**Manage Enrolment Stage Task Time**
(per application in minutes)

Confirm OSHC requirements and pay for cover	7
Add OSHC details in CRM	4
Send OSHC cover details to institution	3
Visa confirmation – update status in CRM	4
Send OSHC cover details to institution	3
Arrival details – Update status / details in CRM	3
Send / upload arrival details to institution	3
Updating student commenced/passed census information in CRM and notify student	3

The confirm OSHC requirement and pay for cover task is time consuming because the process can vary considerably. Many Australian providers have agreements with OSHC providers and have integrated payment systems, but it is fairly common for agents to have their own agreements and separate processes. Ultimately it is the applicant's choice which overseas health cover they take out so this can further complicate the task.

[6] It is a student visa requirement that all international students studying in Australia take out overseas health cover (OSHC) – health insurance – for the duration of their studies.

Managers felt this was the least efficient stage with far more reporting tasks being of 'average' efficiency.

During the Enrolment stage, how do you rate the efficiency of the following actions?

	Highly efficient	Very efficient	Average	Slightly efficient	Not at all efficient	N/A
Managing information between systems	18%	35%	29%	12%		6%
Scheduling student payments	17%	39%	22%	11%	6%	6%
Sending offer acceptance and proof of payment to institution	22%	50%	11%	11%		6%
Transferring payment data between systems	17%	39%	17%	11%	11%	6%
Monitoring for status updates	22%	28%	33%	11%		6%
Reconciling commission payments	22%	28%	28%		17%	6%

- ■ Highly efficient
- ■ Very efficient
- ■ Average
- ■ Slightly efficient
- ■ Not at all efficient
- ■ N/A

In addition to covering the enrolment related tasks, Managers were also asked about their perceptions of the efficiency of Reconciling commission payments. This was the most divisive task with 50% reporting it was high or very high efficiency, 28% average, but 17% reporting it as being very inefficient.

3.4.2 THE IMPACT ON THE MANAGE ENROLMENT STAGE

	Time taken to complete task (minutes)	Probable		Optimal	
		% time saved	Time taken after API	% time saved	Time taken after API
Confirm OSHC requirements and pay for cover	7	0%	7	0%	7
Add OSHC details in CRM	4	0%	4	0%	4
Send OSHC cover details to institution	3	100%	0	100%	0
Visa confirmation – update status in CRM	4	50%	2	50%	2
Send / upload visa confirmation to institution	3	100%	0	100%	0
Arrival details – Update status / details in CRM	3	0%	3	0%	3
Send / upload arrival details to institution	3	0%	3	25%	3
Updating student commenced/passed census information in CRM and notify student	3	0%	3	0%	3
TOTAL FOR STAGE (per application)	**30**	**26%**	**23**	**43%**	**17**

While the StudyLink Connect Recruitment Partner API does increase efficiency of some of the tasks within the stage, the involvement of third-party groups and systems is beyond the API's current scope. As with other stages, the API does improve the efficiency of the tasks which involve sending information which the counsellor has gathered to the provider, e.g. 'send OSHC cover details to institution' and 'upload visa confirmation to institution'.

4. Quantifying the value of efficiency savings

Earlier sections have looked at the efficiency gains in terms of the reduction in time taken to undertake a particular task. Summarised at the Stage level, the total process efficiencies per application become very clear; this table illustrates the time saved in probable and optimal scenarios.

Task and communication combined efficiency savings	Current	Probable scenario		Optimal scenario	
	Time per application (mins)	Time saved (mins)	Percentage of time saved	Time saved (mins)	Percentage of time saved
Research & Counselling Stage	160	0	0%	0	0%
Submit Application Stage	74	45	60%	56	76%
Manage Applications Stage	102	68	67%	74	73%
Manage Decision Stage	76	47	61%	53	70%
Student Enrolment Stage	30	8	26%	9	29%
TOTAL COMBINED TIME (MINS)	**442**	**168**	**38%**	**192**	**43%**
Time taken to submit one application	**7.37 hrs**	**4.57 hrs**		**4.17 hrs**	

4.1 VALUE TO AGENCIES

More student referrals

Increased number of placed students

Reduced costs

With the global outbreak affecting all international student recruitment operations, research conducted by Edified on behalf of BUILA and UKCISA (2021)[7] found that agents are having to spend more time explaining safety issues and policies to prospective students and their families, and are in many cases offering additional services until well after a student has enrolled at a provider. Australian focussed agents have had to quickly diversify into new 'open' markets while maintaining their Australian client base in preparation for easing travel regulations. Like many Australian providers, they are having to do more with less. As such for the Australian sector, time saving efficiencies are in their own right highly valued. Exactly how agencies would choose to use this gained time was beyond the scope of the study, but it is likely that it would be used to increase the quantity of applicants and the quality of the applicant experience. Some of the time is also likely to be attributed to new initiatives and emerging tasks associated with the changing operating environment.

