

**THE GOOD PRACTICE GUIDE
FOR PROVIDERS USING
EDUCATION AGENTS
A MODULAR GUIDE**



CHAPTERS

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INTRODUCTION

Background

Education agents are crucial to the health of the UK international education sector. In 2018-19, UK-based higher education institutions welcomed over 203,000 new international students from outside of the EU, who, through the course of their studies, will have contributed around £22.7 billion to the UK economy.

Recent research¹ from British Universities' International Liaison Association (BUILA) and the UK Council for International Student Affairs (UKCISA) showed that 50% of these students used the services of an education agent to help gain admission to a UK higher education institution and navigate the UK's visa processes, broadly equating to a contribution of £11.35 billion to the UK economy from a year's intake of new enrolments.

This research also indicates that there are currently very high levels of satisfaction with education agents who recruit students to study at UK education institutions. Over 80% of students agreed that their education agent was trustworthy and provided accurate information, while over 90% of UK higher education institution staff agreed that education agents present a positive image of the UK higher education sector and are essential to the success of international education in the UK.

“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



While the evidence suggests the current situation is positive, there is undoubtedly variation in education agent management practice across the sector. The BUILA and UKCISA research suggests that over half of the education agents who recruit students to the UK work in partnership with more than 30 UK higher education institutions, and over 80% of higher education institutions enrol more than 500 international (non-EU) students per year. With many education agents also recruiting to competitor markets, the UK has an opportunity to position itself as a market leader in education agent management and drive best practice across the sector.

The UK's International Education Strategy² (updated in 2021) calls for the sector to increase 'the number of international students in the UK to at least 600,000 per year' by 2030. It is clear that quality partnerships with education agents will be key to achieving this ambition.

Purpose

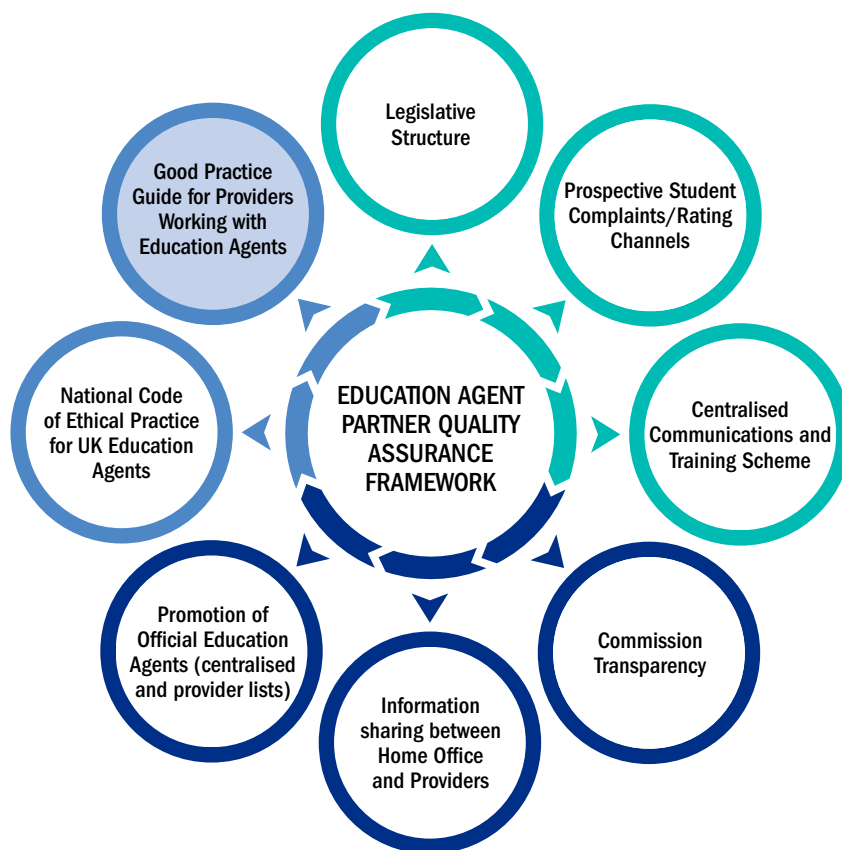
In partnership with BUILA, Universities UK International (UUKi) has produced the 'Good Practice Guide for Providers Using Education Agents' (from hereon referred to as 'the guide') to help optimise the education agent management practice among UK education providers. The broad scope of information will allow providers new to international recruitment to use it as a step-by-step guide, minimising their risk and embedding resource-efficient processes. Experienced providers can use the guide to benchmark their existing

¹ A partnership for Quality: A route to a UK Quality Framework for Education Agents' available at: www.ukcisa.org.uk/uploads/files/1/0501_EE_BUILA%20report%20public%20version%20v3.pdf

² International Education Strategy: global potential, global growth' available at <https://www.gov.uk/government/publications/international-education-strategy-2021-update>

practices against examples of the very best practice across the sector, enabling them to further enhance and refine their agent management. BUILA, UUKi and the UK Council for International Student Affairs (UKCISA) all endorse this guide.

The guide is a crucial component of the UK’s Education Agent Partner Quality Assurance Framework, supporting the National Code of Ethical Practice for UK Education Agents³ and existing assurance practices and policies.



KEY:

- Existing but may need minor modification/better communication
- Some existing practice, needs greater adoption
- Newly developed initiative built on existing practice

The National Code clarifies the standards that the UK sector expects their education agents to adhere to. The guide reinforces its importance and explains how providers can integrate its use into their contracts and their education agent selection and review processes. Similarly, the British Council training explains the National Code standards to education agents, while the organisational competence standards of the National Code promote uptake of the British Council training among education agents. The guide encourages providers to require education agents to have undertaken British Council training.

With around 50% of all UK-bound international students using an education agent, it is critical that the UK has these tools in place to optimise their experience. The guide, the National Code and the British Council Education Agent and Counsellor Training Suite are an integrated package of initiatives designed to enhance international student experiences at the recruitment stage of their UK study journey. The guide also incorporates recommendations on how best to:

- make clear which education agents are ‘official’ so students can make informed choices about which ones they use and what services they are funded to undertake on behalf of providers
- highlight student feedback channels and how to integrate the student voice into quality assurance measures

These other elements of the Education Agent Partnership Quality Assurance Framework are also covered by the British Council training and the National Code.

³ BUILA and UKCISA (2021) ‘National Code of Ethical Practice for UK Education Agents’

Who is the guide for?



Leaders, executives and senior managers

- Pro vice-chancellor (international)
- Chief finance officer
- Chief executive officer

This guide will help you: improve the international student experience, mitigate business risks, build confidence in compliance, maximise return on investment, raise student satisfaction levels.



Policymakers, regulators and interest groups

- Department for Education
- Office for Students
- Home Office
- Devolved UK governments

This guide will help you: understand the ways in which education agents work, formalise a proactive and self-regulating quality assurance framework, provide clear and current sector standards to inform policy decisions.



Practitioners

- Head of recruitment / marketing, regional manager
- International officer
- Agent coordinator
- Compliance manager
- Internal auditor
- Admissions manager

This guide will help you: improve the international student experience, mitigate business risks, use resources efficiently, benchmark against best practice, access a step-by-step process guide.



Others

- Alumni officer
- UK recruitment team
- Digital marketing specialist

This guide will help you: build greater understanding of educational agents and how best to work with them.

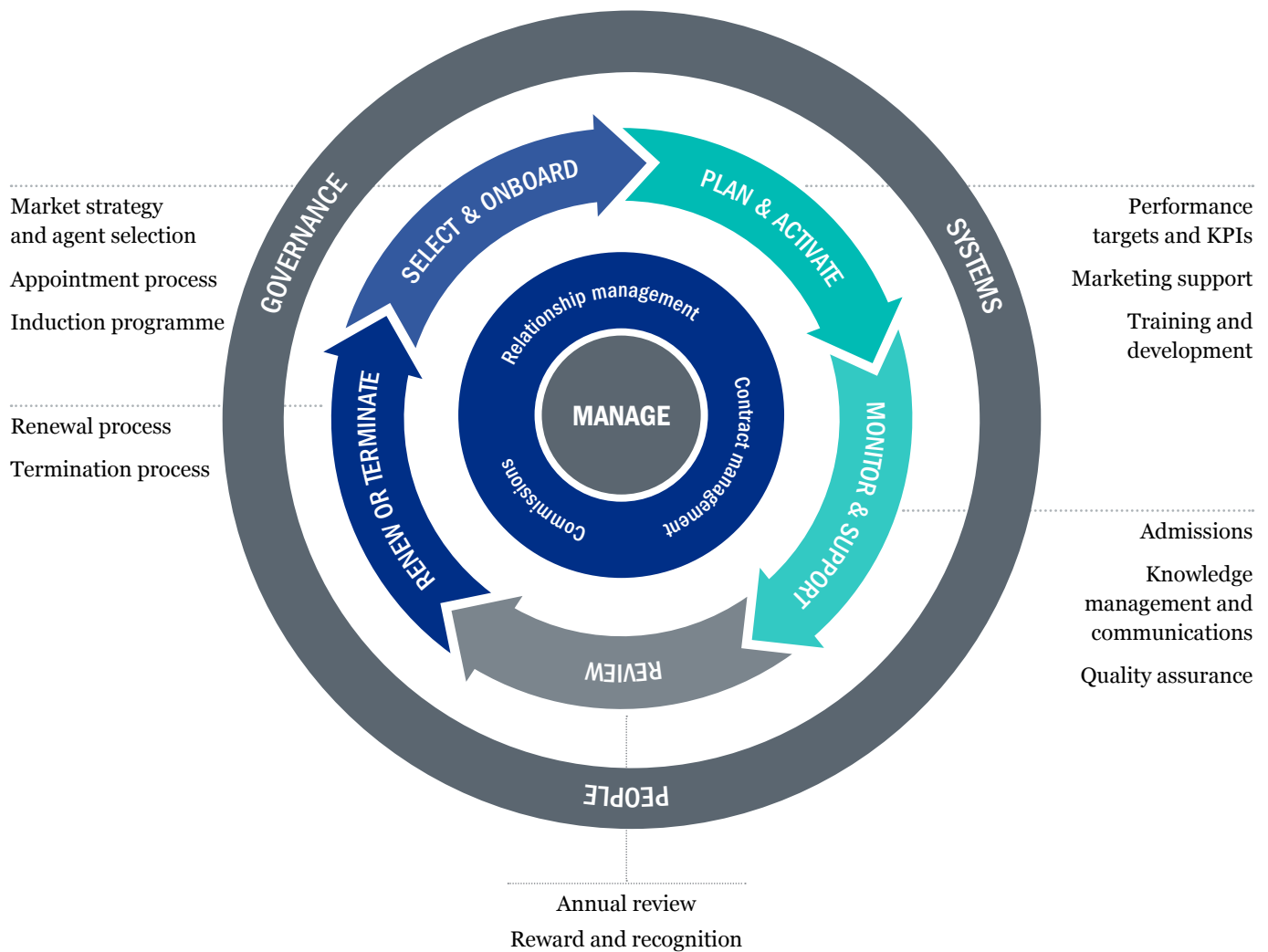


Faculty Management and International Leads

- Dean
- Head of department
- Faculty marketing manager
- Director of studies

This guide will help you: understand how a course is promoted, appreciate the international student journey, see how and where academic staff can add value to the agent relationship, identify new markets for existing courses and provide market intelligence for course development.

Agent management framework for providers



The guide draws on existing good practice in the sector, alongside fresh research and insight from industry experts, students and agents. It provides a central resource for UK education providers that enables them to benchmark their current education agent management practices against the industry gold standards.

Specifically, the guide details best working practices in the following areas:

- Pre-appointment considerations
- Appointment and contracting
- Training
- Planning and support
- Review and assessment
- Commission payments
- Complaints and review processes
- Staffing and resources
- Systems, processes and governance
- Business intelligence

In addition, the guide provides a concise explanation of the types of services provided by education agents and why they are valued by providers and students alike. The guide also includes a set of template forms and checklists that you can adapt for use by your provider.

Provider, education agent and student life cycle

This diagram illustrates the different work undertaken by the providers, education agents and students in relation to one another, with the education agents servicing both the providers and international students. These services are looked at in more detail in the next chapter: EDUCATION AGENTS EXPLAINED.



Benefits

The benefits of education providers adopting the best practice activities outlined in this guide include:

- ✓ providing the best possible level of support to enable international students to make a well-informed study choice
- ✓ 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
- ✓ 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
- ✓ 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

Acknowledgements

The Good Practice Guide for Providers Using Education Agents was developed in 2021 with input from across the spectrum of the UK international education industry. We would like to thank all the students, education agents, membership bodies, providers, government departments and all the other stakeholders who contributed to its creation.

EDUCATION AGENTS EXPLAINED

This chapter will help readers unfamiliar with education agents and their practices to gain a solid understanding of the following:

1. What is an education agent?
2. What services do education agents offer?
3. Why do students use education agents?
4. What do students expect from education agents?
5. What do education agents expect from providers?
6. How are education agents compensated?

1. What is an education agent?

An education agent is a person or organisation that deals directly with prospective international students on behalf of education providers. They are sometimes referred to as international student recruitment agents or international student recruitment representatives.

Education agents are contracted directly or indirectly to deliver a range of services to potential students and the provider. To a student, these services would ordinarily include education counselling, such as course and institution matching, and assistance with academic and visa applications. To a provider, services usually include marketing and promotion services, and support in identifying qualified students.

‘Aggregator agents’ – sometimes referred to as B2B agents, master agents or outsourced agent management services – are a variation on the traditional education agent company model. Contracted directly by education providers, an aggregator agent facilitates the delivery of education agent services to students via a network of education agents (service delivery partners) and by providing a one-to-many relationship between a provider and education agents. This is achieved through a technology platform and/or a sub-contracting-type arrangement.

For the purposes of this guide, ‘education agents’ will be considered as those who recruit international students to study with a UK education provider (including but not limited to schools, colleges, English language schools, foundation studies providers, universities and institutes). These students study directly with UK education providers or their delivery partners in the UK, or overseas at: offshore campuses, approved delivery partners, or via an online platform of a UK education provider.

2. What services do education agents offer?

Education agents offer a variety of services to prospective students and education providers.

Core education agent services to the contracting education provider:

- Raising awareness of UK education through marketing, events, fairs, etc (additional fees may apply)
- Supplying business intelligence and data trends about the markets in which they operate (additional fees may apply)
- Assisting with local arrangements for the provider’s travelling staff (additional fees may apply)
- Improving application quality (in relation to completeness and the applicant’s academic and financial suitability)
- Aiding growth and supporting diversity from given markets by providing targeted recruitment opportunities
- Disseminating key government and provider policy changes to students and their families
- Promoting regions of the UK that may have a lower profile than others in international markets

Core education agent services to the student (and/or family), on behalf of the education provider:

- Matching student needs with providers and courses
- Helping students navigate provider application processes and entrance requirements
- Assisting with document translation and verification
- Assisting with preparing student visa applications
- Providing up-to-date information on government and provider policies (eg those relating to visas, teaching delivery, etc)

In addition to these core services, education agents can also offer ancillary services to students such as travel and accommodation booking, post-arrival support and careers advice.

The prospective student journey diagram in section 3, illustrates the different services delivered by education agents through an international student recruitment journey for a university level student. The duration of this journey can vary considerably depending on the student's country of origin and their desired study level, but it is widely accepted by higher education institutions that the majority of students fall into a 12 to 18-month process from enquiry to enrolment. This prospective student journey for other sector levels may be longer or shorter, but the services provided are broadly the same.

3. Why do students use education agents?

Students employ the services of education agents to facilitate their international student journey, from an initial interest in studying overseas to enrolment with a UK education provider.

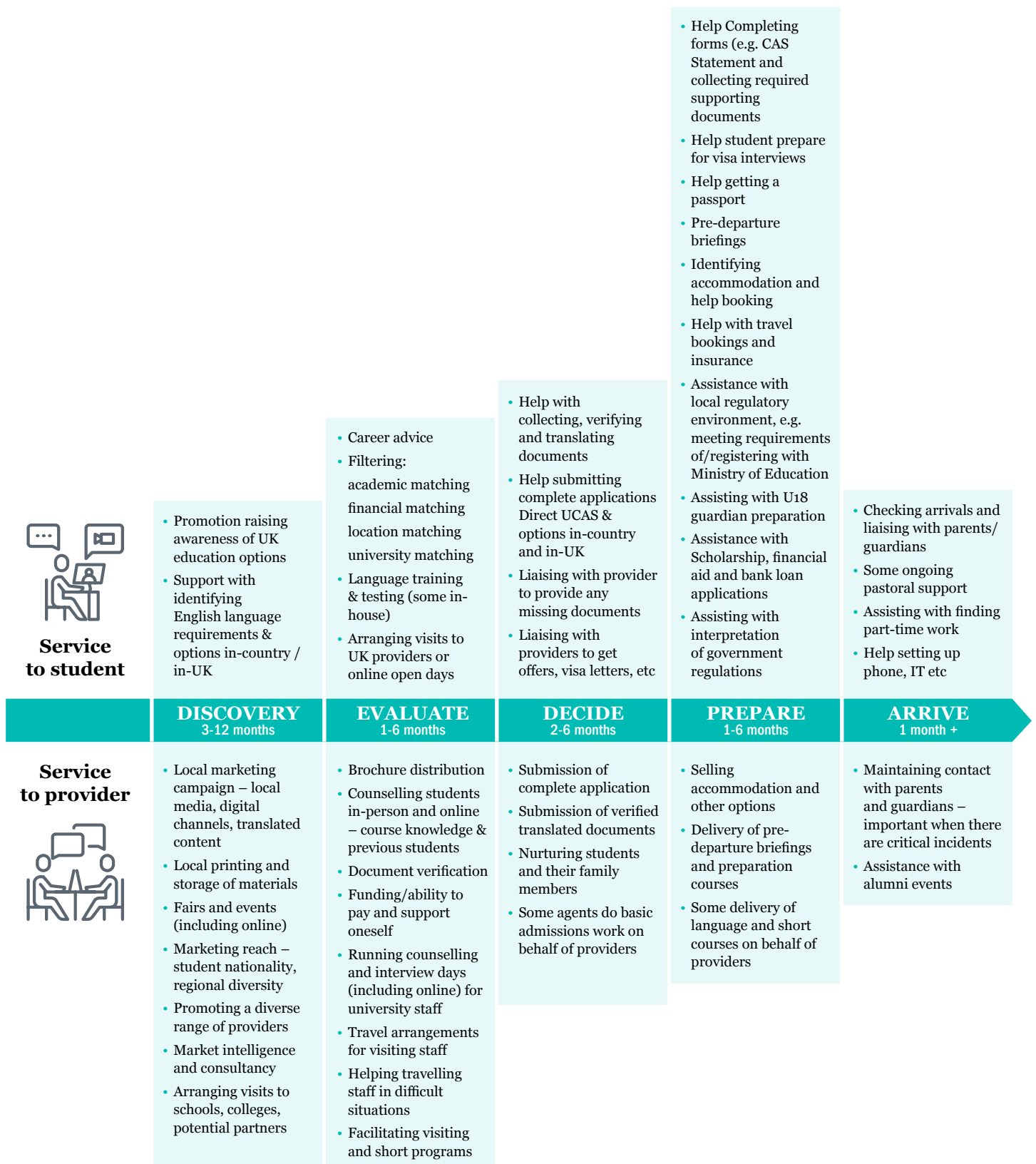
Education agents provide a crucial bridge from the student's home country to that of their destination. Importantly, education agents understand local language and culture, and can provide a direct and timely link to prospective students and their families, often being able to respond to queries promptly, without the restriction of UK office hours (especially when they are based in the student's home country).

An education agent's expert knowledge and understanding of the UK education system enables them to provide tailored advice, and recommend the best-fit course(s) and provider(s) for each student. They may also provide a number of 'added value' services, such as travel and accommodation booking, document translation, visa advice and pre-arrival information (cost of living, UK culture, etc), allowing UK providers to focus their resources elsewhere. Ultimately, the role of education agents, and the reason they are engaged by students, is to assist in delivering an outstanding international student experience.

The student journey below illustrates the different services delivered by education agents to the student and the contracting provider through an average international student recruitment life cycle (this recruitment life cycle relates to prospective Higher Education Institution level students, but the services remain similar across sectors). The duration of this life cycle can vary considerably by student's country of origin and their desired study level, but it is widely accepted by providers that the majority of students fall into a 12–18 month process from enquiry to enrolment, which means changes to policy or activity can take more than 18 months to show an impact.

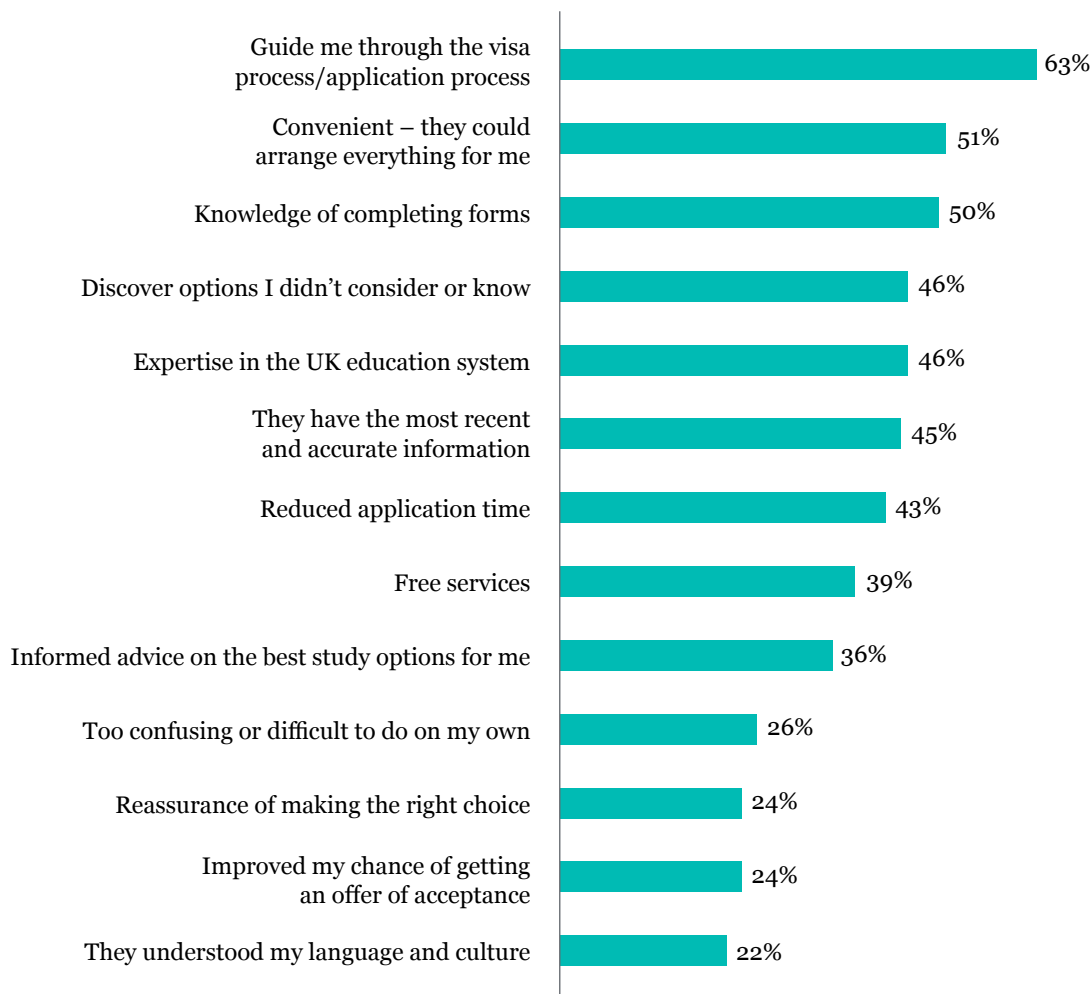
The prospective student journey: Services delivered by education agents

Average timeline of 18 months



According to recent BUILA and UKCISA research (2021), students consider the most valuable services from an education agent to be application guidance/support and visa advice.

What were the main benefits of using an education agent? Select all that apply



Students also value the personal relationship with their counsellors and, generally, having the same person to contact throughout their application process.

‘They helped throughout the process and sometimes it can be so confusing when applying to university, just having someone that’s willing to help out and advise you is extremely helpful.’

Undergraduate student from Nigeria



Very broadly, an education agent’s service provision can be likened to that of a travel agent, where a person with some knowledge (the student or their family) seeks a professional with deep knowledge (the agent) to help them identify the most suitable package for their needs.

International student and family	Education Agent	Education Agent	International student and family
Want the best education experience – little expertise	Wants to match the family with the best-fit provider for them – lots of expertise	Provides a portfolio of education providers which meet or exceed the family's needs	Analyse the information provided and select best-fit institution.

Travellers	Travel Agent	Travel Agent	Travellers
Want the best holiday for them – little expertise	Wants to match the travellers with the best-fit holiday package for them – lots of expertise	Provides a portfolio of destinations which meet or exceed the family's needs	Analyse the information provided and select best-fit package.

Matching students with best-fit providers is just one element of an education agent's varied and crucial role in the international student journey, as detailed in Section 2 and 3 above. As with travel agents, education agents also come in different shapes and sizes. From small family-run agencies with deep roots in the local community and specialists who work with a group of bespoke partners, to huge multinational companies and online marketplaces that handle tens of thousands of enquiries and applications each year. The considerations for appointing an education agent, or network of agents, that best fits the needs of your provider is explored in more detail in the STRATEGY chapter.



4. What do students expect from education agents?

While the benefits of using education agents are plentiful and have previously been identified, analysis of the BUILA and UKCISA research (2021) highlights two potential areas of concern.

One concern is that students may perceive a lack of transparency in ‘education agent to education provider’ and ‘education agent to education agent’ arrangements. Recent workshops with current students highlighted that they expect education agents to be open, honest and transparent. This was a key factor for them when selecting and working with an education agent.

‘Transparency’ includes declaring which providers the education agents are working with officially and whether there are any incentives for them to recommend certain institutions. Students also expect clarity around additional fees for services (if any), and clear information on a complaint process; and their parents value the agent and counsellor qualifications and affiliations being prominently displayed.

‘If agents are affiliated with universities, they should help the student with their choice, [even] if it is not one of their tie-ups.’

Current international student

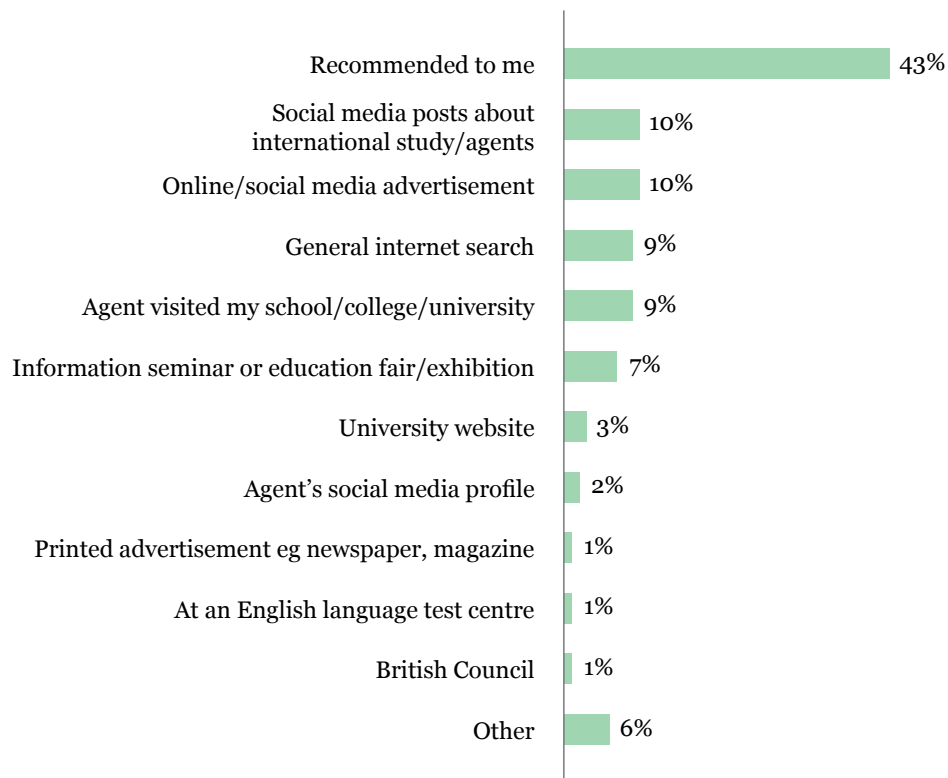
The second area of concern is centred on trust. Trust is integral to the provider–agent–student relationship. An education agent must be professional, providing correct and timely information and advice to both the student (and their family) and the education provider.

Student perceptions of an education agent are driven by the education agent’s ability to understand their needs and support or guide them in achieving their dream – ie gaining admission and ultimately graduating from the best-fit education provider. In turn, a right outcome for the student should be mutually beneficial to the education provider.

Providers should ensure that this desire for trust and transparency is well handled if they are working with a single education agent or a network of sub-agents. The additional layers in the relationship between student and provider can potentially hinder levels of trust and transparency if they are not managed effectively. As such, it is critical that providers have a clear understanding of the interaction between student and agent, ensuring that high levels of trust and transparency are being adhered to.

BUILA and UKCISA data shows that 43% of students who used an education agent had that agent recommended to them by peers, compared with only 9% who found the agent via a search engine, and 3% via a provider’s website. Positive word-of-mouth recommendations are clearly the most influential source of new business for education agents. Consequently, it is also in the education agent’s interests to provide a high-quality, honest and transparent service to their clients.

How did you first become aware of your education agent?



Furthermore, the research suggests that these concerns are currently being well managed across the sector, with 93% of students surveyed saying they found their education agent trustworthy, and 85% saying the information provided to them by their education agent was accurate.

‘I had a very good experience [...] the agents were very professional, didn’t try to influence my preferences, [and had] very transparent processes.’

Student from India



5. What do education agents expect from providers?

Education agents are only able to deliver a high-quality service to their students if they are adequately supported by their partner providers. The ways in which providers can support their agent network are covered in more detail in the SUPPORTING chapter.



Agent perspective: When asked what makes a good provider stand out from the crowd, agents answered ‘speed and stability’. ‘Speed’ in terms of agent support and enquiry resolution, and ‘stability’ - a consistency of service - when there are provider staff changes. A trustworthy, established set of contacts who can successfully manage application processing times are extremely valuable to agents.

