From the Customer Experience to the Student Experience
An Answer to Falling Enrolments?

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Introduction

Over the last few years, universities — particularly private universities — in Japan have had their attention and efforts focused by the drop in the population of 18 year-old high school leavers. The tertiary education market, as we shall see, has been in decline now for some years with worse yet to come. What can further education institutions do to survive in these difficult times?

Similarly, universities in other parts of the world have been finding themselves in increasingly competitive situations and have reacted to this by improving their efforts to provide better student experiences. Can Japanese universities find anything in the strategies of their international counterparts to help their own situation?

The acceleration toward internationalization in the business world has contributed to rising commoditization and intense competition. An increasing number of high profile companies have resorted to examining their customer service and more specifically their customer experience to get an edge over their competitors. Could this too be a relevant avenue of exploration for universities facing a threat to their survival?

This article brings together these strands in an attempt to find a viable path for Japanese universities to follow in trying to ensure that they will be able to continue to provide higher education for high school leavers in the future. One thing is probable; those that do nothing have the most to fear!

The Problem

Since its beginnings in the late 19th century with the foundation of the University of Tokyo, Japan's modern, higher education system has seen periods of modest growth, rapid expansion, and recently, the beginning of a worrying decline. In 1943, there was a total of 49 universities of which just 28 were private. However, following the rapid growth of the previous two decades, in 1975, the figure stood at 420 universities, 305 of them private. There was also a surprisingly large number of two year, junior colleges — 513 — the oldest of which having started life as specialized schools. There was a further major expansion of tertiary education institutions in the 1980s and 1990s and by 2004, 542 private universities existed out of a total of 709. (Oba, 2005)

In terms of student numbers, those attending universities increased by 2.77 times between 1960 and 1975 (reaching 1,734,082) and those attending junior colleges by 4.28 times (reaching 348,922). The percentage of school students going on to university or junior college increased from 10.3% to 38.4%. This figure continued to rise to 49.1% by 1999 but has since leveled off with little indication that it will rise above 50%. The total number of 18 year-olds in Japan reached its peak of 2,050,902 in 1992 but since then the number has deceased to 1,188,725 — a drop of 42% in 20 years. (RIHE, Hiroshima University, 2012)

The main victims of this demographic change have been the junior colleges where enrollments fell by an enormous 73% from a peak of 254,953 in 1993 to 68,432 in 2011. The decline in the number of colleges has been slower: from 598 in 1996 to 387 in 2011 with average enrollments dropping from 431 at their height to just 177. (Appendix 1) This decline in numbers can be attributed in main to the fall in the birthrate but has been exacerbated by the large number of high-school leavers who have decided to apply for 4-year university courses rather than to 2-year junior colleges. Also by universities' increasing willingness to take such students despite their lower academic levels to maintain their own numbers. This has of course delayed the decline in university enrollments, but to what degree?

In the period for which statistics are available (up to 2011) 2010 would seem to be the year in which university enrollments were at their highest with a total of 619,119 students, 418,284 of these being at private universities. As a percentage of total enrollments, the 79% at private universities has remained the same since the beginning of the millennium. (Appendix 2) This compares favourably with the reduction of 18 year-olds, which fell from 1,511,792 to 1,199,897 (-21%) over the same period. (RIHE, Hiroshima University, 2012) But, how long can this trend be sustained?

MEXT's (Ministry of Education, Culture, Sports, Science and Technology) population statistics up to the year 2023 indicate that for the 10 years from 2013 the population of 18 year-olds will fall by a total of over 131,000. On the assumption that the number of 18 year-olds continuing their education after high school will stay at 50% or less and that all school leavers will choose 4-year university courses if they have the chance, then by 2023 the numbers going to Junior Colleges will have dropped to somewhere in the region of 17,000. In reality there has to be a limit to the reductions in enrollments that junior colleges can take and at some point in the near future many more will leave the market in the face of impossible competition from the 4-year universities. However, it is unlikely that all students of the level presently applying for junior colleges will decide to go to 4-year universities — there will undoubtedly be those who are unable to find suitably vocational courses of study at universities or who are unwilling to commit to 4 further years of study. This will provide greater uncertainty about the potential student market for universities, particularly the private universities that need to charge higher fees than their national and public counterparts. As we have seen, it is mostly these private universities that have so far benefitted most from the demise of junior colleges. This will probably lead to a great deal of interest and concern in and after 2014 when the number of school leavers searching for higher education courses is likely to drop by about 25,000. This would seem to be an immediate threat to the prospects of private universities and with further significant, adverse, demographic changes occurring in the last 3 years of the decade the future is looking increasingly bleak. (Appendix 3) In other words, private universities, having already experienced increasing competition for enrollments, will continue to do so to a greater degree throughout the decade with serious implications for their financial survival. So, what is being done to safeguard that survival?

Reactions to the problem

Since the de-regulation of the curriculum in the 1990s, aimed at encouraging diversification of higher education, there has been a good deal of focus on curriculum changes in universities. It is little surprise therefore that universities faced with falling enrollments have turned to reviewing and modifying their subject classifications, their compulsory/elective subjects systems, their credit calculations and graduation requirements in the hope that this will make them more attractive to potential applicants. Some have opted for more English-medium education and others for even more radical measures such as the university in Hagi that changed from international studies to health related subjects to try and capitalize on the increasing demand for health workers in a rapidly aging Japan. (Fackler, 2007)

Following the Nakasone government plan to increase the number of foreign students studying in Japanese universities, numbers increased from around 10,000 in 1983 to 95,000 in 2002 (RIHE, Hiroshima University) and stood at 133,000 in 2009. (Saito, 2012) Some universities such as Ritsumeikan in Kyoto, taking advantage of this trend in an attempt to combat the drop off in Japanese student applications, have admitted almost 50% international students, (Fackler, 2007) Unfortunately, the rate of increase in the number of international students has dropped off in more recent years as the strong yen has made Japanese universities expensive for self-financing foreign students.

Universities have also tried to increase numbers by opening professional graduate schools with the number reaching 130 in 2009 (Hays, 2009), almost all of these opening their doors since 2003. Unfortunately, apart from law schools, they are struggling to achieve their enrollment targets. (Tanikawa, 2010) Mature students are another potential source of customers as evidenced by the doctorate awarded to a 71-year-old former engineer who joined graduate school after retiring from his company. (Fackler, 2007)

Other strategies for ensuring survival have included expanding links with industry (although this is largely national universities where survival is less of an issue), a focus on faculty development, and more extreme measures such as dormitories with spas and cutting tuition fees by 50% (Fukuoka University of Economics). (Fackler, 2007)

Despite the not inconsiderable efforts that private universities have made to try and ward off the evils of Japan's demographic changes, there is no significant evidence that the measures taken have led to improved ability to survive in an increasingly hostile market. Is it possible then, that there are lessons to be learnt from the education sectors of other countries?