4.1.1 INCREASING PRODUCTIVITY - QUANTITY

The table below illustrates the potential increase in the volume of enrolments that the StudyLink Recruitment Partner API could realise from a single counselor's work in a 250 day working year if all of their time, 8 hours a day, was spent processing applications.[8]

	Applicants	Applications	Enrolments
Current situation	68	271	51
Post API integration – PROBABLE	109	438	82
Post API integration – OPTIMAL	120	480	90

Total counsellor work hours in a year
÷
Time taken per application
÷
Number of applications per applicant
X
Application to enrolment conversion rate
=
Enrolled students per a counsellor per year

Current situation: (2000 ÷ 7.37 ÷ 4) x 75% = 51

Probable scenario: (2000 ÷ 4.57 ÷ 4) x 75% = 82

Optimal scenario: (2000 ÷ 4.17 ÷ 4) x 75% = 90

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[7] A Partnership for Quality was produced by Edified for the British Universities International Liaison Association (BUILA) and the UK Council for International Student Affairs (UKCISA)

[8] Based on one FTE = 2000 hours a day based on 8 hour working days for 250 days of the year, and a 75% applicant to enrolment conversion which assumes that 15% drop out for personal reasons and a further 10% are unable to obtain a visa.

If an agency utilises all counsellor time efficiencies realised by the StudyLink Connect Recruitment Partner API, towards increasing the quantity of enrolments, in the optimal scenario they could achieve 77% more enrolments in a year per counsellor (61% for probable scenario).

Using a rudimentary formula, it is possible to place a financial value on the work undertaken by a counsellor in a year. StudyMove carry out an annual analysis of Australian university fees; in 2020, the average undergraduate fee was AU$33,960 and the average postgraduate coursework fee was AU$34,627.[9] Commission rates are held in commercial confidence but Edified's staff experience suggested that they range between 12 and 18 percent of the first year's tuition fees, inclusive of some provider's incentive and bonus schemes. For the purpose of this exercise we used an estimated commission of AU$5,000 per enrolment which equates to between 14 and 15 percent of an average fee of AU$34,300.

1 enrolment = **$5,000** = Value of a counsellors work to achieve **1 enrolment**

When multiplied out for the year and applied to the scenarios, API integration could increase a single counsellor's earning potential by between AU$155,000 and AU$195,000.

	Applicants	Applications	Enrolments	Value (AU$)
Current situation	68	271	51	$255,000
Post API integration – PROBABLE	109	438	82	$410,000
Post API integration – OPTIMAL	120	480	90	$450,000

In reality, a counsellor does not soley process applications. They are involved in events, fairs, university-specific activity as well as a range of other prospecting and administrative tasks that are beyond the scope of this research, but these figures are illustrative of how volume could be increased and the associated value of that increased productivity.

4.1.2 IMPROVING THE APPLICANT EXPERIENCE - QUALITY

Many providers measure their students' satisfaction with their experience of using their agents. This is done through tools like institutional arrival surveys or the International Student Barometer. Measuring student satisfaction is less quantifiable than calculating volume, but volume is often in itself a measure of student satisfaction. BUILA and UKCISA research conducted by Edified (2021) found that 43% of students using agents choose their agent because it was recommended to them; 33% higher than the next best channel. Agents have a commercial interest in delivering a good experience as well as outcome for their clients, therefore, it is highly probable that a portion of the time saved by the API will be used to extend the Research and Counselling Stage even further. The same research found that the majority of agents felt that finding a good fit provider and program for their student clients was the most important motivating factor, above financial or other incentives.

The applicant experience is also affected by the annual peaks and troughs in workflow. With increased efficiency around the peak periods, and more transparent information the agency will be able to better maintain the quality of service to student and provider clients. 89% of surveyed Managers reported that a reduction in turnaround times was a likely benefit of an API integration. Additional advantages identified by surveyed managers included:

- Improved conversion rates 61%
- Quicker response to students 56%
- More transparent and trusted experience 56%
- Students able to make a more informed choice 44%

9 https://www.studymove.com/index.php/news/17-key-data/68-international-students-fees-in-australia-in-2020