Focus groups with education agents, run collaboratively by BUILA, UKCISA and the British Council, identified several common themes around services that they would expect from a provider:

- Clear targets and expectations for the duration of the contract
- Clear information on what kind of support will be provided (financial, marketing, in-country visits, etc)
- Commitment to deliver relevant and regular training
- A regular supply of up-to-date marketing materials (print and digital), optimised to the specific market
- Overall transparency of information. Agents are often asked to provide sensitive information (eg visa refusal rates, financial records). Within reason, agents would like providers to reciprocate and supply them with information such as overall visa refusal rates from a market and total numbers recruited from other agents.
- As a minimum, education agent details to be listed on the provider’s website, ideally with clear messaging that they are formally contracted to work on behalf of the provider.
- Streamlined processes, with a commitment to meeting turnaround times for application decisions, Confirmation of Acceptance for Studies (CAS) requests and commission payments.



Expert tip: Use trusted and well-established agents to deliver market-specific training to your new staff (marketing, recruitment or academic). This will ensure your staff have up-to-date market knowledge and build a mutually respectful and beneficial relationship.



Expert tip: Marketing materials can be made accessible via an online hub/portal, ensuring that only the most recent and accurate materials are available. It is also useful to set up your system to send notifications to your education agents when new materials are available for download.

We explore ways in which a provider can support their education agent in more detail in the PLANNING and SUPPORTING chapters.



For providers, the key services expected of education agents were ‘marketing to prospective students’, ‘market intelligence’ and ‘visa application assistance’, whereas agents reported that they thought the most important factor for their UK higher education institution partners was matching students to the best-fit courses.

‘Typically agents represent the diverse range of UK HEIs in a wide range of markets effectively and successfully, with legitimacy.’

HEI staff



6. How are education agents compensated?

Results from the BUILA and UKCISA research (2021) indicate that nearly all (97%) education agents are paid a fee or ‘commission’ by their UK education providers. The most common payment model is a percentage of the student’s tuition fees (usually just the first year’s) – once a student has enrolled and paid their tuition fees, the provider then pays a percentage of these to the agent. This commission may be a flat rate or on a sliding scale. The i-graduate ICEF Agent Barometer 2019 states that 75% of education agents are paid a commission of between 10% and 30% by their higher education institutions; there is a similarly broad range paid by education providers in other sectors.

Other established models, although less common, include a flat ‘per head’ fee for each student who enrolls at the contracting education provider, or a ‘retainer fee’ where the agent is paid a flat fee to represent the provider and recruit students on their behalf, regardless of how many students they recruit. The nature of this commission, the terms of payment and any specific parameters (eg restricted territories, course offerings) are clearly outlined in the education provider’s education agent contract.

With the recent rise in prominence of online technology platforms that aggregate universities, courses and education agents, a number of new financial compensation models have emerged. These include providers paying for advertising space on the technology platforms, providers paying for premium listings in searches, applicants paying for premium services (enhanced searches, online counselling, faster application processing, etc) and agents paying a fee to be represented on the technology platform.

Depending on the individual relationship between a provider and an education agent, other financial incentives include performance-based bonuses, and the education agents themselves charging fees for ancillary services.

The complexities of how providers pay their education agents are explored in more detail in the FINANCIALS chapter.

STRATEGY: Selecting and appointing your education agents

This chapter will provide detail on how providers can select and appoint the best-fit education agents, including:

1. Education agent landscape
2. International student recruitment channel strategy
3. Initial approach
4. Pre-appointment
5. Appointment and contracting

1. Education agent landscape

Historically, it was common for education agents to approach education providers for a contract. While this practice remains, increasingly education providers are adopting a more strategic approach to contracting education agents. Education providers now approach education agents that complement their portfolio of partners. For example, appointing education agents that give them access to new market segments or regions, or contracting specialist agents that can source applicants for new or underrepresented courses.

In light of the significant changes to the landscape of international education as the sector responds to the COVID-19 pandemic, providers are increasingly looking to balance their agent portfolio to offer their enquirers a variety of communication channels to suit their needs. Recently this has included a shift towards traditional agents delivering more activity virtually and the rapid rise of agent technology platforms where a growing range of agent services are delivered online.



Student perspective: Students expect to be able to access information and communicate with prospective providers at a time, and using a channel, which is most convenient for them. The first step towards delivering an exceptional student experience is ensuring your education agent network offers enquirers a range of communication preferences.

According to recent BUILA and UKCISA research (2021) over half of the education agents recruiting students to the UK represent more than 30 UK Higher Education Institutions (HEIs). Eight out of ten reported that they represent HEIs in other competitor countries (most commonly Australia, Canada and the USA). Often these same education agents represent multiple provider sectors although there are also many specialist education agents only supporting one sector, eg the English Language sector. The marketplace is crowded, so selecting and appointing the education agents best-suited to your provider is a critical first step in delivering successful international student recruitment activities.



8 out of 10

UK agents reported that they also represent HEIs in other competitor countries

The education providers that were cited as delivering the best practice by education agents all described their relationship with the education provider in terms of a ‘partnership’. As with all strong business partnerships, a successful provider-agent relationship is based on trust and a clear understanding of the expectations on both sides. Education agents are successful when they are able to provide an excellent service, with the needs of the students at the heart of what they do. Providers can enable their agent network to achieve this by providing a clear framework of how the agent-provider relationship will work, and committing to supporting the relationship with the necessary resources.



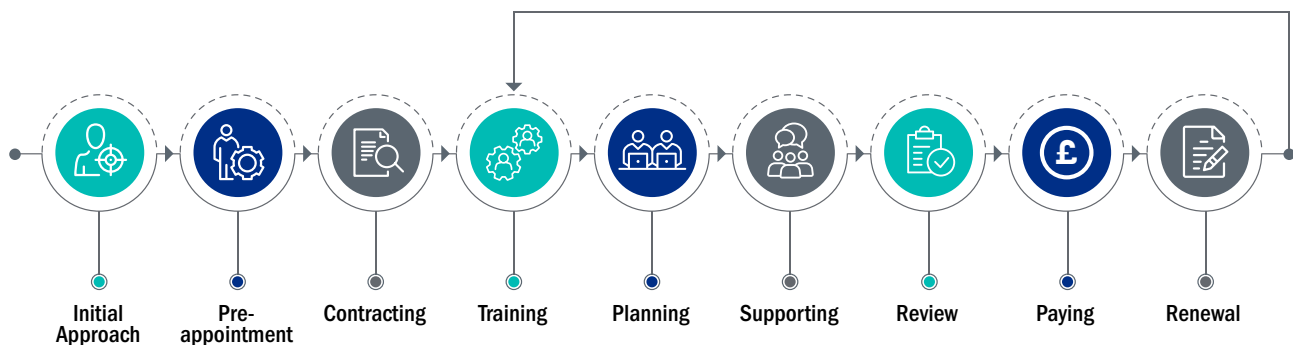
According to the i-graduate ICEF Agent Barometer (2019),

95% of agents said that **‘quick response times’** and **‘regular communication updates’**

were critical to their ability to successfully market institutions.

Over 50% said they would benefit from more **destination-specific training**.

Education agent partnership lifecycle



In this chapter, we look at the first three stages of the life cycle, highlighting best practice for providers in selecting, appointing and contracting your education agents. It can be helpful to imagine the process as being analogous to recruiting a new member of staff and applying a similar degree of rigour to the process.



Expert tip: Developing and following a clear, documented process for the appointment of education agents gives you an equitable process of assessing potential education agents. It also provides an important ‘paper trail’ for auditing purposes.

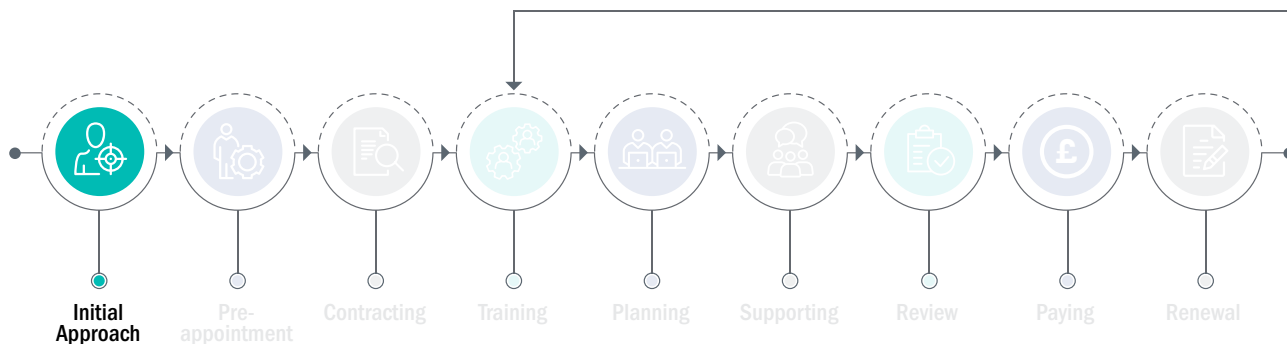


2. International student recruitment channel strategy

The appointment of education agents should be guided by the overarching international student recruitment strategy set out by the provider. Recruiting international students through education agents is one channel of a multi-channel strategy including, but not limited to, recruitment via: schools, partners, pathway providers, employers and direct applicants. This overarching strategy outlines the provider's target source markets, study levels, priority courses and international student recruitment targets, as well as the marketing communication channels and assets to be used. These strategic considerations will influence the characteristics and strengths of the education agent you need to engage to be successful. Depending on your provider's recruitment objectives, you may choose to create individual education agent recruitment and marketing plans. Regional managers and international officer type roles are often well-placed to lead on these plans. Their experience working in specific markets and their relationships with key contacts in these markets (eg academics, agents, government officials, etc) mean they are well positioned to inform decisions on appointing education agents in their regions of expertise, however, it is imperative that a formal due-diligence process is followed to protect all parties.

Questions you might consider asking yourself at this stage:

- Do you need more agents?
- Which type of agents are the right-fit for your institution?
- How will they be engaged?
- How will they support your international student recruitment strategy (eg student diversity, market entry, building presence)?
- How will they help you improve the international student experience?
- What will be the impact of the new appointment on your existing agent network?
- What opportunity and risk does it create to expand your agent network in this market?



3. Initial Approach

Once you have determined the characteristics and strengths of education agents that will support your objectives, you can begin to identify specific organisations. Prospecting for new education agents can be difficult. Word of mouth recommendations from sector colleagues are always valuable, as is consulting official bodies such as International Consultants for Education and Fairs (ICEF) or the British Council. You may also consider talking to your current students and asking them which organisations they used and for their feedback on the experience.



Expert tip: Embedding questions about education agents into student surveys, particularly new-arrival surveys, can be a fantastic insight into potential education agents that are not currently contracted but are already sending you students. It is also an important part of reviewing existing education agents as covered in the REVIEWING chapter.



Expert tip: Organisations like ICEF hold business to business events designed for providers and education agents to meet one another. Once you have a clear strategy, these types of events can be an excellent way to identify compatible education agents.

At this stage, you are looking for answers to these types of questions:

- Does the education agent enhance your presence in key cities/regions?
- Does the education agent offer access to new or emerging student groups, eg international schools, pathway providers?
- Does the education agent specialise in a particular field/subject (eg Top-up degrees, Law, Art)? Is this specialism a good fit for your provider?
- Does the education agent have a good reputation/experience in the region?
- Does the education agent have a strong digital presence?
- Has the education agent already sent you students and what was the quality of those students?
- Would a number of individual education agents or one agent aggregator (digital or traditional) better meet the needs of your provider?
- Where would your provider sit in the education agent's portfolio of university partners?



Expert tip: Direct all prospective education agent enquiries to a basic enquiry web form on your website with questions aligned to your recruitment objectives. A check-list and questions that you can use when initially assessing the compatibility of an education agent is provided in the TEMPLATES AND ANNEXES chapter. Similarly, if you are not open to general approaches from new agents, then display this clearly on the relevant section of your website. This can be done on a country by country basis and will allow you to reply quickly and fairly to unsolicited approaches.

Example of online agent enquiry form

Enquire now

Please complete the form below and our Partnership team will be in contact with you shortly.
Note, that the form must be completed in English.

First name
Please enter your first name

Last name
Please enter your last name

Business name
Please enter the business name

Email address
Please enter the contact email

Confirm email address
Please confirm your email

Telephone
Please enter the phone number

City
Please enter the city

Country
Please select a country

What type of Higher Education programmes are your customers interested in?

Diploma English Language Preparation Foundation Masters

Pre-Masters Programme Undergraduate

In your market, which countries are the most popular study destinations? Please rank the top three from the most to the least popular?

First choice
Please select first choice

Second choice - optional
Please select second choice

Third choice - optional
Please select third choice

Questions - optional
Please enter your question

Characters left: 255

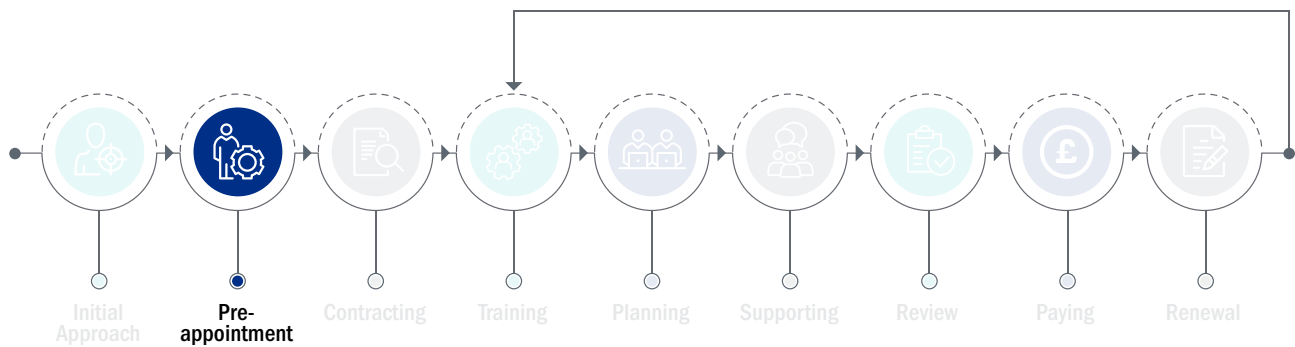
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Data consent
 I acknowledge that Study Group will collect and process information relating to me in accordance with the [Student Privacy Notice](#). Study Group includes Study Group UK Limited and its subsidiaries.



Expert tip: In some cases, you may need to convince an education agent to work with your provider. Education agents indicated that they want to know what is ‘unique’ or special about your offering to students. This might be a strength in a particular discipline area, safety features of your campus or another proposition that can help the education agent differentiate your offering to that of other providers.



4. Pre-appointment

You now have a shortlist of compatible education agents and it is time to determine whether they are capable of meeting your objectives, whether they will represent you in an appropriate and aligned manner and will deliver services to prospective students that meet or exceed their expectations. It is helpful to have the standards of the National Code of Ethical Practice for UK Education Agents in mind as you assess these agents.



Student perspective: “My agent is the first point of contact until I get to the University. So I rely on them. I go to them if I have problems.”

Pre-appointment Process

1. Conduct due diligence
2. Develop marketing plan
3. Take-up references
4. Gather feedback
5. Evaluate the information
6. Set expectations
7. Implement approval/rejection process
8. Move to contracting stage

Conduct due diligence

Invite your shortlisted education agents to complete a more detailed form that asks for the information by which you intend to assess them. The types of information you might request from your education agent include:

- Details of the operational set-up of the agency, for example: direct ownership/franchise/aggregator agent/etc
 - Do they require a business license to operate?
 - Are they financially solvent?
 - Do they own/lease physical office space? If so, where?
 - Which other education providers do they formally represent?
 - Student numbers sent to the UK annually
 - Visa refusal rates to the UK
 - Their annual recruitment expectations for the education provider
 - How they propose to achieve this – ask for an outline of a recruitment plan with any provider costs
- Digital presence: website, social media channels, etc.
- Declaration of conflict of interest - eg does the agent have any contractual obligations to private accommodation providers?
- British Council training status: how many of their staff have completed the British Council Education Agent and Counsellor Training Suite and to what level? Names should be verified by the provider. If British Council training has not been completed, request evidence of the level to which staff have been trained to give UK higher education advice and/or UK visa and immigration advice.
- What are the organisational values?
- The contact details of at least two provider referees who are currently working with the agent on a formally contracted basis; ideally they will be employed by UK providers. If necessary, follow up with a phone call to the referee for further clarification.
- The contact details of at least two student referees who have used the education agent's services in the previous 12 months to gain entry to a UK provider. Ensure the education agent has approval to share the student's personal details.



Expert tip: Require education agents to provide details where a provider has terminated their contract with them and the reasons for termination. You may wish to follow this up with the provider in question.

Samples of an 'Education Agent Due Diligence Proforma' and an 'Education Agent Reference Proforma' are provided in the TEMPLATES AND ANNEXES chapter, which can be adapted and digitised to meet your provider's requirements. It is recommended that the questions you ask are reviewed in line with any changes in strategy or objectives.

Develop marketing plan

In addition to this core due diligence information, you may choose to ask them for a high-level business/marketing plan outlining how they intend to achieve the student numbers they have forecast in the due diligence process, and their expectations of you/your provider to achieve these results. This allows the education agent to really focus on the resources required to deliver the expected outcomes and provides an opportunity for both sides to review the recruitment expectations and ensure they are realistic. This plan can be used as a reference point during the course of the contract to assist progress tracking, however it should not be considered legally binding.

Take up references

An Education Agent Reference Proforma is provided in the TEMPLATES AND ANNEXES chapter. In addition to taking up at least two formal references, requesting a reference from at least one provider (ideally one that has a similar profile to your own) who was not nominated by the education agent, but is listed as working with the agent on their website, is good practice. They may well have a different perspective to those selected by the education agent.



Expert tip: If possible, supplement the proforma responses from the referee by talking to them directly to see if there are any other additional insights that they were perhaps reluctant to write down, or to clarify any further points.

Gather feedback

In addition to the formal due diligence process, contact market experts such as colleagues at other education providers, British Council in-market staff, partner institution staff, etc, to build an informal perspective of the education agent. Providers with overseas offices and staff should make use of their knowledge for added insight.



Expert tip: Carry out mystery shopping of a prospective agent to assess the quality of counselling, hidden costs, potential bias. You can do this yourself or engage current students/student ambassadors.

Where possible try to source feedback from students who have used the services of the prospective education agent. You may request student referee details as part of your formal due diligence or you may have identified them through surveys of current students. You may also ask other providers to connect you to students who were recruited by the agent. It is important to gain insight into the student's experience of the education agent services.

Evaluate the information

You should now have the majority of information required to make an informed decision about whether the education agent is right for you. Some providers choose to supplement this with a formal interview process to help clarify any points and engage provider stakeholders in the appointment process eg academics of courses that the education agent is being appointed to help promote, budget holders, etc.



Expert tip: Using a weighted scoring rubric aligned to your priorities can help to provide a higher degree of objectivity to your evaluation of education agents. You can also stipulate a minimum score threshold that must be met for appointment.

During the completion of the proforma, your education agent should have confirmed their business model including whether they operate business to business models, ie aggregator or master agent models. Where this is the case, you should require them to provide you with details of their operating and quality assurance processes. In particular, they must clearly outline which responsibilities lie with them and which lie with their sub-agents. This could include:

- Who is responsible for delivering training to the sub-agents?
- Who carries out the due diligence checks on sub-agents?
- How are complaints and feedback managed?
- Who ensures brand guidelines are adhered to?
- Who ensures GDPR compliance is maintained?
- Who signs off on the appointment of new sub-agents?

It is incumbent on the provider to ensure that the contracted party has robust policies and processes in place that provide a high degree of confidence in their ability to manage this additional facet of the agent relationship. For example, if there is evidence of fraud or high numbers of visa refusals from a sub-agent, who is ultimately responsible - the sub-agent or the master-agent?

The details of these responsibilities should be clearly articulated in the contract should that be an outcome of the appointment process. Suggested contract inclusions are outlined later in this chapter, but it is the provider's responsibility to source appropriate legal advice.



Agent perspective: It is common knowledge that the use of sub-agents is prevalent in most international student recruitment markets. Agents would prefer that providers address this point head-on and provide clear, transparent frameworks on how they can work together in this space.

Set expectations

The penultimate step of the pre-appointment phase is setting expectations. You should have an honest and open conversation with the education agency about their forecast deliverables and their expectations of you as outlined in their marketing plan. This activity helps set the expectations of one another beyond just enrolment metrics and allows you to determine whether the education agent is well-aligned to your channel recruitment strategy. This conversation might cover:

- How much training and support (in person and online) will the provider be able to offer over the term of the contract?
- Are there specific subject areas/study levels that the education agent should focus on?
- Is there a specific student profile the education agent should be targeting (eg 2.1 and above equivalent)
- Are the ancillary support services (eg visa advice, english language training) an important factor in the relationship?

Both parties must understand how these expectations will be measured and reviewed and both must be confident that they understand the parameters and can deliver on the expectations. Conducting this initial exercise before finalising a contract helps avoid any mis-match between the provider and the education agent and helps launch the partnership on the right footing. Once a contract is in place, it can be expanded upon, see the PLANNING chapter for more details.

Implement approval/rejection process

Your education agent management policy should clearly outline which role(s) have the authority to approve and sign new education agent contracts. This will depend on the individual provider and their organisational structure, but in an higher education setting, best practice suggests that the person responsible for the market, and who will subsequently be managing the education agent relationship, recommends whether or not an education agent should be contracted. A director level role will sign-off for final approval. There may also be financial and legal delegation considerations within your provider. Having the sign-off removed from the operational level activity ensures another level of objective decision making within the audit trail.

If approval is given by the contract signatory then the provider will proceed to contracting.

If the agent appointment was not successful then the reasons for non-approval should be shared with the education agent in a constructive and professional manner. Whilst the decision to work with any education agent lies solely with the provider, if challenged providers should be able to produce documentation which shows the decision was made in a fair and equitable manner.

All correspondence should be recorded, filed and kept as part of an audit trail.



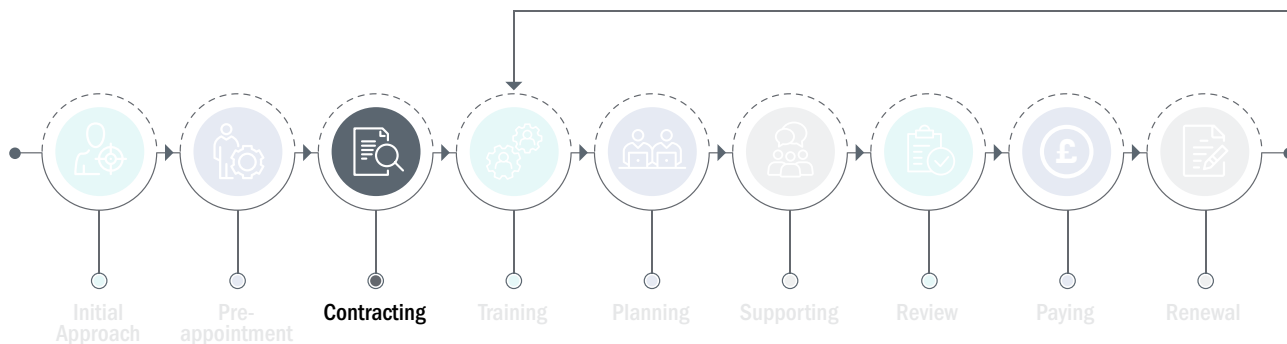
Student perspective: Students want (and expect) that the agent who is representing the provider has been vetted by experts and formally approved to act on the provider's behalf. They expect the agent to have been adequately trained by the provider and have the skills and support in place to deliver an excellent service on their behalf.



Expert tip: Throughout this pre-appointment phase, don't be afraid to ask the tough questions about staff turnover, visa refusals, commission expectations, etc. A formal due diligence process gives you the perfect opportunity to ask these questions in a professional and impartial manner.

Workflows & productivity

Building the pre-appointment process into your education agent management software, CRM system or even basic dynamic web form software with integrated workflows, can save you a lot of time at this and later stages of your partnership. You can include real-time progress tracking and in some cases integration with other provider platforms such as your website, admissions system and student record system. Some agent management platforms also include agent access areas (ie agent portals). This digitised approach ensures the process is appropriately followed, that mandatory information is always provided (an audit trail) and that less paper is used throughout. Digital approaches to agent management are discussed further in the FUNDAMENTALS chapter.



5. Appointment and contracting

Once due diligence has been approved, the agent-provider relationship must be formalised with an official contract.

The purpose of the contract is to offer protection to all parties. You are still working in the spirit of partnership, however the contract is essential to provide structure and assurance to both sides. Providers should ensure that the contract also serves to protect the interests of the student, this should be a key theme which runs throughout the contract.

It is important that your contract is not a document that once signed is filed and forgotten; rather, best practice is that the contract is used as a guiding document, regularly referred back to during the course of the relationship and updated if needed. The expectations and measures that you agreed during the pre-appointment process should be included as a contract addendum.

In order to keep the contract relevant and functional, education providers should provide a robust contract with clear terminology. Clauses should be unbiased and, if necessary, enforceable.

Whilst the details of each individual contract will differ from provider to provider, adherence to the following best practices will ensure the appointment and contracting process is equitable and well-managed.

- The contract should always be that of the education provider, not of the education agent.
- The contract should be reviewed and approved by qualified legal professionals (either the provider's internal legal team or external legal experts).
- An annual internal legal review should be scheduled to ensure the overarching contract terms remain fit for purpose and legally sound.
- Contracts should be in place prior to the enrolment of a 'commissionable student', even where the agreement is cancelled for future students.
- Newly appointed education agents can be offered a short-term probationary contract, with the criteria for contract extension clearly specified.
- Established education agents can be placed on longer term contracts (3-5 years).
- The expectations element of the contract should be reviewed on a regular basis, either annually, or after each intake (see the REVIEWING chapter).
- A decision to renew or extend a contract should be based on a documented evaluation of the agent's performance against the previously agreed criteria.
- Prior to renewing contracts, providers should schedule a refresh of their Due Diligence to account for any potential changes in ownership, senior staff, government policy, strategic goals, market dynamics, etc.



Expert tip: Trusted and long-standing agencies can be placed on a rolling contract which automatically renews on a given date, as long as regular review and assessment remains in place and appropriate termination clauses are included.

This guide does not intend to stipulate the exact terms and conditions of an education agent appointment contract. Any contract should be tailored to the provider's own requirements and must be approved by legal experts.

Sector best practice recommends including the following provisions in your agent contract as a minimum:

- Agreement that the education agent will adhere to the expected standards as set out in The National Code of Ethical Practice for UK Education Agents (2021) and any subsequent amendments.
- Commitment from the agent that counsellors complete a recognised UK-facing education agent training qualification. UKCISA, BUILA and UUKi recommend the British Council Education Agent and Counsellor Training Suite. This contract clause can be linked to Standard 5: Organisational Competence in The National Code of Ethical Practice which sets out specific training benchmarks.
- A clearly articulated compensation (commission) structure, including any bonus schemes or additional payments. This clause should also include agreed timescales for invoicing and payments.
- Clear details of payment processes (including refunds). Include a commitment that both parties are fully aware of their responsibilities regarding the Money Laundering and Terrorist Financing (Amendment) Regulations 2019.
- Termination clause/s. These should include an option for immediate termination for a demonstrable breach of contract. It must be clearly defined what constitutes a 'demonstrable breach of contract'.
 - Termination clauses must include terms which protect any students who have a live application with the provider to ensure their application experience is not unfairly impacted.
 - When partnering with agents located outside of the UK, termination clauses should include details for conflict resolution. This will often require a third-party country to be nominated as the location for any resolution. Ensure that the selected location is a realistic option to be used if required, ie would you really travel to Singapore to resolve an agent dispute?
- Contract renewal dates should be clearly stated. Providers may benefit from placing more established agents on a rolling, automatically renewing contract to reduce administrative workload.
- Clause requiring education agents to comply with all GDPR requirements in the UK and agent's home country.
- Option to include a clause that allows the provider to share information with the UKVI to support future compliance requirements if required.
- Establishing the geographic area from which the education agent can recruit and which programmes they can recruit to. This is becoming increasingly complicated with the rise of online agent aggregator platforms. This clause may not always be necessary unless you have specific agents with exclusivity to certain markets.



Expert tip: If the contract includes multiple geographical territories, ensure the contract reserves the right for the provider to remove permission for the agency to work in one or all locations should misconduct occur.



- If the agent has highlighted that they use/are part of a network of sub-agents, the contract requires a detailed clause that lists the specific roles and responsibilities of the sub-agent, master agent and provider.
- Commitment from the provider to clearly list their contracted education agents on their website and for the education agent to do likewise with their formally contracted education partners. This clause can be linked to Standard 1: Organisational Behaviour in the The National Code of Ethical Practice.
- Requirement for education agents to maintain a written agreement (this can be digital) with their students. This agreement should include transparent information about fees, information about the company, and how students can access complaints processes.



Expert tip: Use written (and co-signed) addendums to reflect changes and new initiatives (eg bonus schemes). This keeps the contract relevant and shows a willingness to adapt with your education agent

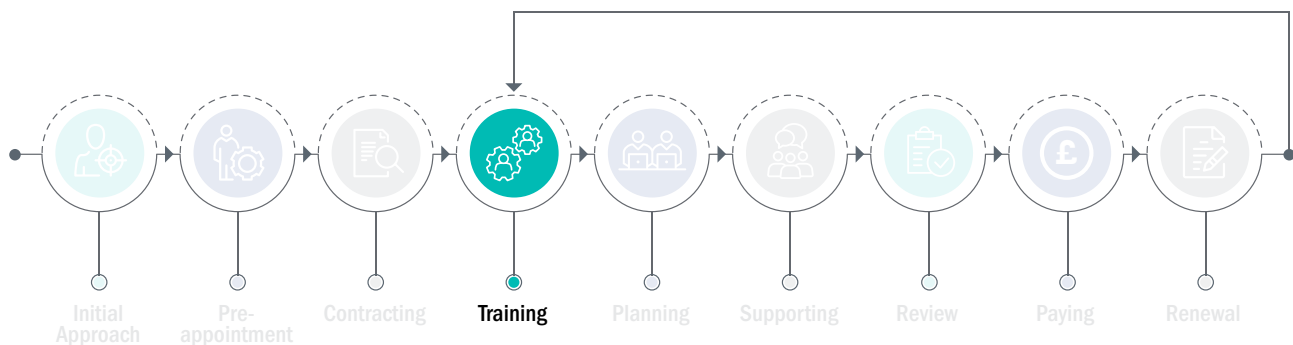
Best practice:

- ✓ Agent recruitment plans aligned with overarching international strategy.
- ✓ Clearly documented processes, ensuring equitable and transparent operations.
- ✓ Detailed due diligence and contracting framework, maintaining robust compliance.
- ✓ Bespoke procedures for selecting and appointing new agents who are best-fit for the provider.