Efforts to increase enrollments outside Japan

After the introduction of tuition fees in 1998 in UK universities and the subsequent tripling of the government's fee cap in 2004 to £3,000 there was a growing appetite for value for money among university applicants and an increasing awareness by universities that they were competing for students. The raising of the cap to £9,000 in 2012 has not only focused potential students on the need to make very careful decisions, it has also reduced the number of applicants for university places and increased the competition for students between colleges.

Help for students in the difficult decision of which university to choose has come in the form of "The Complete University Guide" started in 2007 and compiled by Mayfield University Consultants. This includes a league table of universities based on "entry standards, student satisfaction, research assessment and graduate prospects" (The Complete University Guide, 2012) with the student satisfaction assessment coming from the National Student Survey which was launched in 2005 by the Higher Education Funding Council for England. Student satisfaction in this yearly survey reflects the opinions of all final year degree students in the UK in the areas of teaching, assessment and feedback, academic support, organisation and management, learning resources, personal development and overall satisfaction. (Higher Education Funding Council for England, 2012)

Another reference for students considering applying to universities, is the Times Higher Education Student Experience Survey — an annual survey of over 14,000 university students that started in 2005 and which collects ratings of 21 aspects of the student experience. This survey shows how important social and environmental factors are in students' assessments of universities. As well as questions about teaching, curriculum, support and learning facilities it reports on students' feedback on things like university social life, extracurricular activities, the environment, the students' union and welfare, and commercial and sports facilities. (Grove, 2012) In fact the university that came top in the survey five years running — Loughborough University — received very high scores for sports facilities, extracurricular activities, environment, social life, students' union and library. It is clear from these publications that students and therefore universities are taking the student experience very seriously.

Almost 20 years ago, the 1994 Group, representing nineteen of the UK's most internationally renowned universities was set up with the mission of promoting excellence in research and teaching by "seeking to promote excellence in the student experience". The results of a 1994 Group funded survey in 2007 "provided, for the first time, a rich and detailed picture of the fundamentally important role that the non-academic aspects of the student experience" played in their institutions. (Kay et al, 2007) The report also pointed out that: "English institutions have launched ambitious investment plans designed to meet the increased expectations of students". Some, such as Surrey University, have published student experience strategy documents (see appendix 4) and others have created posts such as Director or Dean of the Student Experience to create greater focus. (Andalo, 2011) It is also clear from various internet references that there are similar student experience initiatives in the USA, Canada, Australia and Ireland. For example, an Aramark Corporation publication from November 2005 reported that "Higher Education has become more 'hospitality' oriented," with facilities such as destination dining, sports bars and night clubs, wellness centers and spas, access to high speed internet, games rooms and accommodation with mini refrigerators, microwaves, televisions and hot pots (Alperin, 2005).

So, could the student experience be something that Japanese universities might focus on to gain competitive advantage and if so what would be the best approach? In an article entitled "The Customer Experience: Lessons from the Masters," following an analysis of how the customer experience has been a success factor for a number of high-profile organizations, this author concluded that; "those (tertiary) institutions that can galvanize themselves to move quickly towards improved customer experiences may be able to reap rewards." (Brumby 2011) These conclusions were based to some extent on the work of Colin Shaw and his organization, Beyond Philosophy, and it is to their work that we now turn to see how lessons from the customer experience can be applied to the student experience.

The Customer Experience

As argued in the article "The Customer Experience" mentioned above, a focus on the customer experience is an effective way of staying competitive when it is impossible for companies to maintain product or service superiority in the face of rapid commoditization. The success of this focus is also evidenced by the rapid growth in popularity of experience products such as theme parks and space tourism and by the opinions of business leaders. Take for example the quote by Ian McAllister, former Chairman and Chief Executive of Ford Motor Company Ltd; "In the 1980s quality was a differentiator. In the 1990s, I think brand was a differentiator. My view is that for the 2000s, the customer experience will be the differentiator". (Shaw, Ivens, 2002) Unfortunately such customer experience differentiation is not something that can be achieved easily or quickly — in Disney's case it has taken in the region of 90 years. Consequently, a systematic approach based on solid research is necessary to achieve results in the shortest possible time. Colin Shaw in his three books: Building Great Customer Experiences, Revolutionize Your Customer Experience and The DNA of Customer Experience, provides such an approach based on the research of Beyond Philosophy.

Customer experience as defined by Shaw and Ivens in Building Great Customer Experiences is, "an interaction between an organization and a customer. It is a blend of an organization's physical performance, the senses stimulated and emotions evoked, each intuitively measured against customer expectations across all moments of contact." (Shaw, Ivens, 2002) The key ideas as we shall see are the combination of a company's physical performance and the senses stimulated in the customer to evoke emotions. In other words, a company that is in control of the points of contact between themselves and customers should be in a position to control the senses stimulated and so affect emotions. This is important because in various Beyond Philosophy studies, 69% of consumers said that emotions account for over half the customer experience. (Beyond Philosophy, 2002) Beyond Philosophy's research has also led to what they call the "Seven Philosophies for Building Great Customer Experiences". Briefly, great customer experiences are:

1. A source of long-term advantage. Organisations that can develop emotional bonds with customers will keep them loyal.

2. Created by consistently exceeding customers' physical and emotional expectations. It is necessary to understand the stages of the customer experience and customers' expectations in order to meet and exceed those expectations. For example, if a customer phoning a call centre as part of a transaction, receives helpful sympathetic treatment then this is the benchmark they will use for future interactions. To exceed expectations it is critical that organisations plan how to achieve this using what Beyond Philosophy call "Moment Mapping", of which more later. The most important question is; what feeling do you want to leave your customers with at each moment of contact?

3. Differentiated by focusing on stimulating planned emotions. "Only

5% of companies are trying to evoke a specific emotion." (Beyond Philosophy, 2002) There is obviously an enormous opportunity for organizations to plan the emotions they wish to stimulate and how to do so. Firstly, these need to be defined and broken down in terms of the basic emotions and sub-elements that will help generate the key emotions that the company wishes to develop. Examples of key emotions might be trust and loyalty. Then, methods of stimulating these planned emotions need to be identified and staff trained to use them across the numerous moments of contact with customers. In doing this it is also important to understand the real motivators for peoples' actions. If, for example, an insurance agent can determine that the real motivation behind a potential customers anxiety to conclude an insurance enquiry quickly is the size of their international phone bill rather than the insurance company's terms, they can stimulate positive emotions by suggesting alternative ways of getting the information or by calling the client back.