4.1.3 IMPROVED ACCURACY - QUALITY

The StudyLink Connect Recruitment Partner API reduces the number of manual process tasks from 40 (current situation) to 24 (optimal) or 25 (probable) tasks.
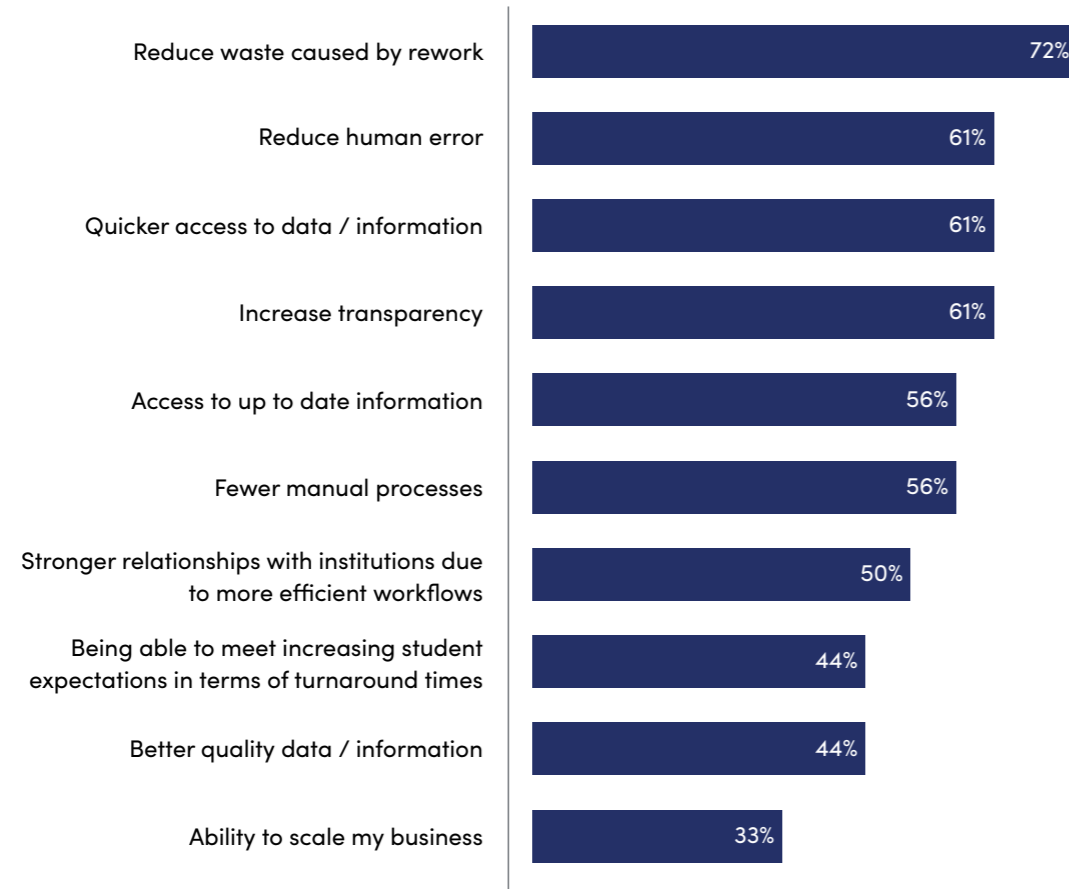
RESEARCH AND COUNSELLING STAGE	SUBMIT APPLICATION STAGE	MANAGE APPLICATION STAGE	MANAGE DECISION STAGE	MANAGE ENROLMENT STAGE
1. Review provider website – possible study choices 2. Collect documentation from applicant 3. Create record in CRM 4. Upload documents to CRM 5. Certify documents 6. Confirm student academic eligibility 7. Collect evidence of funding 8. Verify access to funding 9. Arrange and prepare student for GTE interviews 10. Check visa history 11. Meet additional provider requirements 12. Check for gap history and related documents	13. Complete provider's online application form fields (probable scenario only) 14. Submit application • Find provider's course application form • Upload documents from CRM to Provider's application system • Check application is complete • Update CRM that application has been submitted inc. time stamp and application ID	15. Respond to requests for further information – collect and update CRM • Update status in CRM with date stamps, e.g. waiting for offer / info required • Respond to requests for further information – move data from CRM to provider system or email	16. Upload signed offer acceptance in CRM 17. Send/upload signed offer to provider 18. Update CRM with confirmation of payment • Update status in CRM and attach offer • Update status in CRM – no offer / rejection and advise student • Send payment information to applicant and update CRM • Send/upload confirmation of payment to provider • Check provider has received payment and issued Certificate of Enrolment (CoE) for visa application • Non-accept – send/upload/advise provider • Non-accept – update CRM	19. Confirm Overseas Health Cover (OSHC) requirements and pay for cover 20. Add OSHC details to CRM 21. Visa confirmation – update status in CRM 22. Arrival information – update status/details in CRM 23. Send/upload arrival details to provider 24. Update student commenced/passed census information in CRM and notify student 25. Reconciling commission payments • Send/Upload OSHC cover details to provider • Send/upload visa confirmation to provider
Communicating back and forth with provider	**Communicating back and forth with provider**	**Communicating back and forth with provider**	**Communicating back and forth with provider**	

Essentially, the Recruitment Partner API automates these tasks leaving the counsellor to research and counsel the student, complete tasks that involve updating their own system or third-party systems that sit outside the scope of the StudyLink Connect Recruitment Partner API and respond to any requests from the provider. There is still a need to communicate with the provider, but this time is also likely to be reduced through the greater transparency of information in the agency CRM.