TRAINING: Training your education agents

In this section, we look at the ways you can train and support your education agents so they can deliver aligned, accurate advice and services to prospective students. It is broken into four areas.

1. National training schemes
2. New education agent induction
3. Knowledge management and continuing professional development



There are a myriad of approaches to training, and you may have pedagogy experts in your organisation who could help you with your learning design. Traditionally providers have opted to push information out to education agents through presentations – in-person and online – followed by short ‘question and answer’ sessions. BUILA and UKCISA research (2021) suggests that a more nuanced approach is required.

Many education agents are extremely well established, have a wealth of market knowledge, and have represented providers for upwards of 20 years. Do they need the same training that a new education agent counsellor needs? And do the counsellors need to know and understand the commission invoicing process? Best practice training starts with a needs analysis and tailoring training to your partner’s requirements.

Delivering core information through the national training scheme and provider induction is of paramount importance, but education agents have reported that they want a higher degree of interactivity, greater recognition for completing units of training, and the ability to curate their learning to suit their company and individual needs. In addition, your education agents want proactive delivery of just-in-time information and access to admissions, recruitment and compliance staff throughout the student recruitment cycle.

1. National training schemes

It is important for you or your provider to regularly verify your education agent's counsellors' knowledge of the UK education system, the relevant legislation and the UK's education sales proposition, as well as their understanding of the National Code of Ethical Practice for UK Education Agents. This can be done initially during the due diligence process, but it is worth regularly checking when counsellors last participated in national training – such as the British Council Education Agent Training Suite – as part of your in-cycle and annual reviews (see REVIEWING chapter). This helps to determine whether their knowledge is up to date and whether you need to cover certain areas in your induction and ongoing training.

The British Council Certified Education Agent status (awarded on successful completion of the British Council training) is an important assurance kitemark of core knowledge. This can be used as a base from which you can build your bespoke training content. However, many counsellors will not have had access to this training yet; the British Council is working with the sector to develop a more targeted, modular suite of training and increase agent uptake (as of 2021).



Expert tip: More information on the British Council Education Agent Training Suite and how to verify an education agent's certification status can be found at:

www.britishcouncil.org/education/education-agents/training-agents

Education agents without this training can still be excellent partners with significant knowledge and experience of working with UK providers. Their knowledge might have been attained through their own study; experience of working with other UK providers; or attending talks and seminars on the UK landscape, run by respected organisations like the British Council, UKVI, UKCISA and others.

Whilst education agents can acquire knowledge through other means, Standard 5.3 of the National Code of Ethical Practice for UK Education Agents stipulates that at least one UK focused education agent counselling staff per office should have completed the British Council Education Agent Training Programme. The British Council Education Agent and Counsellor Training Suite is the appropriate quality measure for education agents representing UK providers. The completion of this official training is the best guarantee of quality for both providers and prospective students.



Student perspective: “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.”

In 2021, the British Council initiated a project to make their Education Agent and Counsellor Training Suite more accessible to education agents and better aligned to their needs.



Expert tip: Actively engaging with the British Council to help with this project and subsequently promoting it by requiring your contracted agents to complete the training will ultimately have a positive impact on the quality of advice given to prospective international students by education agents.

3. New education agent induction

Your provider's new education agent induction is a critical success factor for your partnership. Spending time and resources on this stage will help you and your education agents get results quickly, minimise risks to your reputation and deliver a high quality student experience. This is your opportunity to confirm your expectations and accountabilities.

You should not only equip them with the tools required to represent your provider successfully, but also empower them with a strong feeling of belonging and pride. You need your education agents to effectively promote your provider to prospective students and help these students efficiently navigate your processes.

It is strongly recommended that agents complete your induction programme before they are given approval to submit applications. This requires that they participate in the induction programme soon after the contract is finalised.

Core information needs of education agents



Expert tip: When developing your induction, think about the different roles within an education agent office and ensure that your training targets the needs of these roles – eg a student counsellor needs information to support the prospective student journey, while the finance staff need to understand the process for claiming commission. Tailor your induction content to the audience.

COUNSELLOR INDUCTION CONTENT

A well trained counsellor combines the expert knowledge of the market with a good knowledge of your provider, and knows who to contact and where to find further information.



Agent perspective: We have 30+ UK provider partnerships, each with different processes, course offerings and sales propositions. Is it realistic for our counsellors to know everything about all of them after a single training session? We welcome training but we also need access to just-in-time information to effectively counsel prospective students.



Expert tip: Try to think about your experiences of counselling students and the kinds of questions they have asked you, and make sure your induction covers these areas. If you can, ask your new education agent what information is important to them, and adapt the induction accordingly.

With this in mind, core content for training new counsellors should include the following:

- Introduction to provider
- Course/programme subject areas
- Course/programme priorities
- Unique or special proposition relative to generic others – eg advantages of location, course/program unique content or attribute, etc
- Market specific entry criteria (including pre-sessional English, foundation courses, etc)
- Costs – approximate amount in local currency
- How to apply
- Student wellbeing, support and experience information
- Student and alumni profiles (ideally from the relevant market)
- Just-in-time information, and who to contact and where to access course information

Try to reframe your training from a compliance focus to a sales focus designed to enthuse and stimulate interest. You want your education agents to create a similar reaction among prospective students.



Expert tip: Tailor your induction to the market. In some markets, a long institutional history and high ranking have higher prestige, whereas in others career outcomes are more important. Lead with the important factors for that market (see also the 'business intelligence section of the FUNDAMENTALS chapter) and, where possible, include local contextual information – eg local entry criteria, fees converted into local currency, etc. Using real student stories is a great way to relay this information

OPERATIONS/FINANCIAL STAFF INDUCTION CONTENT

Some basic, tailored training for your agent's operational and financial staff will improve efficiency and turnaround times when it comes to invoicing and payments. You may consider including the following in your training.

- Simplified version of the 'introduction to provider'
 - Who we are and the financial nature of the relationship with the education agent
- Review of relevant contract clauses
 - Commission amounts
 - Structure of payments – eg upfront versus split over intakes, sliding scales
 - Approach to currency conversion
- Process for claiming
 - Claiming windows – eg after census date
 - Financial deadlines
 - Invoice requirements
 - Timeframes
 - Appeals
 - Contacts
- Software integrations (if relevant)
 - Access to hub/portal (if relevant)



Expert tip: A provider checklist for the induction of new education agents can be found in the TEMPLATES AND ANNEXES chapter of this guide.

Induction methodology

The best inductions combine online, and face-to-face learning, noting that face-to-face delivery could be via video conferencing or in-person. If resources allow it, developing a good online learning induction course to deliver core content is preferable – IBM research found that participants can learn five times more through well-designed, multimedia-rich online learning than through traditional face-to-face learning. However, many education agents and provider recruiters still see personal connections as the key drivers of success. So, while the education agent sector is evolving, a hybrid approach to inductions is still recommended as the best practice.



Expert tip: Best-practice induction should engage the audience rather than just providing them with information. Consider gamifying the content, make it interactive and use small rewards and incentives to drive engagement.

The following workflow builds on these best-practice findings with a sample approach to induction that makes use of online learning, face-to-face activities and gamification. It's useful to consider which elements of this example are relevant for you and use these as a starting point to design your own engaging induction programme.

Sample new education agent induction

Induction Introduction	Online Induction programme	Market specific induction content	Q&A session	Certification & Handbook	Engagement quiz	Reward / Recognition	6-month check-in /review
<p>Delivered face-to-face by relationship manager</p> <p>Supported by agent coordinator team (if applicable)</p>	<p>Login requirement including company and person name and role</p> <p>Self paced but with completion time-frame</p> <p>Video welcome from provider executive stressing importance of partnership</p> <p>Content is served according to role type</p> <p>Content broken into 10-15 minute modules</p> <p>Use of student case studies throughout</p> <p>Quick content quiz at end of each module</p> <p>Optional extra modules</p>	<p>Run face-to-face by relationship manager supported by relevant roles (eg agent coordinator, admissions officer, lecturer/teacher)</p> <p>Introduces key personnel and contacts at provider</p> <p>Run through 'fictional' student application in the system</p>	<p>Run face-to-face by relationship manager supported by relevant roles</p>	<p>Download and print "Provider X Induction Certificate of Completion" with provider logo, etc</p> <p>Designed for wall display</p> <p>Digital badges for LinkedIn? Education agent company?</p> <p>Downloadable handbook/'cheat-sheet' covering induction content with deep links to further information for use by counsellors</p> <p>Access to application system, resources bank, etc provided</p>	<p>Weekly (up to provider how often) question sent out to education agents designed to help them think about your provider and undertake further research so developing their knowledge base</p>	<p>Recognition for education agent counsellor each week who answers first, or answered the most questions right over the period</p> <p>Digital badges for counsellor/education agent</p>	<p>Ask your agent if they need any updates or new information in-line with their greater understanding of the market dynamics for your provider</p> <p>Run through real case studies of students they've sent you</p> <p>In-cycle review (see REVIEWING chapter)</p>



Expert tip: To encourage uptake of your induction and training programmes, consider whether your provider might be able to offer academic credit or discounts to counsellors that have completed the programme, to undertake other in-house programmes (eg masters degrees). Microcredentials may also be attractive to your education agents.

ON A BUDGET (EXTENDING THE TRADITIONAL APPROACH)

While the optimal way to induct new education agents makes use of online learning tools, not every provider can invest the resources required to produce an online learning programme. Importantly, you can still achieve great results through the traditional PowerPoint or digital slide presentation if you maintain the interactive and knowledge-checking elements. The content essentially remains the same.

It is important to maintain a high degree of consistency across your education agents' training. If you are using the 'traditional' approach, it is highly recommended that you develop a single presentation that is used for all education agent inductions, with additional market-specific insertions, rather than you and your colleagues developing your own presentations.

It is also important that the induction dates of education agents are recorded for auditing and compliance purposes.



Expert tip: When developing your new education agent induction, try to finish with some practical case studies for your education agents to work through. Use student personas (ideally market specific) and ask them to decide how they would counsel the student and what they might need to check along the way. This process will help reinforce learning, particularly for more junior counsellors or those less familiar with the UK education sector. An example is given below.

Example student persona case study

THE STUDENT



It is April 2022. Reshmi is 23 years old and is in their final year of study at Delhi University. They are averaging 55% in their bachelor degree and will finish in June this year; they are planning to start an MBA in September this year. They currently have an IELTS band of 5.5 with a 5 in speaking but all other bands at 5.5. They have been working part-time in their parents' company as an administration assistant for the past 5 years. Reshmi's parents have ₹20,0000 in their shared account.

QUESTION

Knowing we (the provider) do not offer a fresh graduate MBA, how would you counsel Reshmi?

THE AGENT

Use a coaching approach to get your agent to:

Determine eligibility for the desired course and, if not eligible, selling courses that Reshmi could be qualified for, such as MA management (make sure your education agent knows where to source information like this - eg the relevant area of your website)

Clarify the entry criteria

Outline the need for Reshmi to improve their English, and counsel on English options – eg in-country training/pre-session English

Determine whether Reshmi has enough funding and, if not, assist them to identify options – eg scholarships/loans/etc

Determine the likelihood of Reshmi getting a visa (initial check – eg whether they have had a visa refusal before)

Offer counselling through the admissions process

Outline supporting document requirements

Early guidance

When working with new education agents, try to spend extra time guiding them with their first few students. This will help them develop knowledge and confidence at an early stage of the relationship, which lays the groundwork for a strong long-term partnership.

If possible, all of the tools and content used in your induction should be accessible to education agents after completing the induction so they can refer to it afterwards. Some providers choose to condense this information into quick reference guides, such as this one:

UWA APPLY
International Agent Quick Reference Guide

Step 1: Accessing UWA Apply (agent dashboard)
Submit an email request to agentsupport@uwa.edu.au with the name and email address of the staff member who will manage the account for your office. International Agent Management will respond directly to set up your account. Once International Agent Management has created your account, you will receive an automated email from the UWA Apply system which will allow you to set your password.

Step 2: Logging in to UWA Apply
In your browser, go to www.uwa.edu.au/apply/ and click on the 'Login' button at the top right of the screen. Your username is the email address that you registered.

Step 3: Adding other team members
UWA Apply allows for multiple logins for your office. Note that this will not affect where admissions email communications are sent and all staff in your office account can see all students associated with your office.
Administrator users can add other administrators, coordinators and applicants by clicking on the 'Add User' button.
Coordinator users can only add applicants.
Click 'Add User'.

Step 4: Adding applicants

4.1 Add applicant
Enter the student's details. Once completed, the student will receive an email asking them to verify their online verification, but you can continue their application without this verification.

4.2 Viewing as applicant
To lodge an application for your newly created applicant, click 'View as'. If the application was submitted in the old portal agentConnect, you will need to hit the submit button in the new agent portal once you click 'View as' - this will create an account for the student to verify.

Step 5: Starting an application

5.1 Applicant dashboard
Click the 'Start Application' or 'Continue Application' button.

5.2 Applicant type
The first step is to select the applicant type.

5.3 Course selection
Course selection: The portal allows you to choose six preferences to apply for. Choose carefully - you cannot change this after submission.

5.3 Course details tab
Indicates how if the applicant should like to be assessed for advanced standing (credit) and whether they wish to apply for a Direct Pathway, indicate yes to the 'Alternative Pathway' question if your client wishes to be considered for other courses that lead to the first preference choice. This includes CELT and graduate certificate options where available.

5.4 Qualifications
Complete and upload relevant qualifications here.

5.5 Personal details
Input the student's details here.

5.6 Review and submit
Here you will review the application details before submission. You can enter an application fee waiver code or be directed to our payment gateway.
(Examples of statuses during the application process appear at the end of this information.)

Step 6: Quick view of application
Your agent dashboard is where you can view your agency's applications.

6.1 Filter
This is automatically filtered by the application status 'Needs Review'. To clear this filter, or add others, you can use the boxes next to the search bar.

6.2 Offer letter
You can download the offer letter. Be mindful to download the latest offer letter if there are multiple versions.

6.3 Document upload

6.3.1 Adding documents to submitted applications
If you need to upload further documents to a previously submitted application you can do so by clicking 'Upload document'.

6.3.2 Adding documents to conditional offers
This will launch our accept wizard which will allow you to upload documents that are required to meet conditions. Uploading documents here does not mean that the offer is accepted and your student won't be committed to starting the course until the acceptance process is completed. After you have uploaded the document, please don't cancel - UWA Admissions will need to assess the document first.

Step 7: Accepting an offer
Click 'View as' on the student whose offer you wish to accept. On the student dashboard, click 'Accept' to launch the accept wizard.

Step 8: Contract acceptance
Due to legal requirements, the student must personally accept the contract. To facilitate this, follow one of these steps:
1. Click 'Notify Student' which will email the student asking them to sign and accept their contract, or
2. Download the contract, have the student read and sign it and then upload the completed contract. Please note that this second method is slower as our admissions staff will check the signature against the student's passport, which may cause a delay in receiving the CoE.
For more help contact agentsupport@uwa.edu.au with any questions or suggestions.

AGENT DASHBOARD

AGENT DASHBOARD
4.1 6.1 6.2 6.3

STUDENT DASHBOARD
Welcome to UWA Apply
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

You should try to ensure that at least two people in each office of the education agent have completed your induction training. This is to help with business continuity when there is staff turnover, and should result in accurate information being passed on to prospective students. Integrating online induction registration and certification with your CRM or agent management platform (AMP) can help to keep records of agent training levels in order.



Agent perspective: One important complaint from education agents is that when their relationship manager at a provider moves on, they find it difficult to re-engage with the provider – ie there is a loss of corporate knowledge and partnership.



Expert tip: In addition to training a minimum of two education agents in each office, remember to also provide your education agents with two knowledgeable contacts at your provider so that they also have this relationship continuity. (See the FUNDAMENTALS chapter of this guide for more insight on business continuity.)

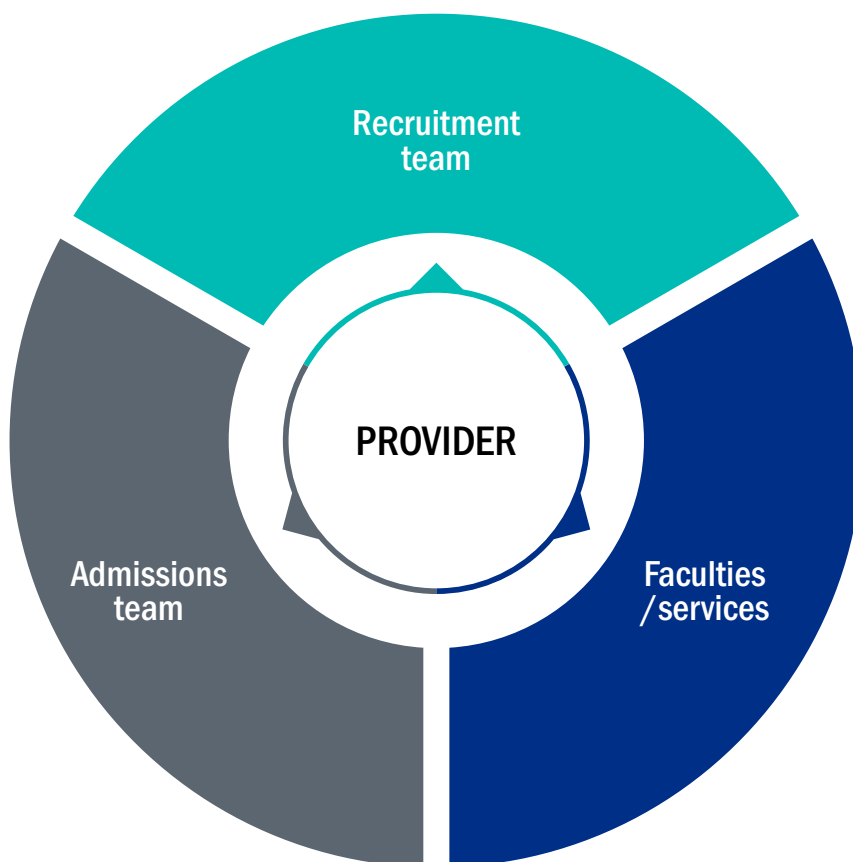
4. Knowledge management and continuing professional development

Education agents often expect and require more detailed information than is available on the providers' public websites.



Agent perspective: We feel like partner providers send us updates and reminders when it suits them, not when we need it. Remembering and storing these fragmented communications is too difficult. We need them to think a bit more about what information we need at which time in the cycle rather than just pushing out communications on a fortnightly basis.

This education agent perspective is notable because it was perhaps the most common feedback received when developing this Guide. The following diagram illustrates the fragmentation and platform chaos.



■ ■ ■	Emails
■ ■	Agent portal
■	Familiarisation tours
■ ■	Brochures
■ ■	Social Media
■	Newsletters

■ ■ ■	Training Events
■ ■	(Virtual) Open Days
■ ■	Website
■ ■	Digital publications
■ ■	Training visits
■ ■	Webinars

If you multiply this situation by the number of providers an education agent represents, it becomes clear why BUILA and UKCISA research (2021) found that generic scheduled agent newsletters, for example, had limited cut-through with them.

Education agents' desire for just-in-time information and the ability to self-curate their own learning has significant implications for how providers manage their education agents' knowledge. Education agents are keen for providers to engage with them, but what providers share needs to be:



Shared with a purpose



Aligned with their needs



Delivered in an engaging manner

As suggested earlier in this chapter (under '3. New education agent induction'), gamification and use of rewards can also help motivate education agents to participate in professional development activities.

The first step in tailoring your professional development activities for education agents is to source the right business intelligence.



Business intelligence gathering

<p>Review your data</p>	<p>Regularly review your admissions funnel data for your education agents. Consider these questions:</p> <ul style="list-style-type: none"> • Are there programme trends? • Do agents need more information on trending areas, or do they need information on areas there are known markets for, but for which they haven't sent you applications? • Why are your conversion rates the way they are? Are there opportunities for improvement? <p>Discuss this data with your education agent to determine their knowledge gaps.</p>
<p>Listen to your education agents</p>	<p>Try to capture queries from your education agents and build answers into induction training and your continuing professional development activities. Ask them if they need any updates or whether they are comfortable with the information they already have. Some successful providers use in-country visits to have conversations with education agents in informal settings – eg coffee shops – to find out what they want and to help develop their knowledge in more informal ways.</p>



Expert tip: Build an online enquiry capture form for your education agent's exclusive use. Allocate a dedicated response team to deliver a fast turnaround, and adapt the software to capture key data trends from the enquiries.

<p>Survey your education agents</p>	<p>Ask them about what information about providers they value and what they don't, and then focus on the higher-value elements in your training and communications.</p>
<p>Listen to your students</p>	<p>Through existing 'new arrival' surveys, bespoke surveys and/or focus groups, learn about your students' experience of using your education agents. What were their pain points and what did they really value? Can these elements be addressed or improved through education agent training and development activities, or is other remedial activity required?</p>
<p>Undertake mystery shopping</p>	<p>Contacting an education agent yourself under the persona of a student or getting a third party to do so (ie a student ambassador) can yield useful insights into their practices and how they are representing your provider. However, it is strongly recommended that you tell your education agents at the pre-contract stage that you may do this, or you may damage the relationship between them and your provider.</p>
<p>Look at your Education Agent Review Finding</p>	<p>In the REVIEWING chapter we look at in-cycle and post-cycle review activities. These can be a rich source of intelligence to develop your education agent induction and continuing professional development activities.</p>

Once you have gathered your business intelligence and adjusted your training accordingly, **test** your information architecture with education agents and adapt it to meet their needs.

We will look at your education agent's role in supplying you with business intelligence in the FUNDAMENTALS chapter.

Just-in-time information

EXPERT CONTACTS AT PROVIDER

In addition to continuing professional development activities, we indicated earlier that education agents are keen to have access to quality just-in-time information to help them effectively counsel prospective students.



Agent perspective: Ideally we want access to provider experts who can respond quickly and accurately to a range of queries.

1. Admissions officer contact – ideally a direct phone number
2. Commission coordinating contact – for financial and contract enquiries
3. Immigration advisor (appropriately trained) – for enquiries about complex visa situations
4. Relationship/recruitment manager contact – ideally two people familiar with the market and the education agent to handle all other queries.

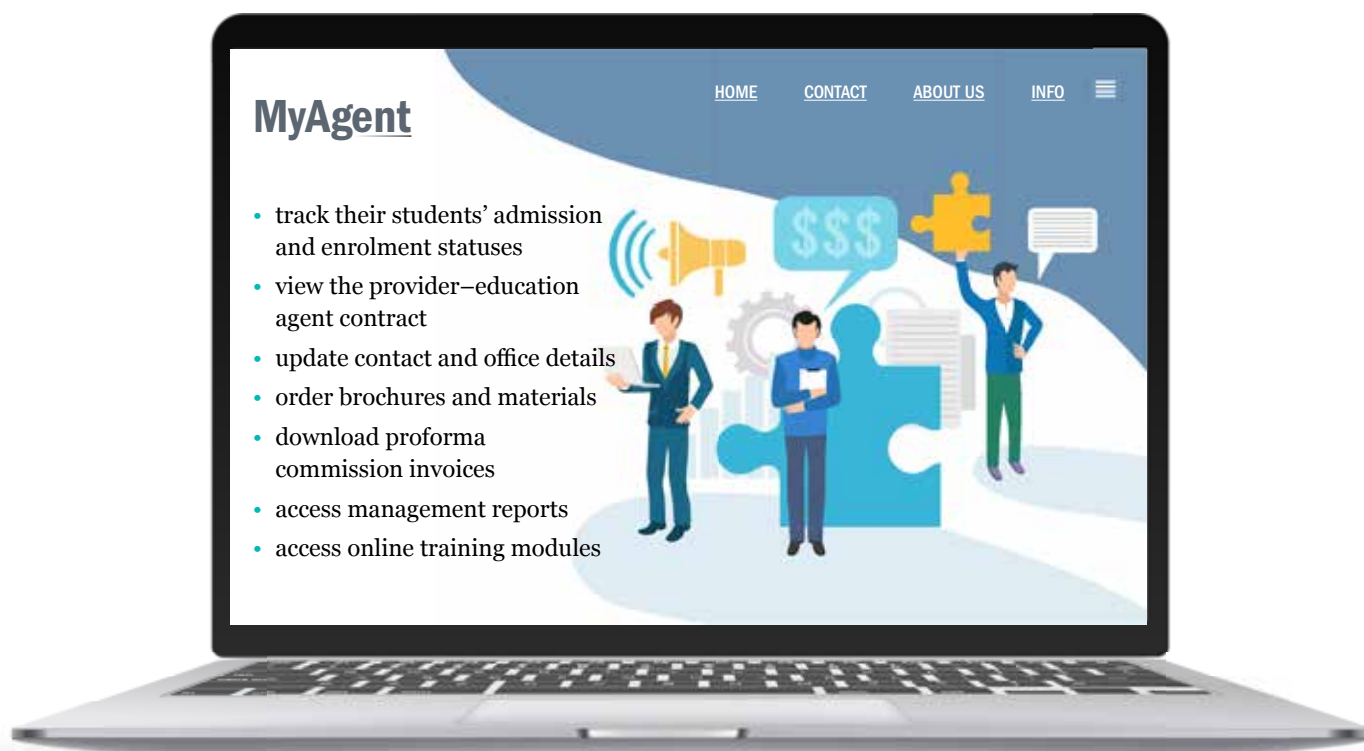
For many of you, particularly those working in smaller providers, some or all of these roles may be combined into one ‘account manager’ type function. Where this is the case, try to ensure you have processes in place to avoid any conflict in relation to admissions decisions and achieving recruitment targets.

The FUNDAMENTALS chapter will look at staffing and quality assurance processes in more detail.

AGENT HUB/PORTAL

An integrated, online self-service hub/portal can significantly reduce the amount of time provider international administrators spend on manual tasks throughout the partnership. However, you need to factor in the cost of software licenses and platform integration when making a decision about investing in such a system. They are often available as a module of a larger Agent Management Platform (AMP).

Your agent hub/portal can be as simple as a set of intranet pages containing agent information and downloadable resources, or a more sophisticated systems-integrated online hub/portal with dynamic content. The more sophisticated portals allow education agent staff to:



The agent-specific information and resources contained on your intranet should be dictated by your business intelligence findings, but might include:

- a suite of logos, digital assets, campus images, brand guidelines, etc for use in education agent-produced marketing communications
- admissions criteria for education agents
- details of key contacts, notably those in admissions and in recruitment
- detailed course information such as sample timetables
- an education agent handbook
- answers to frequently asked questions



Expert tip: Consider using artificial intelligence-enabled chatbots in your education agent hub/portal to answer their frequently asked questions.

The ideal situation is to host all of the education agent information in an area that's easy to navigate and protected by a secure login, so your education agents don't have to spend time searching your website and can quickly access the information they need.



Expert tip: If you are repeating information from elsewhere on your website, check if your CMS enables shared content so that it only needs to be updated in one location.



Expert tip: Include analytics functions on your hub so you can monitor logins and what information/tools are accessed. This can be a useful indicator of what to focus on in your induction and ongoing training.

Centrally coordinated information updates

Establish a coordinated agent communication strategy, consisting of:

- a regular email update (possibly fortnightly) combining and streamlining updates from all relevant stakeholders across the university, including those in admissions, compliance, schools/colleges, recruitment, student support services, etc. The update should be concise, highly practical and related to essential information such as:
 - deadlines
 - changes to major policies and procedures
 - programme changes
 - closed programmes
 - new scholarships
 - news and promotions (included as secondary items only)

Where possible, this should be sent through your CRM or AMP and open rates monitored as part of your assessment of an education agent's engagement (see the 'REVIEWING' chapter). Noting education agents' desire to only receive important updates make sure they are only sent when there is new and relevant information.

- a quarterly presentation deck summarising updates, which enables regional managers to reinforce key information during training visits with agents in-country.



Shared with a purpose



Aligned with their needs



Delivered in a highly engaging manner



Agent perspective: While education agents reported a lack of interest in generic newsletters, they were open to these types of bulletins, provided they contained new and useful information. These were not seen as tools for reinforcing information previously provided.



Expert tip: Don't neglect the personal element of these business relationships. Call or message your agents every now and then, see how they are doing and if there is anything you can help with.

Subject-specific or update training

Where a more formal training process is seen as the best medium (whether it is virtual or in-person), try to focus on making it as engaging and interactive as possible – there is little interest in 'stand and deliver' style lectures for education agents. Before scheduling training, talk to your education agents to determine how to best fit these sessions into their schedules and to avoid peak workload times such as the month preceding an intake.

As with induction training, you may choose to motivate and reward counsellors who stay up-to-date with regular quizzes, competitions and prizes. Examples could include:

- promotions like 'Attend a virtual training session by the end of July to go in the draw to win a seat on next year's Familiarisation Tour'
- prizes in the form of benefits to individual counsellors, or things that they can pass on to their students – eg merchandise, student union vouchers, tickets to local events for students upon arrival



Expert tip: Although this can be challenging and needs to be carefully managed, it is important that you consider who presents and how your provider is presented to education agents. For example, a finance officer might be incredibly efficient and knowledgeable, but not used to leading and facilitating culturally appropriate training. Work closely with your allied and teaching areas to build a network of experts you can rely on to give education agents a positive experience. Developing guidelines of what to include and what not to include will be highly appreciated by your presenter(s).

Familiarisation tours and partner conferences

These events share the same goal, but where a familiarisation tour would ordinarily be organised at and around your campus(es), provider conferences are sometimes held offshore with education agents invited from across a region or market. For both events, the goal is to deliver an intense period of training to your education agents.

These events may require a significant budget to deliver, but if well executed, can have extremely positive impacts on your education agent partnership and future student enrolment numbers. Familiarisation tours in particular give counsellors a greater understanding of the student experience, so they are better able to counsel prospective students.

Increasingly, providers have been running virtual familiarisation tours for their education agents. Delivered entirely online, these tours allow providers to reach agents who cannot travel to the campus. The online content can be accessed 24/7 and - if well packaged - it is ready-made for content sharing.

