The Good Practice Guide for UK Education Agents
Partnering for Quality
Introduction & Background

UK education sector bodies have jointly reviewed the national approach to education agent management. Initiated by British Universities International Liaison Association (BUILA) and the UK Council for International Student Affairs (UKCISA), the review found that education agents are valued partners of the sector, offering important services to prospective international students and their families. Education agents work hard to get good outcomes for their clients and are essential to the sector’s success. This has been true for many years, but especially during the difficult COVID years. As a sector, we would like to extend our sincere thanks to our recruitment partners.

The Partnering for Quality; A Pathway to a Quality Framework report, by BUILA and UKCISA, in March 20211 demonstrated the strategic importance for the UK of education agent relationships – circa 50% of all international students currently studying in the UK used an education agent’s services. Most education agents are working in an ethical fashion to help students achieve their dreams of studying in the UK and delivering an excellent service.

Education agents have identified opportunities to help the sector improve even further. To this end, the report recommended, three integrated initiatives:

• A National Code of Ethical Practice for UK Education Agents
• An updated and revised UK agent and counsellor training and engagement hub
• A Good Practice Guide for UK Providers Using Education Agents

1. A Partnership for Quality: A route to a UK Quality Framework with Education Agents
Alongside existing initiatives and legislation, they form the UK Quality Assurance Framework for UK Education Agents.

UKCISA, BUILA, the British Council and Universities UK International have been instrumental in supporting the implementation of the three recommendations with other sector membership bodies and government agencies also having input. The whole sector and UK government are engaged and supportive of this work.

This Good Practice Guide for UK Education Agents outlines the implications of these initiatives for our recruitment partners. We recognise that many of the insights in this report are consistent with your current work practice, but we hope the Guide will help you identify new opportunities for improvements. The objective of this Guide is for all of us, sector-wide, to deliver fantastic applicant experiences that meet or exceed our student’s expectations:

‘I may only make an investment in my education of this kind once in my life so I want to receive the very best possible counselling for my future education and for studying in the UK.’

International student
The National Code of Ethical Practice for UK Education Agents

The ‘National Code’ outlines the Standards expected of education agents and digital agent networks (agent aggregators, brokers, and marketplaces) representing UK providers.

Standards are broken into five areas. Under each area are a series of expected and desirable practices with suggestions for how you can provide evidence to your partners. Compliance with the National Code will increasingly be a requirement of institution’s contracts as they reach renewal periods. The British Council has included a module on the National Code in its Education Agent Training. The five Standards are:

1. ORGANISATIONAL BEHAVIOUR

Education agents and digital agent networks commit to professional business governance and practices. You conduct yourselves with due regard to the regulatory conditions in the market(s) in which you operate as well as complying with all applicable national laws, regulations and official policies. Furthermore, you act with integrity and in a manner that reflects positively on the image of the profession, of your educational institution partners and of the UK education sector as a reliable and trustworthy provider of high-quality education and training.

2. ETHICAL BUSINESS PRACTICE

Education agents and digital agent networks maintain the highest standards of ethical business practices. You promote yourselves and your educational institution partners fairly and without recourse to unfavourable or negative comparisons with other educational institutions. You do not employ unfair or unprofessional practice to damage the interests of other agents or educational institutions. You are honest in communicating information about yourselves, your educational institution partners and your student clients in published, oral or in any other form.

3. OBJECTIVE ADVICE AND GUIDANCE

Education agents and digital agent networks provide accurate advice and guidance tailored to the student clients’ needs, wants and capabilities. You shall not knowingly or by a failure of professional standards provide or disseminate false, incomplete or misleading information.

4. STUDENT CENTRED PRACTICE

Education agents and digital agent networks advocate for qualified students in their desire to gain admission to recognised, accredited and contracted educational institutions. You act in the best interests of student clients as well as the partner institutions and offer advice, counselling and information to students, and where appropriate their parents, in a manner consistent with the National Code.

5. ORGANISATIONAL COMPETENCE

Education agents and digital agent networks maintain their staff and service delivery partners’ knowledge of the UK and of educational institution partners, and the skills associated with delivering professional practice with a high degree of competence.
UK Agent and Counsellor Training

In response to the recent BUILA and UKCISA research, and informed by education agent and counsellor feedback, the UK agent and counsellor training and engagement hub was updated and relaunched in December 2022.

There are many benefits of completing the training:

- The UK training certification, provided by the British Council, has value in market as a badge of excellence.
- Provides comprehensive knowledge of the UK as an international study destination for new counselling staff.
- Provides a timely refresher and knowledge update for more experienced staff.
- Globally recognised certification which provides clear evidence for UK education providers and other organisations wanting to work with certified agents.
- Certified agents have passed the training and signed the National Code of Ethical Practice.
- The certification gives reassurance and confidence to students and parents when selecting education agents.
- Certified agents and counsellors will be published on the British Council database of certified agents and counsellors.
- Improved overall international student experience.

Your feedback told us that in the past there were too many barriers, making it difficult for you and your colleagues to complete the online agent training. The British Council has listened to this feedback and worked hard to remove these barriers.