Returning to management perceptions of advantages of an API integration, highlighted in 3.1.1, the research shows that the top six advantages are realised by the API.

What do you believe are the main advantages of using APIs

Advantage	Percentage
Reduce waste caused by rework	72%
Reduce human error	61%
Quicker access to data / information	61%
Increase transparency	61%
Access to up to date information	56%
Fewer manual processes	56%
Stronger relationships with institutions due to more efficient workflows	50%
Being able to meet increasing student expectations in terms of turnaround times	44%
Better quality data / information	44%
Ability to scale my business	33%

72% of managers also anticipated a quicker response from the institution and 50% expected an improved relationship with institutions as a result of integrating.

4.1.4 REDUCING COSTS

4.1.1 illustrates how time savings can be repurposed to increase the number of applications processed and allocated a corresponding financial value, while 4.1.2 showed how processing efficiencies allowed more time for improving the quality of experience. An alternative approach might be for an agent to reduce its staff overheads. The table below illustrates the staff required to achieve 1,000 enrolments should an agency decide to cut its operational costs to achieve the same result and therefore increase its margins.

	Enrolments per staff per year	Staff needed to achieve 1,000 enrolments
Current situation	51	20
Post API integration - PROBABLE	82	13
Post API integration - OPTIMAL	90	12

Note the number of staff is rounded up to the nearest whole number.

For some agents in the current operating environment, reducing counselling staff salary bills and associated overheads by 40% could be seen as a desirable outcome of applying the StudyLink Connect Recruitment Partner API.

4.1.4 REALISING THE VALUE FOR AGENTS - PRESUMED APPROACH

It is most likely that agents that implement the Recruitment Partner API integration between their CRM and StudyLink Connect will use the efficiencies in different ways at different points in the cycle. During 'troughs' in the application processing cycle, staff will likely be repurposed to prospecting and value add tasks that will help increase the quantity of applicants. Counsellors will spend more time with each applicant to improve the counselling experience and better matching applicants to providers and programs. During peak processing periods, the efficiencies will probably be used to maintain fast turnaround times, in turn improving the applicant experience. However, the nature of the operating environment may also mean that the cost benefit of the Recruitment Partner API integration to them is reducing some overheads.

4.2 VALUE TO PROVIDERS

Better quality/fit students

More enrolments

Good provider-agent relationships are somewhat symbiotic. If a provider delivers an outstanding service to an agent - e.g. clear entry requirements, quick decision turnaround and simple, easy to follow processes - the agent is able to process more applications and may promote this institution over others. Similarly, if an agent provides an outstanding counselling and service experience to a student they are likely to end up at a best-fit provider in a best-fit program. The StudyLink Connect Recruitment Partner API helps to amplify this mutual success:

- Students receive improved counselling and advice and quicker decision turnarounds
- Agents are able to process more volume and increase referrals for future business
- Providers receive more students that are better matched and prepared for their programs

In addition, because of the significant decrease in manual processing and rekeying facilitated by the Recruitment Partner API, it corresponds that applications will be more complete and accurate when they are received by the provider admissions team. This should enable even faster decision turnaround and potentially help spread processing peaks over greater periods. A further knock-on benefit of improved turnaround times is that students are likely to have more time before enrolment in which to receive their student visa; this could be particularly important to agents in some locations where visa processing times tend to be greater.

One additional benefit for StudyLink client providers that was not addressed by the research is that the StudyLink Connect Recruitment Partner API already exists for their application form (understanding what is involved in implementing the Recruitment Partner API is addressed further in section 5). As part of this extra value proposition for StudyLink providers, they do not need to spend any time developing Recruitment Partner API integration into their system and StudyLink manage the integration with providers, including all of the stakeholder engagement on their behalf.

However, the Recruitment Partner API also presents some new challenges to providers. This research has highlighted the significant bottlenecks at the research and counselling stage, notably the time taken for counsellors to 'qualify student meets institution/course requirements' and 'arranging and preparing students for institutional GTE interviews'. It is perhaps incumbent on them to better train and curate information to help counsellors reduce the frequency and time taken to complete these tasks.

4.3   HOW DOES THE STUDYLINK CONNECT RECRUITMENT PARTNER API BENEFIT THE SECTOR

The calculations used throughout section four give the time savings facilitated by the Recruitment Partner API per single counsellor, but if this is multiplied out for the sector, the numbers become extraordinary. Through 2020 and 2021, StudyLink did a market sizing exercise, using historical application data for eight destination markets to project the likely application numbers by country out to 2025. The model draws on data from a variety of sources including http://uis.unesco.org/en/uis-student-flow. Covid-19 has had a significant impact on global student mobility, so some of the projections for imminent years are likely to differ, but it is conceivable that through 2022-23, markets will begin to correct.

The StudyLink projections can be used to calculate the time efficiency savings at a national level StudyLink Connect Recruitment Partner API. The calculations assume that 25% of applications are coming through agents that are utilising the Recruitment Partner API and realising the probable scenario time efficiencies, and that the projections are accurate.