4. Enabled through inspirational leadership, an empowering culture and empathetic people who are happy and fulfilled. 85% of business leaders believe they can increase loyalty by emotionally engaging with customers. (Beyond Philosophy, 2002) The people who are best at doing this are those that have what David Goleman calls emotional intelligence. (Goleman, 1995) These people exhibit self-awareness, self-regulation, empathy, self-motivation and social skills that provide them with the means to engage with customers. In other words they are the right people to deliver the best customer experiences. However, to do this, they need appropriate support and empowerment from their leaders and the company culture. If the leader and the culture are focused on ensuring the best customer experience then the people will be as well.

5. Designed outside in rather than inside out. Often, companies that maintain that they are customer-centric or customer focused, are only doing things which are good for the company. This is the "inside out" approach. To be "outside in" oriented — that is taking what the customer wants and making sure the company provides it — all functions or business units of the company need to be aligned to provide consistently good experiences. To do this, the customer experience has to be defined including the emotions to be generated and the types of people to take care of customer contact and all business units have to adhere to this. In other words the customer owns the customer relationship and the company has to adjust to this reality. The common acronym CRM — Customer Relationship Management is therefore "inside out". Unfortunately few organizations refer to customer managed relations — an "outside in" concept.

6. ***Revenue generating and can significantly reduce costs.*** In "Revolutionize your Customer Experience," Colin Shaw describes a case study of The Kelda Group — a company that "turned itself from one of the most ridiculed water companies in the 1990s, into one of the most respected," becoming "the second best performing company in terms of service levels," having "developed a record for steady financial performance." (Shaw, 2005, quoting Financial Times, Dec 6, 2002) In fact improvements in its customer experience have led to $15.5 million of financial savings, customer satisfaction up from 53% to 91% and a large reduction in work that is now unnecessary. (Shaw, 2005) Another case study in "The DNA of Customer Experience," described how TNT Express Services — the leading business to business express delivery company in the UK — increased it's customer base by 50% and it's revenue by 100% in a five year period through focusing on the customer experience. (Shaw, 2007)

7. ***An embodiment of the brand.*** Basically, the customer experience and the brand image should be one. Brand knowledge comes at the early stages of the customer experience through advertising and other publicity efforts, which involuntarily set customer expectations. If later, experiences fail to measure up to these expectations the customer or potential customer is left with feelings of disappointment or mistrust which will inevitably affect their actions and loyalty. Unfortunately the customer and therefore the company is let down by the gulf between the brand and the experience as the following statistics from Beyond Philosophy indicate:

- 44 % of companies quote trust as one of their branded values and yet 67% of customer said they couldn't be trusted.
- 70 % of companies do not have a strategy for ensuring that brand values are being met at all moments of customer contact.
- Only 33% of employees receive briefings on their company's advertising and marketing before it goes live.

(Beyond Philosophy, 2002)

The implication of these philosophies is that companies need to understand the experiences their customers have and make efforts to improve them. In this regard Beyond Philosophy has developed a classification system to enable organisations to define both the experience they provide for customers and also the experience they want to provide. This is done in the form of four overall orientations that, as Colin Shaw says, "corporations go through on their journey to enable them to deliver great Customer Experiences."

(Shaw, 2005) These orientations, together with the percentage of corporations that they describe and a brief explanation are as follows:

Naïve — 9%: An "inside out" organization that focuses on itself to the detriment of the customer.

Transactional — 67%: An organization that focuses mainly on the rudimentary, physical aspects of the customer experience though many aspects are left to chance.

Enlightened — 22%: An organization that understands the need for a considered approach and designs and implements emotionally engaging customer experiences.

Natural — 2%: An organization that is naturally focused on producing an exceptional customer experience by using specific senses to evoke planned emotions.

(Beyond Philosophy, 2004)

A company's orientation is assessed in the following nine key areas:

- People
- Customer strategy
- Systems
- Measurement and Targeting
- Channel Approach
- Expectations
- Marketing and Brand
- Process
- Culture and Leadership

Key area orientations can differ significantly from each other and from the overall company orientation. For example Beyond Philosophy's research found that typically 22% of organisations are in the "enlightened" orientation for "people" — the same as overall. This means though that only one in five business leaders realizes that they should be recruiting people with emotional intelligence to improve the customer experience. In the crucial area of measurement and targeting (what gets measured, gets done!) the research indicates that 87% of organisations pay their people based on physical measures such as sales and productivity rather than on customer experience measures. In this key area the vast majority are close to "naïve" orientation.

As mentioned earlier, emotions are at the centre of the customer experience. Indeed they are at the core of almost everything we do and yet companies generally do little to really understand their customers' emotions. In "The

DNA of Customer Experience," Colin Shaw identifies four clusters of emotions that organizations need to focus on to improve the customer experience and drive the value in an organization. These are:

-The Destroying Cluster which in fact reduces value and loyalty and includes such emotions as being stressed, unhappy, disappointed, and frustrated.

-The Attention Cluster which is linked to attracting customers and spending in the short term, and includes such emotions as being stimulated, interested, and indulgent.

-The Recommendation Cluster builds loyalty and long-term relationships with customers and stimulates reactive recommendations. These emotions include being valued, cared for, and trusted.

-The Advocacy Cluster which contains only two emotions — to be happy, and pleased. Such emotions lead customers to proactively recommend an organisation. — the cheapest form of advertising! (Shaw, 2007)

This latter cluster is directly related to another measure of how companies fare on customer experience — the "Net Promoter Score (NPS)" (Shaw, 2007). This index which is calculated based on customers' answers to the question, "How likely are you to recommend this company/product/experience, to a friend?" has been conclusively linked to revenue growth by research carried out by the London School of Economics. (Marsden et al, 2005) A case study described in "The DNA of Customer Experience" indicated that attention to reducing the destroying cluster of emotions had the potential to lead to an increase of 10% of revenues at a company such as IBM.com. In other case studies in which differing clusters were focused on and improved, revenue increases were calculated in the tens of millions of dollars.