Key updates implemented in the new training programme include:

- No cost for registration, assessment, or re-certification. It is completely free and therefore accessible to all.
- 100% online. Enrol at any time and work at your own pace.
- The learning material is now structured in eight clear modules, reducing learning time by 25%.
- Optimised for mobile use - so you can study anywhere at any time.
- Experienced agents and counsellors can jump straight to the assessment, without needing to spend time on the course content.
- Course content has been developed so that it is fit for purpose for both commercial education agents and school and college counsellors.
- Certified agents and counsellors will be published on a public-facing database so that UK education providers and prospective international students and their families can be reassured that these agents and counsellors have a good knowledge and understanding of the UK as a study destination.

As your contracts with institutional partners come up for renewal, it is likely a requirement will be included under the new contract that counsellors have attained ‘certified’ status. New education agents may be expected to provide evidence of certification as part of the education provider’s due diligence processes.

While there is no longer a re-certification fee, it is expected that you will maintain your ‘certified’ status by demonstrating regular engagement with the training platform over a two-year period. The British Council, BUILA and UKCISA are committed to ensuring the UK remains a first-choice study destination and you are strongly encouraged to complete the training program at your earliest possible opportunity.

To access the UK Agent and counsellor training and engagement hub and other useful British Council resources visit

https://www.britishcouncil.org/education/agents-counsellors
The Good Practice Guide for Providers Using Education Agents

Developed by Universities UK International and BUILA, the Good Practice Guide for Providers Using Education Agents is designed to help UK institutions and education providers enhance their education agent management practices. Training has been rolled out to all sectors as the Guide has been distributed. The benefits of the institutions adopting best practice activities outlined in the guide include:

- Raising standards in education agent management across the UK international education sector.
- Providing essential guidance for newer entrants and a process health check for experienced providers.
- Providing tools for education providers to further evaluate and continually improve their education agent management practices.
- Streamlining operations and administrative procedures, leading to increased resource efficiencies.
- Maximising the return on investment through international student recruitment channels.
- Increasing opportunities for international student feedback and consequently raising service levels among education agents and providers, and improving the student experience.
- Delivering improvements at the early stage of the student journey and subsequently increasing overall student satisfaction levels of international students studying in the UK.
- Enabling education agents to represent their partner providers more effectively.
- Ensuring adherence to compliance parameters such as contracting, audit trails, procurement, etc.
- Raising the profile of the UK education sector as robust, transparent and well managed, ultimately leading to sustained international student recruitment and a healthy, diverse UK education landscape.

The Guide produced for education providers was central to the development of this Good Practice Guide for UK Education Agents.
Education Agent Good Practice Guide

The following tips and recommendations are divided into chapters and sections that reflect the institution-agent relationship journey. These tips complement those outlined in the Good Practice Guide for Providers and reinforce good practice in the agent-provider relationship.

We hope the Guide will help you develop even deeper relationships that are mutually beneficial, but most importantly, lead to excellent prospective student experiences like these two below.

“They made the process very easy and it was free of charge. The agent was very helpful, answered all my queries and assisted me through the whole process. I wouldn’t have been here, without their help!”

POSTGRADUATE TAUGHT STUDENT FROM INDIA

“They were both free and very helpful in simplifying the very complex process. I may not have even made it as far as attending in the UK if I had not had their guidance and advice.”

POSTGRADUATE TAUGHT STUDENT FROM THE USA
APPROACHING PROSPECTIVE INSTITUTIONAL PARTNERS

Sometimes institutions will come to you and ask if you are interested in representing them, but it is more common that you will approach an UK educational institution with a proposal to partner with you. Here are tips to help you when approaching a prospective new institution.

EXPERT TIP

When approaching prospective partners, you are encouraged to prepare yourself for a rigorous due diligence process. This may include documents, detailing company set up, business licence, references from other educational institutions, student numbers sent to the UK annually, visa refusal rates, etc. Increasingly you will be asked to show evidence of compliance with the National Code and that students who have used your services are satisfied with the experience.

EXPERT TIP

If you are not currently working with a specific education provider, do not let that deter you from encouraging students to apply to that institution if it is the best fit for their needs. Institutions get insights into potential agents from student new-arrival surveys, and this feedback can influence their strategic approach when looking for new agents and they may then want to engage with you.

EXPERT TIP

Institutions are likely to direct you to a prospective education agent questionnaire when you approach them. Make sure you have researched the institution and the responses you give are relevant and describe how a partnership with your company will enhance quality of services their prospective students receive.

EXPERT TIP

Setting clear partnership goals and education provider requirements for your agency will help you when deciding whether an education provider, that may have approached you, is a well-aligned fit for your portfolio of partners.
SELECTING - NAVIGATING DUE DILIGENCE PROCESS

EXPERT TIP
Be transparent and accountable – During the selection process, the institution may ask you to provide details where another institution has terminated their contract with you and the reasons. Ensure that in such circumstances you can communicate the reasons and show documentary evidence. The prospective institution will appreciate the honesty and accountability, and any evidence of improvement.

EXPERT TIP
Gather your own student feedback – The potential institution is likely to supplement the references you provide by carrying out mystery shopping on your company to assess the quality of counselling offered. It is important you keep this in mind as you build a business that receives positive word-of-mouth recommendations. Carry out your own surveys of placed students, gathering written or digital feedback, so you can offer these perspectives on your services to the prospective partner.