Full Time Equivalency (FTE) is used to describe the total work undertaken by a counsellor in a year.

4.3.1 IMPLICATIONS FOR AUSTRALIA

		2021	2022	2023	2024	2025
Assume 25% of applications via Recruitment Partner API		174,975	181,099	187,349	193,998	200,788
Current processing time	Hours	1,289,566	1,334,702	1,380,764	1,429,767	1,479,808
	Days	53,732	55,613	57,532	59,574	61,659
	Years	147	152	158	163	169
	FTE	645	667	691	715	740
Probable scenario	FTE	400	414	428	443	459
	FTE saved	245	253	263	272	281
Current time to process 1 application (hours) – 7.37						
Probable Scenario time to process 1 application (hours) – 4.57						
Number of hours constituting 1 FTE – 2000						

The time saved measured as FTE helps illustrate the huge potential savings in time that the StudyLink Connect Recruitment Partner API could have if widely adopted by agents working with Australian providers.

Circa 50% of international student applications to Australian providers currently pass through the StudyLink Connect platform; therefore, the more agents that implement the Recruitment Partner API, the greater efficiency gains for the Australian sector. A faster, more efficient and effective service will help Australia to recapture some of their lost market share which resulted from Australia's border closures caused by Covid-19. As previously indicated, the application figures projected here were calculated based on historical data and do not account for the impact of Covid-19 through 2020 and 2021, but remain a useful insight on what can be achieved through smart systems integrations.

But the sector is more than providers; international students are also likely to benefit from API efficiencies. UniQuest, recently (Oct 2021) announced that their UK providers have seen a tenfold increase in enquiries from prospective students. This report has surmised that it is likely agents will repurpose some of their time efficiency into deeper student counselling and advice with a view to getting a better provider and program match. This increased counselling and advice may help to decrease the amount of enquiries to a provider allowing them more time to focus on processing. Faster decision and processing turnarounds will give students more time for pre-departure planning and preparation, and the improved matching should result in a better student experience post enrolment.

The diagram below gives a more complete picture of the implications for the broader sector – agents, students (and their families), and providers.
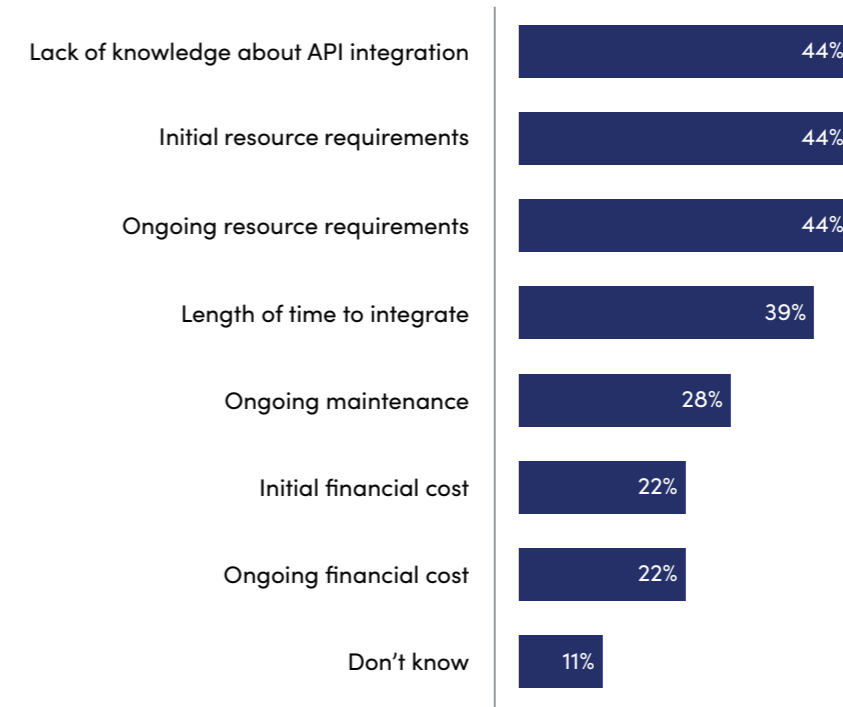

More time spent researching and counselling to find a best fit provider and program

More complete applications with fewer errors

Happier students with a higher propensity to recommend both their agent and their provider

Less chasing documents and faster decision and processing turnarounds

Stronger, more trusted agent and provider relationships

Better outcomes for students

Reduction in manual updates and quicker management of decisions

Improved student retention rates and fewer student compliance issues

Increased income (tuition fee / commission)

Receiving offers earlier allowing more time for visa processing and planning

A greater number of better prepared and matched students enrolling with providers

■ Student benefit   ■ Provider benefit   ■ Agent benefit

4.3.2 GLOBAL IMPLICATIONS

Using the same projections for other key destination markets for international students, the global benefits of 'agency CRM to provider application system' integrations become very clear; a global saving of in excess of 2½ millennia!

