

CRM Applied to Higher Education: Developing an e-Monitoring System to Improve Relationships in e-Learning Environments

Thanasis Daradoumis and Inma Rodríguez-Ardura

Internet Interdisciplinary Institute,
Open University of Catalonia (Universitat Oberta de Catalunya, or UOC)
Avda. Tibidabo 39-43, CP: 08035 Barcelona, Spain

Javier Faulin

Public University of Navarre,
Campus Arrosadía S/N,
31006 Pamplona, Spain

Angel A. Juan and Fatos Xhafa

Technical University of Catalonia,
08034 Barcelona, Spain

Francisco J. Martínez-López

University of Granada,
18071 Granada, Spain

Author Posting. (c) 'Copyright Holder', 2010.

This is the author's version of the work. It is posted here for personal use, not for redistribution.

The definitive version was published in International Journal of Services Technology and Management, Volume 14, Issue 1, pp. 103-125, 2010.

Abstract

CRM has usually been associated to business contexts. However, it has recently been pointed out that its principles and applications are also very appropriate for non-profit making organizations. In this paper, we defend the broadening of the field of application of CRM from the business domain to a wider context of relationships in which the inclusion of non-profit making organizations seems natural. In particular, we focus on analyzing the suitability of adopting CRM processes by universities and higher educational institutions dedicated to e-learning. This is an issue that, in our opinion, has much potential but has received little attention in research so far. Our work reflects upon this matter and provides a new step towards a CRM solution for managing relationships of specific customers, such as students. Indeed, the main contribution of this paper is specifically characterized by the proposal and empirical application of an e-monitoring system that aims to enhance the performance of relationships in e-learning environments.

Keywords: Customer Relationship Management, e-CRM; Higher Education; e-Learning; e-Monitoring Systems.

1 Introduction

The efforts made by universities and public administration to improve the quality of higher education, often at the behest of market forces, has led universities to rethink their strategic orientation in order to respond adequately to the various transformations they face (Hemsley-Brown and Oplatka, 2006); i.e. student demands, the needs and patterns of differentiated behaviour; increasingly competitive global markets, frequent innovation in teaching/learning procedures, etc. In this context, it is not surprising that universities opt for intelligence and information systems and CRM technologies (Seeman and O'Hara, 2006; Neville *et al.*, 2005) in order to identify those students who require greater attention and provide them with a more personalised service, thus reducing the number of dropouts and maximising the value of the service on offer.

Though most CRM studies and applications have usually been developed for the profit-making organization framework, its essential foundations make CRM highly suitable for non-profit making organizations (Amett *et al.*, 2003; Weir and Hibbert, 2000). This idea is strongly related to a wider subjacent view of the customer concept that is more appropriate nowadays, which transcends the consumption framework.

The adoption of CRM systems is coherent in those organizations which practise a customer-centric approach. The final aim pursued by any organization that uses such systems is to provide its customers an added value based on the individualized understanding of their preferences. This philosophy of management, thanks to the intelligence coalition of Information Technologies, working processes, analytical methods for databases, knowledge management capabilities, etc., should contribute to "build and sustain a profit-maximizing portfolio of customer relationships" (Zablah *et al.*, 2004, p. 481).

The non-profit making organizations are suffering increasingly competitive pressure, which has led them to offer services of quality. This explains why non-profit making organizations like universities, now more customer/student focused (Neville *et al.*, 2002) and attracted by the advantages associated to them, have begun to adopt CRM systems (Hemsley-Brown and Oplatka, 2006; Neville *et al.*, 2005; Seeman and O'Hara, 2006). Besides, the adoption of these kinds of systems by institutions whose organizational culture defends a long-term relational orientation, favours the achievement of institutional goals, as well as the generation of positive results for both their own organization and its primary stakeholders; mainly, students and scholars (Jayachandran *et al.*, 2005). In short, the adoption of CRM systems should be viewed as a plausible mean to strengthen the adding-value process of universities. However, we ought to be aware of the fact that just investing in these technological systems does not guarantee a competitive advantage. On the contrary, any CRM system developed and adopted by a university must achieve an in-depth knowledge about its customers, and use such knowledge to properly evaluate the state of relationships, take the right decisions, and address appropriate actions. This is, in our opinion, the gist and challenge of any CRM adoption process at the universities.

Developing CRM systems in higher educational contexts it is not always a mere translation of those applied in the business field. This is why CRM technologies, applications and processes require adaptation to the distinguishing characteristics of the institution (Fjermestad and Romano, 2003; Raman *et al.*, 2006).

Particularly, if we focus on the e-learning arena, the adoption of the CRM systems is even more interesting and challenging. In the electronic context defined by the Internet framework, e-CRM systems are very convenient for revealing the relationships with the

primary stakeholders of the universities. In this regard, one of the most critical tasks in the determination of the whole value provided to the students depends on how the institution monitors the learner behaviour during the interaction with scholars, classmates and the e-learning system in general (Rodrigues et al., 2006); i.e., our main concern is the online monitoring of the students' e-learning process.

This paper shows part of a wider research focused on developing e-CRM solutions to be applied in e-learning environments. Specifically, we present an e-monitoring system we have developed and tested in a real e-learning situation. We hope that its generalised application can improve the performance of the CRM processes in any virtual learning environment.

The structure of the paper is the following. First, we carry out a literature review of CRM and, especially, its extension to the field of non-profit making organizations, as in the case of the universities, the institutional field we have taken as the specific framework to develop our CRM solution. In particular, we discuss the clear necessities that such institutions have to monitor their students' behaviour and performance. This led us to build an initial conceptual model which in turn guided the development of an information system with e-monitoring mechanisms. In fact, the resulting system constitutes an e-Learning Monitoring System (eLMS) that provides an innovative solution that focuses on monitoring customer/student relationships in a higher e-learning institution. Then, we present and discuss the results provided by the e-CRM solution we propose. Finally, some concluding remarks are given.

2 Conceptual background of CRM

CRM is the result of the evolution in marketing as well as its integration of different ideas and concepts that have arisen from new data, technologies and organisational processes (Boulding *et al.*, 2005; Payne and Frow, 2005). This evolution began in the 60s with Theodore Levitt, who stated that organizations should assure their long-term future not by placing and selling their products but by satisfying the needs of those who were going to use them. Years later, Berry (1983), the initiator of relationship marketing, proposed the adoption of a business philosophy (Berry, 2002) in which service companies focused on attracting, maintaining and improving customer relations. Based on the construction of this relationship, the concept was taken further (e.g.: Grönroos, 1994; Gummeson, 1987; Webster, 2002). In addition, the processes and capabilities needed to maintain good customer relationships were studied, which led to the development of market orientation (Jaworski and Kohli, 1993; Narver and Slater, 1990). Alongside the spread of IT among companies and the consequently huge increase in customer data that it generated, there arose the concepts of one-to-one marketing (Peppers and Rogers, 1993) and massive customization (Pine, 1993).

So, in the 90s many companies began to apply these principles (satisfying the customer by giving value, orientation towards the relationship, marketing intelligence, personalisation of communications, etc), and especially the marketing relationship (Bolton and Tarasi, 2006; Payne and Frow, 2006; Zablah *et al.*, 2004), combined with technological solutions that came to be called CRM; these were to allow experts to obtain, store and analyse with greater ease data on customer behaviour and its interaction with the organisation. Through this, there emerged a broader concept of CRM now regarded as a strategic approximation through which the management of

relationships with the organisation's key clients is appropriately developed (Payne and Frow, 2005).

