



Solutions **Metrix**

Higher Education Case Study



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University of Waterloo.

ALIGNING AND OPTIMIZING INTERNATIONAL COLLABORATIONS, FROM AGREEMENTS TO TRAVELS.

● ABOUT THE CUSTOMER.

University of Waterloo is a leading Canadian University with about 46,000 annual students and the #1 in Canada for experiential learning and employer-student connections. As an internationally renowned school with a global network spanning more than 220,000 alumni in 151 countries UW has a large department for international activities, and is responsible for everything in relation to delegations, agreements with other universities and institutions as well as travel safety for all sanctioned travels of students, faculty members and staff.

● CHALLENGE AND BUSINESS PAIN POINTS.

Being responsible for international students and staff means understanding and following up on many international timely tasks, such as:

DELEGATIONS:

- Planning and organizing incoming delegations, which is extremely difficult to maintain due to delegation overlapping and highly manual tasks.
- Receiving a delegation requires a process of approvals and operational activities such as booking rooms, accommodations, catering, which was all conducted on paper
- Delegations visit follow-ups and gifting process was poorly tracked and manual
- Calculating delegation visit costs and ROI and consolidating data of which institutions were visited and how often

AGREEMENTS:

- Agreement set-up or stewardship is lengthy and requires multiple departments input
- Processing new agreements and handling the renewal was done manually (on paper/excel) and with no process for agreement renewals
- No consolidation and reporting of agreements

TRAVEL SAFETY:

- Travel plans must be managed and tracked by the Travel Safety Team and are very complex (itinerary, IATA codes, risk-assessment and risk approvals, 3rd-party travel monitoring provider, arrival notifications, travel alerts, etc.)

Registering and tracking travelers in UW's online training system (LEARN) to observe the completion of travel-related courses

RESULTS AND BUSINESS IMPACT

+2 HOURS

Minimum time saved per
process since automation

360° VIEW

of international students,
faculty members and staff

AUTOMATED MONITORING

with real-time alerts
to ensure follow-ups

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SOLUTION.

- CRM implementation with dedicated workspaces for Delegation, Agreement and Travel Safety
- Automation of complex, lengthy processes to avoid manual entries
- Integration with LMS to track travel course completion with automated reengagement if a student travels again
- Automatic student reminders for trip-related tasks
- Automated alerts to UW team of potential travel policy breach
- Fully Automated 3rd-party Travel Monitoring Partners uploads for individual and Group trips, no human intervention required
- Destination codes stored in CRM to share when sending the itinerary
- Automated business process for management of new trips by assigning tasks to owners and teams, aligning internal teams and limiting silos
- Delegations' workspace contains a section to book and manage bookings for all services
- Gifting inventory management tool, which automatically depreciates when gifts are assigned and can be managed in a controlled and documented way, tracking costs from gifts and hospitality bookings
- Automated business process for agreements and partnership requests, including automated renewals and pending renewal notifications
- Automated consolidation of agreements under Master Agreements

CONCLUSION.

Through this project, University of Waterloo was able to attain a very advanced level of automation. With that, they optimized their internal team's time and limited potential manual errors, which proved to be costly in both money and time.

They are now able to automatically monitor hundreds of traveler profiles to ensure that they have completed all compliance steps.

They now have a centralized database with a complete view of travel information and tasks to align and manage the pre-travel to post-travel journey with the university.