	2025 projected applications through agents	Current processing time (hrs)	Integration processing time (hrs)	Time Saved		
				Hours	Days	Years (2000 working hours a year)
United States	348,280	2,566,824	1,591,640	975,184	40,633	488
United Kingdom	225,917	1,665,010	1,032,442	632,568	26,357	316
New Zealand	23,349	172,080	106,704	65,377	2,724	33
Canada	123,458	909,884	564,202	345,682	14,403	173
Singapore	15,937	117,452	72,830	44,622	1,859	22
China	101,033	744,610	461,719	282,891	11,787	141
World	1,932,518	14,242,660	8,831,608	5,411,051	225,460	2,706

5. Implementing the StudyLink Connect API

Just under 40% of the managers surveyed responded that their agency had previously considered an API integration with StudyLink Connect, but as identified in 3.1.1, a number of barriers were identified.

What do you believe are the main barriers to API integration

Lack of knowledge about API integration	44%
Initial resource requirements	44%
Ongoing resource requirements	44%
Length of time to integrate	39%
Ongoing maintenance	28%
Initial financial cost	22%
Ongoing financial cost	22%
Don't know	11%

Lack of knowledge about APIs is one of the issues that StudyLink expected to find when commissioning this research. The research was not designed to answer this question, rather to identify the perceived barriers and where possible provide an evidence base that either supports or refutes manager perceptions as well as providing quantifiable evidence of the efficiency savings that the StudyLink Connect Recruitment Partner API can facilitate.

Their concerns about resourcing requirements and the length of time to integrate were addressed in the research.

5.1 RETURN ON TIME INVESTMENT TO IMPLEMENT API

StudyLink recorded the staff hours required to integrate the Recruitment Partner API with several agencies in a pilot scheme. The table below maps the length of time taken for one staff member working full-time on the integration and calculates how long it takes for that time to be earned back through the efficiency savings in the probable scenario.

Implementation speed	Education agent dependencies	Time after which every hour worked is a realisation of the efficiency (probable scenario)	Manager expectation alignment
FAST 200 hours or 25 workdays or 5 weeks	• Dedicated technical staff working with Study Link Connect • Good match between existing CRM and standard application requirement fields	• 8.2 weeks of application processing at probable scenario speed to make up 200 hours of time savings • + 5 weeks of implementation • 13.2 weeks to break even point (probable scenario) • 11.5 weeks for optimal scenario	• Minimise or remove duplication of work • Reduce human error • Provide quicker access to information • Increase transparency • increased time to spend on conversion
SLOW 400 hours or 50 workdays or 10 weeks	• Technical staff working with Study Link Connect • Education Agent CRM development work needed to increase the data capture fields in-line with standard application requirement fields	• 16.4 weeks of of application processing at probable scenario speed to make up 400 hours of time savings • 26.4 weeks to break even point (probable scenario) • 23 weeks for optimal scenario	

The 200-400 hours spent on a single Recruitment Partner API integration with StudyLink Connect gives the agency integrated access to 50% of Australia's HEIs. This in itself is a significant saving, because integrating with a single HEI's application system would ordinarily take at least 400 hours. This is also a significant benefit to the StudyLink client providers, many of which work with 200 or more agencies. Assuming it would take a similar amount of time to integrate for each of them, this equates to four years (8,000 hours) of work based on 8 hours a day for 250 working days a year.

Appendix

APPENDIX ONE: DEFINITIONS

StudyLink	An Australian technology company offering digital student recruitment solutions ranging from a student-facing web portal that aggregates provider programs through to application and admission processing systems
StudyLink Connect	A StudyLink suite of products designed to facilitate student applications directly or through a recruitment partner, and the subsequent processing of that application by a provider
API	An application program interface is a software intermediary that allows two applications to talk to each other
Recruitment Partner	An organisation that supports the recruitment of students to a provider, usually through a formal relationship. These include education agents, education partners, schools, etc.
Provider / Institution	A provider of education to students, for example, school, college, TAFE, university, etc. Provider and institution are used interchangeably
Education agent	An organisation delivering advice and administrative support services to a prospective student of a provider
CRM	Customer relationship management software used to retain data about customers, such as names, contact details, buying preferences, etc. In the context of this report, it is a system used by recruitment partners to host information about their student clients (the prospective students of providers)
Application system	A digital form used by providers to gather information and data about prospective international students that is needed to communicate with them and make decisions about their suitability for a program of study at the provider
OSHC	Overseas Health Cover is health insurance for international students that is required for study in Australia
Counsellor	Generic term used to describe staff at an education agency that might counsel students and submit and manage the application process. It includes staff at an agency who might have sole responsibility for submitting and managing the application process

StudyLink Connect is the best way for education providers to manage their international student recruitment channels.