EXPERT TIP
Working with a new institution involves a two-way partnership and you need to have confidence you’re partnering with the right institution for your business. During the selecting phase do not be afraid to ask questions and discuss marketing plans, resource requirements, training needs, institutional support, expectations, use of sub-agent frameworks and expected service levels on their side etc.

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EXPERT TIP
Understanding the obligations - Ensure you fully understand your contracted legal obligations. Ensure you’re able to adhere to expected standards in The National Code of Ethical Practice for UK Education Agents (2021), comply with all GDPR or other data compliance regulations in the UK, and act in accordance with the relevant legislation in the UK and in your country of operation.

APPOINTING (CONTRACTING)

Remember the contract is a legally binding document, but it shouldn’t all be one way. If you are uncomfortable with certain terms, discuss these with your partner. Make sure it is possible to have targets and agreed service levels captured in the agreement, probably as an annually updated addendum.

EXPERT TIP
Use the agreed contract as your guiding document to consistently meet your partner’s requirements and deliver services to prospective students that meet or exceed their expectations. This will help build trust between you and your partners. Performing well against the contracted expectations will likely lead to contract renewal.
EXPERT TIP
Keep in regular written communication with the institution, and notify the institution of any changes to your services you provide to students that might affect how you represent the institution.

EXPERT TIP
If the institution would like to change or add elements to the contract, they should use written addendums (co-signed) to reflect this.
EXPERT TIP
Help the educational institution to provide your company with a more tailored, relevant induction and training programme by providing them with full business intelligence, including staff roles and responsibilities.

EXPERT TIP
Provide the educational institution with information your company would like to ensure is included in the training programme that you know from experience is important to your staff. For example, market specific requirements, localised student information, communication channels, commission claiming instructions, availability of just-in-time information.

EXPERT TIP
Based on your experience, suggest preferred and most effective training approaches to the new partner institution. They will likely appreciate the input, and it will help them to tailor their training to best engage, enthuse and stimulate your team, help you get results quickly, and minimise risks to your reputation.

EXPERT TIP
Gather feedback from your team with relation to incentives and training, and open that dialogue with the institution. There might be opportunities that could be opened up to your staff such as micro credentials, academic credit, or discounts, for your counsellors who complete the training, and represent the educational institution.

EXPERT TIP
Keep a record of the frequently asked questions from students and the information you and your team need, to provide appropriate counselling. Share these questions with the institution during the induction and training so they can incorporate the solutions in the training programme ensuring that you’re able to meet their needs.

EXPERT TIP
To ensure good two-way communication as well as good handover processes, encourage as many of your team as possible to take the educational institution’s training programme. Ensure you are linked to at least two knowledgeable, relevant contacts at the educational institution too. Regularly communicating and engaging with your educational institutions’ contacts, even if asking for any updates, is a good way to strengthen the relationship.

Give your educational institution feedback after the training sessions, as this will help improve ongoing professional development. Ongoing communication providing purposeful information, delivered in an engaging way, at the right time in the student cycle via the quickest channel will make it easier to support students and meet expectations.
EXPERT TIP

Ensure you work together with your educational institution partner during the planning stage to set realistic expectations around ongoing response times and communication updates on both sides. This collaboration will maximise the effectiveness of your partnership and ensure you work together to deliver an outstanding international student experience.

EXPERT TIP

Ensure your objectives are planned and agreed together with your educational institution partner and that they are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). Ensure they do not only refer to student recruitment targets and conversion rates. These objectives will then be used to measure your performance and should be reviewed yearly and updated as an addendum to your contract.

EXPERT TIP

Education agents should be able to demonstrate, to their partners, how they intend to manage their sub-agent network in line with their expectations (e.g. application quality, transparent complaints process, market diversity, conversion rate, etc.) and demonstrate how it will work in practice. Again, transparency and honesty will be key here. Ensuring the quality and accuracy of advice given to students is the most important element of the provider-education agent relationship.

EXPERT TIP

Objective Setting – In the planning stage it is essential that communication is honest and transparent on both sides. When agreeing to SMART objectives, it is important that the agent can have a conversation about what support they will need from the educational institution to meet those objectives from the outset.

EXPERT TIP

Education agents and Digital Agent Networks (agent aggregators, brokers, and marketplaces) should be able to tell their partners how they intend to manage their sub-agent network in line with their expectations (e.g., application quality, transparent complaints process, market diversity, conversion rate, etc.) and demonstrate how it will work in practice. Again, transparency and honesty are key here.

STUDENT PERSPECTIVE:

Students want (and expect) that the agent who is representing the provider has been vetted by experts and formally approved to act on the provider’s behalf. They expect the agent to have been adequately trained by the provider and have the skills and support in place to deliver an excellent service on their behalf.
EXPERT TIP
To make your objectives realistic and achievable, both education provider and education agent need to offer investment in resources and a commitment to provide ongoing support for projects. If your contract includes a service level agreement, use this to manage expectations from applicants and their families. Request a back-up contact at the institution for when staff are away or are not able to respond quickly to ensure service levels are maintained.