Another tool in the Beyond Philosophy kit for assessing and improving customer experiences is what they call "Moment Mapping". The seven philosophies state that great customer experiences are created by consistently exceeding customers' physical and emotional expectations by focusing on stimulating planned emotions. Such customer experience design requires a process that maps a customer's expectations, both physical and emotional, across all moments of contact throughout the entire customer experience. Moment mapping for something as simple as an impulse buy of a canned hot drink at a convenience store, might look like this:

Stage	Physical Expectation	Emotional Expectation
Enter the store.	They have hot drinks.	It's not crowded and you can find something good, easily.
Choose a drink.	They are easy to see and pick up.	The display includes interesting items as well as your favorites.
Take it to the cash desk.	You can pay immediately.	Servers will make sure you don't waste time waiting.
Pay for it.	It is the usual price.	The server smiles and thanks you for your custom.
Leave, open the drink and taste it.	It is the right temperature.	It is tasty and refreshing.

If such a map is then compared with the actual experiences determined through research — sometimes called a customer experience map — it will then provide a focus on key areas for improvement. An actual example of an experience map for a Starbucks customer is provided in Appendix 5.

The emphasis in comparing the moment map with the customer experience map should be on what emotions the company needs to evoke to exceed expectations. In this way the organization will be be able to progress from being naïve or transactional to being enlightened or natural in their orientation to the customer experience.

As indicated in philosophy 7 above, it is crucial that employees understand how the brand and the customer experience are linked in order to provide the best customer experiences. To this end, an essential output of the customer experience management process is a customer experience statement. This is defined by Shaw and Ivens as, "A description of the customer experience which contains the elements that have been chosen for delivery, written in a way that can be easily understood and will inspire people into action." (Shaw, Ivens, 2002) To construct such a statement it is necessary to break down the customer experience into the physical and emotional elements that the organization wishes to focus on. This in turn will provide a basis for determining sub-elements, aims, internal and external measures, targets and initiatives. Here is an example of a customer experience statement for a management consultancy company showing the interplay between the physical and emotional elements.

"Our customers will enjoy working with everyone on the team. They will smile when they hear or see our company name. They will feel that working on their project is our most important task. Our customers will always feel in control of their projects. They will feel confident that we will deliver creative and cost-effective solutions." (CWa, 2003)

Taking the first sentence, it would then be necessary to determine the sub-elements of enjoyment (perhaps intellectual stimulation and job satisfaction), use these to set team aims with respect to the customer, decide on how the accomplishment of these aims can be measured, what the target measures are for any particular period and most importantly, how to reach these targets.

Customer Experience and Student Experience — the same thing?

Aramark Education in the report cited above points out that: 'Higher Education may constitute the ultimate example of a service economy. The physical manifestation of its "product" is a diploma. The rest of the product is experiential — the result of idea exchange, critical thought, social interaction, and personal maturation. Yet, higher education rarely thinks of the beneficiaries of its service as customers.' (Alperin, 2005) The first thing for tertiary education to do therefore is to recognize its customers. Aramark goes on to say that "anyone who benefits from the environment and experience created by a college or university should be considered a customer." Clearly a student is a customer but so too are the faculty and staff, the alumni and the community. However, let us for the moment focus on how seriously the student experience is being taken by educational organizations.

The Student Experience in Japan

Revolutionize Your Customer Experience (Shaw, 2005) includes a "Naïve to Natural" self assessment for those wishing to understand better what their company's orientation to the customer experience may be. The first question is as follows:

> *1. The emphasis of my organizations' recruitment process for customer-facing people is on identifying people with:*
> *a. The right attitude: attitude tests take place with a view to recruiting people who have a generally positive attitude.*
> *b. Specific skills, knowledge of the product, the competitive offering and/or our industry.*
> *c. An ability to act, role play, and improvise: people are selected for their ability to evoke deep emotions and stimulate customer senses.*
> *d. Emotional capability, who is good at evoking emotions: people are rejected because they are not good at evoking emotions.*

Your answer [ ]

a = 2 points, b = 1 point, c = 4 points, d = 3 points

An educated guess at the answer for a typical teriary education organization in Japan might be **b**. There may be cases in which **a** might be true though this author is unaware of any attitude tests that are used. So, 1 point, perhaps 2. So far so good!

The remaining questions are reproduced in Appendix 6 together with a general assessment of a private Japanese university by this author. This is of course, highly subjective and in some cases it is difficult to apply the questions to the situation in a private university. However it is sufficient to provide an idea of where the private university's orientation may lie and how useful the customer experience tools described above could be.

As can be seen in Appendix 6 the total score for all 18 questions is 23. Beyond Philosophy classify scores as follows:

18 – 29	Naïve
30 – 47	Transactional
48 – 65	Enlightened
66 – 72	Natural

This particular university would therefore most likely fall into the Naïve category alongside many of its competitors. According to Colin Shaw what "Naïve organizations need to do to revolutionize their customer experience is to:

- change their attitude to customers
- put themselves in the customers' shoes and see what it feels like
- realize that emotions account for over half the customer experience
- define the customer experience they want to deliver
- move from reactive to proactive
- understand that all these elements ultimately affect the customer experience
- define a plan of how to move forward
- look at all customers touch points and review if these are appropriate
- review customer complaints and define where the biggest problem areas are
- treat their employees well".

(Shaw, 2005)

An action plan for improving the student experience

So, what practically, can be done to make tertiary education more competitive? Aramark in comparing higher education with the hotel industry states, "Herein lies the lesson for higher education. The hospitality industry understands its consumer. This industry recognizes that serving the consumer is a complex process, involving customer "touchpoints" and a host of operations all working together. Successful organizations understand and script the customer's experience at each touchpoint. At the end of the day, the sum components of these interactions and the integrated operation create an appealing consumer experience. Hotels are no longer simply a place to lay your head. And a campus is no longer simply a place to obtain a diploma". (Alperin, 2005) The following table from the same publication neatly summarises the actions in the various stages:

Creating Your Unique Customer Experience

Inventory	Determine the touchpoints that affect your customer's experience. (As with moment mapping)
Input	Assess your current service delivery's effectiveness. (As with experience mapping v moment mapping)
Improve	Enrich the experience
Integrate	Integrate academic and non-academic functions for a unified experience.
Ingrain	Implement customer service and leadership training.
Inform & Influence	Communicate the experience and develop the brand.
Innovate	Stay ahead of the competition.

Taking the above summary and introducing elements from the Shaw analysis of the customer experience a ten-point action plan for a university might be as follows:

Aims: To move from having a provisionally naïve orientation towards having a natural orientation by improving the student experience.

Actions:

1. Carry out a naïve to natural orientation analysis to identify areas of weakness in the nine key areas mentioned above.

2. Identify all customer touchpoints and develop a moment map which

catalogues physical and emotional expectations. (A non-comprehensive list of possible touchpoints is contained in Appendix 7 though the final organizational one needs to be drawn up by people in the various functional areas that have a complete overview of their area.)

3. Develop a customer experience map through research with customers identifying the actual physical and emotional experience.