Below are some high-level considerations when planning and delivering education agent tours and conferences:

PLANNING

- Begin your planning at least six months in advance – a lot can derail projects like these, not least visa requirements.
- Consider your participant selection criteria to ensure they are transparent, fair and objective.



Expert tip: It is imperative that you do not tie participation in these events solely to student enrolment numbers. This could be seen as an inducement under the Bribery Act 2010, which could result in both the organiser and your provider being prosecuted.

- Provide a suggested packing list.
- Arrange for flights to arrive at similar times to help with transfers from airport(s) to accommodation.
- Allow time for participants to recover from jet lag and travel.
- Choose comfortable accommodation and good food – think about dietary requirements.



Expert tip: If possible, use meals to demonstrate that good cuisine from their country is available locally. This will be helpful when they advise prospective students and their families.

- Place a welcome pack in their hotel/residence rooms. This might include a prepaid local SIM card, as well as important information such as the schedule.
 - Ask local companies and organisations that might be of interest to provide promotional materials and goodies for the welcome pack.
 - Include a reusable water bottle and a snack that is culturally appropriate and promotes sustainability.
 - Ask organisations (or even internal departments) for sponsorship to help cover the cost of the programme.
 - Include some downtime for participants to catch up on emails and other commitments.
 - Allow time for education agents to explore the surrounding environment and enjoy leisure activities like shopping.
 - Halve what you first plan to include – it is usually too much.

EXECUTION

- Start with a welcome and orientation that covers:
 - the schedule
 - what to do if something is not right – ie who to contact
 - a reminder that the water is safe to drink
 - a reminder for participants to use certain social media tags to post content, and have your marketing team re-post (retweet, etc) their content (offer prizes for the best social media commentary)
- Arrange a mixture of formal and informal training, and include practical elements and sample classes.



Expert tip: If your agents can experience world-leading facilities or innovative teaching methods, this can help you be top of mind when an education agent is counselling a student.

- Arrange a mixture of academic and student support/experience topics – ensure safety is covered.
- Facilitate education agent engagement with students (ideally with students they have sent).
- Get students to run campus tours with strategically positioned staff to answer questions.
- Include a social evening where provider staff (including those at executive levels) can relax and chat with education agents.



Expert tip: For some markets, karaoke can be a great way to break down barriers. If you do this, try to get some hits from their country in the machine – personalised touches like this can make an education agent’s experience (and therefore your provider) even more memorable.

- Capture photos throughout the event, including a group shot.
- Provide a personalised certificate of participation/completion at the end of the training, as well as a framed group photo of all the participants.

FOLLOW-UP AND MONITORING

- Send a link to (or provide on a USB) all training resources, as well as photos of the trip.
- Ask the returning agents to present a summary of the trip to their colleagues – this personal opinion often carries more weight than a provider marketing presentation.
- Monitor the application, conversion and enrolment data for the participating education agent office for the next 12 months to help evaluate the success of the event.



Expert tip: Ensure that these events are not a one-way flow of information. In an extremely busy work environment, it can be difficult to find time to listen to ideas and feedback from your agents. Familiarisation trips and partner conferences are the perfect opportunity to host informal feedback events (ie regional focus groups) or ask agents to deliver market-specific training to your staff. This will provide valuable market intelligence while strengthening relationships with key stakeholders.

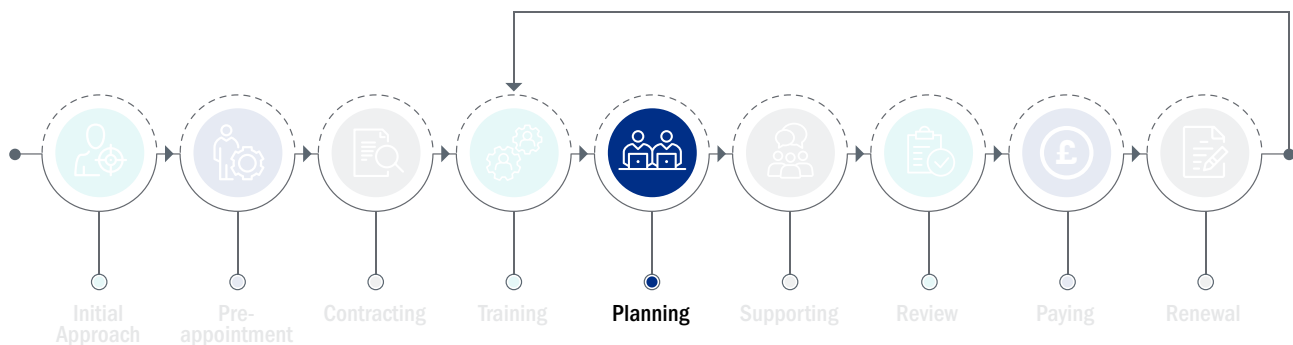
Best practice:

- ✓ Require your education agents to complete the updated British Council Education Agent and Counsellor Training Suite – the National Code suggests a minimum of one counsellor per an office.
- ✓ It is strongly recommended that education agents complete your induction programme before they are given approval to submit applications.
- ✓ The most effective induction training and continuing professional development incorporates both online learning and in-person delivery with some interactive and gamified content.
- ✓ Use practical case studies and student personas (ideally market specific) in your training, and work through how best to counsel them and what they might need to check along the way.
- ✓ For business continuity, try to make sure at least two counsellors in each of the education agent’s offices are fully trained so if one leaves, students still have an expert to talk to about your provider.
- ✓ Spend time researching your education agent needs and develop a multichannel communications strategy that provides education agents with the information they need, when they need it and in the format they want it.

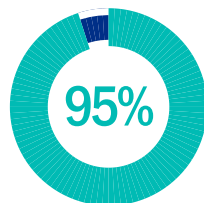
PLANNING: Working with your education agents

You've selected, appointed and trained your education agent, and now it is time to work together to set expectations and agree on a plan. In this chapter, we look at ways you can work with your education agent to set objectives, manage expectations and support each other during the recruitment cycle.

1. Planning fundamentals
2. Planning collaboratively
3. Setting objectives
4. Investment and support
5. Aligning your plans



When asked what makes a provider-education agent relationship really positive, education agents say it centres on regular communication, timely responses and mutual respect. Conversely, when these elements are not at play, their absence can negatively impact the provider-education agent relationship, as can unrealistic or unachievable targets being set by the education provider.



95% of agents

said **quick response times** and **regular communication updates** are the most important factors to help them support providers*

While annual planning and agreeing on a set of expectations with your education agent might be time consuming, these are important for building a foundation for a positive provider-education agent relationship.

This chapter highlights existing best practice on how you can collaborate with your education agents during the planning phase to maximise the effectiveness of your partnership and work together to deliver an outstanding international student experience.

* ICEF Agent Barometer 2019



1. Planning fundamentals

Having completed your due diligence and appointment process (see STRATEGY chapter) and having trained your education agents (see TRAINING chapter), both parties should now be clear on what they can offer one another in the relationship. The next stage is for you to set your objectives for the upcoming cycle and commit to how you will support each other to meet these objectives. (More detailed analysis on how you can work with your agents on specific activities can be found in the SUPPORTING chapter.)

It is best practice to develop a planning document with each of your contracted education agents, which sets out the specific objectives for that cycle, the level of support required, and how and when progress will be reviewed. This document can be as detailed or as basic as you see fit, depending on the relationship with each education agent. (A planning document template can be found in the TEMPLATES AND ANNEXES chapter).



Expert tip: If you have a large number of education agents, you may need to categorise them by their actual or potential importance to your provider. Try putting all of your education agents into three priority groups – the amount of time you spend developing plans should be proportionate to the education agent categorisation, with more time spent with more important education agents. Here, importance doesn't always mean highest enrolment numbers – think about how well the agent will help you meet your broader objectives, eg diversity and student satisfaction levels.

SMART objectives

To facilitate progress tracking and timely reviews, you might wish to use the SMART model for setting objectives in the planning document. SMART objectives are: Specific, Measurable, Achievable, Realistic and Time-bound (or timely). Well-written SMART objectives will enable an effective review and assessment process at a later point in the recruitment cycle.



Standard objective: Increase the profile of Provider X in the target market.

SMART objective: ‘Fictional Agent’ will raise awareness of Provider X among enquirers from their region through targeted digital marketing campaigns on Facebook and Instagram. Both campaigns will deliver a combined total of 5,000 impressions and 500 click-throughs to the dedicated campaign URL. Final numbers will be reported on 1 March 2022.

This objective is **specific** in the marketing channel, platforms and geographical region, **measurable**, as you have quantified the target; and **time-bound**, as you have stated a deadline for measuring the progress. To make the objective **achievable** and **realistic**, you should set your objectives in collaboration with the education agent, ensuring you can both commit the necessary resources to meet the target.

Effective use of the contract

We have looked at ways in which you can develop a robust and transparent relationship with your education agents in the STRATEGY chapter. Throughout the duration of your agreement, you should aim to use the contract as a guiding document that is regularly referred to and not something that only comes out in the event of a problem arising.

In the REVIEWING chapter, we talk about using a weighted review scorecard – which should be the product of your planning – as an annual addendum to your contract. It is good practice to include clauses that refer to the SMART objectives in this annually updated addendum, as well as how you will monitor them, and any potential implications such as rewards or corrective actions (see the REVIEWING chapter) when objectives are or are not met. This will allow you to keep a functional link between objectives, performance and contracting, and reinforce the importance of your education agent’s commitment to setting realistic targets and committing the necessary resources to meeting objectives.

Regular reviews

A key part of your objective-setting should be to establish set review points throughout the recruitment cycle. Regular check-ups on the progress towards individual objectives will not only improve the communication flow between you and your agents, but it will also allow both parties to implement corrective action before it is too late.

Your review points should be influenced by the nature of the objective – eg application number review in May, conversion-to-offer review in June, successful visa review in August.

Recommendations and best practice for reviewing your education agents is explored in more detail in the REVIEWING chapter.



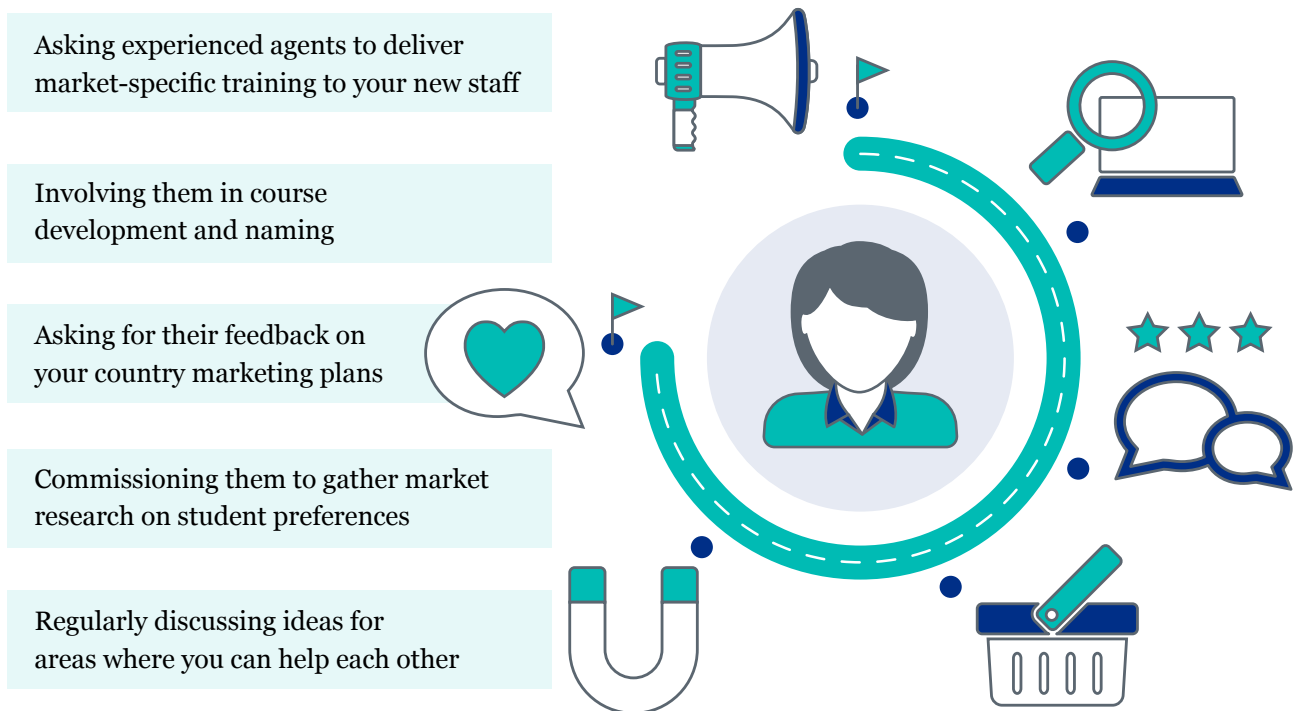
Expert tip: Align your planning expectations with a documented process for reviewing your agents. Look beyond just application numbers and conversion rates to also consider factors such as visa refusals, withdrawals rates, student satisfaction levels and progression rates.

Use your education agents' expertise

Your relationship with each education agent is a partnership and, as such, it shouldn't be a one-way flow of information.

If you have selected and appointed your education agents well, hand-picking from the relevant best practice in other chapters, you should now have a portfolio of agents who are market experts. This expert knowledge can be a vital resource for you and your prospective students. Your agents should have a realistic view of what is achievable in their markets, so discuss your objectives with them to arrive at a mutually agreeable figure.

Other ways you can engage your education agents include:



Ideally, both your planning and your review documents should be co-designed with your education agents to maximise their investment into the process. The following section explores the benefits of this collaborative approach in more detail.



Agent perspective: Agents really value the co-planning process with their providers, particularly when ideas flow in both directions. In their experience, this doesn't always happen in reality due to resource (time) constraints from the provider.

2. Planning collaboratively

Honesty and transparency on both sides are essential when planning achievable objectives. It should be noted that this planning process can be conducted alongside training sessions, as the information shared through these processes can help both parties arrive at more effective operational plans and recruitment strategies.

In addition to this, as education agents broaden their services to include institutional partnership development, student arrival services and even career services for returning students, the open dialogue created through collaborative planning can improve the student experience during and after their time studying at your institution.



Agent perspective: ‘Providers should be prepared to have more of the difficult conversations around enrolment numbers versus quality – be transparent around what they really want.’



Expert tip: Ask your education agents how many students they think they can realistically recruit and what support they would require in order to achieve this. Continued growth in all markets is an admirable objective but is not always achievable. Where a market is in overall decline, your objective might be maintaining or growing market share.

Planning with your education agents should focus on tailoring your activities to meet your specific goals in the market in which they operate – eg diversifying your applicant pool, increasing application numbers in key subject areas or building your institutional profile in a particular region.

At this stage, you should also be discussing with your agent what support they require and how you will work in partnership over the year. We look at this in more detail in this chapter under Investment and Support.



Agent perspective: ‘It should be a broader discussion about initiatives and activities, combined effort, investment and training.’

3. Setting objectives

Setting objectives with your education agents can be one of the more difficult aspects of managing your relationships. In some markets there are cultural challenges around directly discussing targets, and it can also be a potentially time-consuming process for both education agents and providers. However, well managed objective setting will be critical to the success of your agent-led recruitment plans. Linking the initial education agent appointment process with your objective setting process and training will inform your annual review and recognition processes.



Agent perspective: ‘Numbers are really important to Provider X, and at a regional level they are measured by targets. The level of pressure on those provider staff, and how they engage with our network, means targets [are] a very strong focus and it diminishes the relationship.’



Expert tip: If you are struggling to align your objectives for a particular agent, try approaching the challenge from a different angle. Why not ask your education agent to submit a proposal that they believe is realistic and then work together to make it targeted and achievable.

When setting your objectives with your education agents, there are several good practice points to keep in mind, including:

- setting objectives and activity plans in good time to allow both parties to align with internal plans and budgets
- clearly defining which market activity (eg fairs, interview days, digital marketing) will be delivered. Include both costed and un-costed activities, and agree which activities will be supported by your provider and which will be driven by your education agent.
- including a wide range of performance indicators (eg visa compliance and student satisfaction levels) where relevant, and not just application and enrolment targets (see REVIEWING chapter for more ideas on what might be included)
- ensuring your objectives are focused on the distinct needs of the specific market. Ask yourself, ‘What is the most important added-value offering that my agent can contribute here?’ For example, in certain markets it would be more beneficial to the provider, both reputationally and from a compliance perspective, for an agent to enrol 20 students with no visa refusals than 40 students with 10 visa refusals. It is these key performance targets agents should be measured against.
- considering how you are setting enrolment targets, if you are using these.
 - Are they based on market research and intelligence?
 - Are they realistic?
 - Have you asked for input from your education agent on these targets?
 - Are they in line with your institution’s overall recruitment targets?

Remember that not every market is predominantly agent-led, so ensure your targets are adjusted for the individual market and allocate your resources appropriately.

- highlighting factors that may potentially impact both parties’ abilities to meet their objectives. External factors may include changes in government legislation, education and immigration policies, currency volatility, scholarship funding and, health emergencies. Also take into account potential internal risk factors, such as course or programme closures, changes in entry requirements and tuition fees.

Aggregator and sub-agent models

During the planning stage, you should have an open and honest discussion with your education agent around the use of sub-agents. If they are working with a network of sub-agents, then it is extremely important that the lines of responsibility for all objectives are clearly set and that everyone is aware of who is responsible for meeting targets and expectations.

Transparency and honesty is key here. Your contracted education agent should be able to tell you exactly how they intend to manage their sub-agent network in line with your expectations (eg application quality, transparent complaints process, market diversity, conversion rate, etc), and be able to demonstrate to you how this will work in practice.



Expert tip: Ask your aggregator or master education agent to explain how they will ensure the quality of student counselling provided by their sub-agents and consider how you intend to monitor this through your contract with them. It is recommended that they provide you with sufficient evidence that they are managing their network of sub-agents to deliver student services of an appropriate standard, and you have an agreed mechanism to monitor this, prior to contracting. Ensuring the quality and accuracy of advice given to students is the most important element of the provider-education agent relationship, so, as the contracting provider, you must be certain that the education agent can deliver services that meet or exceed expectations.

At the end of your planning conversations with your education agent you should both be clear on the activities which will be undertaken from this point through to the Annual review process. Of course market conditions evolve and it may be necessary to revisit these shared expectations during the recruitment cycle. As you will be considering a broad scope of outcomes – not just application and enrolment numbers – it is important that the objectives are properly documented, enabling accurate and effective assessment at the agreed review date. A full planning and review document template is available in the TEMPLATES AND ANNEXES chapter, but let’s look at a quick example.

Example objective setting for Fictional Agent

Objective	Activity	Target	Support required	Lead	Notes	Review date
Increase profile of Provider X in target market	Online advertising campaign on native language social media platforms	5,000 impressions 500 click-throughs	Latest visual marketing materials from Provider X	Fictional Agent	Full details of content plan, channels, landing pages, etc saved here	01.03.2022
Increase numbers of trained counselling staff in Fictional Agent head office (1/2)	British Council Education Agent Training Suite	100% of head office staff to successfully complete the British Council MOOC (Study UK: A Guide for Education Agents)	None	Fictional Agent		01.07.2022
Increase numbers of trained counselling staff in Fictional Agent head office (2/2)	British Council Education Agent Training Suite	Four head office senior counsellors to successfully achieve ‘Assistant Level’ of the British Council Education Agent and Counsellor Training	Provider X to cover the course fees for two head office senior counsellors.	Fictional Agent	Senior counsellors commit to presenting their learning to Fictional Agent’s office staff upon completion	01.11.2022

Once you have documented these objectives, you may wish to transpose them into a review scorecard to include as an annual addendum to the contract (see REVIEWING chapter for examples, and more details on scorecards and rubrics).

4. Investment and support

In order to make your objectives realistic and achievable, it will often be necessary for both provider and education agent to offer investment in resources and a commitment to provide ongoing support for projects.

From a resource perspective, particularly financial, we recommend that any support you've agreed to is detailed in your objective-setting document and clearly aligned to the specific project(s) to which it has been allocated. During the reviewing phase, it is also important to analyse how support has been provided, as this may affect the outcomes of activities.

You should also set clear expectations about the potential (or lack of potential) for any increased support in line with forecast growth in student enrolments. It is important to manage the expectations of education agents on this matter to avoid a misunderstanding which may, potentially, negatively impact the applicant experience.

'Joint target setting would be best practice, but it rarely happens due to a lack of time and resources.' - UK HIGHER EDUCATION INSTITUTION

It is also good practice to set the service expectations of each party.

- What are the communication procedures?
- Who is the dedicated contact for the education agent in the international office team?
- Does the education agent have a dedicated contact in other teams?
 - admissions
 - schools
 - for resources (eg training/marketing assets)
- What are the agreed response times for different interactions?
 - application to acknowledgement and decision turnaround
 - enquiry response times
 - CAS issuing from the provider
 - document submission
 - email response from the education agent

Providers should state their realistic turnaround times. Some providers choose to include service level agreements in their contracts to make this clear, as this helps the education agent to manage expectations from applicants and their families.

If your IT systems have the capability to capture the necessary data, then you should analyse the level of service delivery at the same point as you review the objectives. Failure to meet agreed service levels on the part of the provider may have significantly affected the education agent's ability to meet some of their objectives.



Expert tip: To maintain your service levels with your agents, you can provide a cascading list of contacts. If certain service level targets are missed, then your education agent can directly contact a staff member of increasing seniority. See example below.

Example contact cascade for agent immigration queries from Fictional Agent:

Days without response since email or call	Contact Name	Contact email	Phone numbers
First contact	International office	International.Office@providerX.ac.uk	+44(0)1202 123 4657
Three days	Admissions manager	International.Admissions@providerX.ac.uk	+44(0)1202 123 4658
Five days	Regional manager	Regional.Manager@providerX.ac.uk	+44(0)1202 123 4659
Ten days	Immigration manager	Immigration.Manager@providerX.ac.uk	+44(0)1202 123 4660

Prior to publishing this information, you should ensure that all provider contacts are able to commit to this level of service and be sure your agent will follow the agreed protocol. You could consider offering this cascade system as part of a reward framework (this is covered in more detail in the REVIEWING chapter).

A good question to ask yourselves before entering into the planning phase is ‘are we genuinely analysing the return on our investment in our education agent?’

Are your best-performing agents also the ones on whom you are spending the most time and money? What about the education agents who are exceeding expectations with minimal or no support from your provider? Are you assessing their contribution fairly and recognising their achievements?

Limiting support for your smaller agents (albeit inadvertently) by giving them less time, funding, support, office visits, etc, could perpetuate, resulting in a cycle of low performance.



Expert tip: Develop a simple matrix to record all the investment you have made on each education agent over the recruitment cycle. ‘Investment’ can include financial commitments (eg marketing and travel budgets), number of training sessions delivered, number of office visits, speed of application turnaround.

When you start to map this data against KPIs – particularly if you use a weighted review scorecard like the example in the REVIEWING chapter – then you may start to see a different picture of who is performing ‘well’. This can help you make more informed decisions about how to prioritise future marketing efforts and be prepared to provide strong evidence in any future business cases related to agent projects.

Marketing support

It is reasonable to expect your contracted education agents to commit some resources to marketing campaigns, both to promote your individual institution and their wider network of partners. The ICEF Agent Barometer 2019 confirms that most education agents do run promotional activity themselves and also highlights the continuing shift towards digital, with 82% of education agents saying they pay for online advertising.

The same research shows that the majority of education agents (80%) spend less than \$5,000 a year on digital marketing. This, combined with the fact that most agents represent more than 30 providers in the UK (BUILA and UKCISA, 2021), means that your education agent(s) may seek some marketing support from you as a provider to help them promote your institution. If you agree to commit budget to marketing activity delivered by the agent or via a third party digital agency, it is reasonable to expect to be able to develop the goals for the marketing activity together with your agent. The activity should demonstrably deliver measurable results for your institution, and the agent should provide the relevant data and analytics to allow evaluation. You should agree these data reporting parameters when you are setting the campaign goals and budgets.

The BUILA and UKCISA research (2021) found that education agents particularly valued:



Tailored (country-specific) marketing materials



Social media campaigns (on local social media channels such as WeChat or LINE, where possible)



Regular communications (just-in-time or targeted updates, but not generic newsletters)



Student-led marketing materials, including engagement with student ambassadors



Personalised communications from providers, ideally those that directly mention the agency name



Co-branded advertising (print or online)



Access to the provider's latest digital assets, ideally via an agent portal or alternative self-service provision, in order to meet students' increasing demand for digital materials



Expanding access to communication channels for agents. Students are increasingly expecting instant answers from their agents, so counsellors value contacts who can respond to simple requests by WhatsApp, text or instant message.



Agreement on how you will cross-promote each other on your websites. Students value and expect this. Any reference to the agent or provider should include contact details and what to do in the event of a complaint.



Agent perspective: 'Personally, the university should always put their education agents on their website, and the education agent should put the university on their website. That is the absolute minimum.'



Student perspective: The BUILA and UKCISA research (2021) found that many prospective students were not fully aware of which education agents were working with which provider, with several providers not publishing full details of their contracted education agents.



Expert tip: As a matter of course, all providers using education agents must publish and keep an updated list of their education agents on their websites. This ensures prospective students can check that they are engaging education agents that officially represent the provider and who have completed appropriate training to effectively support the student to make an informed decision about the provider.



While in 2020–2021 there has clearly been a shift towards digital recruitment, driven mainly by the global COVID-19 pandemic, the relatively low levels of investment from education agents in digital marketing (as shown in the ICEF data, 2019) is still at odds with current student behaviour and the preferences of generations Y and Z, who are highly digitally connected. In the 2019 QS International Student Survey¹, 87% of prospective students indicated that online sources, such as social media, play a key role in their study decisions. The disconnect between education agent marketing practices and student behaviour indicates an opportunity and, in fact, necessity for providers to fill that gap with marketing support and skills training.



Expert tip: Establish a ‘digital marketing innovation fund’ to help agents grow their digital marketing capabilities. In practice, regional managers would work with education agents to identify opportunities in their markets and apply for funding. Funding could be allocated in rounds, in the form of grants, and matched with mentoring and oversight from the provider’s central marketing and campaigns teams, ensuring quality execution and measurement of outcomes. Not only would this enable agents to develop new skills and attract new leads for the provider, but it would also provide an opportunity for cross-cultural learning and internal cooperation within the broader marketing and recruitment portfolio.

¹ International Student Survey 2019 available at <https://www.qs.com/portfolio-items/international-student-survey-2019/>

5. Aligning your plans

A final consideration for this planning phase is to evaluate how your individual education agents' plans fit in with your overall operation plan.

Most providers will have some high-level international student enrolment targets associated with university budgets and load planning. These may be broken down into greater detail such as by students' country of origin, study level or school of study, or they could even be broken down by course. Use these targets to determine your overall enrolment targets for each of your recruitment channels – direct applicants, through academic partnerships, from your pathway provider, through your education agents, etc – then align your education agent plans to your overall channel plan. This alignment of planning should give you a channel recruitment profile, which will help you prioritise areas of work.

As we have highlighted in this chapter, enrolment numbers should not be the only metric you use to plan with and review your education agents. Ensure that your individual plans are aligned with your overall international strategy. For example, at a provider level the focus may be to mitigate risk by building a wider network of education agents and partners. If this is the case, then make sure your plans align to this by allocating sufficient support to new education agents.



Expert tip: If possible, your planning phase should be completed before top-level institutional targets are set. In this way, the more granular agent objective setting data and analysis can be built into the institutional target setting process and, as a result, targets may be more accurate and effective.

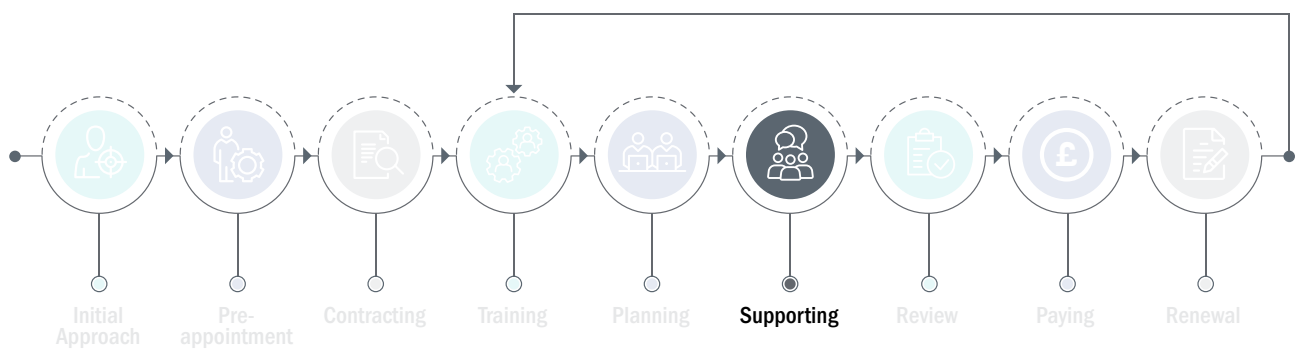
Best practice:

- ✓ Setting objectives that are clear, achievable and measurable, allowing for a constructive review and assessment process.
- ✓ Building a positive relationship with your education agents and promoting commitment to objectives through collaborative working.
- ✓ Developing a robust and documented process of planning, feeding into an equitable review process.
- ✓ Ensuring that investment and support is allocated where it will be most effective.
- ✓ Aligning plans to fit in with and support the provider's international strategy and plans.

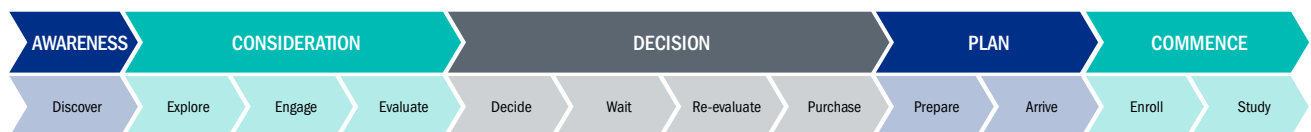
SUPPORTING: Optimising your education agents

You've selected, appointed and trained your education agent and you've worked together to set expectations and agree a plan. In this chapter, we look at the ways in which you and your colleagues can support your education agents to provide prospective students with expert advice and guidance.