In accordance with the latest and most relevant contributions in marketing literature (Bolton and Tarasi, 2006; Li *et al.*, 2005; Payne and Frow, 2005 and 2006; Zablah *et al.*, 2004), this approximation defends the creation of value, the intelligent use of technological systems and inter-functional business processes to obtain and spread knowledge on customers as well as the development of advantageous and long-lasting relationships with customers and segments of specific customers (Boulding *et al.*, 2005).

3 Marketing, relationships and CRM in higher education

Although most of the research on CRM has concentrated on business, the principles, technologies and procedures that derive from this concept are also applicable to non-profit making areas (Arnett *et al.*, 2003; King, 2006; Pan *et al.*, 2006, among others). It is important, therefore, to consider the particular characteristics of the relationship or certain factors that condition its development (Cervera *et al.*, 2001). This idea is coherent, in essence, with the premises defended some decades ago by Kotler and Levy (1969) regarding the widening of the field of application of marketing.

Even though these proposals received a mixed response from those in public and non profit-making organisations, it has not proved to be an obstacle for the acceptance of the expansion of marketing into public and non profit-making organisations in general (Cervera *et al.*, 2001) and into universities in (e.g.: Gibbs, 2002; Hemsley-Brown and Oplatka, 2006). In universities, the debate on the application of marketing principles continued into the 90s (for more detail see: Sharrock, 2000; Hemsley-Brown and Oplatka, 2006). The main resistance to the use of business concepts and principles came from academics and educators opposed to applying market forces to the university system. They considered that these principles contradicted educational values. This concern about the "marketisation" of university education led to the debate, for example, around considering the student a customer of the institution (e.g. Barrett, 1996; Franz, 1998).

Curiously, alongside the increased application of marketing to public services and non profit-making organisations, there has been a greater acceptance of the evolution of the theoretical development of marketing. In fact, the principles that currently carry greater weight are closer to the specific problems of these institutions (Stokes, 1997; Weir and Hibbert, 2000). Today's marketing focus is not so much on getting "buyers" as on customer satisfaction, giving them what they want and cultivating a relationship with them that is not just strictly commercial, unilateral and impersonal. Thus, the adoption of CRM by educational institutions brings with it the use of appropriate instruments to acquire greater knowledge of the needs of students in terms of training, to help organise services tailored to their characteristics and requirements, to improve the process of education and get better results that reduce the number of dropouts (Neville *et al.*, 2005).

However, marketing education literature has not developed uniformly and there is a lack of development of theoretical models that are clearly adapted to educational services (Hemsley-Brown and Oplatka, 2006). As Hemsley-Brown and Oplatka (2004) point out, when literature originated in the 80s, it was fundamentally theory and norms oriented, based on the application of models initially conceived for business, especially those from marketing communication, to the promotion of educational institutions. Later, the debate was about if students fitted into the "customer" label (in their

“consumption” of training programs) or whether it was about “products” that educational institutions “offered” to the labour market (Conway *et al.*, 1994; Emery *et al.*, 2001).

At around the same time, education was being labelled a service, which situated marketing education literature within marketing services (Mazzarol, 1998; Chung and McLarney, 2000). Other subjects that sparked the interest of researchers were the processes of internationalisation in the educational context (Binsardi and Ekwulugo, 2003; Mazzarol *et al.*, 2003; etc.), as well as factors that determined the choice of a university (e.g. Maringe, 2006).

The adoption of the relationship perspective and the principles and instruments of CRM have been considered as the latest and most recent subject for study in marketing education mainly due to the fact that the studies applied to non profit-making organisations have highlighted their rich contribution to the development of the organisation’s activities (Arnett *et al.*, 2003; King, 2006; Pan *et al.*, 2006). In the specific field of education, studies like those undertaken by Klassen (2002) y Trim (2003), have provided additional support to the organisational philosophy that marketing relationships propose, proving that this orientation is compatible with providing educational services.

Nevertheless, there is still very little specific research on CRM in education. In this sense, as far as we know, based on the literature review we have undertaken in this paper, we have only identified two previous studies. Seeman and O’Hara (2006) demonstrate how the development and implementation of a CRM project improves the obtaining and management of information, reduces the number of dropouts and increases student satisfaction with programs and educational services on offer. These researchers consider that the CRM impact on university education is greater when the institution adopts e-learning systems. Also, Neville *et al.* (2005) examined the results of an e-learning management system developed and implanted using a CRM strategy. This study shows that the effectiveness of a virtual educational environment does not depend so much on a system’s complex technology as on the teaching-learning methodology, and that the technology to be used must serve specific educational proposals. More research is required in order to increase understanding of CRM initiatives, as well as the design of specific technologies and instruments for the service of teaching/learning processes (Hemsley-Brown and Oplatka, 2006) in general, and for e-learning in particular.

4 The need for e-monitoring students and virtual teams in e-learning environments

The technological CRM tools available in the field of education allow us to make use of database capabilities, data mining systems and interaction technologies in order to obtain and store huge quantities of information on the characteristics and behaviour of students, and to generate knowledge about the same and make it available to the educator so that he/she can contribute more efficiently to the students’ learning process. However, the usual technologies are limited for obtaining and analysing information on student behaviour in a virtual environment; especially when students cooperate in carrying out learning activities. Thus, although these tools allow the educator to consult the most relevant personal and academic data (prior qualifications, academic report on current university course, etc), giving the educator knowledge of the student’s educational needs, there are still limitations regarding following the student’s behaviour when navigating and interacting with learning environment (Jerman *et al.*, 2001; Zumbach *et al.*, 2002).

The current limitations of CRM systems when applied to e-learning can be illustrated, for example, in the lack of consideration of relevant variables like frequency of access to the student classroom, the student's consultation of on-line information and educational resources, their individual contribution to the development of activities in collaboration with other students, etc. In fact, work in this area focuses on conceptual aspects of monitoring (Guerrero *et al.*, 2005; Jeong, 2004), providing simple, limited monitoring instruments (Stahl, 2006). Therefore, if we consider that the resulting information from monitoring processes of learning on-line is particularly relevant for the university and its educators, as it would permit them to know the level of progress of each student and team in the development of each activity, motivate the participants according to their level of progress and organise the working group, etc. (Dillenbourg 1999; Daradoumis *et al.*, 2006), then it is worthwhile researching the development of proposals for the monitoring of added value.

It is possible to resort to a variety of generic methods to be imported and/or adapted to the monitoring of students and working groups to the e-learning field. These methods range from formal methods (e.g.: statistical analysis, social network analysis, monitoring through shared information and objects) to informal ones (Reffay and Chanier, 2002; Martínez *et al.*, 2003; Mazza and Milani, 2005). Also, differences exist as regards the sources of information used for monitoring, such as log files of synchronous and asynchronous communication, bulletin boards, and electronic discussion information reports. Besides, the necessity for adequately integrating the application of a particular e-monitoring solution to the rest of the CRM technologies used, as well as to the e-learning environments (as e.g.: Basic Support for Cooperative Work or BSCW system, Moodle, WebCT, eClass, etc.), also requires the use of a common data format.