4. Compare the experience map with the moment map and identify the emotions to evoke at each stage of the journey to exceed expectations. (A tentative list of emotions to evoke with examples of where they might be in the moment map is contained in Appendix 8).

5. Develop a student experience statement.

6. Identify actions necessary to ensure that the emotions listed above are evoked and develop targets and assessment criteria to measure success.

7. Carry out training of all staff on actions, targets, and assessment criteria.

8. Set up communication systems to make sure staff receive feedback on their performance.

9. Communicate the target experiences to all potential customers and stakeholders to develop the brand and the culture.

10. Monitor improvements in The Net Promoter Score and subsequent financial gains.

Conclusions

The situation is very serious for higher education providers in Japan and it may already be too late for many to be able to change the tide of their enrolments in the face of intensifying competition brought about by demographic changes. It is clear that there is no easy short-term solution to this problem and that universities must look to longer term strategies to increase the number of applicants. There is potential in the 50% of school leavers that do not presently continue their education at the end of high school but to persuade them that they should find the resources to continue their education for a further four years will take a change in the brand images that universities are presently projecting. Indeed this is also likely to be the case in terms of attracting those students who see themselves as university material for all but the top echelon of Japanese universities.

The customer experience or in the case of higher education, the student experience, seems to offer a way forward. However, a reactive approach will not be enough. Universities need to systematically examine the experiences that their students have in a way similar to that described above and proactively find ways to delight students so that they will find it easy to talk positively about the university that they have chosen. It will also be necessary to make sure that these new standards of service become part of the organizational culture and brand image. Only in this way will universities be able to compete with other institutions that are similarly being motivated to ensure their own survival.

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Author's Profile

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Appendix 1: Junior College Enrollments

Junior Colleges	No. of JCs	Enrollments	Average/JC
1950	149		
1951	180		
1952	205		
1953	228		
1954	251		
1955	264	37,544	142
1956	268	36,285	135
1957	269	34,133	127
1958	269	34,888	130
1959	272	37,889	139
1960	280	42,318	151
1961	290	47,278	163
1962	305	55,613	182
1963	321	61,417	191
1964	339	61,070	180
1965	369	80,563	218
1966	413	108,052	262
1967	451	121,263	269
1968	468	127,365	272
1969	473	128,124	271
1970	479	126,659	264
1971	486	136,392	281
1972	491	141,631	288
1973	500	154,771	310
1974	505	164,077	325
1975	513	174,930	341
1976	511	174,683	342
1977	515	183,224	356
1978	519	181,181	349
1979	518	176,979	342
1980	517	178,215	345
1981	523	179,071	342
1982	526	179,601	341
1983	532	183,871	346
1984	536	181,223	338
1985	543	173,503	320
1986	548	206,083	376
1987	561	215,088	383
1988	571	218,036	382
1989	584	225,364	386
1990	593	235,195	397
1991	592	249,552	422
1992	591	254,676	431
1993	595	254,953	428
1994	593	244,895	413
1995	596	232,741	391
1996	598	220,875	369
1997	595	207,546	349
1998	588	191,430	326
1999	585	168,973	289
2000	572	141,491	247
2001	559	130,246	233
2002	541	121,441	224
2003	525	113,029	215
2004	508	106,204	209
2005	488	99,431	204
2006	468	90,740	194
2007	434	84,596	195
2008	417	77,339	185
2009	406	73,163	180
2010	395	72,047	182
2011	387	68,432	177

Appendix 2: University Enrollments

University Enrollments			
Year	Total	Private	% of total
1955	136,467	82,417	60
1956	139,591	86,890	62
1957	141,081	90,799	64
1958	146,377	94,286	64
1959	155,686	102,642	66
1960	166,761	112,653	68
1961	179,622	123,233	69
1962	201,125	142,133	71
1963	215,884	156,075	72
1964	217,763	158,253	73
1965	249,917	186,106	74
1966	292,958	222,545	76
1967	312,747	238,428	76
1968	325,632	249,657	77
1969	329,374	256,977	78
1970	333,037	258,303	78
1971	357,821	282,016	79
1972	376,147	298,953	79
1973	389,560	309,577	79
1974	407,528	323,904	79
1975	423,942	337,790	80
1976	420,616	333,600	79
1977	428,412	339,371	79
1978	425,718	334,684	79
1979	407,635	314,524	77
1980	412,437	316,858	77
1981	413,236	317,009	77
1982	414,536	317,037	76
1983	420,458	321,465	76
1984	416,002	317,319	76
1985	411,993	312,526	76
1986	436,896	332,014	76
1987	465,503	354,198	76
1988	472,965	360,938	76
1989	476,786	364,682	76
1990	492,340	377,167	77
1991	521,899	404,758	78
1992	541,604	420,628	78
1993	554,973	429,758	77
1994	560,810	435,126	78
1995	568,576	441,142	78
1996	579,148	451,430	78
1997	586,688	457,197	78
1998	590,743	462,227	78
1999	589,559	461,690	78
2000	599,655	473,023	79
2001	603,953	476,815	79
2002	609,337	481,760	79
2003	604,785	475,870	79
2004	598,331	469,705	79
2005	603,760	473,580	78
2006	603,054	472,092	78
2007	613,613	484,191	79
2008	607,159	477,353	79
2009	608,731	478,470	79
2010	619,119	488,702	79
2011	612,858	481,284	79