EXPERT TIP
Ensure you only list full details of educational institutions that you have active contracts with on your website to ensure prospective students know who you are working with. Likewise, you can expect educational institutions to only list agents with whom they have active contracts on their website.

INSIGHT:
Education institutions may help agents grow their digital marketing capabilities. Marketing support could be matched with mentoring and oversight from the institution’s central marketing and campaigns teams, ensuring quality execution and measurement of outcomes. Not only would this enable agents to develop new skills, but it would also provide an opportunity for cross-cultural learning and internal cooperation within the broader marketing and recruitment portfolio.

INSIGHT:
Institutions should meet or exceed the expectations set earlier in the partnership life cycle. Honesty is the best policy. Realistic timeframes and honest advice from your education institution will help you manage your students’ expectations. Without this, you could be dealing with disgruntled students and families, which will in turn erode the relationship between agent and education institution.

EXPERT TIP
Work with your education institution to determine the value of translated marketing, communication and admissions materials and where they are important in the prospective international student journey. Different market segments may require different approaches.
EDUCATION PROVIDER BEST PRACTICE:

✓ Think about the student’s perspective throughout the decision-making journey and tailor your support for your education agent to meet those needs.

✓ Make sure the outcomes of your activity with your education agents can be measured so you can make informed decisions about future activity.

✓ Effective education agent relationships work as partnerships rather than supply-chain relationships.

✓ Be proactive and responsive, particularly in relation to making decisions on applications. Ensure the education agent always has somebody to speak to at your institution.

✓ Evaluate the cost benefit of using technology platforms to support your education agent management which have self-service functionality.

When the Good Practice Guide for Providers Using Education Agents was being developed, a prospective student journey mapping exercise detailed the different emotions of students, actions of education agents and possible support opportunities for institutions, at each stage of the journey. The quotes below are from the original research and highlight the importance of effective communication at every stage of the journey. This is true in both directions and with the student.

“Regular communication and updates/training support, swift response to emails and applications, in person visits to agents.”

AGENT

“Proper training to agents, assist them to know all details of Universities to advise students properly, closely follow-up with agent and their activities, marketing or promotional supports, quick feedback on admission process.”

AGENT
| JOURNEY STAGE | DISCOVER  
First Impressions (of country/agent/provider) |
|---------------|--------------------------------------------------|
| THINKING      | I need to make a good investment  
A highly ranked university must be good quality  
Which country is best for me?  
I want to have good career prospects |
| FEELING       | WONDER  
CURIOUS  
EXCITED  
OVERWHELMED |
| DOING         | Talking with friends, parents, teachers about study options  
Reviewing ranking sites, aggregator sites, university sites  
Attending expos and study fairs (virtual and online)  
Studying English, high school, training course or at tertiary provider |
| OBJECTIVE     | Raise awareness of the company among prospective students  
generating prospective student leads |
| ACTION        | Social media marketing  
SEO  
Advertising  
School and campus visits, presentations, careers fairs and webinars  
Promoting partners = affiliate marketing  
Flyers/posters in student hang-outs |
| PROVIDER SUPPORT | List education agent on website  
Affiliate / Endorsement marketing  
Assets / Info available on demand in an online-agent portal  
Approval to develop own promotional materials on provider behalf (Planning chapter) |
## CONSIDERATION

### EXPLORE
**Gathering Information**
- Where are my friends going?
- Can I (my family) afford this?
- Which course is best for my career?
- Is it safe?

**What is the course about?**
- How are they teaching me?
- What are the career outcomes from this provider?

**Do they care about me?**
- How do I evaluate the different providers offering my preferred subject?
- Will I get practical experience as part of this program?

### ENGAGE
**Enquiring and making contact**
- I want personalised advice in a way I can understand
- How do I evaluate the different providers offering my preferred subject?

**Meeting with current/past students**
- Meeting with provider staff
- Searching for points of difference

### EVALUATE
**Considering options**
- Where will I live?
- What do other students say?
- Will I be safe?

**How will I apply?**
- How is provider X’s course different to provider Y’s and which is better?
- Do I believe what I’m being told by the provider / education agent?
- Are there other students / at a local community from my country?