Taking the previous questions as a backdrop, it is convenient to create first a conceptual model that allows us to develop an e-Learning Monitoring System (eLMS) that provides monitoring or activity reports about the primary stakeholders of the institution. In this sense, we have developed a system called SAMOS (Student Activity Monitoring using Overview Spreadsheets), based on the combination of easy-to-use spreadsheets models and MS/OR techniques, in order to be used for tracking a group's and an individual's activity and performance in any e-learning environment.

5 SAMOS: an e-monitoring system to support CRM in e-learning environments

5.1 Description of the e-learning environment selected for developing and experimenting with the system

In order for the implantation of these technological solutions to be successful, the organisation needs to have adopted an orientation towards the relationship (Jayachandran *et al.*, 2005; Srinivasan and Moorman, 2005), and to have consolidated organisational processes to collect and analyse, distribute and use the acquired information (Jayachandran *et al.*, 2005). For this reason, the SAMOS system was developed and for and experimented within a university framework that has these characteristics. Specifically the Open University of Catalonia (UOC, Universitat Oberta de Catalunya), widely considered for its work in e-learning not only in Europe but across the world, was the institution chosen for this work.

The UOC (www.uoc.es) was created in 1994 at the request of the Generalitat de Catalunya in Barcelona (Spain). It has shaped a widely diverse university community, with around 37,000 students from more than 45 countries. These individuals all share

the common goals of acquiring knowledge, personal enrichment and lifetime learning, and they all use IT to interact, thereby consolidating a growing, dynamic online community.

The UOC complies with the main characteristics of strategic and organisational order that, in accordance with authors like Sin *et al.* (2005), match CRM. Firstly, it is an institution clearly oriented to the customer/student. This is apparent in its pedagogical model, which situates the student at the centre of the teaching-learning process providing him/her with information in any given place and time, and at the rhythm the student decides. Secondly, it has designed an organisational structure that allows an orientation towards the creation and strengthening of relationships.

On the one hand, this structure contains groups of varied characteristics (e.g.: inter-functional, centred on processes, customers/students etc), designs that facilitate inter-functional coordination and integration, resources for the identification and satisfaction of customer/student needs, and systems of internal marketing that stimulate the service vocation of educators and management personnel.

On the other hand, the UOC promotes and supports collaborative work and learning in small groups in several courses, which reinforce and create tighter relationships among students. However, collaboration at a distance requires not only some additional effort but also it may present problems that can harm members' relationships and thus group cohesion. It is, then, very important for group managers (e.g., tutors) to be able to supervise and monitor group and member activity in order to identify problematic relationships in time and intervene effectively to improve group dynamics and performance.

This educational context, located in the web-based distance learning and teaching arena, is where our e-monitoring system has been developed. We have considered a common scenario where groups of students have to work on long-term software projects, which are problem-solving collaborative practices, supported by the BCSW collaborative platform. Such projects are organized in several phases; each phase corresponds to a target goal.

The instructional design of each target goal includes several learning tasks, adequately linked to each other, that students should carry out individually (such as readings) or collaboratively (activities and exercises) in order to achieve the corresponding goal. In addition, the design of some target goals also dictates the realization of specific synchronous debates at group (and class) level, aiming at decision taking on a set of specific questions. The whole project is carried out mostly asynchronously within the scope of several distance learning undergraduate courses which usually run over a period of 14 to 15 weeks.

Each of these courses involves several academic agents (see figure 1): an academic director (responsible for the degree), a course manager (responsible for the course), several professors (responsible for a virtual class) and the class of students (about 50 per class) distributed among different online groups with four to five members each.

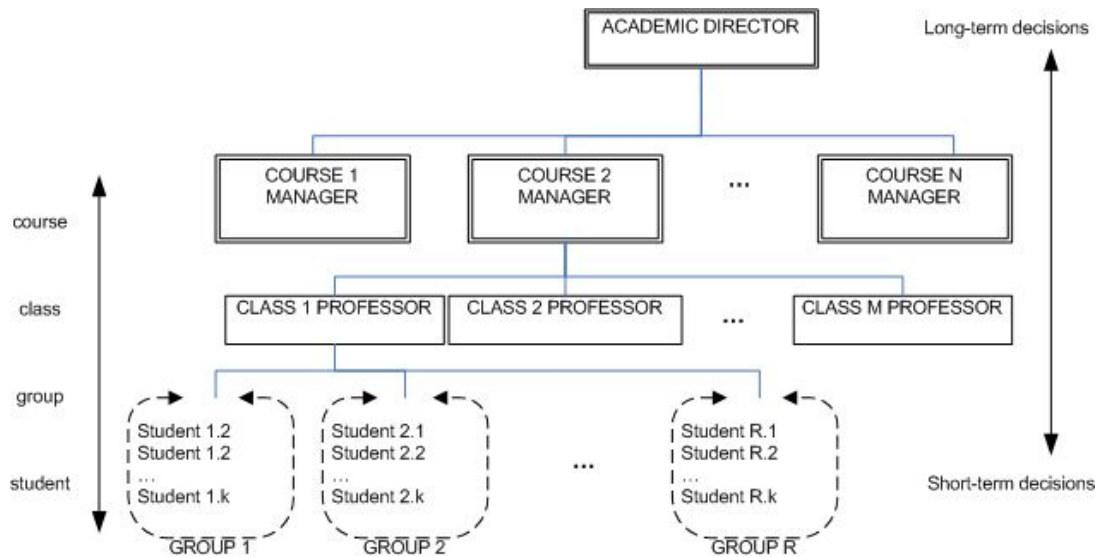


Figure 1: Agents that participate in the e-learning process

5. 2 Development and implementation of the e-monitoring system

5.2.1 Design of the e-monitoring process

The e-monitoring process starts when a learning activity takes place on the BSCW server. Interaction activity data are captured in BSCW log files which are not readable and cannot be analyzed in a straightforward way. To solve these problems, we have developed a specific tool, called EICA, which automatically reads and processes new incoming log files and stores the extracted data in a unique and permanent database. The SAMOS system will then analyze this information using spreadsheet models in order to generate weekly activity and summary reports (see figure 2).