Appendix 3: Population Changes in 18 year-olds

18 year-old population changes					
Year	Population	Change %	50% Popn	Drop in 50% of Popn	Popn available for JCs
1955	1,727,969		863984.5		
1956	1,782,994	3.2	891497		
1957	1,558,152	-12.6	779076		
1958	1,696,225	8.9	848112.5		
1959	1,899,384	12.0	949692		
1960	2,022,207	6.5	1011103.5		
1961	1,917,896	-5.2	958948		
1962	1,992,297	3.9	996148.5		
1963	1,786,850	-10.3	893425		
1964	1,413,748	-20.9	706874		
1965	1,961,621	38.8	980810.5		
1966	2,504,684	27.7	1252342		
1967	2,440,244	-2.6	1220122		
1968	2,369,820	-2.9	1184910		
1969	2,141,606	-9.6	1070803		
1970	1,953,836	-8.8	976918		
1971	1,852,126	-5.2	926063		
1972	1,742,326	-5.9	871163		
1973	1,671,307	-4.1	835653.5		
1974	1,625,468	-2.7	812734		
1975	1,564,954	-3.7	782477		
1976	1,523,400	-2.7	761700		
1977	1,627,056	6.8	813528		
1978	1,583,998	-2.6	791999		
1979	1,567,170	-1.1	783585		
1980	1,583,146	1.0	791573		
1981	1,610,411	1.7	805205.5		
1982	1,638,649	1.8	819324.5		
1983	1,726,014	5.3	863007		
1984	1,680,525	-2.6	840262.5		
1985	1,559,314	-7.2	779657		
1986	1,853,509	18.9	926754.5		
1987	1,885,560	1.7	942780		
1988	1,884,578	-0.1	942289		
1989	1,935,574	2.7	967787		
1990	2,007,035	3.7	1003517.5		
1991	2,046,334	2.0	1023167		
1992	2,050,902	0.2	1025451		
1993	1,982,755	-3.3	991377.5		
1994	1,861,304	-6.1	930652		
1995	1,774,535	-4.7	887267.5		
1996	1,733,172	-2.3	866586		
1997	1,680,798	-3.0	840399		
1998	1,623,009	-3.4	811504.5		
1999	1,546,190	-4.7	773095		
2000	1,511,792	-2.2	755896		
2001	1,512,840	0.1	756420		
2002	1,503,544	-0.6	751772		
2003	1,465,713	-2.5	732856.5		
2004	1,411,420	-3.7	705710		
2005	1,366,467	-3.2	683233.5		
2006	1,326,138	-3.0	663069		
2007	1,299,762	-2.0	649881		
2008	1,237,504	-4.8	618752		
2009	1,212,178	-2.0	606089		
2010	1,214,389	0.2	607194.5		
2011	1,199,897	-1.2	599948.5		68432
2012	1,188,725	-0.9	594362.5	5586	62846

2013	1,228,299	3.3	614149.5	-19787	82633
2014	1,177,557	-4.1	588778.5	25371	57262
2015	1,195,913	1.6	597956.5	-9178	66440
2016	1,185,091	-0.9	592545.5	5411	61029
2017	1,192,817	0.7	596408.5	-3863	64892
2018	1,182,329	-0.9	591164.5	5244	59648
2019	1,176,085	-0.5	588042.5	3122	56526
2020	1,168,705	-0.6	584352.5	3690	52836
2021	1,141,686	-2.3	570843	13509.5	39327
2022	1,121,339	-1.8	560669.5	10173.5	29153
2023	1,097,148	-2.2	548574	12095.5	17058

Appendix 4: The Surrey Student Experience Strategy

Vision statement
We are an independent and ambitious University, with a long history of connection through our research, learning and teaching to the "real world". We have a welcoming, respectful and encouraging environment, which facilitates questioning, free-thinking and innovation.

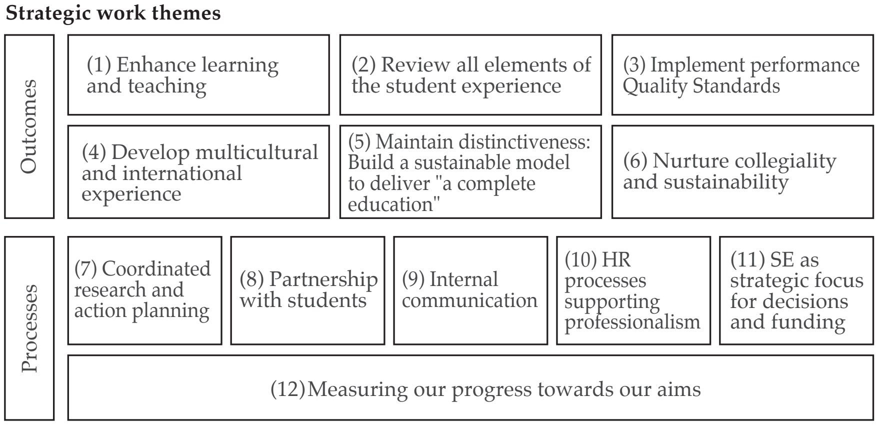
A complete education: enabling professional preparation
Our distinctiveness is in the completeness of the education we offer, and its relevance to today's complex world. We provide a combination of personal development, academic learning and real-world application which results in a powerful blend of skills, knowledge and experience. We recognise that students combine this education with experiences they gain in the rest of their lives.

A multicultural and international experience
We have a rich multicultural campus, a long history of global connection, and are internationalising our student experience. We promote mobility of study, intercultural awareness and are making our curriculum responsive to the needs of global society, culture and economy.

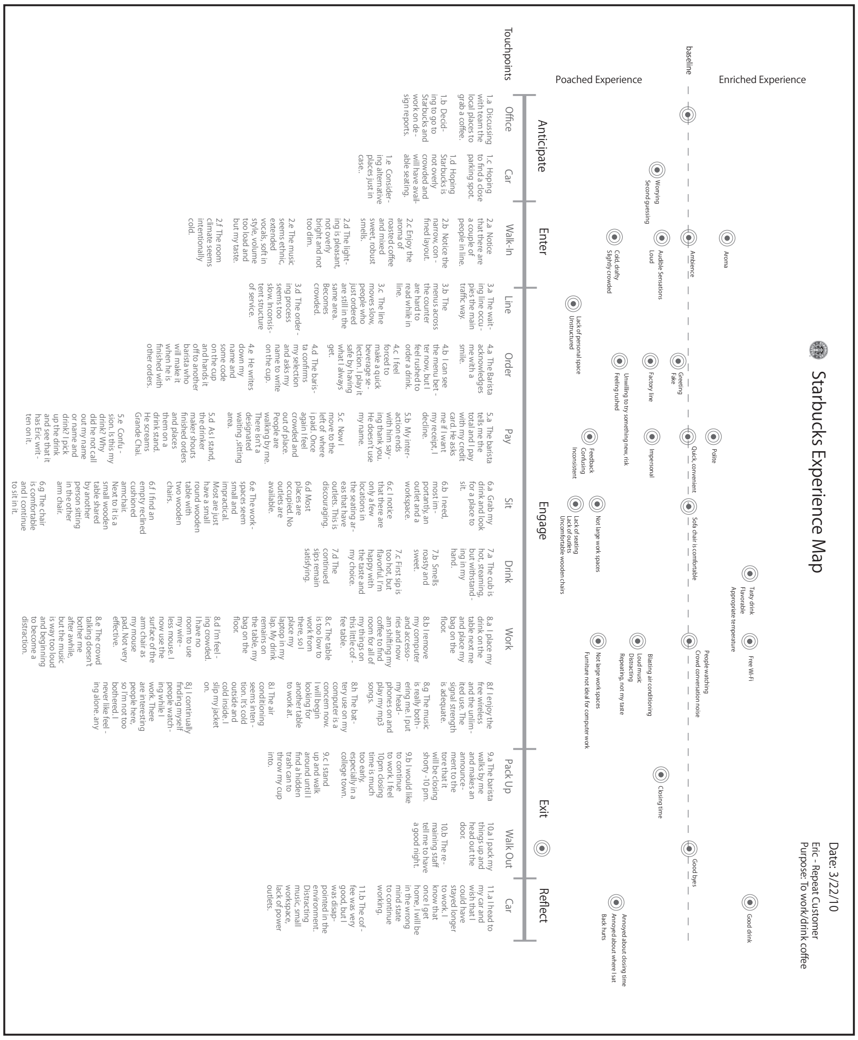
A safe and friendly environment
We have one of the safest and most pleasant campuses in the UK, which is home to a friendly and inclusive community.