### JOURNEY STAGE

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</tr>
<tr>
<td><strong>ASSESSING THE COWARD SITUATION</strong></td>
<td><strong>CHECKING ELIGIBILITY</strong></td>
<td><strong>MEETING WITH CURRENT/PAST STUDENTS</strong></td>
<td><strong>ASKING FRIENDS AND FAMILY FOR ADVICE</strong></td>
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</tr>
<tr>
<td><strong>RESEARCHING COURSE FEES, SCHOLARSHIPS, CAMPUSES, LOCATION</strong></td>
<td><strong>CHECKING ELIGIBILITY</strong></td>
<td><strong>MEETING WITH CURRENT/PAST STUDENTS</strong></td>
<td><strong>ASKING FRIENDS AND FAMILY FOR ADVICE</strong></td>
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</tr>
<tr>
<td><strong>LOOKING FOR HELP TO MAKE INFORMED DECISIONS</strong></td>
<td><strong>CHECKING ELIGIBILITY</strong></td>
<td><strong>MEETING WITH CURRENT/PAST STUDENTS</strong></td>
<td><strong>ASKING FRIENDS AND FAMILY FOR ADVICE</strong></td>
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</tr>
</tbody>
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1. Customer Relationship Management system
<table>
<thead>
<tr>
<th>JOURNEY STAGE</th>
<th>DECIDE Applying for course, scholarship or accommodation</th>
<th>WAIT Waiting for outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>THINKING</td>
<td>This could be the provider for me. I'll see if I can get in, then decide. Why are they asking me all these questions?</td>
<td>I cannot find all the documents I need. These courses and providers can get me where I want to be if my English is good enough? What if I make a mistake on the applications?</td>
</tr>
<tr>
<td>FEELING</td>
<td>NERVOUS</td>
<td>ANTIPLICATION</td>
</tr>
<tr>
<td>DOING</td>
<td>Gathering academic and other relevant documents. Completing course application forms. Completing other application forms - accommodation, scholarship, funding, etc. Comparing experience with peers.</td>
<td>Submitting further information (as required). Improving English. Participating in interviews / auditions / selection activities.</td>
</tr>
<tr>
<td>OBJECTIVE</td>
<td>Making the student’s experience as painless as possible.</td>
<td>Managing the student’s (family’s) expectations.</td>
</tr>
<tr>
<td>EDUCATION AGENT VIEW</td>
<td>Gathering and submitting the required documents / portfolios, etc.</td>
<td>Completing application on behalf of student (some countries). Assisting student with Statement of Purpose (some countries).</td>
</tr>
<tr>
<td>ACTION</td>
<td>Ensuring agent knows the likely turn-around times so they can manage student expectations. Integrate agent CRM with application system. Acknowledge application and outline time-frames (including for selection activities).</td>
<td>Make application decisions within the time-frame expectations you have set. Send all communications to the education agent or agent and student (NOT STUDENT ONLY). If student is not eligible for their preferred course offer an alternative (check with education agents if this strategy is appropriate in their markets).</td>
</tr>
<tr>
<td>PROVIDER SUPPORT</td>
<td>Where appropriate provide information targeting parents and guardians.</td>
<td>Try to keep the application process and requirements as simple as possible and online. Simple and quick scholarship application and recognition process.</td>
</tr>
</tbody>
</table>
### DECISION

<table>
<thead>
<tr>
<th>JOURNEY STAGE</th>
<th>RE-EVALUATE</th>
<th>PURCHASE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THINKING</strong></td>
<td><strong>CONSIDERING OPTIONS</strong></td>
<td><strong>CONFIRMING STUDY PLAN</strong></td>
</tr>
<tr>
<td><strong>FEELING</strong></td>
<td><strong>HAPPY</strong></td>
<td><strong>HAPPY</strong></td>
</tr>
<tr>
<td><strong>DOING</strong></td>
<td><strong>WAIT FOR AN OUTCOME FROM THE PROVIDER</strong></td>
<td><strong>ACCEPTING OFFER(S) AND/OR DEFERRING OFFER</strong></td>
</tr>
<tr>
<td><strong>OBJECTIVE</strong></td>
<td><strong>CONVERTING THE APPLICANT TO AN ACCEPTANCE</strong></td>
<td><strong>GETTING THE STUDENT VISA APPLICATION IN AS QUICKLY AS POSSIBLE</strong></td>
</tr>
<tr>
<td><strong>ACTION</strong></td>
<td><strong>COUNSELING STUDENTS ON THE BENEFITS OF DIFFERENT OFFER TYPES FROM DIFFERENT PROVIDERS</strong></td>
<td><strong>ASSISTING WITH FEE PROCESSING – LOANS/DEPOSITS, ETC</strong></td>
</tr>
<tr>
<td><strong>PROVIDER SUPPORT</strong></td>
<td><strong>CRM ENGAGEMENT AND CONVERSION COMMUNICATIONS</strong></td>
<td><strong>QUICKLY ACKNOWLEDGE AND PROCESS DEPOSIT PAYMENTS</strong></td>
</tr>
</tbody>
</table>

#### THINKING
- I have offers from 4 other providers
- Why should I choose this provider over that one? Should I do the foundation course they’ve offered me to bridge the qualification gap?
- They made me wait too long
- How can they say I’m not qualified?
- Will I be able to travel and will I be safe? COVID-19 implications
- What is the balance between online and face-to-face learning

#### FEELING
- HAPPY
- RELIEVED
- DISAPPOINTED
- FRUSTRATED
- STRESSED
- ANXIOUS
- EXCITED
- HAPPY

#### DOING
- Wait for an outcome from the provider
- Receiving course offer / no offer
- Receiving reply to other applications - accommodation, scholarships, etc.
- Evaluating best financial offer including scholarships and discounts
- Checking government websites and asking people about COVID-19 situation
- Accepting offer(s) and/or deferring offer
- Paying tuition fees /deposit or indicate fee arrangements
- Accepting scholarship offer
- Accepting accommodation offer
- Paying accommodation fees / deposit

#### OBJECTIVE
- Converting the applicant to an acceptance
- Getting the student visa application in as quickly as possible