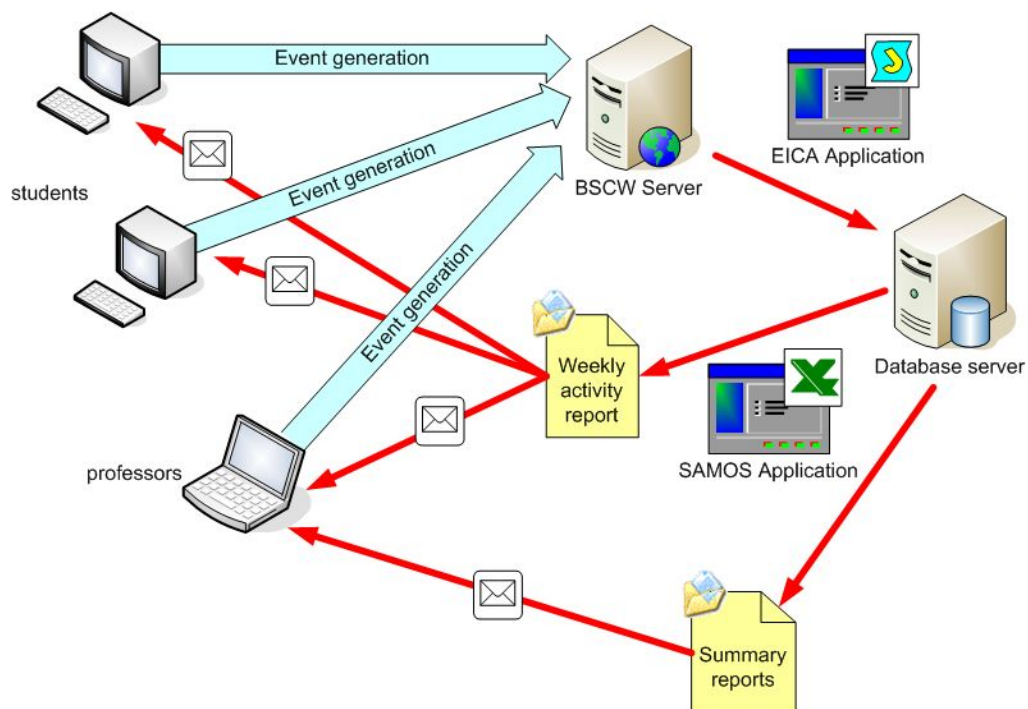


Figure 2: Generation flow of weekly activity reports

At this point, it is important to comment that any web-based environment different from the BSCW system that characterizes the e-learning environment of reference will keep similar log files. Therefore, an equivalent model could be considered (obtaining a similar database if not the same one).

5.2.2 Use of spreadsheets as a tool for developing different e-monitoring capabilities

The SAMOS e-monitoring system has been designed to best exploit the big volume of data (BSCW actions and connections log files) that are stored in the database and produce information that can help different academic agents (student, group coordinator, professor, course manager and academic director) understand the complex relationships among the participants in the learning process and take adequate decisions. In particular, SAMOS allows academic agents to automatically obtain the following information:

- *Weekly monitoring reports on the activity indices of groups and students.* In doing so, both group coordinators and professors could specify short-term policies oriented to increase activity levels in those groups with a low activity index, promote group leadership and prevent student dropouts.
- *History information on connection habits* that can be used to increase the efficiency of communication within a group as well as between students and professors.
- *Summary information about classes and course performance* that academic directors and course managers could use to take strategic long-term decisions regarding course load (in credits), course objectives and methodology, etc.

Having detected these information necessities, SAMOS was implemented to provide important functionalities, such as:

- a) Import data from a database in an easy and reliable way.
- b) Perform advanced data analysis on raw data.
- c) Facilitate a graphical visualization of numerical results.
- d) Be customizable –depending on the final user information needs (student information needs are different from a manager's, etc.)– modular and scalable so that additional information functionalities could be easily incorporated in the future without affecting the existing ones.
- e) Be able to generate portable reports in a standard file format, so that different academic agents could consult them, from any geographical location, using a simple web browser (independently of the operation system and other application software used).
- f) Be able to automatically send these reports by e-mail as well as to publish them in the UOC intranet, so that users with appropriate permission rights could access them anytime.

We should point out here that we could have developed a stand-alone Visual Basic, C# or Java-based tool able to meet some of the previous specifications –namely, specifications a), d), e) and f)–, but specifications b) and c) would have been difficult to achieve, whereas a lot of design and programming effort should have been necessary to do it. Therefore, it seemed clear that the most natural way to develop such an e-monitoring system was by means of spreadsheets, due to their contrasted efficiency when dealing with data analysis, both numerical and graphical. In particular, Microsoft

Excel (<http://office.microsoft.com>) proves to be the tool we need, since it has well-known capacities for data import and analysis -including Microsoft Query, pivot tables and filters (Zapawa, 2005), outstanding graphical capabilities (Aitken, 2006), scalability properties (via Add-Ins), portable file generation (XML, HTML, etc.). Perhaps its most important property is the wide variety of options that the VBA programming language (fully integrated in Excel) offers in order to perform advanced data analysis as well as to personalize, generate and distribute reports in an automatic way via the Internet (Albright, 2006; Bullen *et al.*, 2005). Next, we present each of the three main e-monitoring capabilities of the SAMOS system and discuss the results obtained from applying it in a real web-based collaborative learning situation.

5.2.3 Weekly reports for monitoring group and individual activity

Regarding the weekly activity reports, our interest was focused on obtaining numeric and graphical information that speeds up the classification of the different entities (groups or students) according to their level of participation in the learning activity (software project development). In addition, they allow us to easily identify and highlight those entities that were bound to maintain extremely high or extremely low activity levels (we were especially interested in the last ones, since we needed to apply performance correctional policies to them). In this sense, we opted to establish three different activity levels: high, medium and low.

Besides, we considered the distribution of the random variable `N_Events` (number of events generated by an entity), and we classified each entity according to its position with respect to the sample distribution quartiles. That is, level 1 corresponds to a low-level activity (below the lower quartile or Q_1), level 2 corresponds to a medium-level activity (between the lower and the upper quartiles), and level 3 corresponds to a high-level activity (above the upper quartile or Q_3).

At the group aggregation level, the weekly report generated by SAMOS offers us output about group activity in three different formats, all of them based on the `N_Events` variable (which shows the representation possibilities of different result types that the eLMS can offer):

1. A listing of all the groups sorted by the variable `N_Events` (number of events generated by each group up to the current week), which offers a group classification by activity level. Additionally, this output also provides us with the frequencies associated to each kind of action or event; i.e. for each group, it shows the number of create-type events (`N_CreateEvent`), change-type events (`N_ChangeEvent`), move-type events (`N_MoveEvent`) and read-type events (`N_ReadEvent`) generated by the group (see figure 3).

GROUPS ACCUMULATED ACTIVITY - WEEKLY REPORT
Week 15

Group_Id	N_CreateEvent	N_ChangeEvent	N_MoveEvent	N_ReadEvent	N_Events	P_Events	Activity
2510336	598	159	117	2653	3527	12,7%	3-High
2516274	404	72	16	2500	2992	10,8%	3-High
2516784	343	93	365	2159	2960	10,7%	3-High
2513581	416	20	128	1713	2277	8,2%	3-High
2516780	283	39	175	1617	2114	7,6%	2-Medium
2502292	320	78	80	1622	2100	7,6%	2-Medium
2513563	335	43	24	1402	1804	6,5%	2-Medium
2516788	159	28	31	1371	1589	5,7%	2-Medium
2513550	292	70	104	1108	1574	5,7%	2-Medium
2516792	196	9	31	1267	1503	5,4%	2-Medium
2510293	185	33	27	1158	1403	5,1%	2-Medium
2512520	160	37	52	1114	1363	4,9%	1-Low
2512491	238	16	44	994	1292	4,7%	1-Low
2516239	114	43	19	886	1062	3,8%	1-Low
2516796	20	0	0	191	211	0,8%	1-Low
Total	4063	740	1213	21755	27771	100%	
P_Events	15%	3%	4%	78%	100%		

Figure 3: Groups accumulated activity – numerical weekly report

2. A graphical representation of the previous list is effected by a histogram with two added bands, representing the lower and upper quartiles (that is, Q1 and Q3) respectively. Again, three activity-level areas are well defined, allowing for a visual classification of each group in one of these areas (see figure 4).