1. Raising student awareness
2. Seeding student consideration
3. Influencing student decision making
4. Helping students plan
5. Supporting students to commence



It is now time to put that plan into action and support your education agent to deliver on your mutual expectations. As discussed in the TRAINING chapter, the availability of 'just-in-time' sales information has become increasingly relevant to both traditional and new digital aggregator agent models; expecting education agents to know everything about every institution they represent is not realistic so while delivering induction and ongoing training is important, it must be supplemented by effective support from and access to key information and process gate-keepers. Note that some support activities sit across multiple stages such as remaining highly responsive to their enquiries which is critical throughout the prospective international student journey.



Expert tip: Meet or exceed the expectations you set earlier in the partnership life cycle. Honesty is definitely the best policy. We all want a 24 hour admissions turn around but if you know it's going to take 3-5 weeks, say so and explain why. Providing realistic time-frames and honest advice to your partner will help them manage your student expectations. Without this, the education agent will be dealing with disgruntled students and families, which will in-turn erode the relationship with you and your provider.















Expert tip: Work with your education agent 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.

2. Raising student awareness (Discovery)

At the ‘awareness’ stage, prospective students are just beginning their search. The education agent is promoting the UK as a study destination and their services to help guide the student.

Supporting your education agents to raise awareness among prospective students

		AWARENESS			
JOURNEY STAGE		DISCOVER First Impressions (of country/agent/provider)			
STUDENT PERSPECTIVE	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
EDUCATION AGENT VIEW	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	ACTION	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)

There is a wealth of activity that can be implemented to support your education agents. These activities will all have varying resource implications, so you should put in practice those that will have the biggest impact within your resource capacity.

Many of the provider actions listed here will have been initiated during the TRAINING and PLANNING stages and remain important throughout the prospective international student journey.

Affiliate/Endorsement marketing activity

EASY TO DO | £-£££

The degree of promotional support will depend on your budget allocation and education agent strategy/plans. Ultimately, as a UK provider, students are interested in your brand, so affiliate/endorsement marketing helps education agents to generate leads and gives them credibility among prospective students, which in-turn increases the size of your leads pool.



Expert tip: Make sure marketing outcomes are measurable and track progress so you can be confident of a return on investment for future activities (See PLANNING Chapter). This might include the use of unique URLs on print media and tracking code on digital media. Work collaboratively with your education agent partner to analyse the response.

List Education Agents on your Website

EASY TO DO | £ | IT SOLUTIONS AVAILABLE

List your contracted education agents on your website including the locations (virtual and/or physical) of counselling offices; listing your education agents by 'country and city' will help students easily find support near them. Make sure to include links to the education agent website and up to date contact details.



Student perspective: I want to be confident that my education agent has the authority to represent you and will be able to give me expert advice on your institution

Example of a provider's education agent search function for prospective students

City	Company Name	Office Address	Contact
Ca Mau	SIT Education	Ca Mau Office 40/1A Phan Ngoc Hien Street, Ward 4	nam.nguyeng@sit.edu.com
		Ca Mau - 96000 Vietnam	+84 780 353 1157
Can Tho City	KOP Education Pty Ltd	261 Floor, Room 201, 131 Tran Hung Dao Street, Ninh Kieu District	info.cantho@kop.com
		Can Tho City - Vietnam	+84 91 073 3667
Da Nang	EA VIETNAM LTD. CO.	164-171 Nguyen Van Linh St Thanh Khe District	rec-cc@ea vietnam.edu.vn
		Da Nang - Vietnam	+84 236 354 7441
Da Nang	StudyTRK	71 Le Dinh Ly Street, Thanh Khe District	trasegetr@studytrk.org
		Da Nang - Vietnam	+84 236 310 4058

Linking from your website to your education agent's helps avoid any confusion among students and can improve your partner's website search outcomes (**remember to ask them to do the same to your site**). Maintaining the accuracy of this list is very important for both your education agent and prospective students.



Expert tip: Include a clause in your agency agreement requiring your partner to update you of any new, retired or changes in office locations. Education agent management software platforms (AMPs) sometimes have integration functionality allowing your education agent to update their office information in a portal which automatically updates your website.

3. Stimulating student consideration

Prospective students are now exploring their options in more detail and starting to engage with providers and education agents to get deeper insights and evaluate their options.

Supporting your education agents to seed prospective student consideration

		CONSIDERATION							
JOURNEY STAGE		EXPLORE Gathering information	ENGAGE Enquiring and making contact		EVALUATE Considering options				
STUDENT PERSPECTIVE	THINKING	Where are my friends going? Can I get in? Which course is best for my career? Is it safe?	Can I (my family) afford this? Will I learn the things that are important to me? Will I enjoy the UK?	Do they care about me? How are they treating me? I want reassurance about things I read online What are the careers outcomes from this provider?	I want personalised advice in a way I can understand How do I evaluate the different providers offering my preferred subject? Will I get practical experience as part of this program?	Where will I live? What do other students say? Can I work while I study? 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 / a local community from my country?		
	FEELING	EXCITED	OVERWHELMED	NERVOUS	ANXIOUS	HAPPY	UNCERTAIN	STRESSED	DISTRACTED
	DOING	Visiting provider websites and social media Asking friends, family, teachers for recommendations Researching course fees, scholarships, campus, location Looking for help to make informed decision e.g. from an education agent	Reading course guides Visiting campuses, virtual open days Looking for student reviews Researching COVID-19 situation	Checking eligibility Asking for specific course and careers advice Waiting for answers from provider/education agent	Meeting with current/past students Meeting with provider staff Searching for points of difference?	Asking friends and family for advice Reading online forums and social media Hoping to be courted / given a great experience Validating official information with peers	Searching accommodation and living costs Creating a budget and plan for funding Shortlisting potential providers		
EDUCATION AGENT VIEW	OBJECTIVE	Be seen as professional and knowledgeable with good partner providers		Be appointed by students as their representative		Getting student to submit applications to a range of contracted providers			
	ACTION	Advertising (print and digital)	Running events/presentations etc (online and in person)	Responding to emails / phone calls Getting students to sign agent-student agreement Advising and guiding student / family	Chasing and converting prospects to applicants Promoting provider webinars and events	Advising and guiding student / family Explaining the processes involved	Determining the students eligibility and means Entering student details into Agent CRM		
PROVIDER SUPPORT	ACTION	Promoting and co-branding interview and counselling session through advertising and website Engaging training (Training chapter) Sharing and collaborating on content for the agent's social media channels	Seeding word of mouth promotion through current students and alumni. Participating in promotional events and fairs	Supply up-to-date marketing materials Respond quickly to enquiries Refer / introduce qualified leads to a local agent for assistance	Capture information requests and adapt training and information architecture to meet agent needs Use relevant and charismatic academics to engage with the prospect pool	Use student ambassadors to engage with the prospect pool Providing career outcomes information (by course) and working while studying opportunities Remind agent of campus and student life aspects including safety mechanisms	Provide clear and accurate tuition fee and cost of living information Provide accommodation information Ensure website information is up-to-date and relevant		

CONSIDERATION (Explore)

The Discovery and Explore stages often merge into one another, but the student is now a little more deliberate in their search for information and is thinking about the drivers and issues they want to address. The sheer quantity of information available can have them feeling slightly overwhelmed.

Implementing the following recommendations (within your resource constraints) will support your education agents in providing an excellent applicant experience.

Promoting and co-branding interview and counselling session through advertising and website

EASY TO DO | £

Organising and promoting joint events is a good way of supporting your partner and generating new enquiries that you review your event against your goals. Provide your education agent with appropriate assets for them to promote the event simultaneously with promotion through your own website and social media channels. It is important and track your promotion to determine the effectiveness of channels.

Seeding word of mouth promotion through current students and alumni

EASY TO DO | £

Our research showed that ‘word of mouth’ is the most important promotional tool providers and education agents have. Asking your current students and alumni from a particular location to forward promotional materials to their networks is a great way to help your education agents engage with strong prospects; this is particularly useful when promoting interview and counselling sessions. If possible, find current students or alumni who used the specific agent in question so they can speak to their service provision.

Sharing and collaborating on content for your education agent’s social media channels

EASY TO DO | £

In their region, education agents will often have a deeper social media penetration than your Provider has from the UK. Sharing and collaborating on content for their social media channels is a win-win situation, highlighting the strong relationship between agent and provider to any prospective students.



Student perspective: “Provide more facts about how students would experience things on the ground - so international students have a greater idea of 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.”

Participating in education agent’s promotional events and fairs

EASY TO DO | £-££

Virtual or face-to-face, the presence of provider staff, particularly dynamic teaching and academic staff for popular subject areas, is a great way to help your education agent source prospects for you. It will also provide you with useful feedback on the education agent’s ability to source the profile of students you are looking for.

CONSIDERATION: ENGAGE

Ensure website information is up-to-date and relevant

EASY | £

Students use provider websites to source new information and to validate the information your education agent has provided. It is imperative therefore that you keep your education agent updated with changes and that they can rely on the information on your website (or agent hub) for counselling students. This is true throughout the student journey but particularly important at this decision making stage. Of particular importance at this stage are:

- **Clear and accurate tuition fee, scholarship and cost of living information and payment structures.** Poor advice or a failure to keep information up-to-date in this area could potentially lead to a student receiving a visa refusal.
- **Career outcomes information (by course) and working while studying opportunities.**
- **Accommodation information.**



Expert tip: The Competition and Markets Authority has published advice to help universities understand their responsibilities under consumer protection law when dealing with undergraduate students. It is recommended that all providers follow this advice and that you make your education agents aware of the same:

<https://www.gov.uk/government/publications/higher-education-consumer-law-advice-for-providers>

Respond quickly to enquiries

MODERATE | £-££

Responding quickly to education agent enquiries keeps the education agent thinking of you and helps to build a trusting relationship. This is seen as one of the key benefits of engaging in-country/region staff.

Supply up-to-date marketing materials

EASY | £-££

This service will depend on the education agent. Most education agents value print copies of the latest prospectus. They also value print-on-demand course information made available digitally and they also often need digital assets - logos, videos, images, etc. Note that some agents will have strict branding guidelines of their own, so are less likely to display your specific promotional materials in their offices.



Expert tip: There are a number of integrated software platforms that allow you to manage education agent preferences and education agents to order marketing assets. There are also print, storage and distribution companies located in key regions that may help reduce freight costs.

Capture information requests and adapt training and information architecture to meet education agent needs

EASY | £-££

Logging education agent information requests (ideally in a CRM or AMP) can help you build up a useful frequently asked questions table which can be used to

- tailor training to the needs of education agents
- tailor content on your website and in your marketing communications
- Help develop 'personas' and prospect scores based on tracking subsequent behaviours

Many providers develop agent handbooks which provide top-level information and often contain deep links to useful information on agent portals, course directories, etc



Expert tip: As more data is captured, investigate the possibility of using a chatbot to automate responses to the most commonly asked education agent questions. A person should always be available if the chatbot cannot answer the question, but this approach has freed-up staff time in other industries. Chatbot enquiry data can also be analysed and used to inform your agent communications and training plan.

Use relevant subject matter experts to engage with your prospect pool

EASY | £-££

When choosing a provider, students are considering multiple factors - location, ranking, sustainability, etc, but ultimately they are looking for a course(s) that meets their academic needs. Using academics and teaching staff to answer student questions through webinars and/or in-country sessions can significantly influence their decision, but only where the subject matter expert has the necessary intercultural communication skills. You should spend time briefing such staff on the target country's education system and key cultural competencies before running these types of activities; subject matter expertise alone is not enough.



Expert tip: Having a professional staff member alongside the subject matter expert to answer process and local entry requirement questions is often appreciated by students and agents alike.

Refer/introduce qualified leads to a local agent for assistance

EASY | £

Depending on your strategy and/or the characteristics of markets you are working in, you may choose to refer students to an education agent fairly early in the cycle. This might be because there is a high risk of fraudulent documentation being submitted and you need a trusted education agent to filter applications for you, or a student's personal circumstances mean they would benefit from some assistance with their application. This may also happen at the Plan stage of the student journey where visa assistance is required.

CONSIDERATION: Evaluate

Use student ambassadors to engage with the prospect pool

EASY | £

Peer-to-peer student engagement through the funnel is shown to have a significant positive impact on conversion rates from enquiry to application, offer to acceptance, and acceptance to enrolment. There are some purpose designed platforms that can help facilitate these interactions and provide monitoring tools such as keyword tracking and micropayment management. These tools can also be used to link academic and support staff to prospective students.



Expert tip: It is imperative that you spend time selecting and training your student ambassadors so they can help effectively promote you. Some of the peer-to-peer student recruitment platform companies have designed ambassador focussed training and can help you with this.

Remind education agent of campus and student life aspects including safety mechanisms

EASY | £

May include campus and accommodation security, student buddy programs, COVID-19 measures, groups and societies (faith, cultural, etc). Keeping education agents abreast of your protocols and policies can be a critically important decision making factor for some students and families.



Expert tip: Consider the opportunity cost of implementing a 24/7 on-demand student safety (on and off-campus), health and wellbeing solution; some providers have found their offerings to be particularly attractive to prospective students and their families. Make sure your education agent is aware of your approach and how it can benefit their students.

4. Influencing student decision making

The student has now done all of their research and is deciding on the courses and provider(s) they are going to apply for. This may also affect which education agent(s) they engage with as applicants will value agents with a formal agreement with their provider(s) of choice.

Supporting your education agents to influence prospective student decision making

		DECISION														
JOURNEY STAGE		DECIDE Applying for course, scholarship or accommodation	WAIT Waiting for outcome	RE-EVALUATE Considering options	PURCHASE Confirming study plan											
STUDENT PERSPECTIVE	THINKING	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?	I cannot find all the documents I need These courses and providers can get me where I want to be Is my English good enough? What if I make a mistake on the applications?	When will I find out? Have I done/provided everything I need to? Why haven't they contacted me?	Will I get in? I don't think they want me Did my application submit properly?	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	Provider X were with me at every stage of the journey This is a lot of money, I hope I'm making a good decision How do I pay? Is there a payment plan?	What if I don't get a visa? Will I have to quarantine? How will that work? I want to start now							
	FEELING															
	DOING															
	OBJECTIVE	Making the student's experience as painless as possible		Managing the student's (family's) expectations'	Getting offers on behalf of the student	Converting the applicant to an acceptance		Getting the student visa application in as quickly as possible								
	ACTION															
PROVIDER SUPPORT	ACTION	Ensure agent knows the likely turn-around times so they can manage student expectations	Try to keep the application process and requirements as simple as possible and online	Make application decisions within the time-frame expectations you have set	Where appropriate provide information targeting parents and guardians	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								
		Integrate agent CRM with application system	Simple and quick scholarship application and recognition process	Send all communications to the education agent or agent and student (NOT STUDENT ONLY)		Reminders about accommodation /scholarships, etc	Facilitate opportunities to talk with current students and subject matter experts									
		Acknowledge application and outline time-frames (including for selection activities)		If student is not eligible for their preferred course offer an alternative (check with education agents if this strategy is appropriate in their markets)												

DECISION: Decide

Simple (integrated) application process

MODERATE | ££-£££ | IT Solutions available

While most undergraduate applications are received through UCAS, many providers have direct application forms for their international students, irrespective of level. Education agents often complete part or all of the application form on the students behalf so keep the form concise and ask only what you need for a particular course. Also, ensure you have fields for capturing education agent contact details that will tag them to their students through the student record life cycle (application to alumni). Not only will this make paying your education agents much simpler, but also provide useful long-term quality indices for use when REVIEWING your partner and identification of students for word-of mouth promotion.



Expert tip: Dynamic application forms which adapt according to particular course information, country and document requirements, etc, can save a lot of education agent time and effort. Where possible include pre-population functionality, eg if student details have been previously captured, or if your education agent is clicking through from a course page on your website. There are many application and admissions platforms available specifically designed for international student applications with education agent functionality.



Expert tip: Your online application form should have an ‘at a glance’ snapshot of what has been completed and what is still outstanding. This will allow agents to upload documents, complete data, etc without needing to contact your admissions team. More advanced systems can also ‘push’ notifications to agents reminding them what is still outstanding.

Be honest about turn-around times so education agent can manage student expectations

EASY | £

Provide your education agent with actual (NOT aspirational) application assessment turnaround times by course type/subject. The same is true for other provider actions through the admissions process eg acceptance to CAS issuance. You may choose to give a range rather than a specific time. Provide your agents with a direct communication channel should the service level fall outside this range.

Simple scholarship application process reminders

EASY | £

This will depend on how you administer scholarships - integrated into the course application process or an independent process - however, ensuring the process is simple and that the education agent is well informed of the opportunities, criteria, deadlines and process will help them sell your offerings more effectively.



Student perspective: “It is common for someone who is not familiar with the process to feel overwhelmed and therefore it is very important education agents to be able to properly communicate with international students” (Undergraduate Student, 2020)

Education Agent CRM to provider application system integrations

MODERATE | £-££ | IT Solutions available

Many education agents operate their own CRM system which captures a lot of the information ordinarily required in provider applications. Integrations through APIs or similar to your provider’s application system, can significantly reduce the time and error-rate associated with ‘rekeying’ data thereby increasing an education agent’s capacity to grow their business with you.

DECISION: Wait

Fast decision turnaround time

MODERATE | £-£££ | IT Solutions available

Whatever the decision, delivering a fast, accurate response to an application reinforces positive student perceptions of your education agent:

- Offer > education agent can focus on converting the student to acceptance stage
- Rejection > education agent can help the student to gain admission at another partner provider
- Alternative Offer (pathway) > make sure you have told your education agent that this is a possibility so they can manage student expectations
- Alternative offer (different course or level) > it is advisable to consult your education agent before doing this so they can counsel the student accordingly. Not doing so can create confusion and erode the provider-agent-student relationship

Where an additional process is required eg interview/audition it is still important to be clear about time-frames eg are they held in blocks and if so when?



Agent perspective: Education agents reported being put in difficult situations with student families by providers taking significantly longer than they said they would to assess applications, especially where students receive rejections but the processing delay has resulted in them missing application deadlines for alternative providers.

Send all admission communications to education agent as well as student/parent/guardian

EASY | £

This helps education agents develop and maintain an expert knowledge of your provider's processes and to be prepared to answer any questions from students and/or their parents/guardians.



Expert tip: Review all of the communications you send to students and education agents throughout the admissions funnel and adapt them to be absolutely clear about what happens next in the process and how long it usually takes. Consider including communications to parents/guardians for certain student groups. Put in place processes that ensure the education agent receives a copy of all communications in case they are asked questions about its contents.

DECISION: Re-evaluate

Reminders to education agent about accommodation/scholarships/ancillary offerings

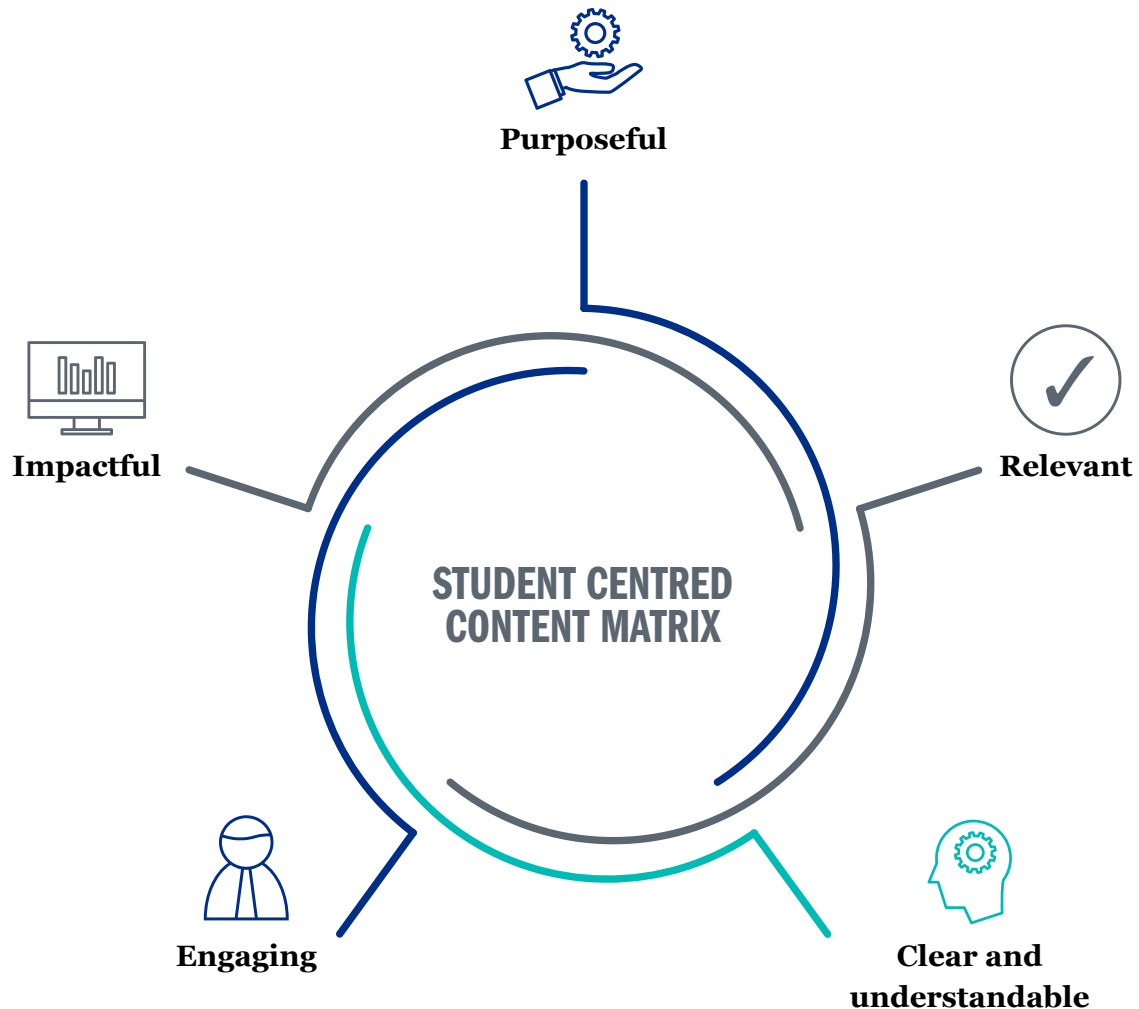
Special updates e.g. COVID-19 impacts

EASY | £

Build reminders about ancillary offerings such as accommodation, scholarships into your personalised conversion campaign. Where possible, try to provide your education agent with advanced notice of the information being sent out (better still engage them in the development process).



Expert tip: Mine your existing enquiry and admissions data to see when students converted to the next level or other decisions are made. Look for trends by market and build up “typical student profiles” - personas - for each market then tailor your communications (content and timing) as well as your market activity to the decision making points and characteristics of these personas. Use the expertise of your education agents to refine and endorse these personas. Develop student centred content using this matrix:



Converting students through the funnel is good for you and the education agent so working together on this - planning and delivery - will help you get the best results.

Facilitate opportunities to talk with current students and subject matter experts

EASY | £ | IT Solutions available

Integrated with your communication plan, using existing students and your subject matter experts at this stage demonstrably enhances your chance of converting students to the Purchase stage. Where possible match prospective students with current students or alumni from their home country as this helps answer the question “Can someone like me be successful at this provider?”



DECISION: Purchase

Quickly acknowledge and process deposit payments

EASY | £-££ | IT Solutions available

A quick turnaround at this stage is important in helping the relationship between the education agent and student. The student's expectation is that they will receive acknowledgement as soon as they pay their deposit. Ensure that you offer students multiple payment channels (eg credit card, bank transfer, online payment) which minimise additional charges. IT solutions exist which can facilitate payments in multiple currencies.

Quickly issue CAS/visa supporting letter

EASY | £-££

Students and agents expect that their CAS is issued quickly and accurately once all requirements have met, to allow them to apply for a visa.

NOTE: Provider processes will vary and not all courses require a CAS to be issued, however whatever the context for your provider, the need to quickly respond at this stage remains.

















Expert tip: Provide agents with a detailed checklist of all the documents that must be submitted before a CAS can be issued. If possible integrate this into your online admissions portal so agents can see instantly what is still outstanding.

5. Helping Students plan

The student has a place on their course of choice at your provider, they are now thinking about their visa application and travel and accommodation arrangements, etc.

Supporting your education agents to help students plan

		PLAN			
JOURNEY STAGE		PREPARE Getting ready to start	ARRIVE Proving/disproving perceptions of location and university		
STUDENT PERSPECTIVE	THINKING	How am I going to get there? Will somebody meet me when I arrive? What do I need to bring / buy? The visa application process is complicated	Will they have the food I like? How am I going to cook for myself? I got a visa refusal I've never been overseas before	How do I get from the airport to my accommodation? An official asked me lots of scary questions at the airport How will I make friends? My visa took a long time to process so I'm late and the course has already started	How do I get to the campus I am so tired and lonely and its cold and wet How do I get a part-time job?
	FEELING	 EXCITED	 ANXIOUS	  LONELY EXCITED	  NERVOUS HAPPY
	DOING	 Applying for a visa Making travel arrangements Researching student life in provider location	 Prepare for visa interview (if applicable) Downloading/consuming orientation materials/app Attending pre-departure briefings	 Moving in to accommodation Getting set-up in country: e.g. buying bedding/cooking materials, etc Phoning/Messaging home to confirm safe arrival	 Buying books and study materials Meeting people /making friends Exploring and getting used to new surroundings
EDUCATION AGENT VIEW	OBJECTIVE	Getting the student's visa and preparing/orientating them for travel to and study at the partner provider		Uneventful travel and arrival of student at partner provider / accommodation	
	ACTION	 Making travel arrangements on behalf of the student Running / Participating in pre-departure briefings Connecting student with other students	 Applying for and chasing refunds (where appropriate) Arranging late enrollment extensions Counselling on items to pack and items to buy there	 Checking students have arrived safely Arrange late enrollment extensions	 Applying for and chasing refunds (where appropriate)
PROVIDER SUPPORT	ACTION	Involvement of 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 Produce student arrival videos for use by the agent	Promoting buddy schemes and facilitating peer to peer interactions Remind education agents of provider contacts for problem solving

PLAN: Prepare

Quickly refund deposits where a student cannot travel

MODERATE | £-££ | IT Solutions available

The refund criteria, process and timelines should be clearly articulated to education agents in their training and reminders sent to them 2-3 months prior to your provider's intake. Education agents do understand that the lead-up to an intake is often your provider administration's busiest time, but where there are appropriate grounds for a refund, it should be processed quickly (ideally within 5 working days).



Agent perspective: Many education agents complained that where a student had a visa rejected, the refund process was convoluted and/or slow. This has caused them reputational damage as the prospective student gets upset that they (anger focussed on the education agent rather than the provider) are not returning their money quickly.



Expert tip: To avoid possible money laundering or financial impropriety activities, make sure your provider has a clear policy which stipulates that refunds can only be made to the account/card that the original payment was made and that articulates the criteria for exemptions to this process. Have clear processes in place for determining the genuineness of a refund application.

Involve education agent in pre-departure briefings

EASY | £-££

Education agents may help facilitate the organisation of pre-departure briefings through virtual or in-country events. Where your provider is organising pre-departure sessions for large groups of students, some of which may have used one of your education agents, it is still good practice to invite them to attend so they can learn from the session.



Expert tip: Consider facilitating networking opportunities as part of your pre-departure briefing so prospective students can meet one another; having some familiar faces when they arrive at your provider can help them to settle into their new environment. Inviting returned alumni to share their stories is also often welcomed.

Provide a simple 'what to bring check-list'

EASY | £

Some of your education agents will not have had the opportunity to travel to the UK or to your provider so may not have a clear picture of the weather, environment, boarding inclusions, etc. Providing a simple checklist is a great tool for them when they are preparing their students to travel. Similarly, your checklist might include some examples of what students shouldn't bring because they are widely available locally or because of import restrictions.

Easy access to and innovative orientation materials and translated orientation/welcome for EFL students

MODERATE | ££

Your student orientation marks a shift from the student's focus being primarily on their education agent to being primarily focussed on you and as such is another opportunity to make a good impression. Work with the relevant staff at your provider to deliver orientation in innovative ways that reflect the learning environment of your provider. Invite education agents to preview and have input into your orientation design, possibly including market localised introductions for example. Where you are offering English pathways, try to include appropriately clear language or translated/subtitled material to ensure students understand the content.

Details of airport pick-ups and welcome programmes

EASY | £-££

Where a provider is facilitating this, try to provide details to your education agent as early as possible so they can help facilitate aligned student travel arrangements. Online booking forms for airport pick-ups can help facilitate the process.

PLAN: Arrive



Expert tip: Remind education agents of the key contacts for problem solving when students arrive and commence. Often students will not know how to navigate your provider's services and so will address any issues to their education agent. It is important they know who to put the student in touch with to deal with anything that arises and that the nominated staff are expecting and ready to be contacted.

Notify agent of student arrivals

EASY | £

Where possible notify the education agent when a student has arrived in the UK. This will help them address any family concerns and helps them deliver on their duty of care to the student. This information should be readily available as part of the enrolment process.

Promoting buddy schemes and facilitating peer-to-peer interactions

EASY | £-££ | IT Solutions available

The use of buddy schemes can significantly help a newly arrived student to settle into their new environment. This type of initiative is often well received by education agents.

Produce student arrival videos for use by the education agent

MODERATE | ££ | IT Solutions available

Where consent has been given, producing arrival videos is great content for education agents to promote through their social media channels and helps counsellors understand the student experience at this stage which will help them to effectively counsel future students.


















Expert tip: Students will want to notify their family and friends of their arrival (as well as their education agent). Providing free internet access possibly through a prepaid mobile data package to new arrivals will allow students to do this both directly and through social media channels giving you some relatively low cost promotion.

6. Supporting students to commence

The student is now ready to formalise their enrollment with you and begin their studies. Your education agent may still be in close contact with their/your student, helping them resolve any issues and responding to enquiries from the student's family.