Excellence
We strive to offer the highest quality student experience in learning and life, and want all our graduates to be proud of their University, and want to remain part of it. We believe that students are our partners in the co-creation of their experience, and that every member of our community contributes to each others' experience.

Strategic work themes



Appendix 5: Starbucks Experience Map



Appendix 6: Naïve to Natural Self Assessment

1. The emphasis of my organization's recruitment process for customer-facing people is on identifying people with:
   a. The right attitude: attitude tests take place with a view to recruiting people who have a generally "positive" attitude.
   b. Specific skills, knowledge of the product, the competitive offering and/ or our industry.
   c. An ability to act, role-play, and improvise: people are selected for their ability to evoke deep emotions and stimulate customer senses.
   d. Emotional capability, who are good at evoking emotions: people are rejected because they are not good at evoking emotions.

   Answer [**b**]
   a = 2 points, b = 1 point, c = 4 points, d = 3 points

2. The emphasis of my organization's training for customer-facing people is:
   a. Specific in nature, focusing on acting techniques, and stimulating customer senses.
   b. General in nature, focused on dealing with difficult customers providing good service and evoking general "positive" emotions in customers.
   c. Specific in nature, focusing on how to evoke specific emotions in customers.
   d. Primarily product-focused.

   Answer [**d**]
   a = 4 points, b = 2 point, c = 3 points, d = 1 point

3. Which of the following best describes the Customer Experience in relation to your organization?
   a. The Customer Experience we want to deliver has been articulated: it outlines the transactional elements and also the customer emotions we want to evoke.
   b. Different groups across the organization look at the Customer Experience in isolation. Nothing is defined. Everyone does what he or she believes is right, so there is no consistency and the Customer Experience is confused.
   c. The Customer Experience we want to deliver has been articulated. It outlines the transactional elements, the customer emotions we want to evoke, and the customer senses that we want to stimulate.
   d. No one in the organization has an overall view of the Customer Experience the organization wants to deliver.

   Answer [**d**]
   a = 3 points, b = 2 point, c = 4 points, d = 1 point

4. Which of the following most accurately reflects the degree of alignment between your Customer Experience strategy and other functional strategies?
   a. The organization doesn't have a Customer Experience strategy or there is no alignment - strategy is developed in isolation by product managers.
   b. There is alignment. This has been achieved by the establishment of a recognized infrastructure (such as a Customer Experience council) with members from each function looking at transactions and emotions.
   c. There is no alignment. There are many siloed customer strategies, with each function or department developing and implementing its own strategy in isolation.
   d. There is alignment. This has been achieved by the establishment of a recognized infrastructure (such as a Customer Experience council), with members from each function looking at transactions, emotions, and senses.

   Answer [**a**]
   a = 1 point, b = 3 points, c = 2 points, d = 4 points

5. Which of the following best describes the degree to which your systems have given the or-

ganization "a complete and holistic view of an individual customer?"

a. Every function has an in-depth complete view of the customer: all products, all sales, and full service history and customer preferences.
b. Every function has a basic complete view of the customer: all products, all sales, and full service history.
c. Each department only has a view of its own products, the sales of those products, and the revenues resulting from those products.
d. Each department only has a view of its own products, sales of the products, revenues from those sales, and the service history.

Answer [**c**]
a = 4 points, b = 3 points, c = 1 point, d = 2 points

6. Which of the following best describes your organization's approach to call routing/answering?
   a. Customers can talk to a person but it usually requires lots of transfers of calls to get to the right person. A directory of telephone numbers is given to customers to call different parts of the organization for different requirements.
   b. Dialogue is discouraged by extensive use of call routing and many levels of menus to "direct callers to right person." Typically there is music on and "how much we value your call" messages. Typically sales lines are answered quicker than service lines.
   c. A considered appraisal of whether human or machines should answer the phone has taken place. Call routing and the amount of menus have been minimized.
   d. Humans answer the telephone. Videophone contact is also encouraged.

   Answer [**a**]
   a = 1 point, b = 2 points, c = 3 points, d = 4 points

7. Key performance indicators (KPIs) and targets are used to …
   a. Drive sales and manage production volumes. Our main KPIs are product-related (for example, product returns, time to market, and so on).
   b. Appeal to customer senses. Profitability and Transactional performance account for about 50 percent of our KPls/targets. Depth of emotions and senses are measured at each moment of contact and account for a significant percent of bonus/pay.
   c. Drive the CEO Profitability and Transactional performance account for about 50 percent of our targets. Defined emotions are also measured across each moment of contact and are a growing percent of people's bonus/pay.
   d. Drive sales and Transactional performance. Main KPls are revenue and Transactional performance (for example, achievement of stated lead times, punctuality, and so on). Customer satisfaction accounts for a small percentage of bonus/pay.

   Answer [**-**]
   a = 1 point, b = 4 points, c = 3 points, d = 2 points

8. Which of the following best describes the mix of internal and customer measures in the organizations overall Key Performance Indicators?
   a. 50 percent internal - 50 percent customer.
   b. 75 percent internal - 25 percent customer.
   c. 100 percent internal - 0 percent customer.
   d. 30 percent internal - 70 percent customer.

   Answer [**b**]
   a = 3 points, b = 2 points, c = 1 point, d = 4 points

9. Which of the following best describes the structure of your organization?
   The organization is ...
   a. Matrixed - functions are pulled together to face the customer.

b. Siloed and organized around different functions.
c. Organized around the customer.
d. Organized around our products and product lines.