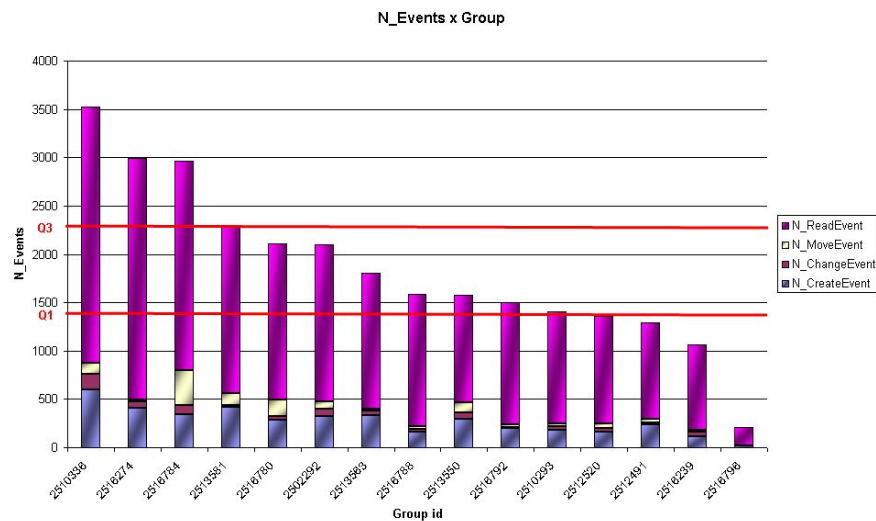


Figure 4: Groups accumulated activity – chart accumulated report

3. For each group in the class, a chart shows, first, a time series representing the group historical evolution (number of events generated by the group at each week). Secondly, it shows a quartile-based activity areas representing the aggregated historical evolution; i.e.: for week n , $Q1(n)$ and $Q3(n)$ are represented, where $Q1(n)$ and $Q3(n)$ are the lower and upper quartiles associated to the sample distribution of the variable “number of events generated by a group at the n_{th} week” (see figure 5). This chart allows us to follow the group evolution along the weeks and can be especially useful to observe if short-term policies (activated by professors or group coordinators) are having the expected effects on the groups they have been applied to. In the sample screen below, we observe the weekly evolution of group 2502292: it has performed

above $Q3(n)$ at weeks 1, 2, 4, 7, 8 and 12, and it has only performed below $Q1(n)$ at week 14.

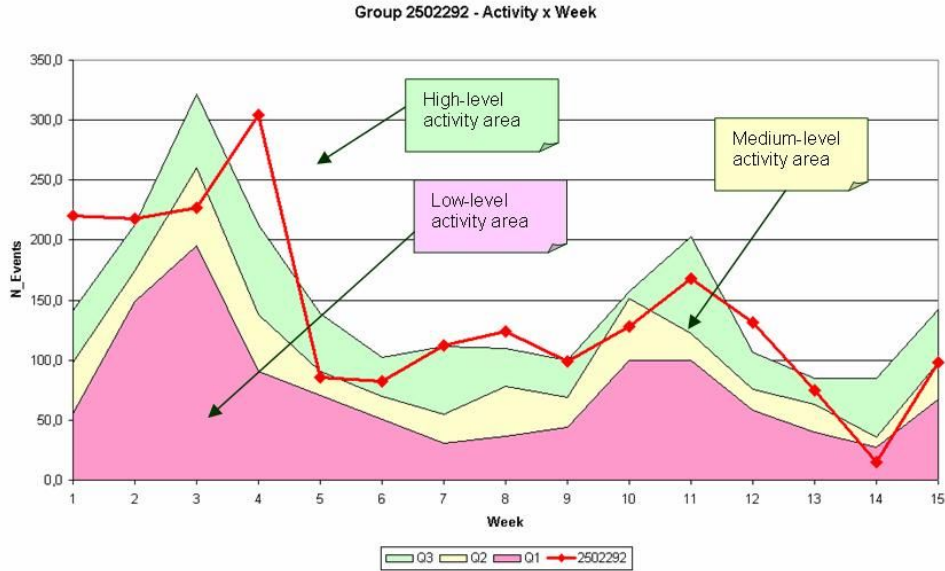


Figure 5: Individual group historical evolution vs. aggregated historical evolution

In the case of individual students, the weekly report offers us the same type of numerical and graphical output described before (in figures 3, 4 and 5). In this way, weekly reports provide an up-to-date classification of students according to their activity level.

In addition, for each group in a class the system generates a time series chart that describes the historical evolution of each group member (see figure 6). This graph shows the number of events generated by each of the four members of the group '2502292' at week n . From this chart, group leaders and group non-attending members (that is, students who are not cooperating enough to develop group tasks) can be easily identified and tutors can immediately activate policies aimed at preventing negative situations such as inefficient distribution of group tasks or even student abandonment.

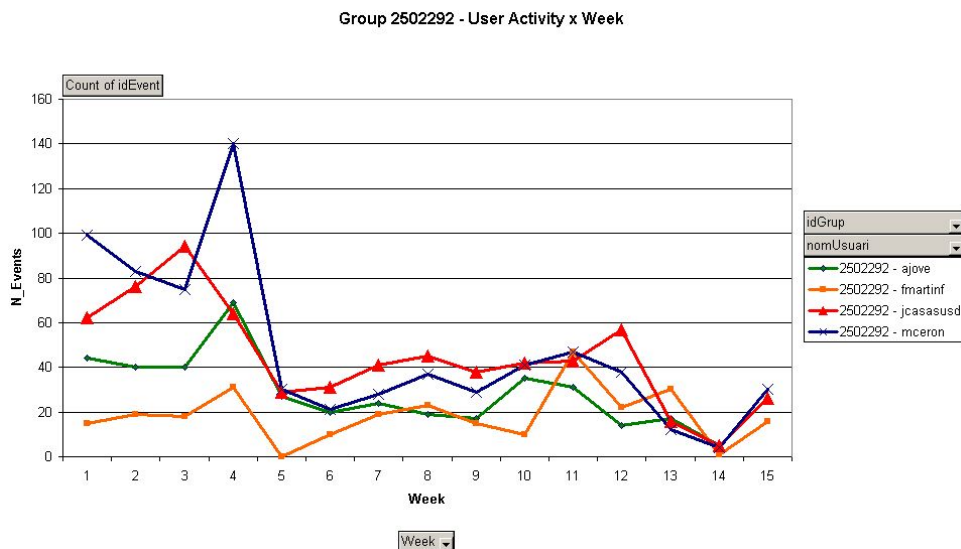


Figure 6: Historical evolution of group's member activity

5.2.4 History information about students' connection habits

Besides monitoring groups' and students' activity by means of weekly reports, we were also interested in obtaining additional information on key aspects about our students' behaviour regarding connectivity and navigation habits. In short, we were especially interested in having some additional information about students' activity habits.

On the one hand, SAMOS provides us with the average daily activity (event generation) by time interval. As we can see in the sample screen (figure 7), there are two maximum-activity peaks, at [10:00 – 11:00) and [18:00 – 19:00). We also observed that there was almost no activity from 2 a.m. to 7 a.m., and that a lot of activity occurred between 6 p.m. and 1 a.m. (that can be explained by the fact that most of our students are over 25 years old and they pursue a professional career alongside their studies). The knowledge of these activity habits can guide other group members and professors when publishing course material, starting on-line debates or arranging synchronous meetings.