Supporting your education agents to support students to commence

		COMMENCE								
JOURNEY STAGE		ENROLL Getting ready to study		STUDY Comparing the learning experience/ content with your expectations						
STUDENT PERSPECTIVE	THINKING	The provider doesn't have one of my documents and won't let me enrol Provider person X was amazing and helped me through the enrolment They've cancelled unit X from my course which was one of the main reasons I came here Why is this all taking so long?	Everybody speaks English so fast - I don't know what is going on They have some really cool clubs that I'm going to join I've made it! I miss my family/friends/home	I'm finding it really hard to adapt academically and culturally I don't understand my lecturer I haven't got access to the provider IT systems Where is my classroom?	The facilities are amazing How do I use the library? Everybody seems to know what they're doing My first assignment is due in 3 weeks - it's too soon!					
	FEELING	       	EXCITED	HAPPY	NERVOUS	APPREHENSIVE	EXCITED	OVERWHELMED	STRESSED	STIMULATED
	DOING	 Attending welcome programmes/orientations Completing enrollment formalities Receiving and analysing class timetable Registering with Police/Doctor/Embassy, etc	 Searching for part-time work Making friends Accessing provider support services Setting up a bank account/mobile phone/internet/utilities, etc	 Start classes - English/Degree/A-Levels, etc Tell friends and family about your experience	 Going through academic culture-shock					
EDUCATION AGENT VIEW	OBJECTIVE	Being seen as professional and supportive – receiving student / provider endorsements		Be paid for work undertaken						
	ACTION	 Problem solving on behalf of student Confirming enrollments	 Requesting student / provider endorsements and testimonials	 Invoicing provider (commission) Reviewing intake and preparing for next intake						
PROVIDER SUPPORT	ACTION	Send agent student enrollment details to education agent so they can invoice you quickly Assisting agent/student with issues in a timely manner	Pay commission in a timely fashion Send anonymised student feedback on services to agent as appropriate Provide student testimonials	Remind agent of any trailing commissions as student progresses Send feedback on students to agent						

COMMENCE: Enrol

Send student enrolment details to your education agent so they can send you their commission invoice you quickly

MODERATE | £-££ | IT Solutions available

Paying your education agent is subject to its own chapter: FINANCIALS. However, a proactive approach where you send them details of eligible student enrolments and the amount payable, enabling them to invoice you quickly, is appreciated by your education agents.

Assisting education agent/student with issues in a timely manner

MODERATE | £

As previously indicated, students often ask their education agents for help at this time. While it is often an extremely busy time of year, it is important that you find ways to address issues quickly so students can commence their studies with minimal disruption. Doing so will take the pressure off your education agent and help them to present your provider in the best light possible.

COMMENCE: Study

Pay commission in a timely fashion and remind your education agents of any trailing commissions as students progress through their programme

MODERATE | £-££ | IT Solutions available

Paying your education agent is subject to its own chapter: FINANCIALS. However, a proactive approach where you send them eligible student enrolments and the amount payable so they can invoice you quickly, is appreciated.



Expert tip: Approaches to paying your education agent including expert tips on how to streamline your processes are provided in the FINANCIALS chapter.

Provide feedback to your education agents on both student quality and student perceptions of their services

EASY | £

This is covered in more detail in the REVIEWING chapter, but providing your education agent with constructive feedback on the students they've sent you - in terms of academic quality, course progression, and administrative ease - and curated, anonymised student feedback can help them improve the characteristics of students they send you and their services to students.

Provide your education agent with student testimonials

EASY | £ | IT Solutions available

Student testimonials are great proof points for education agents counselling new students at every stage of the prospective student journey.

Gather feedback from students on their education agent experience

EASY | £

By embedding questions relating to the application journey (both with the agent and the provider) in your existing new student surveys, you can gather constructive information which can inform your future planning and target setting with your education agents.

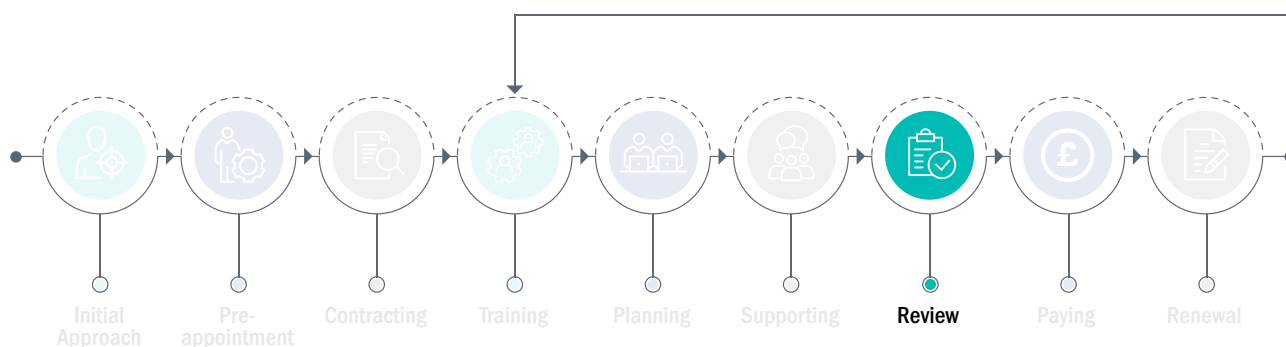
Best practice:

- ✓ 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.

REVIEWING: Assessing and recognising your education agents

In this chapter we look at approaches to monitoring and reviewing your education agents, what to do when things are not going as planned and the importance of recognising success.

1. Compliance with the National Code
2. In-cycle tracking
3. Annual review
4. Renewal/non-renewal decisions
5. Recognition



International student enrolment numbers have traditionally been the main performance metric for education agent activity, but they are not the only or fairest indicator of an education agent's performance. Moreover, providers have often focused on end-of-cycle reviews rather than adopting more proactive in-cycle monitoring that would allow them to take corrective or enhancement actions to improve end-of-cycle results.

BUILA and UKCISA research (2021), which included consultation exercises, found that qualitative measures (in addition to quantitative) could also help providers better evaluate their education agent performance; in particular, sourcing prospective student feedback on their experiences. The same research illustrates some of the other assurance points that you may consider integrating into your provider's education agent performance evaluation mix. This is not an exhaustive list and you may come up with alternatives. It is a personal choice how you categorise the different indicators.

Admissions funnel

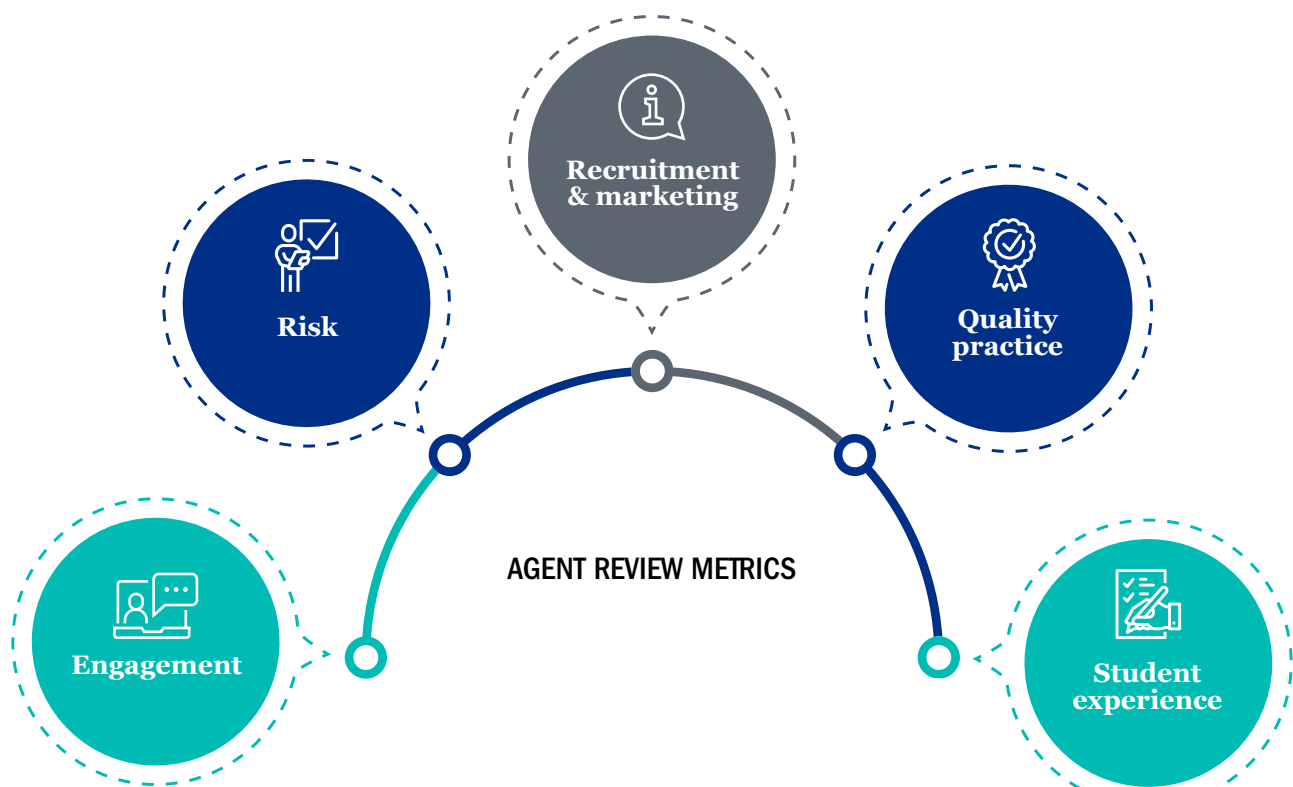
- Enrolment numbers
- Priority aligned enrolment numbers
- Conversion rates
- Withdrawal rates
- Use of online application form
- Application completeness

Visa/Legislation

- Home Office feedback or flag
- Visa issuance success rates
- CMA compliance

Contract compliance

- Applications from approved region
- National Code compliance
- Use of sub-agents (where not permitted)
- Appropriate use of provider brand



Student feedback

- Formal student complaints
- New arrivals survey
- Social media comments and reviews

Ease of doing business

- Partnership transparency
- Change of agent requests
- Dispute resolution
- Using appropriate communications channels
- Poaching students from others




Promotional activities

- Appropriate display of brochures
- Event/activity lead quality
- Marketing RoI
- Proactive marketing activity
- Website accuracy



Expert tip: Remember, your review process is not about trying to find fault. Education agents have indicated that when providers frame the evaluation mix in the positive (eg ‘application offer rate’ rather than ‘application rejection rate’) it keeps your relationship success-oriented, and recognising their success in formal or informal ways enhances partnerships.

Not all measures will suit all provider contexts, so you will need to decide what mix will be the most appropriate for your evaluations. Some of the things you might consider are:

-  your education agent’s business model – eg some measures may be more or less important for evaluating aggregator or B2B agents than they are for direct education agents;
-  the region(s) in which your education agent operates – eg greater emphasis may be placed on visa success rates in higher-risk markets
-  the status/nature of the relationship with a particular agent – eg an established education agent partnership may warrant a lighter touch review or longer review terms than a new education agent partnership

As also highlighted in the TRAINING and PLANNING chapters of this guide, as part of the evaluation process, it is important to spend time setting expectations early on with your education agent. It is essential to be transparent about what your expectations and targets are, and how and when you intend to measure your agent’s performance in relation to them.



Expert tip: Take a tailored approach to setting your education agent review criteria. It is not necessary to evaluate every education agent using the same measures or metrics, provided you are equitable and transparent with your partner about how their performance will be assessed; your evaluation mix should reflect the partnership context.

Equally important is managing your education agent’s expectations of your provider and, during the review process, acknowledging any provider or external issues that may have limited your education agent’s ability to achieve a performance metric.

Throughout this chapter we give practical examples of applying best reviewing practice to ‘Fictional Agent’, an imaginary education agent.

1. Compliance with the National Code

The National Code of Ethical Practice for UK Education Agents sets out the standards and the best practice that education agents and aggregator agents representing UK education providers are expected to follow.

Embedding the National Code in your contracts (see STRATEGY chapter) gives you and your education agents a clear set of standards that you can use to assess your education agents' success. You will have assessed new education agents against many of these standards at the pre-appointment stage of the 'education agent partnership life cycle' (see INTRODUCTION), but you may not have checked some of your existing education agents' practice against the standards. It is recommended that when you issue new contracts that reference compliance with the National Code, you assess all of your education agents against all of the standards; it is a big task, but one you only really need to complete once – after which, annual audits against a set of standards, in-cycle and post-cycle, should confirm that your education agents remain compliant.

National Code Audit of 'Fictional Agent' (an example)

During your annual review process, you have decided that you want to make sure your education agents are complying with:

- Organisational Behaviour Standards 1.4 and 1.6
- Ethical Business Practice standard 2.8
- Objective Advice and Guidance 3.6

Using the National Code's suggested evidence, you assess Fictional Agent's compliance.

Criteria	Target (Suggested Evidence)	Actual	Outcome	Reassessment Date In	
National Code	1.4 Are transparent about the provider relationship 1.6 Are using approved marketing communications	Education agent websites and promotional materials clearly list provider as a partner and follow our brand and logo use guidelines	The marketing materials were all approved but the logo on agent website is an old version (did we provide the new logo?)	LARGELY COMPLIANT Provide agent with the new logo and ask agent to update website within five working days	5 days
	2.8 Have good processes in place to identify fraudulent documents	Systems are documented and processes are being applied	Provided with protocols document as well as records of recent training attended on identifying fake documents	COMPLIANT	1 year
	3.6 Transparent about agent fees that students pay, and refund processes	Refund policy in place and new agent students confirm they were not charged	Students confirmed that they were not charged fees, and agent provided a copy of their refund policy	COMPLIANT	1 year



Expert tip: Build an audit of National Code standards into your annual review, with a scoring rubric to quantify how compliant your education agents are.

2. In-cycle tracking

In-cycle tracking refers to the monitoring of performance indicators you can assess during the recruitment phase leading up to an intake.

A proactive approach to in-cycle issue resolution, particularly with a newer education agent, can help your education agent be successful and minimise larger issues later in the cycle or after enrolment. Using a wide range of qualitative and quantitative measures, you can gain a holistic view of your agent's performance, and this feedback can inform your post-cycle annual review.

The following table illustrates the types of performance indicators you may want to monitor so you can adapt your strategy as the needs arise.

Performance indicator	Monitoring approach/actions
Delivering to plan	During the PLANNING phase, you will have agreed to an outline of promotional activities. If you are not directly involved in their delivery, you should ask for evidence of delivery in relation to your brief – eg screenshots, link to agent website, etc
Alignment of applications	During the PLANNING phase, your agent may have agreed to recruit to particular programmes/courses or from a defined region. If compliance is lower than expected, contact your education agent to determine the reasons and whether they need further support or training.
Incomplete or low quality applications	If this is picked up early in the cycle, you may correct this through focused training using case studies and reconfirming the 'persona' of the students you are seeking to recruit (see TRAINING chapter).
Low visa success trends	It is important to monitor this in cycle so you can avoid any damage to your provider's reputation or license. Determine whether this warrants immediate corrective action or if it is grounds for termination. Where appropriate and legally possible, share with provider networks and the Home Office.
Change of agent requests	Monitor changes of agent request and see if there are any possible trends: <ul style="list-style-type: none"> • away from a contracted agent • to a contracted agent In both cases, you need to determine whether there is actually a trend and, if so, whether your education agent is in breach of the National Code. You may be able to do this through your agent or application portal, or by asking your admissions officers to notify you of changes.
Student complaints	As per the National Code, the education agent should make students aware of your complaint processes. Complaints about your education agents should be investigated in a timely manner and decisions made about what, if any, action should be taken in relation to the education agent. All this must be done with appropriate measures in place to protect the identity of the complainant while providing the education agent with equitable treatment through due process.
In-cycle admissions funnel metric	You may already use previous years' data to work back from your future intake enrolment target to determine the total number of: <ul style="list-style-type: none"> • applications you need to generate • offers you need to issue • acceptances you need to hit the enrolment target Regularly monitoring education agents—specific cuts of this data can help you identify recruitment performance trends, positive and negative, and take proactive, in-cycle action, rather than waiting until after an intake.
Response/turnaround times	Performance monitoring can also be useful when focused internally. Use the data from your online admissions system to monitor your application-to-offer turnaround times, as well as response times to queries and CAS requests. <p>If slow turnaround times align with high levels of incomplete applications or high visa refusal rates in certain markets, this may present an opportunity for tailored training.</p>

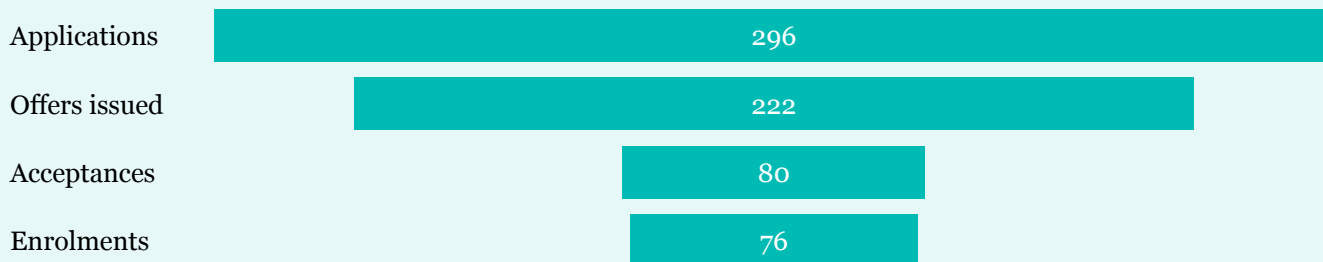


Expert tip: Where appropriate, share and discuss your data and intelligence with your education agent. This can help them better understand your expectations and help you develop your understanding of the market, allowing you to make informed decisions about any action you may want to take.

In-cycle tracking of ‘Fictional Agent’ (an example)

For the previous year, at the end of enrolment, Fictional Agent had the following results:

Semester 1 2020 Results



Let’s take a date 10 weeks out from the end of semester 1 2020 enrolment. We can then calculate the percentage growth between that point in time and the final results.

	Applications	Offers issued	Acceptances	Enrolments
Semester 1 2020, 10 weeks out	235	178	52	
Semester 1 2020, FINAL	296	222	80	76
Growth in last 10 weeks	25.96%	24.72%	53.85%	

If we now move to ‘today’s’ situation ten weeks out:

	Applications	Offers issued	Acceptances
Semester 1 2021 (10 out)	212	121	33

Assuming all things remain the same (market dynamics, admissions service, etc), we can forecast that Fictional Agent may only get you 51 acceptances, of which 95% will convert to enrolments = 48 enrolments (based on the Semester 1 2020 conversion rate).

The further you move back in the funnel, and the further out you are from an intake, the less reliable this forecasting becomes. But monitoring this data on a regular basis alerts you to the need for a conversation with Fictional Agent to try and work out what is happening and whether there are opportunities for you to implement supportive/corrective measures in the subsequent weeks. Similarly if Fictional Agent is outperforming the previous corresponding period (PCP), the conversation could focus on support opportunities to further enhance their performance.

Reviewing the data without context is dangerous and can lead to ill-informed decision-making, so it is also important to provide context for the data and determine how your provider’s practice may have contributed to positive or negative outcomes. If we look back at Fictional Agent’s admissions performance, we can see that the conversion rate from application to offer was considerably lower in 2021 than 2020.

	Applications	Offers issued	Acceptances
Semester 1 2021, 10 weeks out	212	121	33
Conversion rate		57.08%	27.27%
Semester 1 2020, 10 weeks out	235	178	52
Conversion rate		75.74%	29.21%

Has there been a change in your admissions procedures or are there delays in processing that have contributed to a 20% worse conversion rate from application to offer? It is imperative that you review possible internal issues, acknowledge these with your education agent and take supportive or corrective action before you discuss any areas you expect them to take corrective action in – and by doing so, framing the relationship as a partnership for success.



Expert tip: Running data reports for your education agents (and your markets) every week for a year provides a rich pool of comparative data for the next cycle. Rather than comparing the previous corresponding period (PCP) in the calendar year, determine the PCP relative to your intake dates, eg 5 weeks out, 6 weeks out, 7 weeks out. This is a more accurate, like-for-like measure. Analysing the data will highlight the life-cycle trends of a market/agent, so you can adapt your strategies to the cycle.

3. Annual Review

You now have a full picture of the recruitment cycle and can further evaluate how your education agent has performed against any targets set during the PLANNING phase, and in comparison with their previous years' performance and that of your other education agents. You will need to determine the criteria and its weighting suitable for your provider's context, but it is good practice to incorporate engagement, risk, recruitment & marketing, quality practice and student feedback metrics, with an understanding that some metrics could sit in more than one area.

When determining the criteria, you should also consider the language commonly used within your provider and adapt it accordingly so that internal stakeholders understand your approach.

Review Scorecards



Expert tip: Using a scorecard approach to education agent reviews is an excellent way to get a clear picture of how one education agent is performing relative to your evaluation mix and in relation to your other education agents. This will help you make informed resource investment decisions in your next cycle or determine whether or not to continue working with a particular education agent.

The Fictional Agent review scorecard below is an example of how this tool can be used, but it would need to be adapted to suit the different types of relationships you may have with your education agents.

It is not recommended that you rely only on procedural measures. When assessing your education agents performance, it is important to consider factors like cultural differences, the effectiveness of communication with with one another and other less tangible influences on the success of a relationship. Use your conversations with education agents to assess your own practice as well as theirs.

Fictional Agent annual review scorecard

Criteria		Target	Actual	Rating	Score	Total
Recruitment & marketing <i>Weighting 40%</i>	Enrolment target	80	76	Below expectation	1	11
	Conversion rate (app to offer)	85%	88%	Exceeded expectation	3	
	Conversion rate (app to enrol)	25%	22%	Below expectation	1	
	'Priority programme' enrolments	11	16	Exceeded expectation	3	
	Cost per enrolment (marketing and commission)	<£2,000	£1,760	Exceeded expectation	3	
Quality <i>Weighting 20%</i>	Complete applications	95%	95%	Met expectation	2	4
	Visa success	95%	92%	Below expectation	1	
	CAS cancellations (after CAS being issued)	<2%	5%	Below expectation	1	
Student experience <i>Weighting 20%</i>	New-student survey feedback	★★★★☆ 4	★★★★☆ 4.1	Exceeded expectation	3	12
	Change of agent requests	<2%	0%	Exceeded expectation	3	
	Student complaints	<2%	1%	Exceeded expectation	3	
	Student propensity to recommend agent	85%	88%	Exceeded expectation	3	
Engagement <i>Weighting 10%</i>	Business intel, feedback, responsiveness	Average	Average	Met expectation	2	8
	Training participation	>15 staff	21 staff	Exceeded expectation	3	
	Value-add service	None	Travel booking	Exceeded expectation	3	
Risk <i>Weighting 10%</i>	National Code Audit (See Section 2: 'Compliance with the National Code' of this chapter)	Compliant	Somewhat Compliant – old logo use	Below expectation	1	3
	Warnings	0	0	Met expectation	2	
Weighted Score TARGET		7.0		Weighted Score ACTUAL		8.7

The weighted score is calculated by multiplying each total by the corresponding percentage and adding them all together:

Criteria	Weighting x TOTAL
Recruitment & marketing	40% x 11 = 4.4
Quality	20% x 4 = 0.8
Student experience	20% x 12 = 2.4
Engagement	10% x 8 = 0.8
Risk	10% x 3 = 0.3
Total Weighted Score	8.7

Annual review timing

The timing of your annual review is also important. Most public providers will have September intakes, with some also having a January intake, but many private providers, particularly in the English language and pathway sectors, will have multiple intakes throughout the year. You will necessarily have to extract education agent enrolment data after each intake to determine which commission payments (see FINANCIALS) so you can use this step as part of your performance tracking.

Ideally, you should determine a time-of-year to undertake the review so you can compare year-on-year data. This may be determined by intakes or by workflows. But because you are gathering some of the data for other purposes, it does make sense to time the review shortly after your larger intakes. For the majority of UK providers, this means February/March.



Expert tip: To gain national insights, it may be helpful for providers to agree a good time for annual reviews to take place so they can share some aggregated data or findings. For example, BUILA and UKCISA research (2021) indicates that inserting a set of standardised experience questions into the new student arrivals surveys conducted by providers could allow for some national benchmarking of agents' performance, which could help providers refine their approach. This approach also reduces 'survey fatigue' by making use of existing channels to gain student insight.

Incorporating the student voice

Embedding a set of education agent-related questions into your new student arrival survey can provide you with excellent insight into your contracted and uncontracted education agents.

If a standard set of questions is used nationally, and providers agree to sharing certain datasets, then there is the potential to benchmark your results against both your competitors and the wider sector, helping you determine what, if any, action might be required. Moreover, this information can feed into your contracted education agents' annual reviews, as well as identify uncontracted agents who are sending you students. This latter group may warrant further investigation and action such as cease and desist notices, clearer information on your website and/or sharing information with other providers and bodies. However, it may also present an opportunity for you to open discussions with a new education agent who may make a positive impact on your agent portfolio mix.

The nature of these questions would need to be discussed among providers, but the following questions, if used in your new student arrival survey, would provide useful insights that could also inform your review process.

Question	Answer	Insights (used for annual review & national benchmarking)
Did you use an education agent to help you gain admission to [PROVIDER NAME]?	YES > next question NO > skip to next area of questionnaire	Percentage of students using an education agent
What was the education agent's company name and office location	Dropdown list of contracted agents. Free text box for uncontracted agents.	Confirming it is a contracted education agent – also good for insight on potential education agents
To what extent do you believe that your education agent accurately represented [PROVIDER NAME]?	5 Very accurately to 1 Very inaccurately	Indicators for further action: 4/5: Recognition/reward 2/3: Investigation leading to training 1/2: Investigation leading to possible dismissal
Would you recommend your education agent to other potential students wanting to study at [PROVIDER NAME]?	5 Yes, recommend to 1 No, discourage	Student satisfaction rating metric – useful in national benchmarking
How would you rate the quality of your experience of using your education agent?	5 Excellent to 1 Poor	Student satisfaction rating metric

The role of mystery shopping

Mystery shopping can provide valuable information for your education agent review. It is particularly insightful where you may have concerns about one or several of your education agents that you wish to verify, such as low conversion rates, anecdotal feedback that they do not prioritise your provider, or that they are breaching some other element of the National Code or your contract.



Expert tip: If you are going to conduct mystery shopping of your education agents, we suggest informing ALL of them well in advance that this is something you intend to do, even if you actually only mystery shop a few education agents. Trust is a significant component of the partnership and can be quickly eroded if you are not transparent in sharing information.

Mystery shopping can be a resource-intensive exercise. You may be able to carry it out using student ambassadors, or even do it yourself using student personas with emails, but you could also consider engaging companies on your behalf who use trained, ‘prospective’ students in the education agent’s country/region.

Scaling up review processes

One of the challenges of education agent reviews is developing a process that can work at scale and be conducted in a timely manner. This is particularly true for providers that partner with hundreds of education agents.

Work with colleagues to determine

- which areas of your preferred performance evaluation mix can and cannot be reported on through existing IT systems, and whether it is worth pursuing additional functionality
- whether process changes can make data more accessible – eg how and where you record marketing spend by agent, their participation in training or any value-add services they deliver
- whether a different metric that is more easily accessible can replace your preferred ones
- whether for experienced and trusted education agents, a biennial review will suffice

Your resourcing and IT systems will dictate what can be achieved (this is covered in more depth in the FUNDAMENTALS chapter). But even with some basic admissions and enrolment data, better curation of marketing planning, and engagement reports combined with some ‘look-up’ functionality, you should be able to develop a risk-appropriate review scorecard to evaluate your education agents.



Expert tip: Using your list of preferred performance evaluation metrics as a guide, look at your agent engagement strategy to identify each of the data capture points, and integrate this data capture into a single location like a CRM or specialist agent management platform (AMP). (See the TEMPLATES AND ANNEXES chapter for some tools you can adapt to your provider’s context.)



The importance of review meetings

As with in-cycle tracking, the information from your agent scorecard should not be used on its own to make decisions about next steps; it needs contextual information about factors such as

- market dynamics – eg impacts of COVID-19
- provider performance – eg slower admissions turnaround than previous cycles
- provider change – eg staff movement and restructuring
- agent change – eg counsellors moving

Ideally, you and your education agent have in place protocols that mitigate issues like staff movement. But even with the best contingency plans in place, issues can arise that are not controllable. This is why it is important to share as much information as you can with your education agent, and discuss it with them in a review meeting to determine whether your scorecard is a fair reflection of performance or whether you need to account for additional factors.

A review meeting also allows the education agent to point out areas of practice that the provider might be able to improve. Collaborative review meetings will not only make it easier to decide what, if any, action is required in relation to the education agent's contract, but also form the base for the following cycle's planning (see PLANNING chapter).

4. Renewal/non-renewal decisions

Accepting the contextual limitations of the scorecard, when combined with the review meeting it forms an objective approach to determining your education agent's strengths and weaknesses, and a way of providing clear and justifiable evidence needed to decide whether you are going to renew or cancel a contract.

In the STRATEGY chapter, we touched on contract models. Good practice with new education agents is to use a one-year probationary agreement that clearly defines the mix of performance evaluation metrics you will use to determine whether they will be rewarded with a new contract – either another year's probation or a full contract – or whether their contract will not be renewed.



Expert tip: Insert the annual review scorecard with education agent-specific targets into your contracts as an addendum, along with any additional expectations you may have for the early stage of engagement (eg completing the British Council Education Agent and Counsellor Training Suite, etc). When renewing a contract, add an updated scorecard as an addendum annually. Remember that it is essential to obtain appropriate legal advice to ensure your approach is sound and enforceable.

For their full contract, many UK providers described having three-year contracts, while a few described having rolling renewal clauses. The advantage of a rolling renewal is that you do not have to reissue all of your education contracts every three years, which cuts down on the administrative burden, but you will need to seek appropriate legal advice and ensure you have tight termination clauses. The termination clauses should clearly state grounds for termination that include reference to the addendum with your review scorecard.

NOTE: Universities UK accepts no legal responsibility for the use of examples or suggested contract inclusions detailed in this guide. You are strongly advised to obtain legal advice specific to your provider.

5. Recognition

Recognition for excellent performance is universally well received by education agents, although BUILA and UKCISA research (2021) did find that some education agent managers held concerns about providers directly rewarding counsellors without their prior knowledge.



Expert tip: Being clear with your education agent about your plans for recognising and rewarding practice can significantly reduce the chance of any unintended offence.

Providers should also carefully evaluate any approaches to rewarding agents to ensure they are not in breach of UK Bribery legislation¹ or any similar legislation¹ in the market(s) the education agent is working in.

It is of course still possible to recognise and reward good education agent practice when keeping these factors in mind.

As one example, the use of gamified training was discussed in the TRAINING chapter. Rewards for activities like training could take the form of a letter of recognition, a certificate of completion or a low-cost prize. Recognising and rewarding work delivered 'above expectation' is appreciated, but it might be wise to check with your education agent or their manager how best to recognise and reward them for it.