#### ACTION
- Counselling students on the benefits of different offer types from different providers
- Relaying any important information from the provider or destination country
- Assisting with accommodation, funding and other arrangements
- Securing student signed acceptance declarations
- Assisting with the preparation of visa applications
- Document verification
- Assisting with fee processing – loans/deposits, etc
- Requesting visa documents from provider

#### PROVIDER SUPPORT
- CRM engagement and conversion communications
- Provide agents with any critical information before sending to students e.g. COVID-19 updates
- Quickly acknowledge and process deposit payments
- Quickly issuing CAS
- Reminders about accommodation /scholarships, etc
- Facilitate opportunities to talk with current students and subject matter experts
## PLAN

<table>
<thead>
<tr>
<th>JOURNEY STAGE</th>
<th>PREPARE</th>
<th>ARRIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THINKING</strong></td>
<td>How am I going to get there?</td>
<td>How do I get from the airport to my accommodation?</td>
</tr>
<tr>
<td><strong>FEELING</strong></td>
<td>Will they have the food I like?</td>
<td>An official asked me lots of scary questions at the airport</td>
</tr>
<tr>
<td><strong>DOING</strong></td>
<td>How am I going to cook for myself?</td>
<td>How will I make friends?</td>
</tr>
<tr>
<td><strong>OBJECTIVE</strong></td>
<td>I've got a visa refusal</td>
<td>My visa took a long time to process so I’m late and the course has already started</td>
</tr>
<tr>
<td><strong>ACTION</strong></td>
<td>How do I get the campus I am so tired and lonely and its cold and wet</td>
<td>How do I get a part-time job?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STUDENT PERSPECTIVE</th>
<th>EDUCATION AGENT VIEW</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GETTING READY TO START</strong></td>
<td><strong>FOR TRAVEL TO AND STUDY AT THE PARTNER PROVIDER</strong></td>
</tr>
<tr>
<td>Applying for a visa</td>
<td>Getting the student’s visa and preparing/orientating them for travel to and study at the partner provider</td>
</tr>
<tr>
<td>Making travel arrangements</td>
<td>Uneventful travel and arrival of student at partner provider / accommodation</td>
</tr>
<tr>
<td>Researcing student life in provider location</td>
<td></td>
</tr>
<tr>
<td><strong>PROVING/DISPROVING PERCEPTIONS OF LOCATION AND UNIVERSITY</strong></td>
<td></td>
</tr>
<tr>
<td>Prepare for visa interview</td>
<td>Making travel arrangements on behalf of the student</td>
</tr>
<tr>
<td>(if applicable)</td>
<td>Running / Participating in pre-departure briefings</td>
</tr>
<tr>
<td>Downloading/consuming orientation materials/app</td>
<td>Connecting student with other students</td>
</tr>
<tr>
<td>Attending pre-departure briefings</td>
<td></td>
</tr>
<tr>
<td><strong>MOVING IN TO ACCOMMODATION</strong></td>
<td></td>
</tr>
<tr>
<td>Moving in to accommodation</td>
<td>Checking students have arrived safely</td>
</tr>
<tr>
<td>Getting set-up in country: e.g. buying bedding/cooking materials, etc</td>
<td>Arrange late enrolment extensions</td>
</tr>
<tr>
<td>Phoning/Messaging home to confirm safe arrival</td>
<td></td>
</tr>
<tr>
<td><strong>BUYING BOOKS AND STUDY MATERIALS</strong></td>
<td></td>
</tr>
<tr>
<td>Buying books and study materials</td>
<td>Applying for and chasing refunds (where appropriate)</td>
</tr>
<tr>
<td>Meeting people / making friends</td>
<td></td>
</tr>
<tr>
<td>Exploring and getting used to new surroundings</td>
<td></td>
</tr>
<tr>
<td><strong>APPLYING FOR AND CHASING REFUNDS</strong></td>
<td></td>
</tr>
<tr>
<td>Applying for and chasing refunds (where appropriate)</td>
<td></td>
</tr>
<tr>
<td>Arrange late enrolment extensions</td>
<td></td>
</tr>
<tr>
<td>Counselling on items to pack and items to buy there</td>
<td></td>
</tr>
<tr>
<td><strong>SOON TO BE HAPPY</strong></td>
<td></td>
</tr>
<tr>
<td><strong>LONELY</strong></td>
<td></td>
</tr>
<tr>
<td><strong>EXCITED</strong></td>
<td></td>
</tr>
<tr>
<td><strong>ANXIOUS</strong></td>
<td></td>
</tr>
<tr>
<td><strong>NERVOUS</strong></td>
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</tbody>
</table>

### OPPORTUNITIES

- Uncovered needs for student support
- Opportunities to improve provider support
- Opportunities for education agents to add value

### ACTIONS

- Involve education agent in pre-departure briefings or support their briefings
- Provide a simple ‘what to bring check-list’
- Details of airport pick-ups and welcome programmes
- Quickly refund deposits where student cannot travel – visa refusal/compassionate circumstances, etc
- Easy access to and innovative orientation materials (including book lists)
- Translated orientation/welcome for EFL students
- Notify agent of student arrivals
- Promoting buddy schemes and facilitating peer to peer interactions
- Produce student arrival videos for use by the agent
- Remind education agents of provider contacts for problem solving