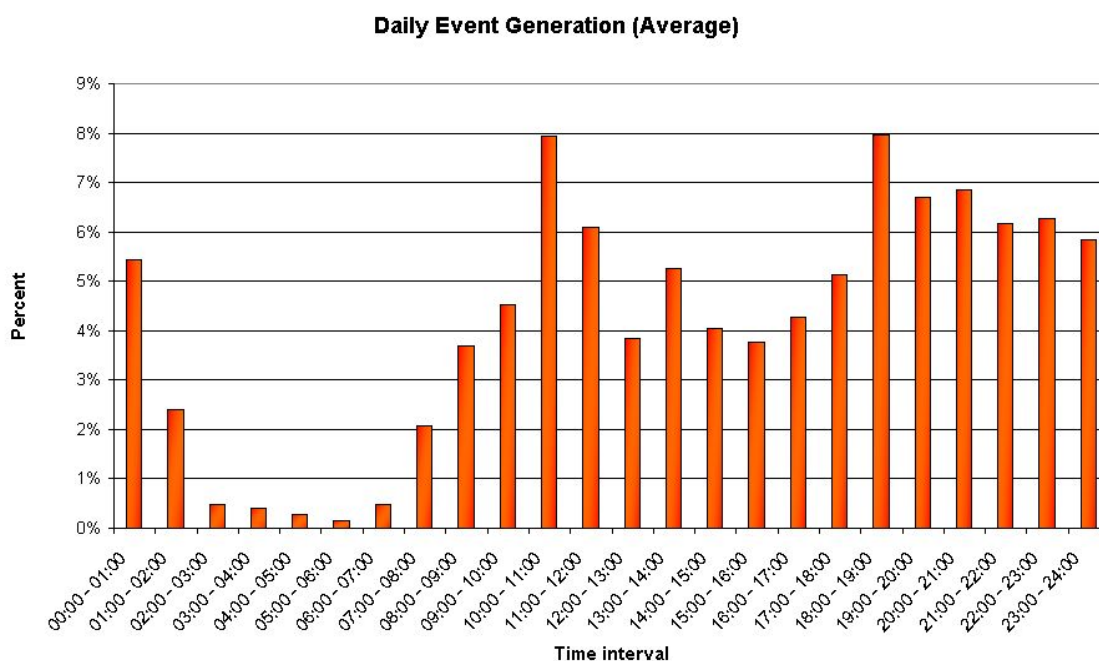


Figure 7: Average daily activity (event generation) by time interval

On the other hand, figure 8 shows the average daily activity (event generation) per day of the week. As can be derived from the sample chart, students generate a lot of activity on Sundays, and tend to lower their activity level on Wednesdays and, especially, on Saturdays. Even so, workload seems to be quite uniformly distributed throughout the week, which is a good regularity habit. The combination of this information with the previous information provided by SAMOS (daily activity by time interval) can be helpful not only when arranging synchronous meetings, but also when UOC's computer department has to plan server updates or back-up processes (both tasks should be done as transparently as possible for the intranet users).

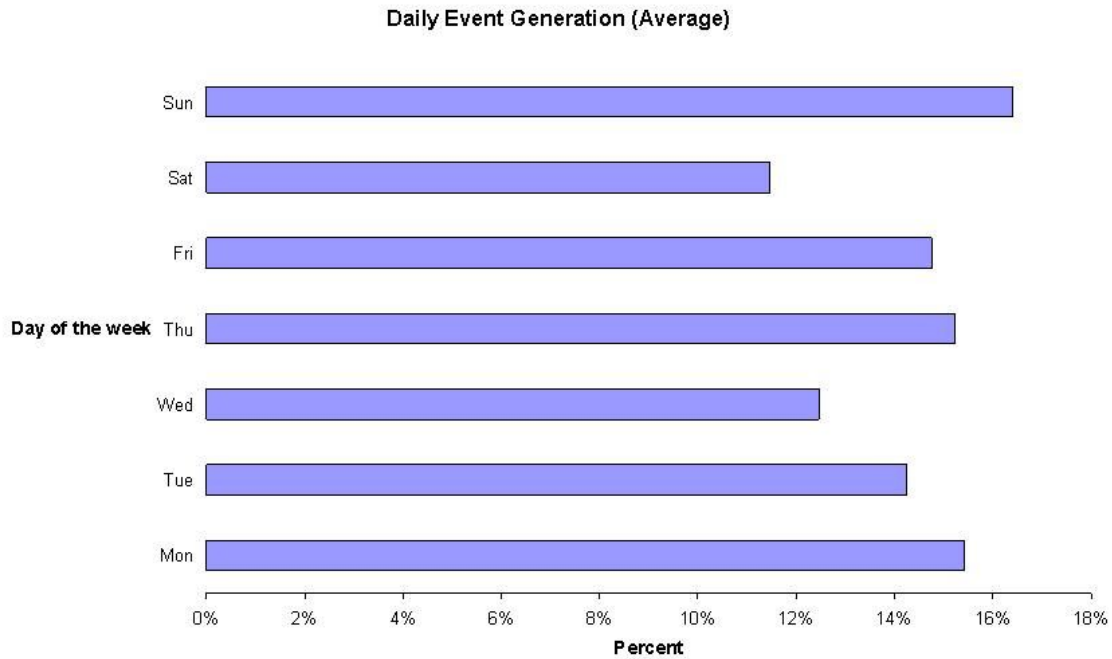


Figure 8: Average daily activity (event generation) by day of the week

5.2.5 Summary reports about classes and course performance

Our eLMS provides two kinds of summary reports for both professors and course managers, one at class aggregation level and the other at course aggregation level; a course comprises several classes and groups. Such reports offer information about the following variables:

- *Initialized (timely incoming) students.* It refers to the students that start their academic activity as soon as the course begins. This information is significant, since a problem that is frequently encountered in on-line courses is that some students tend to start their activity with some important delay – two or three weeks after the course has begun. So it is important to identify these students, since this delay makes their integration into the academic activity a difficult task. In fact, this late entry eventually tends to increase the abandonment rate. Obviously, a correlation exists between the initialized students rate and participation rate as well.
- *Student participation in the course project.* It is considered that a student participates in the course project when he/she makes active contributions –according to the assigned tasks– towards the development of the different project phases. The report shows both final participation and the evolution of participation at each phase. In this sense, not only the classes (and courses) with a high abandonment rate can be easily identified, but also those project phases where students tend to encounter special difficulties are highlighted.
- *Distribution of student records/marks* (in frequencies and percentages). This kind of information can be useful when comparing academic results among different classes and for detecting courses with extremely high or extremely low academic results.
- *Percentages of passing students* (both over registered students and over participative ones). It is important to know the students' passing rate over the entire population (registered students) of the class, as well as the passing index

over the set of students who have actively worked during the project development (participative students). This index can be fundamental when trying to detect level differences among classes and even among courses with the same credit load.

For instance, in figure 9 we show an example of a class summary report where we can easily observe the information associated to the variables we mentioned above.