¹ <https://www.legislation.gov.uk/ukpga/2010/23/contents>



Expert tip: In almost all cultures, a degree of personalisation is welcomed – rather than offering the ubiquitous provider-branded pen! But if you are offering a small reward, make sure it:

- does not have negative cultural associations
- cannot be construed as a romantic gesture or inappropriate advance
- is sustainably and ethically sourced and not contributing to landfill
- reflects the values of your provider
- is useful and/or desirable

Also, remember that not all cultures are comfortable with the singling out of one person's achievement over others. This is why it is important to discuss ideas with your education agent before implementing.

Simple recognition competitions

Where possible, linking your recognition categories to metrics you are already reviewing as part of your annual review scorecard will help minimise additional administration and data harvesting. The list of recognition categories given below is not exhaustive; rather, it is designed to get you thinking about the type of competition categories you could run that may motivate your education agents to work with you and keep your brand front of mind. It is also important to keep in mind that creative use of gamification is proven to increase engagement.

Suggested recognition categories:



Most engaged education agent



Most knowledgeable agent (see TRAINING chapter for quiz ideas)



Best application-to-offer conversion rate



Best application-to-enrolment conversion rate



Highest visa success rate



Best student experience rating



Social media post (about provider) with greatest number of likes



Highest proportion of enrolments in priority courses




You may also choose some more subjective award categories and engage colleagues within your provider institution or even your students as judges. These could include categories such as:

- Most creative marketing campaign execution
- Best marketing video production
- Most useful feedback on ways we can improve our services to students and education agents

Agent reward frameworks

Some providers choose more formal frameworks that allow education agent companies to attain ‘statuses’ (similar to those used in airline frequent flyer schemes) based on performance. The tiered statuses have increasingly generous rewards attached to them, which might be based on preferential services or access, increased influence in market planning and execution, and even improved financial compensation for work done. Such schemes can help motivate education agents but are often administratively heavy, so it may be worth surveying your education agents to find out what they want before introducing a detailed agent reward framework.

Example of an agent rewards framework

Benefits		 Bronze	 Silver	 Gold
Relationships	Support from the international recruitment team	✓	✓	✓
	Dedicated regional manager		✓	✓
	Dedicated admissions contact			✓
	Member of agent reference group			✓
Training	Agent portal	✓	✓	✓
	‘Just in time’ newsletter	✓	✓	✓
	Virtual training	✓	✓	✓
	Online induction module	✓	✓	✓
	Face-to-face training		✓	✓
	Familiarisation trip		Every second year	Yearly
Admissions	Turnaround time on standard applications	15 working days	10 working days	5 working days
	Agent support live chat (admissions)		✓	✓
	Authority to issue offers (exceptions apply)			✓
Marketing Support	Representative certificate	✓	✓	✓
	Brochures, digital assets	✓	✓	✓
	Annual performance review	✓	✓	✓
	Promotional materials	Upon request	Brochures Posters Digital assets Student giveaways – limited	Brochures Merchandise Banners Digital assets Student giveaways – unlimited
	Annual marketing plan		✓	✓
	Event attendance		Consideration	Priority
	Co-branded scholarships			✓
				✓
Incentives	Standard commission rates	✓	✓	✓
	Counsellor competitions and promotions	✓	✓	✓
	Bonus commission scheme		✓	✓
	Course tuition fee discounts/credit and microcredential opportunities		✓	✓

Bonus/tiered commission schemes

It is fairly common practice among providers around the world to offer some kind of bonus scheme or tiered commission based on enrolment numbers. However, operating a scheme like this based on enrolment numbers alone could place your education agent in conflict with the National Code of Ethical Practice for UK Education Agents. Standard 2.3 of the National Code requires education agents to:

... refrain from practices designed to lure prospective students away from competitor organisations

Again, measuring agent performance using a range of indicators can help to reduce this risk. For instance, offering bonuses for outstanding performance across not one, but a range of measures, such as student experience and application quality, is less likely to cause conflict between education agents and can help to promote compliance with all of the Standards in the National Code.

It should also be noted that many education agents report that variable commission schemes are a disincentive to work for a provider when they believe a competitor education agent could be earning more to send a student to that provider. As a result, the education agent may focus their attention on other providers (BUILA and UKCISA, 2021).

Ultimately, which type of scheme to use is a decision for each provider to make. If you and/or your provider do decide to offer some kind of bonus or tiered commission scheme, it is essential to seek legal advice about how to frame it in the context of the UK's Bribery Act 2010 and its consequential amendments.

Best practice:

- ✓ Once added to your contracts, audit your education agents compliance with the National Code of Ethical Practice for UK Education Agents.
- ✓ Engage your education agents throughout the cycle, monitoring a range of in-cycle performance indicators that are important to you.
- ✓ Link your annual review to the agreed metrics discussed at the planning stage.
- ✓ Use a broader range of performance indicators, including student feedback that is systematically included in your annual reviews.
- ✓ Use objective performance measures to determine whether to recognise and/or reward your education agents, and then personalise your rewards.

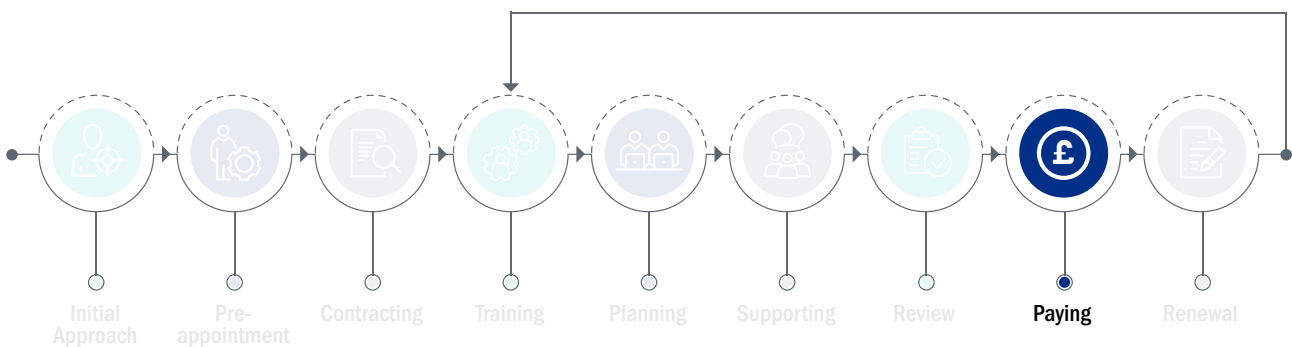
FINANCIALS: Paying your education agents

The commercial arrangements between a provider and their education education agents should always be documented in a legally binding contract. The vast majority of these arrangements result in a commission being paid per each new enrolment, although the STRATEGY chapter does indicate that there are now other financial models being used too.

Successful partnerships can result in significant commission payments, which, when looked at in isolation, may worry managers. It is important to remember that increases in commission paid out directly corresponds to increases in tuition fee revenue generated.

This chapter includes the following topics which explore how the commercial relationship between providers and agents should be displayed, how you can incentivise agents and how you can use best-practice policies and systems to support your commission framework.

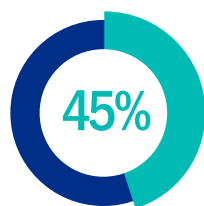
1. Transparency
2. Policies
3. Incentives
4. Systems
5. Service Fees



1. Transparency

The UK recognises the importance of giving prospective international students all of the information needed to make informed decisions. There is legislation in place, managed by the Competitions and Marketing Authority, that guides the provision of information by education providers to students, and the OfS monitors practice to ensure students rights are upheld. Moreover, the student experience is listed as one of the three main goals of the UK's International Education Strategy.

Central to improving the applicant experience is greater transparency around the use of education agents, particularly in relation to commission payments and the commercial relationship between providers and education agents. The UK Education Agent Partner Quality Assurance Framework has been developed to support this transparent practice.



45% of students

BUILA and UKCISA research (2021) found that only 45% of students agreed that their education agent was transparent about how they get paid by the provider.

‘Ethical Business Practice’ is one of the five standards of the National Code of Ethical Practice for UK Education Agents.



Under this standard, the first three expected practices deal directly with the commercial relationships between providers and their agents, and the transparency needed around them.

Expected Practice	Suggested Evidence
<p>2.1 Ensure all staff have read and understand the National Code of Ethical Practice for UK Education Agents and the associated business practices of your organisation including being open about commercial relationships (not financial detail) with student clients</p>	<ul style="list-style-type: none"> • Staff handbook • Staff/education agency certification – British Council Education Agent and Counsellor Training Programme
<p>2.2 Be transparent about which education agent services fall under ‘provider pays’ (under commission arrangements) and/or ‘student pays’</p>	<ul style="list-style-type: none"> • Signed written/digital agreements between education agents and student clients that include information about fees, information about themselves and complaints processes
<p>2.3 Disclose the use of marketing incentives to contracting providers and refrain from practices designed to lure prospective students away from competitor organisations</p>	<ul style="list-style-type: none"> • Documented systems and protocols for handling complaints

The financial relationship between your provider and education agents must comply with a number of UK laws, and it is essential that both your provider and your education agents are fully aware of this.

For example, tuition fees taken by providers are subject to competition law, as institutions are delivering a product (course) to a market and are therefore competing with one another for customers (students). Institutions cannot collaborate or collude on areas such as price. The same applies in relation to commission payments made to education agents, where sharing of commission rate data between education providers could be construed as collusive behaviour under the Competition Act (1998).¹

Providers should confirm that their education agents are aware of their responsibilities to comply with the Competition and Markets Authority regulations². This should be included in the education agent training to clarify understanding.

As such, details of individual commissions should not be published. However, feedback from students (BUILA 2021) indicates that they would value more transparency around the financial relationship between agent and provider.

It is recommended that institutions publish information on their website that clearly details the nature of the financial relationship they have with their contracted education agents. BUILA and UKCISA recommend using the following text:

“<<PROVIDER NAME>> has entered into a commercial arrangement with the following education agents, who are our official representatives. They are contracted to support qualified prospective students to choose a course, submit an application, find accommodation, and apply for a visa as appropriate to the prospective student’s circumstances. If you enrol with us, we pay the education agent a commission/fee. You can choose to use other education agents if you wish, but we spend resources training and helping these education agents to offer the best possible service, and we strongly encourage you to only use one of our official education agents listed here. Please note, there have been examples of unofficial education agents claiming to represent us. Please check this list to be sure you are using an official partner of <<PROVIDER NAME>>.”

The terms of the payment structure between provider and education agent are commercially sensitive, and this guide does not dictate how these terms are set or agreed. However, we do explore best practices in managing the wider financial relationship.



Expert tip: Ensure that your education agents are fully compliant with the National Code of Ethical Practice for UK Education Agents by embedding this requirement at the contracting stage, including it in your objective setting and reviewing your agent’s compliance on an annual basis. Doing this will go a long way to ensuring the commercial aspects of your education agent partnerships remain lawful.

¹ Competition Act 1998 available at <https://www.legislation.gov.uk/ukpga/1998/41/contents>

² Competitions & Markets Authority available at <https://www.gov.uk/government/organisations/competition-and-markets-authority/about>

2. Policies

While on the surface, paying your education agents a commission based on the number of enrolled students they send you seems straightforward, the reality is often far different. The student application journey can vary greatly from student to student, and you or your provider will often not see the entire picture. This is why, in addition to embedding compliance with the National Code of Ethical Practice for UK Education Agents in your processes, as discussed above, it is imperative that you have robust policies in place to cater for different possible outcomes (see the FUNDAMENTALS chapter for more information on education agent governance). Some of the more common situations you may encounter are covered below. In these scenarios we refer to two hypothetical education agents - Fictional Agent and Imaginary Agent - to help add context to the examples.

Split payments

Scenario: Fictional Agent has submitted an application on behalf of a student, provided all the required documents and received an unconditional offer from you. One month before enrolment, the student contacts you to say they have decided to engage a new education agent (Imaginary Agent) who assists them with their deposit payment, visa application, accommodation and travel arrangements.

Dilemma: Who is the 'official' agent for this student? Who do you pay? How much do you pay them?

Recommendation: This is a fairly common situation. Your policy on 'split payments' should clearly stipulate which stages of the application process must be completed in order for the education agent to receive commission for an enrolled student. Note, both your education agent contract and your education agent policy (see the FUNDAMENTALS chapter) should document this policy.

For example:

Application submitted	50% of commission	↓
Conditional offer		
Unconditional offer		
Deposit paid/firm accept	50% of commission	↓
CAS issued		
Visa received		
Student enrolled		

In the scenario above, Fictional Agent would be paid 50% of the commission fee and Imaginary Agent would be paid 50%, as they were the contracted agents at the clearly defined stages of the process. If Imaginary Agent had only assisted with the visa application then they would not receive any commission, as Fictional Agent had already initiated this stage of the process.



Expert tip: If a student decides to change their agent mid-cycle, it is good practice to contact the student to ask the reason for the change. This may lead to additional training required for the initial agent, or potentially a warning given to the new agent about poaching students.

Some providers prefer not to split commissions, worrying that it gives education agents incentive to 'poach' students from other education agents, in contravention of Standard 2.3 of the National Code. However, it is also important to support student choice. Either approach is acceptable, as long as you consider the impact on students, and are clear about what you will and won't accept. If you choose to split commission, you should be clear with your agents that poaching students is in breach of their agreement under Standard 2.3 of the National Code of Ethical Practice for Education Agents.



Non-contracted education agents

Scenario: Two weeks prior to your enrolment date, you are contacted by a non-contracted education agent who has two applicants for your provider. Both are fully qualified applicants with all the necessary documents and no visa is required.

Dilemma: These two students would be a perfect fit for your provider, but the education agent is requesting a contract and commission before they submit the application.

Recommendation: It is not recommended to commit to paying a commission to a non-contracted agent. While the short-term gain may be tempting, you should consider the bigger picture – have you carried out sufficient due diligence processes to learn about the agent, are they a good fit for your education agent portfolio, and will they help you meet specific objectives? If you cannot carry out your selection, appointment and contracting process to your required standard, then it is recommended that you work towards appointing this education agent for a future enrolment cycle rather than the current one.



Expert tip: If a non-contracted agent is pushing you to accept students and pay commission without going through the due process, you should remind them that student-centred practice is a key element of the National Code of Ethical Practice for UK Education Agents – a code you would expect them to comply with if they were to become a contracted agent. The National Code states that an ethical and compliant agent would ‘introduce a range of possible providers to the student client aligned to their profile’ and ‘refrain from claiming or implying a contractual relationship with a UK education provider, or similar endorsement, where one does not exist’.

Late commission claims

Scenario: It is four months after your enrolment date, and you receive a call from one of your contracted education agents saying that they missed one student off their commission invoice and would like to invoice for it separately now.

Dilemma: How do you deal with this situation sympathetically while maintaining the integrity of your financial procedures?

Recommendation: Your commission policy should include a section on late commission claims. It should clearly define timeframes, service level agreements, responsibilities and contact details for each party. For example:

Deadline	Task	Responsibility	Contact
October 31 2021	Submit proforma invoice for enrolled students	Fictional Agent	headcounsellor@fictionalagent.com
November 14 2021	Confirmation of enrolled students	Provider	commission@provider.ac.uk
November 30 2021	Submit final invoice for enrolled students	Fictional Agent	headcounsellor@fictionalagent.com
December 7 2021	Approval of final invoice	Provider	commission@provider.ac.uk
December 31 2021	Payment of commission fees	Provider	commission@provider.ac.uk

Note, both your education agent contract and your education agent policy (see the FUNDAMENTALS chapter) should document this policy.

Student-agent agreements

Scenario: Fictional Agent is claiming commission for a student who has enrolled at your provider, but your application system is not showing this student as being linked to this education agent.

Dilemma: How do you corroborate that this student has actually used the services of Fictional Agent and, if so, what assistance did Fictional Agent actually deliver (see Split Payments scenario)?

Recommendation: Your policy for the recruitment of students via education agents should include a requirement that all your education agents formalise their association with their students through a signed agreement. This signed agreement should be submitted along with the initial application and kept linked to the applicant. Not only will this help to quickly resolve any disputed commission claims, but it will also serve as evidence of your education agents complying with the ethical business practice standard in the National Code of Ethical Practice for UK Education Agents.



Expert tip: Attach these policies as addendums to your education agent contract. This gives you the flexibility to amend the policies on a regular basis and to stay relevant with a changing sector landscape, while also making it clear to your education agents that these policies form part of their contract and are enforceable.

3. Incentives

In addition to commission payments, some providers offer additional incentive schemes such as bonuses tied to the recruitment of more students. Provided this is a clear commercial arrangement, it is not in violation of the UK's Bribery Act 2010³. However, education providers must be able to demonstrate that the allocation of such rewards (whether monetary, gifts or provision of services) is fair and in line with the regulations set out in the legislation.

While it is common and accepted cultural practice in some markets to give personalised gifts, great care must be taken to avoid breaking either UK law or the laws of the source market. Alongside this, financial incentives that reward higher enrolment numbers must not place your education agent in conflict with the National Code of Ethical Practice Standard 2.3, which requires education agents to '... refrain from practices designed to lure prospective students away from competitor organisations'.



Agent perspective: Where providers set targets to secure/retain contracts, and also offer higher commission rates for enrolment volume, this was felt to be in conflict with the expectation of unbiased and student-centred counselling.

The REVIEWING chapter details how to reduce the risk of conflict situations with other ways to recognise your education agents, including alternative rewards frameworks that are not financially led.

All bonus schemes must be supported by a robust and specific policy that shows transparency and equality to all education agents. This policy must be clearly detailed in the contract between education agent and provider and referenced in your agent policy document.

Let's now look at some of the more common incentive schemes used in the sector and the factors you will need to consider and include in your policy documents.

Sliding scale of commission (enrolment based)

One of the most common incentive schemes used across the sector, this scheme rewards agents with an increasing commission fee percentage as the number of enrolments increases. For example:

Confirmed enrolments	Commission (as a percentage of first year tuition fees)
0–10	X%
11–15	Y%
16+	Z%

Considerations:

- Does a pre-sessional course count as an enrolment? ie if a student enrolls on a pre-sessional English course at your institution and then subsequently enrolls on a Masters degree, does this count as one or two enrolments on the sliding scale?
- Do you pay the higher commission rate on all enrolments or just the ones that sit in the higher brackets? ie Fictional Agent enrolls 13 students – do you pay 10 enrolments at X% and 3 enrolments @ Y% or do you pay all 13 at Y%?
- Note that a higher commission rate (percentage) does not always result in a greater financial return to the education agent, as it is tied to the annual tuition fee for the individual course.
- If your education agent enrolls more than 10 students, how do you decide which students fall into which payment bracket?

³ Bribery Act 2010 available at <https://www.legislation.gov.uk/ukpga/2010/23/contents>

Sliding scale of commission (tier based)

As an alternative to enrolment-based commission, some providers reward their education agents based on their status within a tiered system. How these tiered systems are implemented is covered in the REVIEWING chapter, but essentially, education agents are allocated a tiered status (eg gold, silver, bronze) based on their performance against agreed metrics.

You may choose to allocate different commission rates to education agents in different tiers, for example:

Agent status	Commission (as a percentage of first year tuition fees)
Bronze	X%
Silver	Y%
Gold	Z%

Considerations:

- This is a very effective way to reward education agents who meet a wider range of objectives rather than just pure enrolment numbers.
- Consider whether or not a scheme like this could potentially be a disincentive to some of your larger education agents, who would otherwise sit in a higher commission bracket if it was based purely on enrolment numbers.

Follow-on payments

In addition to a commission paid as a percentage of the first year's tuition fee, education providers may consider tying an element of commission (or a bonus) to a student's completion of a course. This will encourage education agents to consider retention factors in more depth when referring students. This could be linked to a number of factors, but if you implement a system of follow-on payments, it is best to focus on one element that best aligns with your provider objectives.

For example, you may pay a commission based on a student's:

- successful progression from semester one to semester two, or year one to year two, of an undergraduate degree
- successful progression from your pathway provider to your primary provider
- successful progression from one study level to the next – eg an undergraduate degree to a postgraduate degree
- successful completion/graduation from your institution

Considerations:

- For schemes like these to be successful, you need to be able to track the whole journey of 'education agent-tagged' students through your student record system, potentially including their transfer from pathway provider to primary provider.
- This model could be attractive for providers in the context of student visa sponsor requirements, as it will encourage education agents to only recommend best-fit students, reducing the likelihood of suspension or withdrawal of studies and subsequent reporting to UK Visas and Immigration (UKVI).
- How you define 'successful' could be aligned to the student's academic performance if one of your provider objectives is to increase academic quality.

4. Systems

Commission payments need to be managed confidently, accurately and transparently by the provider to ensure confidentiality and to adhere to the relevant legislation, as indicated earlier in this chapter.

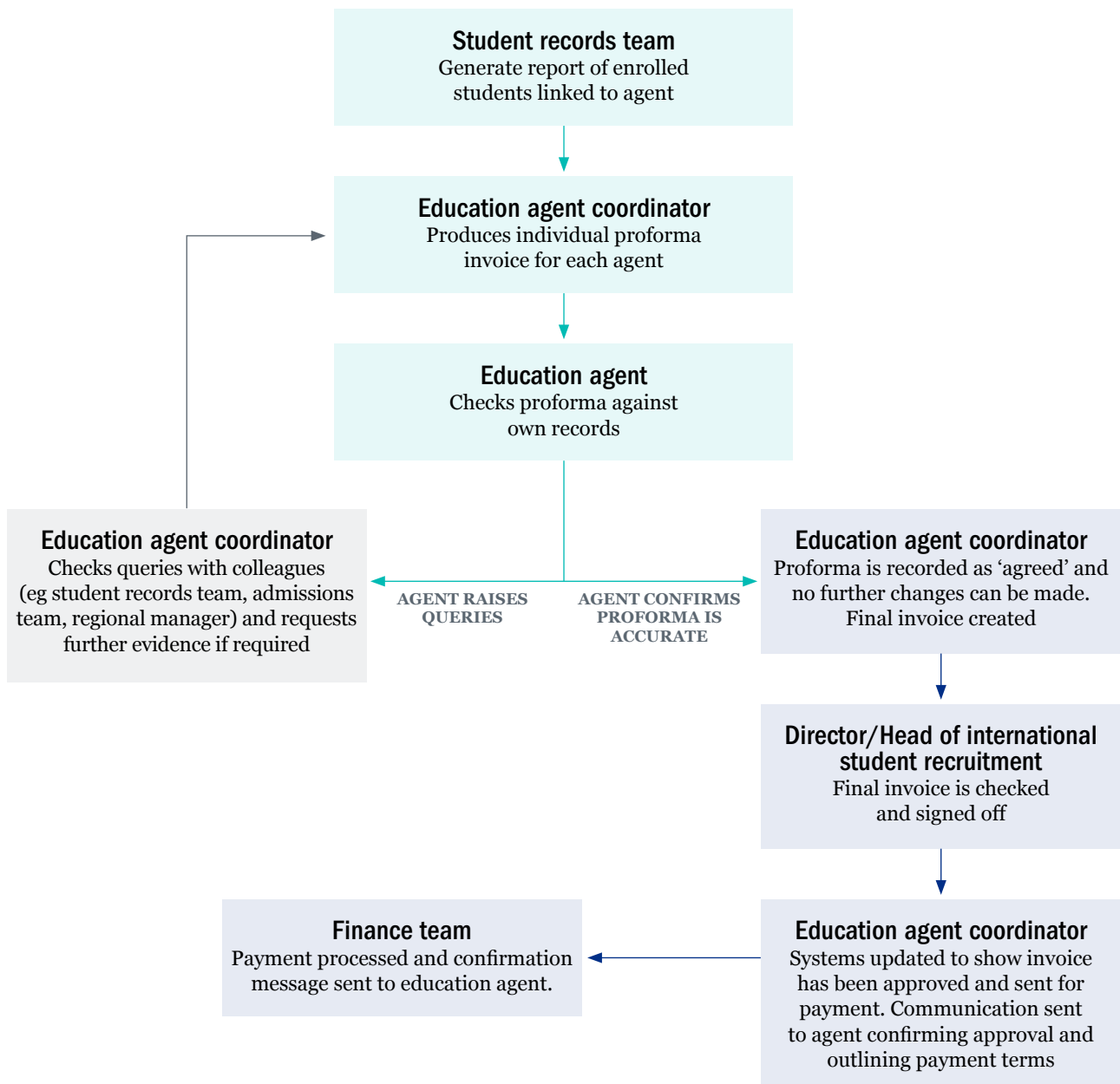
This can be managed through a combination of a well-resourced and capable agent management team and fit-for-purpose IT systems to support them.

Staffing

In most institutions, the successful management of the commission payment process will rely on smooth interaction between team members and across the wider organisation. While all organisational structures will differ, and in some instances multiple roles will be filled by the same person, the process chart below acts as a general guide to how the commission process can be best managed to ensure transparency and minimise the risk of errors.

The most important role in this process is the education agent coordinator, a role which is sometimes standalone and at other times may form part of another role, often within the international team. It is crucial that whoever is in this role builds strong relationships with the other teams to smooth the way for a prompt and accurate payment process.

Commission process chart



While you may not be able to structure your commission process in exactly the same way as shown above, there are some key points that you should look to incorporate into your provider structure.

- Ensure that there are multiple checkpoints throughout the process, where possible carried out by different people.
- Give education agents the opportunity to formally approve the invoice before proceeding to payment. This will eliminate any queries after payment leading to refunds or additional payments.
- Try to keep the education agent relationship manager role (often the international officer/regional manager) at arms length from this process to remove the possibility of any perceived conflict of interest. However, they may have useful insights on complicated cases.
- Involve your finance team in the development of the commission process from the beginning. This can help speed up the payment process, especially if you convey the importance of prompt commission payments and regular communication to the success of your institution's overall recruitment objectives.
- In all cases, your contract payment terms should be adhered to. If for any reason there is a delay, make sure you communicate this to your education agent at the earliest opportunity.
- To minimise the risk of procedural failure when relevant staff are unavailable, develop a set of Standard Operating Procedures (SOPs) for the administration of education agent commission claims, application tagging and commission payment processes.



Expert tip: Proactively invoice your education agent based on the enrolment data held in your student admissions systems. This enables you to take control of the timeframes, so you will not need to wait or chase agents for their invoices. Your education agents will really appreciate your commitment to getting them paid promptly and this will build good will for your long term partnership.

IT systems

To optimise your commission payment process, a well-run staffing structure should be complemented with tailored IT systems. The process chart above may well function perfectly with communications managed through an email system and records maintained on shared drives and spreadsheets, but this more predominantly manual process can significantly increase the chance of errors and misunderstandings, and will certainly increase the administrative workload.

As a minimum, providers must have a high degree of confidence that their admissions/CRM systems will consistently track student ID numbers and link them accurately to the correct education agent. With the increasing variety in commission models and incentive schemes (see above) it is now more important than ever that these systems track the students all the way from initial application to graduation.

'75% of commission enquiries are unnecessary and [agents] should be able to self service!' - AGENT LIAISON OFFICER



There are a range of online platforms available with features dedicated to streamlining the commission process. These features are often part of much larger agent management platforms (AMP) which interface seamlessly with your existing systems.

In terms of streamlining commission payments, AMPs can:

- interface directly with your provider's existing admissions system, allowing commission invoices to be automatically generated
- produce detailed commission reports, covering information right down to how much each individual branch of an education agent gets paid
- allow login-protected access for education agents, for activities like approving invoices or raising queries within the platform
- interface directly with your provider's finance department systems to issue final invoices
- send automated messages to education agents at each stage of the process to keep them informed of progress

Embedding a system like this will allow you to still implement, and in many cases enhance, all the recommendations made above in the process chart (eg multiple sign-offs, regular communication) while at the same time improving the speed and accuracy of payments, providing robust data to support future planning and helping to maintain basic financial audit requirements.

IT systems are looked at in more detail in the FUNDAMENTALS chapter.



Agent perspective: Providers should make quick and accurate commission payments once claims have been checked and processed. This is not just best practice but also good business, as it will build trust and a positive relationship between provider and agent.

5. Service fees

In addition to receiving commission payments from providers, some education agents also charge students directly for their services. This can be in the form of a one-off fee covering all services, or payments for individual ancillary services such as document translation or travel bookings.

While this practice of charging students a service fee is not in itself contravening any legislation, providers should be aware of any additional charges made by contracted education agents to students. Providers should be confident that these charges are transparent, clearly communicated to students and detailed fully in the agent contract.

Standard 2.2 of the National Code of Ethical Practice for UK Education Agents, stipulates that education agents must:

‘Be transparent about which education agent services fall under “provider pays” (under commission arrangements) and/or “student pays”’

Best practice includes inserting a clause requiring compliance with the National Code into your education agent contracts and referencing important elements such as this in your induction and training schemes. This will help students understand what services the provider is paying for on their behalf, and what additional services they may be paying the education agent for.

From a student experience perspective, it is absolutely critical that any fees are transparent and clearly communicated. The BUILA and UKCISA research shows that students who paid their education agent for services were less likely to recommend their agent (50%) compared with those who didn't (85%). Also, students who paid their education agent were less likely to believe their education agent was trustworthy and provided accurate information. This may be a result of raised student expectations when paying for a service, or uncertainty around what they were getting for their money. Nevertheless, it highlights the importance of education agents delivering a quality customer service experience and delivering value for money for both students and providers, particularly if they are offering paid for services.

'Yes - we made a payment and the agreement showed the services and also showed what we "the applicant" needed to do.' - STUDENT

Best practice:

- ✓ Ensure your education agents are complying with the National Code of Ethical Practice for UK Education Agents.
- ✓ Develop clear governance practices and protocols and make sure you education agents are aware of these from the outset of the relationship.
- ✓ Get your legal team to review any incentive schemes against the UK Bribery Act 2010. Avoid incentive schemes that could lead to practice not aligned with the National Code Standards.

FUNDAMENTALS: Governance, staffing, systems and business intelligence

In this chapter, we review the previous stages of the education agent partnership life cycle, considering the best systems, staff roles and structure to support your agent management and your agent management governance, as well as business continuity when you experience changes in staff or other business changes – essentially the fundamentals underpinning your work with your education agent partners.

1. Education agent governance
2. Staffing considerations
3. Supporting IT systems considerations
4. Budgeting
5. Business intelligence: Helping your education agent help you

The scale of your operations will determine what you can and cannot implement. For example, smaller providers may not have separate roles covering different aspects of the partnership with an education agent. Similarly, some providers may invest in bespoke agent management software, while others will adapt existing systems (such as their CRM) or use spreadsheets to manage their education agent network.

As such, you will need to review this chapter with your provider context in mind and determine what is appropriate for your context. If you do not already have an approved ‘education agent policy and procedures’ document or handbook (referred to as policy hereafter) in place, we recommend you develop one.