Answer [**b**]
a = 3 points, b = 2 points, c = 4 points, d = 1 point

10. Which of the following best describes who owns and is responsible for the Customer Experience in the organization?
   a. No one generally owns or is responsible for the Customer Experience. The Customer Experience ends up being done for each individual product - usually this happens by default as no one thinks proactively about the Customer Experience.
   b. There is a group, comprised of representatives from all functions, who have been given responsibility for owning the (transactional and emotional) Customer Experience or a vice president/director of Customer Experience has been appointed.
   c. No one generally owns or is responsible for the Customer Experience. Customer experience ends up being done by silo: all activity is by silo (this can be done proactively by some silos and by default for some silos).
   d. There is a group, comprised of representatives from all functions, that has been given responsibility for owning the sensory Customer Experience and/or an experiential vice president/director has been appointed.

   Answer [**a**]
   a = 1 point, b = 3 points, c = 2 points, d = 4 points

11. Which of the following best describes the frequency with which customer expectations are reviewed?
   a. Done on an ad hoc basis - as required.
   b. Done on a systematic basis - expectations are reviewed at frequent and predetermined times.
   c. The organization does not capture and research customer expectations.
   d. Done on a systematic basis - expectations are reviewed at least annually.

   Answer [**c**]
   a = 2 points, b = 4 points, c = 1 point, d = 3 points

12. Which of the following best describes your organization's approach to managing customer expectations?
   a. Decisions have been made about which expectations, including emotional, will be exceeded and which will be met.
   b. People don't talk about expectations within the organization.
   c. People say that meeting expectations would be a significant step forward, but there is little evidence that this is done in a systematic way - it is transactional expectations that are referred to.
   d. Decisions have been made about which expectations, including sensory, will be exceeded and which will be met.

   Answer [**b**]
   a = 3 points, b = 1 point, c = 2 points, d = 4 points

13. Which of the following best describes the degree of alignment between your organizations brand and its Customer Experience?
   a. Full consideration is given to aligning the brand and Customer Experience - a formal mechanism exists to ensure this happens.
   b. No consideration is given to aligning the brand and Customer Experience - brand values are developed in isolation from operational groups.
   c. Full consideration is given to aligning the brand and Customer Experience
   d. Little consideration is given to aligning the brand and Customer Experience - operational

groups may occasionally be consulted on the development of brand values.

Answer [**b**]
a = 4 points, b = 1 point, c = 3 points, d = 2 points

14. Which of the following best describes the primary emphasis of your organization's market research?
    a. It is primarily focused on customers' service requirements and making a general assessment of the experience they have.
    b. It is primarily focused on product attributes and pricing, and is primarily conducted by product lines.
    c. It includes looking at specific emotions and is conducted on a company-wide basis.
    d. It includes looking at specific emotions and senses and is conducted on a company-wide basis.

    Answer [**b**]
    a = 2 points, b = 1 point, c = 3 points, d = 4 points

15. Which of the following best describes the basis on which processes are designed?
    a. Changes to processes happen to focus around the customer. These are matched against the Customer Experience the organization is trying to deliver.
    b. Processes are designed on the basis of what is good and convenient for the company - usually done by product managers and product lines.
    c. All processes are reviewed to focus around the customer. These are matched against the Customer Experience the organization is trying to deliver.
    d. The customer is talked about but all processes are designed for the convenience of the organization. Design takes place in silo without consideration of the impact on other silos or the customer.

    Answer [**d**]
    a = 3 points, b = 1 point, c = 4 points, d = 2 points

16. Which of the following best describes the depth to which "customer journey" maps have been created?
    a. No overall customer journey map exists. However, some rudimentary mapping by silo/function has been completed - but it is very transactionally based No time is spent with customers. A limited amount of time.
    b. Customer journey maps (including emotions) have been plotted at both strategic and tactical level - emotions have been intrinsically designed into processes.
    c. Customer journey maps (including emotions and senses) have been plotted at both strategic and tactical level - emotions and senses have been intrinsically designed into the processes.
    d. No customer journey map exists.

    Answer [**d**]
    a = 2 points, b = 3 points, c = 4 points, d = 1 point

17. Which of the following best describes the percentage of time senior managers spend with customers?
    a. A large amount of time
    b. No time is spent with customers
    c. A limited amount of time.
    d. A significant proportion of time.

    Answer [**c**]
    a = 3 points, b = 1 point, c = 2 points, d = 4 points

18. Which of the following best describes your organization's complaints procedure?

a. The organization has established a complaints department. Complaints are directed to it – there is little empowerment at the front line to deal with complaints
b. Complaints are treated with disdain.
c. All our people are empowered to anticipate complaints and take proactive action to prevent and/or resolve them.
d. Our customer-facing people are empowered to respond to and resolve complaints - they are authorized to spend significant amounts to achieve this.

Answer [**d**]
a = 2 points, b = 1 point, c = 4 points, d = 3 points

Self Assessment Summary Table

Question	Score
1	1
2	1
3	1
4	1
5	1
6	1
7	0
8	2
9	2
10	1
11	1
12	1
13	1
14	1
15	2
16	1
17	2
18	3
Total	23

Appendix 7: Moment Mapping – University Students

(a non comprehensive list)

- First consideration of following a university education
- Initial research or information search
- School counseling
- University presentations at schools
- University credentials research
- Decision of what to study
- University visits
- Decisions on Entrance Exams to take
- Paying for Entrance Exams
- Taking Entrance Exams
- Receiving results of Exams
- Deciding which university or which exams to take again
- Dealing with rejection
- Lead in to starting courses
- Accommodation applications and choice
- Travel to and from university
- Entrance Ceremony
- Orientation
- Meeting other students
- Settling in
- Choosing courses
- Choosing clubs/extracurricular activities
- Registration
- First classes
- Finding out the expectations of the school etc.
- Dealing with the timing of classes
- Missing classes
- In class study and participation
- Out of class study
- Dealing with the workload
- Assessment. Dealing with expectations
- Dealing with feedback on assessment
- Managing new life
- Eating at university
- Social occasions at university
- Dealing with the administration
- Part-time jobs
- Payment for tuition
- Balancing life
- Dealing with teachers
- Dealing with opportunities such as study abroad
- Study abroad advice and preparation
- Counseling
- Getting help with medical and personal problems
- Getting help with learning problems
- Career Advice
- Dealing with job search and recruitment procedures
- Securing a job
- Understanding graduation requirements
- Graduating
- Dealing with alumni opportunities and events
- Transition from study to work

Appendix 8: Student Emotions to Evoke

1. Destroying Cluster: emotions to avoid evoking:
- Stressed
- Neglected
- Unsatisfied
- Frustrated
- Disappointed
- Unhappy
- Hurried
- Irritated

2. Attention Cluster:
- Stimulated
- Interested
- Exploratory
- Energetic
- Indulgent

3. Recommendation Cluster:
- Values
- Cared for
- Trusted
- Focused
- Safe

4. Advocacy Cluster
- Happy
- Pleased