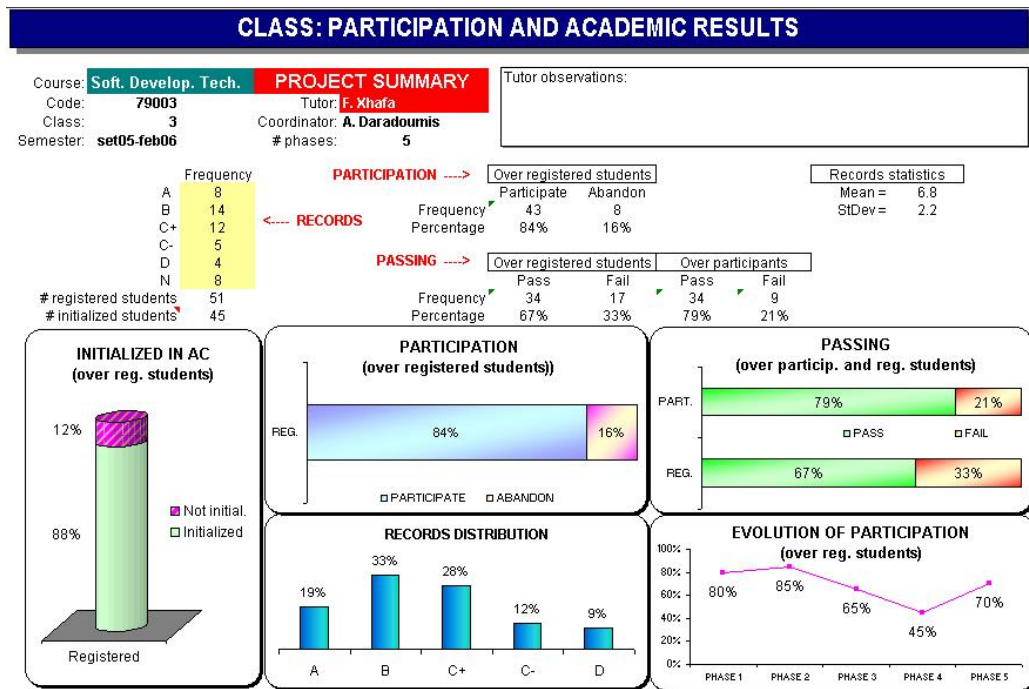


Figure 9: Summary information about class participation and academic results

6 Final discussion and concluding remarks

There are several ideas that we would like to point out in this final part of the paper, those being the main questions we have tackled here. We have tried to make some contribution to the general CRM framework of non-profit making organizations and, in particular, to the CRM applications used in the e-learning arena.

We are all aware of what CRM is. We find lots of academic papers that offer their vision of this management model during the last decade. Most of them could be aggregated into a small set of perspectives; i.e. CRM as a process, strategy, philosophy, etc.). However, no matter what the perspective is, it is reasonable to agree with the essential purpose of any CRM perspective: a process for managing the relationships with the firm's customers that, based on the application of capabilities for knowledge generation, aims to maximize the value offered to every one of them.

In this paper, we have highlighted the importance of amplifying the scope of CRM application, from the more restrictive arena of businesses to the non-profit making organizations. Consequently, the concept of "customer" must not be constrained by the business context, but it has to be open to the non-profit making context. Specifically, we have focused on analyzing the potential that CRM has to be applied in e-learning domains. In this respect, educational institutions are advised to make use of CRM

systems in order to better know their “customers” –i.e. the students– and address specific actions, with dynamicity, to improve the value provided to every one of them, so to increase the students’ performance. Besides, we defend the use of CRM systems in this context, not only to maximize the value offered by the e-learning institution to the students, thus focused on managing the institution-student relationships, but also to favour collaborative relationships with and among scholars’ and students’ working groups. In other words, we point out that, in the e-learning contexts, it is interesting to apply CRM by broadening its focus from customer/student to a group of primary stakeholders compounded by the students and scholars of the institution.

One of the key questions that should be considered in any CRM process aiming to obtain successful results is that of monitoring and evaluating the customers’ performance in order to know the right ways to address, if necessary, accurate actions to improve it. This is especially interesting when CRM is applied to the e-learning domain. The main contribution of this paper is the development of an e-CRM application, called SAMOS, which facilitates the automatic generation of monitoring reports derived from data contained in the e-learning environment log files and databases. We have presented its main constituent elements, as well as an illustration of how it performs.

In particular, SAMOS provides university managers, professors and students with relevant information about students’ academic activity and performance inside the e-learning environment at different aggregated levels. On the one hand, students are able to use monitoring reports to know the state of their group activity, to scaffold their colleagues, to adopt policies and take decisions regarding future work. On the other hand, monitoring reports are used by professors to track down the learners’ online behaviour and group activity at specific milestones, gather feedback from the learners and scaffold groups with a low degree of activity, intervening whenever necessary. Finally, these reports also allow course managers to specify the main criteria to analyze and assess course effectiveness. All these questions are very necessary to improve the value offered by the institution to their primary stakeholders.

Both the SAMOS system and the automation of information generation have gone through an in-depth evaluation and verification process by all the agents (students and scholars, in our case professors and course managers) involved in the learning process. This has not only proved its effectiveness and usefulness for all of them but it also constitutes a significant contribution to the enhancement of the functionality of e-learning environments by adding a new role – e-monitoring.

Lastly, the models presented here can be easily adapted to the necessities of other e-learning environments, universities and institutions that desire to practise an adequate management of their relationships with and among students and scholars.

References

- Aitken, P. (2006). *Excel pivot tables and charts*. New York, Wiley.
- Albright, C. (2006). *VBA for modelers: developing decision support systems using Microsoft Excel*. Duxbury Press.
- Arnett, D. B.; German, S. D. and Hunt, S. D. (2003). The identity salience model of relationship marketing success: the case of nonprofit marketing. *Journal of Marketing* 67(2) 89-105.
- Barrett, L. R. (1996). On students as customers: some warning from America. *Higher Education Review* 28(3) 70-1.

- Berry, L. L. (2002). Relationship marketing of services: perspectives from 1983 and 2000. *Journal of Relationship Marketing* 1(1) 59-77.
- Berry, L.L. (1983). Relationship marketing. In: L. L. Berry, G. L. Shostack and G. Upah (Eds.). *Emerging perspectives on services marketing*. Chicago, American Marketing Association, 25-28.
- Binsardi, A.; and Ekwulugo, F. (2003). International marketing of British education: research on the students' perception and the UK market penetration. *Marketing Intelligence and Planning* 21(5) 318-327.
- Bolton, R. N.; and Tarasi, C. O. (2006). Managing customer relationships. In: N. K. Malhotra (Ed.). *Review of marketing research*, Vol. 3, New York, M.E. Sharpe, 3-38.
- Boulding, W.; Staelin, R.; Ehret, M.; and Johnston, W. J. (2005). A customer relationship management roadmap: what is known, potential pitfalls, and where to go. *Journal of Marketing* 69(4) 155-166.
- Bullen, S.; Bovey, R.; and Green, J. (2005). *Professional Excel development: the definitive guide to developing applications using Microsoft Excel and VBA*. Addison-Wesley Professional.
- Cervera, A.; Mollá, A.; and Sánchez, M. (2000). Antecedents and consequences of market orientation in public organisations. *European Journal of Marketing* 35(11/12) 1259-1286.
- Chung, E.; and McLarney, C. (2000). The classroom as a service encounter: suggestions for value creation. *Journal of Management Education* 24(4) 484-500.
- Conway, T.; Stephen Mackay, S.; and Yorke, D. (1994). strategic planning in higher education: who are the customers. *International Journal of Educational Management* 8(6) 29-36.
- Daradoumis, T.; Martínez, A.; and Xhafa, F. (2006). A layered framework for evaluating online collaborative learning interactions. *International Journal of Human-Computer Studies* 64(7) 622-635.
- Dillenbourg, P. (Ed.). (1999). *Collaborative learning. Cognitive and computational approaches*. Elsevier Science.
- Emery, C.; Kramer, T.; and Tian, R. (2001). Customers vs. products: adopting an effective approach to business students. *Quality Assurance in Education* 9(2) 110-115.
- Fjermestad, J.; and Romano Jr, N.C. (2003). Electronic customer relationship management. Revisiting the general principles of usability and resistance – an integrative implementation framework. *Business Process Management Journal* 9(5) 572-591.
- Franz, R. S. (1998). Whatever you do, don't treat your students like customers! *Journal of Management Education* 22 (1) 63-69.
- Gibbs, P. (2002). From the invisible hand to the invisible handshake: marketing higher education. *Research in Post-Compulsory Education* 7(3), 325-338.
- Grönroos, C. (1994). Quo vadis, marketing? Toward a relationship marketing paradigm. *Journal of Marketing Management* 10(5) 347-360.
- Guerrero, L., Madariaga, M., Collazos, C.; Pino, J.; and Ochoa, S. (2005). Collaboration for learning language skills. In: *Proceedings of 11th International Workshop on Groupware CRIWG'05*. Pernambuco, Brazil, 284-291.
- Gummesson, E. (1987). The new marketing: developing long-term interactive relationships. *Long Range Planning* 20(4) 10-20.
- Hemsley-Brown, J.; and Oplatka, I. (2006). Universities in a competitive global marketplace. A systematic review of the literature on higher education marketing. *International Journal of Public Sector Management* 19(4) 316-338.