### FEAR

- Unintended consequences of actions
- Undesirable outcomes for student support
- Opportunities to improve provider support
- Opportunities for education agents to add value

### FEELING

- Excited
- Anxious
- Lonely
- Excited
- Nervous
- Happy

### OBJECTIVE

- Getting ready to start
- Proving/disproving perceptions of location and university
- Moving in to accommodation
- Buying books and study materials
- Applying for and chasing refunds
- Checking students have arrived safely
- Making travel arrangements on behalf of the student
- Running / Participating in pre-departure briefings
- Connecting student with other students
- Counselling on items to pack and items to buy there
- Applying for and chasing refunds (where appropriate)
- Making travel arrangements
- Running / Participating in pre-departure briefings
- Connecting student with other students
- Counselling on items to pack and items to buy there
- Applying for and chasing refunds (where appropriate)
<table>
<thead>
<tr>
<th>JOURNEY STAGE</th>
<th>ENROLMENT</th>
<th>STUDY</th>
<th>COMMENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Getting ready to study</td>
<td>Comparing the learning experience/content with your expectations</td>
<td></td>
</tr>
<tr>
<td><strong>THINKING</strong></td>
<td>The provider doesn’t have one of my documents and won’t let me enrol.</td>
<td>Everybody speaks English so fast - I don’t know what is going on.</td>
<td>The facilities are amazing.</td>
</tr>
<tr>
<td></td>
<td>Provider person X was amazing and helped me through the enrolment.</td>
<td>They have some really cool clubs that I’m going to join.</td>
<td>How do I use the library?</td>
</tr>
<tr>
<td></td>
<td>They’ve cancelled unit X from my course which was one of the main reasons I came here.</td>
<td>I don’t understand my lecturer.</td>
<td>Everybody seems to know what they’re doing.</td>
</tr>
<tr>
<td></td>
<td>Why is this all taking so long?</td>
<td>I miss my family/friends/home.</td>
<td>My first assignment is due in 3 weeks - it’s too soon!</td>
</tr>
<tr>
<td><strong>FEELING</strong></td>
<td>ATTENDING</td>
<td>Happy</td>
<td>EXCITED</td>
</tr>
<tr>
<td></td>
<td>PROGRAMMES/orientations</td>
<td>NERVOUS</td>
<td>擬心</td>
</tr>
<tr>
<td></td>
<td>Completing enrolment formalities</td>
<td>APPEHENSIVE</td>
<td>STIMULATED</td>
</tr>
<tr>
<td></td>
<td>Receiving and analysing class timetable</td>
<td>EXCITED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Registering with Police/Doctor/Embassy, etc</td>
<td>OVERWHELMED</td>
<td></td>
</tr>
<tr>
<td><strong>DOING</strong></td>
<td>Attending welcome programmes/orientations</td>
<td>Start classes - English/Degree/A-Levels, etc.</td>
<td>Going through academic culture-shock.</td>
</tr>
<tr>
<td></td>
<td>Completing enrolment formalities</td>
<td>Making friends</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Receiving and analysing class timetable</td>
<td>Accessing provider support services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Registering with Police/Doctor/Embassy, etc</td>
<td>Setting up a bank account/mobile phone/internet/utilities, etc</td>
<td></td>
</tr>
<tr>
<td><strong>OBJECTIVE</strong></td>
<td>Be seen as professional and supportive – receiving student/provider endorsements.</td>
<td>Invoicing provider (commission).</td>
<td></td>
</tr>
<tr>
<td><strong>EDUCATION AGENT VIEW</strong></td>
<td>Confirming enrolments</td>
<td>Reviewing intake and preparing for next intake</td>
<td></td>
</tr>
<tr>
<td><strong>ACTION</strong></td>
<td>Requesting student/provider endorsements and testimonials.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PROVIDER SUPPORT</strong></td>
<td>Problem solving on behalf of student.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ACTION</strong></td>
<td>Pay commission in a timely fashion</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Send agent student enrolment details to education agent so they can invoice you quickly</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assist student with issues in a timely manner</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Send anonymised student feedback on services to agent as appropriate</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide student testimonials</td>
<td></td>
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</tbody>
</table>
REVIEWS AND RECOGNITION

EXPERT TIP
Understand the metrics that you’ll be reviewed against – As mentioned earlier in ‘planning’, spending time setting and understanding expectations and metrics early on with your educational Institution is essential. They will use these expectations and targets to measure your performance.

EXPERT TIP
The educational institution can scan a wide range of qualitative and quantitative measures (e.g., student complaints or response/turnaround times) leading up to an intake. Ask them to share this with you as it will help you be successful and minimise more significant issues later in the cycle or after enrolment.

EXPERT TIP
Educational Institutions may carry out Mystery Shopping to determine areas for training and other incremental improvements in the way they support you. Low conversion rates, anecdotal feedback that you do not prioritise a particular institution, or that you are breaching some element of the National Code, or your contract are common reasons why education institutions carry out mystery shopping. They should inform you this will be carried out well in advance.

RENEWAL / NON-RENEWAL DECISIONS

EXPERT TIP
Institutions are increasingly considering broader metrics, including both qualitative and quantitative measures of assess success of their partnerships and make renewal decisions. Use your earlier conversations with educational institution to evaluate your practice and theirs and make sure you understand how your performance is being measured. If an annual review scorecard is being used, make sure you understand how scores are calculated.