Providers can use StudyLink Conect as their complete admissions solution or improve an existing admissions system by making it easier for recruitment partners to send applications, track the progress of an application and manage offers and acceptances online.

It enables education providers to:

- Receive and manage complete applications from recruitment partners and direct applicants
- Access up to date and quality information and reports to make informed decisions
- Make it easy for their agent and recruitment partners to work with them
- Give their recruitment partners the information they need to work effectively
- Streamline the application and communication process
- Save time, speed up turn-around times and increase conversion rates.

For recruitment partners, it is their preferred method for submitting and managing student applications to education providers.

Recruitment partners are given access to a Partner Portal that allows them to manage all the applications and information for their contracted education providers, in one place.

A 2021 survey of agent users found:

- 94% would recommend StudyLink Connect to their institution partners
- 95% would like all institutions they work with to use StudyLink Connect
- 80% agree StudyLink Connect is a better way to manage applications compared to other application systems
- 93% say StudyLink Connect is the best way to submit applications and increase acceptances.

StudyLink Connect Recruitment Partner APIs now enable an agent to integrate their existing system or platform with the Partner Portal to exchange data. This saves time rekeying information and switching between systems. Making it even easier to work with education providers who use StudyLink Connect and freeing up more time to counsel and qualify applicants to ensure they make the best decision.

With one simple integration point, recruitment partners can integrate with the admissions systems of all the education providers using StudyLink Connect. Similarly, by using StudyLink Connect, an education provider can make the Recruitment Partner APIs available to all their recruitment partners.

StudyLink Connect is used by over 15,000 agents worldwide and manages over 300,000 applications each year - more than half the applications to Australia from international students.

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APPENDIX THREE: AGENT LEADERS, MANAGERS, AND OWNERS SURVEY QUESTIONNAIRE

What country do you work in?

What is your role at your business / organisation?

Which of the following best applies to your role?

How would you best describe your organisation?

What geography does your company represent?

What system does your business use for customer management e.g CRM? This could also referred to as CMS, SRS, AMS or something else in your company.

Do you have any integrations between your current CRM and application portals or external systems?

In the year ending 2019 (i.e. before Covid-19), please provide your best estimate for the following:

- Average number of applications submitted per student
- Average number of offers per student

When reviewing the websites of possible study choices, where does your staff mostly access this information?

During the **Research / Counseling** stage, how do you rate the efficiency of the following actions?

- Finding course information
- Accessing the right information
- Compiling / maintaining course data for inhouse systems
- Qualifying student meets institution/course requirements
- Screening / approvals for GTE

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

During the **Submit Application** stage, how do you rate the efficiency of the following actions?

- Re-keying data across multiple systems
- Uploading documents across multiple systems
- Logging into institution's system to confirm receipt of application
- Chasing for status updates
- Updating application with additional information when requested from institution
- Managing information between systems
- Switching between multiple systems during the application process
- Converting documentation to correct file type and size

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

During the **Manage Application** stage, how do you rate the efficiency of the following actions?

- Checking notifications or updates from the institution
- Responding to requests for further information
- Managing information between systems
- Updating applications due to errors at submission
- Having to check multiple systems for updates from the institution

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

During the **Manage Offers** stage, how do you rate the efficiency of the following actions?

- Checking for status updates from institution
- Checking and responding to requests for further information
- Managing applications with no offer
- Receiving up to date financial statements from student if requested from institution
- Updating full offer status in all systems
- Generating payment link to make payment
- Receiving proof of payment and offer acceptance from student
- Managing student payments between systems

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

During the **Enrolment stage**, how do you rate the efficiency of the following actions?

- Managing information between systems
- Scheduling student payments
- Sending offer acceptance and proof of payment to institution
- Transferring payment data between systems
- Monitoring for status updates
- Reconciling commission payments

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

During the **Student Requirement** stage, how do you rate the efficiency of the following actions?

- Managing requests from institution, for example – enrolment forms, enrolment link, registration link and arrival documentation
- Managing communications and documentation to and from student
- Managing information between systems

  If you have any comments about the challenges or pain points that impact efficiencies during this stage, please provide further detail?

Have you previously considered API integration with StudyLink Connect?

What do you believe are the main barriers to API integration?

What do you believe are the main advantages of using APIs?

What additional benefits, if any, would there be for your business, institutions or your student if you were able to improve efficiencies across the application process?

OPTIONAL:

In the rapidly changing landscape of international education recruitment, what do you believe is essential for your business to continue its success?

If you have any additional feedback about current challenges or suggested solutions to improving the application process, we would love to hear about.

In case we need to follow up with further questions, would you be willing to provide your email address?

APPENDIX FOUR: AGENT FRONTLINE COUNSELLING STAFF QUESTIONNAIRE

What country do you work in?

What is your role at your business / organisation?

Which are the following best applies to your role

Researching or Counselling Stage

When gathering information on possible study choices, where do you mostly access this information?