- Jaworski, B. J.; and Kohli, A. K. (1993). Market orientation: antecedents and consequences. *Journal of Marketing* 57(3) 53-70.
- Jayachandran, S.; Sharma, S.; Kaufman, P.; and Raman, P. (2005). The role of relational information processes and technology use in customer relationship management. *Journal of Marketing* 69(4) 177-192.
- Jeong, A. (2004). The combined effects of response time and message content on growth patterns of discussion threads in computer-supported collaborative argumentation. *Journal of Distance Education* 19(1) 36-53.
- Jerman, P.; Soller, A.; and Muhlenbrock, M. (2001). From mirroring to guiding: a review of state of the art technology for supporting collaborative learning. In: *Proceedings of EuroCSCL*. Maastricht, NL, 324-331.
- King, S. F. (2007). Citizens as customers: exploring the future of CRM in UK local government. *Government Information Quarterly* 24(1) 47-63.
- Kotler, P.; Levy, S.J. (1969). Broadening the concept of marketing. *Journal of Marketing*. 33(1) 10-15.
- Levitt, T. (1960). Marketing myopia. *Harvard Business Review* 38(July-August) 45-60.
- Maringe, F. (2006). University and course choice: implications for positioning, recruitment and marketing. *International Journal of Educational Management* 20(6) 466-479.
- Martínez, A.; Dimitriadis, Y.; Rubia, B.; Gómez, E.; and De la Fuente, P. (2003). Combining qualitative and social network analysis for the study of social aspects of collaborative learning. *Computers and Education* 41(4) 353-368.
- Mazza, R.; and Milani, C. (2005). Exploring usage analysis in learning systems: gaining insights from visualizations. In: *Proceedings of the 12th International Conference on Artificial Intelligence in Education (AIED)*. Amsterdam.
- Mazzarol, T. (1998) Critical success factors for international education marketing. *International Journal of Educational Management* 12 (4) 163-175.
- Mazzarol, T.; Soutar, G. N.; and Seng, M.S.Y. (2003). The third wave: future trends in international education. *International Journal of Educational Management* 17(3) 90-99.
- Narver, J. C.; and Slater, S.F. (1990). The effect of a market orientation on business profitability. *Journal of Marketing* 54(4) 20-35.
- Neville, K., Adam, F., McCormack, C., (2002) Mentoring Distance Learners: An Action Research Study – Xth European Conference on Information Systems (ECIS 2002), Gdańsk, Poland, June 6-8, 2002.
- Neville, K.; Heavin, C.; and Walsh, E. (2005). A case in customizing e-learning. *Journal of Information Technology* 20(2) 117-129.
- Oplatka, I.; J. Hemsley-Brown (2004). The research on school marketing: current issues, future directions. *Journal of Educational Administration* 42(3) 375-400.
- Pan, S. L.; Tan, C. W.; and Lim, E.T.K. (2006). Customer relationship management (CRM) in e-government: a relational perspective. *Decision Support Systems* 42(1) 237-250.
- Payne, A.; and Frow, P. (2005). A strategic framework for customer relationship management. *Journal of Marketing* 69(4) 167-176.
- Payne, A.; and Frow, P. (2006). Customer relationship management: from strategy to implementation. *Journal of Marketing Management* 22(1/2) 135-168.
- Peppers, D.; and Rogers, M. (1993). *The one-to-one future: building relationships one customer at a time*. New York, Currency/Doubleday.
- Pine, J. B. (1993). *Mass customization. The new frontier of business competition*. Boston: Harvard University Press.

- Raman, P.; Wittmann, C. M.; and Rauseo, N.A. (2006). Leveraging CRM for sales: the role of organizational capabilities in successful CRM implementation. *Journal of Personal Selling and Sales Management* 26(1) 39-53.
- Reffay, C.; and Chanier, T. (2002). Social network analysis used for modeling collaboration in distance learning groups. In: *Proceeding of Intelligent Tutoring System conference (ITS'02)*. Juin, France, 31-40.
- Rodrigues, M.F.; Bressan, G.; and Ruggiero, W. (2006). "Monitoring e-Learning: Concepts, Scenarios, Architecture and Conceptual Model. In V. Uskov (Editor) *Proceedings of the Conference Computers and Advanced Technology in Education (CATE)*, Lima, Peru.
- Seeman, E. D.; and O'Hara, M. (2006). Customer relationship management in higher education. Using information systems to improve the student-school relationship. *Campus-Wide Information Systems* 23(1) 24-34.
- Sharrock, G. (2000). Why students are not (just) customers (and other reflections on life after George). *Journal of Higher Education Policy and Management* 22(2) 149-164.
- Sin, L.Y.M.; Tse, A.C.B.; and Yim, F.H.K. (2005). CRM: conceptualization and scale development. *European Journal of Marketing* 39 (11/12) 1264-1290.
- Srinivasan, R.; and Moorman, C. (2005). Strategic firm commitments and rewards for customer relationship management in online retailing. *Journal of Marketing* 69(4) 193-200.
- Stahl, G. (2006). *Group cognition: computer support for building collaborative knowledge*. Acting with Technology Series, MIT Press.
- Stokes, D. (1997). A lesson in entrepreneurial marketing from the public sector. *Marketing Education Review* 7(3) 47-54.
- Webster, F. E. (1992). The changing role of marketing in the corporation. *Journal of Marketing* 56(4) 1-17.
- Weir, L.; and Hibbert, S. (2000). Building donor relationships: an investigation into the use of relationship and database marketing by charity fundraisers. *The Service Industries Journal* 20(2) 114-132.
- Zablah, A.R.; Bellenger, D.N.; and Johnston, W.J (2004). An evaluation of divergent perspectives on customer relationship management: Towards a common understanding of an emerging phenomenon. *Industrial Marketing Management* 33(6) 475-489.
- Zapawa, T. (2005). *Excel Advanced Report Development*. Wiley.
- Zumbach, J.; Muehlenbrock, M.; Jansen, M.; Reimann, P.; and Hoppe, U. (2002). Multi-dimensional tracking in virtual learning teams: an exploratory study. In: *Proceedings of the Conference on Computer Supported Collaborative Learning CSCL-2002*. Boulder, CO, 650-651.