REWARDING

EXPERT TIP
Be open and honest with education providers when it comes to discussions about recognition and rewards. Make sure you understand the educational institutions plans for recognising and rewarding your company. Make them aware of any organisational or cultural factors to consider and your relevant local legislation.
The financial relationship between an educational institution and education agents must comply with several UK laws, and education providers and education agents must be fully aware of this. In addition, you must be mindful of your responsibilities to comply with the Competition and Markets Authority regulations. Of particular importance is that you are honest about the commercial relationship you have with your educational institutions, ideally through a signed contract with them. You do not need to state the value of your commission, just that you receive a commission for helping a student to enrol at that institution and that that pays for a defined set of services you will provide the student.

Split Commissions - In support of student choice, some institutions allow for split commission payments when a student decides to change agents. As an agent, you could still receive a commission based on the stages of the application process completed at the time of the change. Please note that this is not an incentive to ‘poach’ students from other education agents. If you do, you will be in contravention of Standard 2.3 of the National Code.

Some educational institutions take a hands-on approach to payments by proactively invoicing education agents based on the enrolment data in their student admissions systems. Again, this is a gesture of goodwill to help build long-term partnerships, which should always be a high priority.

It would be unethical and against agent good practice to refuse to submit applications for fully qualified prospective students simply because you are non-contracted and may not receive a commission from an education provider. Educational institutions have a rigorous selection, appointment and contracting process and trying to bypass that forcefully reduces the likelihood of the education provider considering your appointment for a future enrolment cycle.
**EXPERT TIP**
Focus on embedding a student-centred approach across your company - Educational Institutions’ agent governance and policies are developed using the prospective students’ perspective to increase the likelihood of students receiving excellent service. This will ensure that you continue to meet both your own and the education providers’ requirements.

**RESOURCES (STAFFING)**

**EXPERT TIP**
Business continuity is vital for education agents and educational institutions. Education agents should have a plan to mitigate disruptions or staff changes as should the partner institution. Maintaining good communication with more than one key contact will reduce the likelihood of a once successful relationship with an education provider disintegrating when the relationship manager moves to another institution. Having UK or institution experts to call on for more specialised support is also good practice.

**SYSTEMS AND BUSINESS ANALYTICS**

**EXPERT TIP**
Talk to your educational institution about the CRM system that you use. With the growing advancements in systems integrations, there could be a variety of ways to save a significant amount of time, reduce error rates and reduce set-up times.

**EXPERT TIP**
Web analytics is a powerful tool that you can use to gather more insights on prospective students. You can share those insights with your education provider partners to contribute more to their marketing strategy and generate additional value. They may wish to engage your help similarly to test potential market demand for certain courses or other things indicated by their web analytics.
The original research that informed much of this work is available to download from UKCISA website:

A Partnership for Quality: A route to a UK Quality Framework with Education Agents

We asked students how education agents could improve their services? We hope the following student insights will be helpful:

**INSIGHT:**
Increase the awareness of what you can offer students and how that will help them and/or their families.

**IMPLICATION:** This may mean doing more promotion, but also being clearer about the range of services you provide.

**INSIGHT:**
Be more transparent about the overall process and fees.

**IMPLICATION:** Note the earlier comments about having a student-education agent contract, or signed declaration, which list the services provided and any fees that you may charge the student. You do not have to say how much you receive from the partner institution, but it is important that you tell them that you have an agreement with the partner institution, and you will receive a payment if the student enrols with them.

**INSIGHT:**
Provide expertise and advice but allow students to make the decision.

**IMPLICATION:** This insight influenced some of the content of the National Code of Ethical Practice for UK Education Providers. We do understand that you are a commercial entity, so this is not always an easy one to navigate, but note it is something students are aware of. As word-of-mouth is your number one marketing tool, it is in your interest to ‘guide’ rather than ‘place’ students.

**INSIGHT:**
Publish/share student placement success rates and stories.

**IMPLICATION:** Or go one further and engage some of your enrolled students in partner institutions to chat with prospective students through peer-to-peer software. There is an increasing amount of evidence that using your enrolled students to help with promotion and explain your services will result in better recruitment outcomes.
We will leave you with a few student quotes:

“Provide more facts about how students would experience things on the ground – so international students have a greater idea what experiences they will expect. So maybe sending out videos of past students who used the education agent and how they found the whole process and how studying in the UK is like.”
UNDERGRADUATE STUDENT FROM SOUTH AFRICA WHO USED AN AGENT

“It is common for someone who is not familiar with the process to feel overwhelmed and therefore it is very important for education agents to be able to properly communicate with international students…”
UNDERGRADUATE STUDENT FROM MALAYSIA WHO DIDN’T USE AN AGENT

“Be more transparent in the process, give honest suggestions and do not make the decision for students.”
POSTGRADUATE TAUGHT STUDENT FROM CHINA WHO DIDN’T USE AN AGENT

“Deeply understand the personality of a student and also what the student wants from the University they wish to go to.”
UNDERGRADUATE STUDENT FROM INDIA WHO DIDN’T USE AN AGENT