Expert tip: Review the processes and activities described and suggested throughout this guide, and map your staffing and systems to them. With this in mind, consider any changes you might want to make, and ensure these are reflected in your education agent governance and policy.

This is also an opportune time to remind you to put yourself into a prospective student’s shoes at every stage of developing your approach to agent management. Here are a few reasons why:

1. Strong education agent governance increases the likelihood of students receiving excellent service.
2. Appropriate staffing and business continuity protocols can help to maintain a seamless student experience.
3. Simple and effective IT systems enable education agents and provider staff to spend less time on administration, and more time counselling students and making sure they can make well-informed decisions.

1. Education agent governance

The chapters of this guide reflect best practice in education agent management and should be used to develop or refine your education agent policy. This policy should then be approved through a formalised governance structure. The resulting governance document and structure has three core purposes:

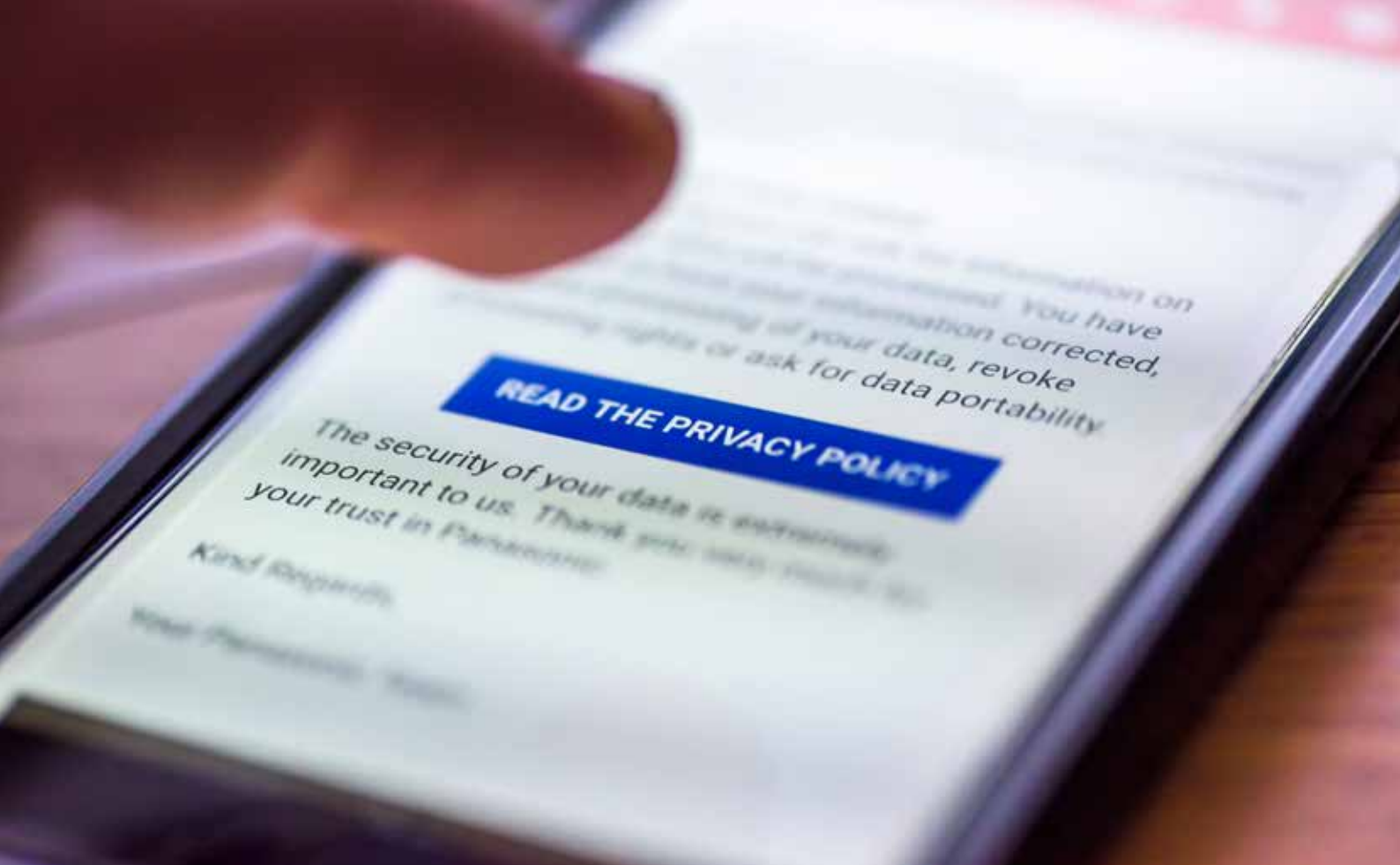
1. To align education agent practice with provider values and strategies
2. To document legitimate processes and procedures in your education agent operations that bring order and minimise risk
3. To keep internal stakeholders informed and engaged with your partnership activities

Role	Staff member(s)	Responsibilities
Policy approver	Corporate/Executive-level board	Approves overall policy at the provider's highest level. The policy could require pre-approval at a sub-board, such as a recruitment and admissions board or an international strategy board.
Policy sponsor	Most senior international marketing role	Checks the policy alignment with the provider's values and strategies and ensures the policy is ready for approval. Supports the policy's approval progress through the appropriate boards and committees.
Policy developer/owner	Operational international lead – eg Director or Head of international	Develops policy with input from key stakeholders. Presents the policy to senior management and committees/boards for approval. Ensures the policy is supported by appropriate procedures and that it is applied consistently.
Policy input stakeholders	International recruitment staff (including offshore staff)	Outline the processes that reflect best practice for the provider's context. This guide should be used to review existing policies and develop new ones.
	Admission staff	Ensure policy aligns with admissions policies and procedures.
	Marketing staff	Ensure policy aligns with references and is referenced by marketing policies and procedures (including adherence to brand guidelines).
	Compliance staff	Ensure policy aligns with, references and is referenced by compliance policies and procedures (eg those relating to U18 students and visa sponsorship licence).
	Governance/registry staff	Ensure policy aligns with the provider's governance processes.
	Academic/teaching staff (as appropriate)	Ensure policy aligns with expectations for student quality, course diversity, priority areas, etc.
	International campus staff (if appropriate)	Confirm policies align with provider's global strategy, ensuring there are no conflicts (eg considering whether an education agent can represent all campuses)
	Finance/procurement/legal staff	Ensure the contracting and financial elements of the policy align with, reference and are referenced by other corporate policies, and that they follow required due process.
	Delivery/teaching partner staff (if appropriate) – eg private foundation studies provider	Check alignment with key partner policies in order to simplify the education agent's relationship with you and your partner institutions.
Trusted education agent(s)	Verify that the policy can be applied by agents at an operational level.	

In your institution, some of these roles may not exist or could be condensed into fewer roles. This is fine, provided the policy can be reviewed and approved by relevant committees or by an executive level staff member (or members) with appropriate authority.



Expert tip: Seeking input and involving stakeholders in the policy development and approval process helps them to better understand the role of education agents in the recruitment of international students. It will help build internal trust in your international operations, and it can also present opportunities to work with colleagues to improve recruitment outcomes.



Some providers may choose to embed their education agent policies within existing policies – eg partnerships, admissions, recruitment, etc. However, the complexity of the education agent relationship with providers, as outlined in this guide, shows us that best practice requires a specific policy for this integral student recruitment channel. Where you do choose to embed these governance processes into other policies, it is important that the policies accurately reflect your agent management processes and procedures, and that they have been through a rigorous approval process. Should you be audited, or a serious issue arises warranting investigation, your ability to demonstrate that you have sound processes in place will be crucial.

Policy content

Your policy content must reflect your provider's context. Using the best practice advice laid out in this guide will allow you to develop a policy that covers:

- a rationale for your provider's use of agents, and how using this recruitment channel aligns with your provider's broader strategy (see INTRODUCTION and STRATEGY chapters)
- the ideal characteristics of the education agents with whom you will or already do partner with (see STRATEGY chapter)
- the process for identifying and contracting education agents, with reference to due diligence requirements (see STRATEGY chapter)
- the training required for your education agents, including how you induct new agents and how you maintain their knowledge through regular training and communication (see TRAINING chapter)
- the ways in which you support and are supported by your education agents (see SUPPORTING chapter)
- how you assess and manage quality control of your education agents (see REVIEWING chapter)
- how you compensate your education agents, and the core services you expect to be covered by this compensation (see FINANCIALS chapter)

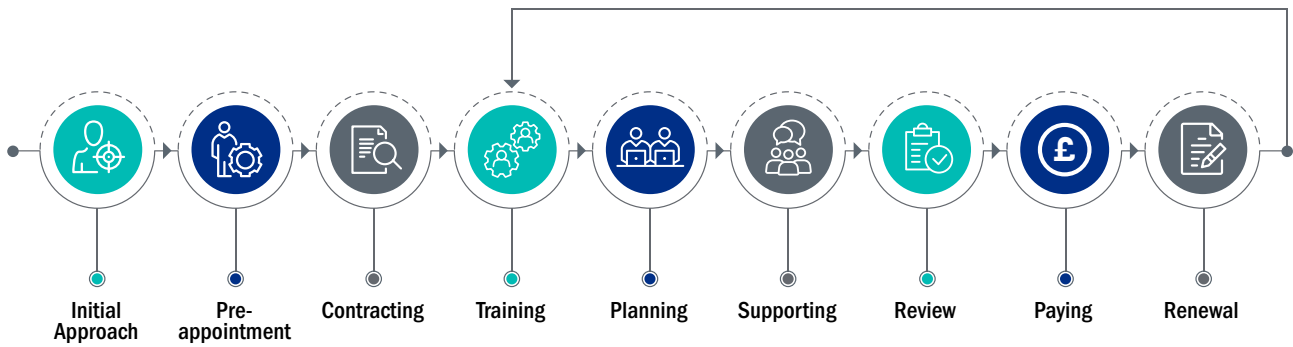
Within the policy document, you should also outline staff roles and responsibilities and the system protocols. We look at these in more detail in this chapter.

3. Staffing considerations

The wide variety of staffing strategies adopted across different provider types and sizes makes it too complex to come up with one best organisational design. However, the diagram below illustrates the broad range of functions and roles that are required to manage your education agents through the relationship life cycle.

Education agent partnership lifecycle provider roles					
STRATEGY	TRAINING	PLANNING	SUPPORTING	REVIEWING	PAYING
<p>Recruitment role – relationship/account management (often regional manager/international officer)</p> <ul style="list-style-type: none"> Identifying marketing channels and evaluating potential education agents <p>Admissions data role (admissions officer or business intelligence officer)</p> <p>Web content officer</p> <ul style="list-style-type: none"> Website forms and agent listings <p>Education agent coordinator</p> <ul style="list-style-type: none"> Contract and process compliance role <p>Director/Head of international recruitment</p> <ul style="list-style-type: none"> Overall strategy and contract sign-off 	<p>Contract and process compliance role</p> <ul style="list-style-type: none"> Overseeing training access, completion and recording <p>Recruitment role – relationship/account management</p> <ul style="list-style-type: none"> Delivering induction training Helping answer questions and provide localised content e.g. entry criteria Training design – online system/ppt, etc (collaboration with learning design professionals and international team) Course and student experience/service content (range of roles from across provider and community) 	<p>Recruitment role – relationship/account management</p> <ul style="list-style-type: none"> Working with selected education agents to determine activity, budget, and performance metrics <p>Contract and process compliance role</p> <p>Director/Head of international recruitment</p> <ul style="list-style-type: none"> Budget sign-off Business intelligence and market segmentation 	<p>Recruitment role – relationship/account management</p> <ul style="list-style-type: none"> Helping answer questions and provide localised content e.g. course availability <p>Admissions roles</p> <ul style="list-style-type: none"> Processing and updating on application statuses <p>Visa/Compliance/Student wellbeing roles</p> <ul style="list-style-type: none"> Specialist advice and support <p>Marketing communications & design team</p> <ul style="list-style-type: none"> Website content Digital and social media marketing Enquiry management Course and student experience/service content 	<p>Recruitment role – relationship/account management</p> <ul style="list-style-type: none"> Overseeing annual review and information gathering <p>Contract and process compliance role</p> <ul style="list-style-type: none"> Supporting information gathering and process compliance Data mining and visualisation Admissions input Enrolment team input Student survey team <p>Director/Head of international recruitment</p> <ul style="list-style-type: none"> Reviewing of plan execution and results against targets Gathering marketing staff input on campaigns 	<p>Contract and process compliance role</p> <ul style="list-style-type: none"> Checking and confirming commissionable students Split commissions Tier allocation Bonus scheme implications <p>Accounts payable finance role</p> <ul style="list-style-type: none"> Paying within contract terms <p>Recruitment role – relationship/account management</p> <ul style="list-style-type: none"> Answering questions and providing input <p>Director/Head of international recruitment</p> <ul style="list-style-type: none"> Sign off commission payments.

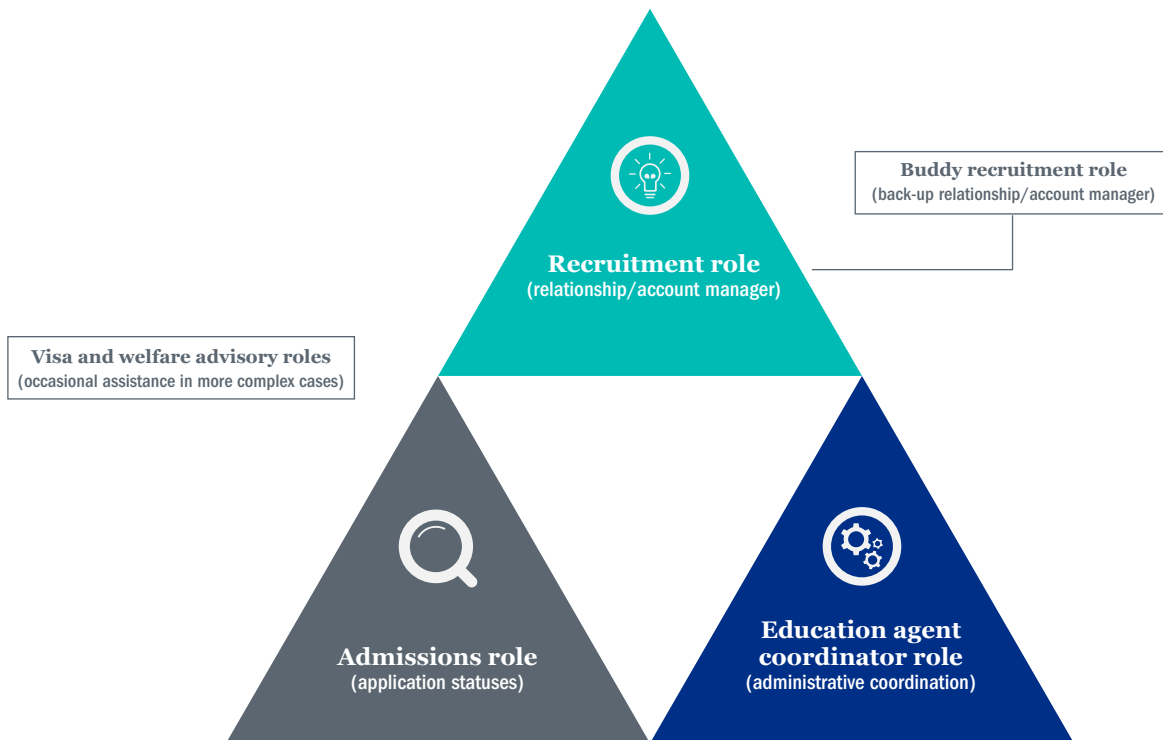
Education agent partnership lifecycle



Many of the staff in these roles will only have an indirect relationship with education agents – for example, the website content developer role will upload your education agent application form, list your education agents on your website and help with publishing events and activities, but would rarely interact with an education agent directly. Similarly the director or head of international student recruitment may only be signing contracts and providing overall strategic direction. But in both cases, these roles are important in optimising your education agent partnership.

Depending on your provider’s size, the listed roles might be condensed into a smaller number of roles or spread across a broader set of roles; the same is true for the core team, as follows.

The **core team** of contacts that education agents want providers to given them access to are:



Recruitment role (relationship management)

Education agents describe provider recruitment roles as having the most important function in a successful provider–education agent partnership. They might be described as ‘business development’, ‘recruitment’, ‘marketing’, ‘sales’ or simply ‘international advisers/officers/managers’.

The bond between the education agent and provider’s international recruitment staff is largely built on personal relationships. This means staff in these roles – must have excellent intercultural communication and relationship-building skills, have thorough knowledge of the provider’s offerings (academic, support and lifestyle) and be expert problem-solvers. They are the ‘face’ of the provider overseas, and have to balance the dynamic external student recruitment environment and demands of students and education agents on one side, with the process-driven and often risk-averse internal business culture of their providers on the other.

Through collaborative planning and ongoing support of their education agents, recruitment staff set the tone of the working relationship and are held accountable by education agents for their provider’s actions.

Managing a network of education agents across a set of international markets is ordinarily just one aspect of their role, but with approximately 50% of all international students coming to the UK using an education agent, this aspect is almost always the most significant.

In-market (overseas) recruitment staff

Many providers have placed staff in the above relationship manager roles in their source markets to increase their brand presence. Depending on the characteristics of the market, these in-country roles sometimes fulfill the role often undertaken by education agents, but are often tasked with working closely with education agents in the region.

This practice has accelerated since COVID-19, with some providers moving their entire recruitment operations into a series of regional offices, with only a small supporting office in the UK. If a regional office is run to support the education agent channel, rather than compete with it, education agents generally prefer this regional office model, which affords them more local support for initiatives and greater access to provider representative staff.

During education agent focus groups led by BUILA in 2021¹, education agents commented that the year-round, face-to-face, informal and formal contact with provider staff had helped them to get a better understanding of the provider (and the institution), which led to better enrolment outcomes. Similarly, if well operated, these offices can provide detailed and up-to-date market intelligence to providers so that they are better positioned to capitalise on new opportunities.

Like the recruitment roles described above, many of these staff and offshore offices have much broader responsibilities than just agent management.



Agent perspective: When asked what makes a provider–education agent relationship really positive, agents said it centres on regular communication, timely responses and mutual respect. Many also commented on how a successful relationship with a provider disintegrated when the relationship manager moved to another provider, and the agent no longer knew who to contact or did not receive timely responses.

¹ A partnership for quality: Consultation & engagement workshop (Education Agents) 2021

Buddy recruitment role

A buddy scheme – where you pair up two staff members (often one junior and one more senior) to work on the same project or in this case relationship – can help to avoid a breakdown in the provider–education agent relationship and allow business to continue as normal when a relationship manager leaves. It also provides extra cover when the relationship manager is away from the office.

Ideally the buddy role should be filled by a recruitment-focused staff member who has market knowledge and intercultural communication and relationship-building skills, and who is known to the education agent counsellors. However, providers have successfully used admissions and education agent coordination staff (sometimes without this specific skill set) to maintain sufficient business continuity during times of staff change.



Expert tip: Education agent relationships remain reliant on personal relationships. Whatever the size of your operations, make sure you have a plan in place for covering or transitioning your education agent relationships when you are undergoing staff change. It is easy to lose education agent business if the relationship functions through only one staff member, so this should be avoided wherever possible.

Admissions role (application status updates)

Education agents reported that they ideally want a dedicated contact for admissions-related questions – ideally, a phone number or ‘hotline’ for quick resolutions. However, time spent answering education agent enquiries is often at the expense of time spent processing applications, so if you implement this service, it does need to be carefully managed.

It is important that during the planning and training phases you are very clear with your education agents about when an education agent should use the hotline. This is where service level agreements around turnaround times can be particularly useful (see TRAINING and PLANNING chapters). You may also consider a cascade of contacts similar to the example in the PLANNING chapter.



Expert tip: If at all possible, investing in an IT solution that allows your education agents to track progress of their applications online can significantly reduce the number of calls received. Alternatively, build up the admissions expertise of one or more enquiry staff members and allocate them the ‘hotline’ so they can deal with admissions enquiries without taking your admissions staff off task.

Education agent coordinator role (administrative coordination)

This role goes by many different names – for example, agent liaison, operations coordinator, or partnerships officer – and is sometimes part of broader roles. Essentially this role should oversee:

1. agent processes optimisation, compliance and reporting
2. contract execution, renewal, termination and management
3. training coordination (however, training is often delivered by a different staff member)
4. systems access for education agents
5. commission reconciliation and payment coordination

The education agent coordinator is often also responsible for education agent updates and communications (see the SUPPORTING chapter for more information on how education agents want to receive news).

While the coordinator may build relationships with the education agent community and will work closely with relationship managers and admissions staff, best practice is to have them slightly removed from the day-to-day recruitment or admissions functions so they can deliver a process-based and unbiased service to education agents.

Immigration and welfare advisory roles

On occasion, education agents may need to speak directly with specialist staff members in other areas of your institution. For example, if a prospective student has particular additional learning needs, the agent may need to speak with your provider's learning support team so plans can be put in place in time for the student's arrival.

Similarly, agents may need to speak directly with one of your provider's specialist immigration advisors in the event of a particularly complex visa situation. In situations like this, it is best practice that admissions team staff act as the first-contact 'gatekeepers', rather than giving education agents unrestricted, direct access to these departments.

Scaling for provider size

You can now look at how best to scale this model up or down to suit your provider's resources. In doing so, try to consider what staffing is needed to deliver your strategic plan. What might suit your situation today may not be enough to get you to where you want to be in the long term.

4. Supporting IT systems considerations

Throughout this guide, we've made reference to possible IT systems support, from the use of a CRM to implementing dedicated education agent management software. As with your staffing considerations, your practice will be somewhat dictated by available resources. However, effectively configuring your existing systems or integrating them with an agent management platform (AMP) to support your education agent practice, procedures and engagement can greatly improve your efficiency in education agent management.

Agent management platforms (AMPs)

There is a huge range of AMPs available to providers, some of which cover only one or two specific tasks such as contract management or commission payment, while others offer comprehensive 'end-to-end' solutions. These more comprehensive systems are often modularised, allowing providers to select the specific functionality that best meets their needs whilst also allowing room to add more functionality in the future. AMPs can be standalone, operating alongside but isolated from your existing systems, or they might operate with some degree of integration with your provider systems.

While it may be tempting to purchase a fully comprehensive system, you would be well advised to work with your IT department to map your processes, identify your pain points and work out what you really need, as well as what can already be executed through existing systems configuration.

Universities UK cannot recommend a particular AMP over another, but the diagram below illustrates some of the functionality available in existing systems that can digitise the education agent partnership life cycle.

AMP systems functionality mapped to education agent partnership life cycle

Education agent partnership lifecycle AMP functionality at a glance					
STRATEGY	TRAINING	PLANNING	SUPPORTING	REVIEWING	PAYING
<ul style="list-style-type: none"> Platform preloaded with details of your education agents who already use the system with other providers Web integrated new agent enquiry forms Enquiry form integrated due diligence forms Automated referee and sign-off workflows Notes fields – eg for uploading student and colleague feedback Contract generation and issuance workflows (with digital signatures) Contract management and storage 	<ul style="list-style-type: none"> Agent hub/portal providing access to: <ul style="list-style-type: none"> – online training programmes – Induction and training materials and documents Training completion log (with dates) Micro-credentials/badging Log in access to application form upon completion of training Reporting functionality for provider 	<ul style="list-style-type: none"> Storage for planning document alongside education agent contract Multiple education agent contact information eg finance/contracts /office managers/ head counsellor Communication capture and date stamping (CRM style) Agent hub/portal access – reviewing contacts, training materials, etc Brochure/marcomms ordering Updating contact and office details – integrated with website updates 	<ul style="list-style-type: none"> Dynamic application form designed with education agent in mind (also suitable for domestic recruitment) Dynamic and configurable admission system with education agent tracking and some offer-making automation Communications capture eg log of email interactions Agent hub/portal providing access to: <ul style="list-style-type: none"> – admission status updates – materials order form – resources access – updating details – integrated with web updates – Payments – Push notifications Reporting functionality for provider: <ul style="list-style-type: none"> • By region/market/company, etc • Conversion rates/WIP/engagement metrics 	<ul style="list-style-type: none"> Enrolment data sorted by education agent Review scorecard fields linked to education agent Renewal/termination letter generation and workflows Tiered recognition scheme adjustments Reporting functionality for provider Archived documentation for audit and reviews, in-line with legislative requirements 	<ul style="list-style-type: none"> Automated proforma invoicing Agent approves within the system and workflows directly to Finance Team for payment Capable of managing a tiered commission structure Capable of managing at tiered reward scheme Integration with payment processing platforms Reporting functionality for provider

The integration and automation of administrative tasks through dynamic workflows does take time to set up, but there are clearly long-term administrative savings to be had, and education agents are usually comfortable using these systems.



Agent perspective: ‘We get a lot of pressure from students and their families wanting to find out the status of their application, but we have to wait for the admissions office to be open (time difference) and even then we often cannot get through [when we call] at the busiest times of year. If we could just log in and see our students’ statuses, we could save everybody a lot of effort and time.’

Education-agent-to-provider systems integrations

Emerging research from Australia suggests that there is an appetite among some education agents to integrate their CRMs with provider systems. It is common for the education agent to manually input significant amounts of student information into their in-house CRM only to have to re-enter this information into provider application forms. Some AMP companies are already working towards integrated approaches that could save a significant amount of time and reduce error rates through this early part of the student journey.



Expert tip: If you are in the market for an AMP, look for a system that your education agents are already using. You may find that they are already trained and used to a particular system that houses all of their relevant information or that they have integrated their own IT systems with. AMPs that are already in use by education agents may reduce your set-up time and provide a simpler transition for your education agent(s).

It’s worth noting that many AMPs now use relatively simple application programming interfaces (APIs) to pass information from one system to another, and already have APIs designed for commonly used student record, CRM, file management and other provider systems. These tend to be simpler to implement and more stable than integrations that require bespoke programming and more commonly suffer from faults when platform software is updated. As a result, ‘bolt-on’ systems designed to simplify a specific process are becoming easier to maintain and increasingly attractive.

Existing systems configuration

Provider CRMs can often be adapted to deliver some of the same functionality as an AMP, particularly around communication logging and time-stamping and also some elements of contract management.

Your provider may have already adapted their admissions and student record systems to capture extra fields – such as ‘tagging’ the student to an education agent so post-enrolment reports can be run to identify commissionable students. However, there is a good chance you still have some pain points during the student application journey. This will result in you providing less self-service functionality and workflow automation specific to the management of education agents. This means more time spent on low-value work such as scanning and uploading documents and manually replying to application status requests.



Expert tip: Before making any configuration or purchasing decisions, map out the process workflow for an education agent and identify the ‘pain’ and ‘delight’ points from the perspectives of the education agent, the provider staff member and, where relevant, the student. However good your systems are, it is likely you will be using spreadsheets and re-entering data at some point in the journey, which can open up the potential for manual errors in the process. Work with your IT department to look at how this can be best resolved, ie through:

- adapting your existing systems
- purchasing a module of an AMP to help alleviate a particular ‘pain point’
- implementing a complete AMP with associated system integrations

5. Budgeting

Make sure you allocate sufficient budget to support your education agents effectively. Ensure your senior managers understand the associated costs of working with education agents, including commission – a non-fixed cost – which you will be contractually obliged to pay.

Providers will have a myriad of approaches to allocating budget, but it is important for international recruiters to persuade senior management to avoid a simple allocation model based on the previous year. Where possible, you should have your education agent budget allocation linked to recruitment targets, as the commission element should directly correspond to revenue generated.

The FINANCIALS chapter looks at the costs and paying your education agents in more detail.

6. BUSINESS INTELLIGENCE: Helping your education agents help you

Throughout this guide, we have emphasised the importance of good research and business intelligence in making informed decisions, particularly at the early stages of a relationship or student recruitment cycle, including:

- developing your channel strategy and selecting your education agents (see STRATEGY chapter)
- creating your marketing and recruitment activity plan with your education agents to attract the right type of students (see PLANNING chapter)
- tailoring your training and just-in-time information to your education agents (see TRAINING chapter)

We also touched on using business intelligence in the REVIEWING chapter, in relation to looking at performance in the context of the market's dynamics.

In addition to these knowledge sources, many education agents can offer significantly more business intelligence to a provider. The following list outlines some ideas you may want to discuss with education agent partners.

- Asking for information on new trends they are seeing in student demand – eg regions, course offerings and delivery modes that could inform new course development
- Asking for information on competitor activities (be careful not to put your education agent into a difficult position, as they understandably may not want to share work they are doing with another provider)
- Testing course/programme titles in a market – eg a course designer might want to name their course 'MSc System on Chip Design', but the target market segment is looking for courses/programmes called MSc Semiconductor Engineering.



Expert tip: Use web analytics such as the Google Trends tool to understand the potential demand and attractiveness of course/programme titles, which you can then test directly with your education agents and prospective students.

- Gaining help with due diligence on and introductions to potential academic partnerships with local providers, sponsor organisations or other target organisations
- Requesting insights on how to work successfully in higher-risk regions or on regions to avoid altogether due to potentially damaging practices – eg a sudden trend in visa refusals due to fraudulent documents being submitted
- Gaining insights into long-term impacts on market dynamics, such as demographics, education policy, exchange rate fluctuations, GDP per capita, etc, and the impacts of those on student demand – potentially leading to collaborative planning for market diversification or exit
- Gaining insights into employment needs and trends in the source market, which can assist your provider in developing new courses/programmes or re-validating existing ones, and help providers ensure study offerings align with students' graduate employment expectations.

Any intelligence gathered through your education agents should be verified by alternative means or sources – this is not an issue of not trusting your education agent; it is simply good research practice to check that any action you intend to take as a result of the information provided is going to be a sound and justifiable investment decision.



Agent perspective: BUILA and UKCISA research (2021) suggests that most education agents are keen to offer additional help to their providers, and value being engaged in these types of discussions.



Best practice:

- ✓ Develop a policy and procedure specific to education agent management, and use existing committee structures to gain input and executive approval.
- ✓ Ensure your education agents have a core team of contacts at your institution, including a 'buddy' relationship lead to ensure business continuity during staff changes or other business changes.
- ✓ Review education touchpoints through the provider–education agent life cycle and determine the efficiency gains – both for your provider and education agent – that an AMP or existing system configuration may offer.
- ✓ Engage your education agents in business intelligence gathering beyond the recruitment of students. Many of them have worked in international education for decades and have a wealth of market knowledge and insight they can share with you.