When reviewing the websites of possible study choices, what is the Average number of times you do this action (e.g how many websites review) and average amount of time per action (minutes)

How long does it take to collect documentation from the applicant? Best case and Worst case (minutes)

For each of the following, what is the average amount of time (minutes) it takes to do the task?

- Create record in CRM (or similar system your business uses for customer management e.g. CMS, SRS, AMS, etc)
- Upload documentation to CRM and/or server
- Certify documents
- Qualify student meets institution/course requirements:

During the GTE screening and approvals process, how often and how much time (minutes) do you spend on these specific actions?

- Collecting evidence of funding
- Verification of access to funding
- Arranging and preparing student for institutional GTE interviews
- Checking visa history
- Meeting additional institutional requirements
- Checking for gap history and related documents

When communicating (e.g. email, phone, etc) with an institution during the 'Research / Counseling'

stage, what is the average number of times to communicate with an institution and average amount of time per communication (minutes)?

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Submit Application Stage

On average, when finding the course and application form to apply to, what is the minimum and

maximum time (minutes) this takes

For each of the following, what is the average amount of time (minutes) it takes to do the task?

- Complete fields in online application form
- Upload documents from CRM and/or server to application portal
- Check application is complete
- Submit application
- Update CRM that application has been submitted, including date and reference from application portal
- When communicating (e.g. email, phone, etc) with an institution during the 'Submit Application' Stage, what is the average number of times to communicate with an institution and average amount of time per communication (minutes)?

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Manage Application Stage

For each of the following, please provide the average number of times you do the task, and on average, how long it would take in (minutes)

- Check for correspondence from the institution
- Respond to requests for further information, collect and update CRM
- Update status in CRM – ie waiting for offer; more information required etc including date of update
- Respond to requests for further info AND move data from CRM to application portal or email

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Manage Offer Stage – including no offer received

For each of the following, what is the average amount of time (minutes) it takes to do the task?

- For each offer, update status in CRM and attach offer
- For each application with no offer / institution rejection, update status in CRM and advise student

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Offer Acceptance Stage

For each of the following, what is the average amount of time (minutes) it takes to do the task?

- Update status and upload signed offer in CRM
- Send / upload signed offer to institution
- Send payment information to applicant and update CRM
- Update CRM with confirmation of payment details
- Send / upload confirmation of payment to institution
- Check institution has received payment and they have issued COE

When a student doesn't accept an offer e.g. defers, rejects, etc what is the average amount of time (minutes) it takes to do the following?

- Send/upload/advise institution
- Update status in CRM

When communicating (e.g. email, phone, etc) with an institution during the 'Offer Acceptance'

Stage, what is the average number of times to communicate with an institution and average amount of time per communication (minutes)?

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Students' Requirements Stage

For each of the following, what is the average amount of time (minutes) it takes to do the task?

- Confirm OSHC requirements and pay for cover
- Add OSHC details in CRM
- Send OSHC cover details to institution
- Visa confirmation – update status in CRM
- Send / upload visa confirmation to institution
- Arrival details – Update status / details in CRM
- Send / upload arrival details to institution
- Updating student commenced/passed census information in CRM and notify student

OPTIONAL: For any of the steps above, please provide any further detail around what makes the task more difficult, what happens to make it worse, or increases the time to complete the task?

Additional information

When you're having to manage multiple applications, across multiple systems, often email notifications

from an institution can be missed, during each of the following stages how often, on average, does this

happen?

- Manage applications
- Manage offers
- Offer acceptances
- Not applicable

On average what is the time lag between when the email is sent from the institution and the notification is it received by you?

OPTIONAL:

If you have any additional feedback about current challenges or suggested solutions, please provide details below.

In case we need to follow up with further questions, would you be willing to provide your email address?

Company Profile

Edified is a specialist education consultancy dedicated to assisting education providers and promoters globally to significantly improve their ability to build their brands, acquire and retain students, and deliver outstanding student/graduate success. Our partners each have 20 plus years of experience working within education providers, government and service providers to the education sector. We are results oriented, using our expertise, energy and partnerships with curated service providers to help our clients make dramatic improvements to their key metrics.

OUR MISSION
To dramatically improve our clients' ability to Build, Acquire, Retain and Deliver.

OUR VISION
To be the first-choice global consultancy and solution provider for the education sector.

VALUES
Integrity, Respect, Excellence, Happiness.

BACKGROUND
Edified was established because the founding partners saw a gap in the market for a specialist education consultancy who could not only analyse problems but also find and implement the right solutions to help our clients achieve worldclass results.

SOCIAL RESPONSIBILITY
Edified is committed to making the world a better place to live in:
We carbon offset any travel associated with the delivery of this proposal.
All of our print work is done on FSC paper and we only use eco inks.
We support Lead 5050 – an organisation dedicated to gender equality in the education professions.
Every year we run a grants program called Energiser to support students and recent graduates around the world to deliver innovative programs to improve education in their communities.

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