



# **The good practice guide for UK education agents partnering for quality**

# Introduction & Background

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

'Without agents it would be very difficult to convert and get students to the UK. There are so many steps in applying to a university overseas and the agents can help answer questions saving reps a lot of time.'

**UK HEI INTERNATIONAL STAFF**

*The Partnering for Quality; A Pathway to a Quality Framework* report, by BUILA and UKCISA, in March 2021<sup>1</sup> demonstrated the strategic importance for the UK of education agent relationships – circa 50% of all international students currently studying in the UK used an education agent's services. Most education agents are working in an ethical fashion to help students achieve their dreams of studying in the UK and delivering an excellent service.



**85%** of HEI agree 'agents are well informed and up-to-date on the higher education sector in the UK'



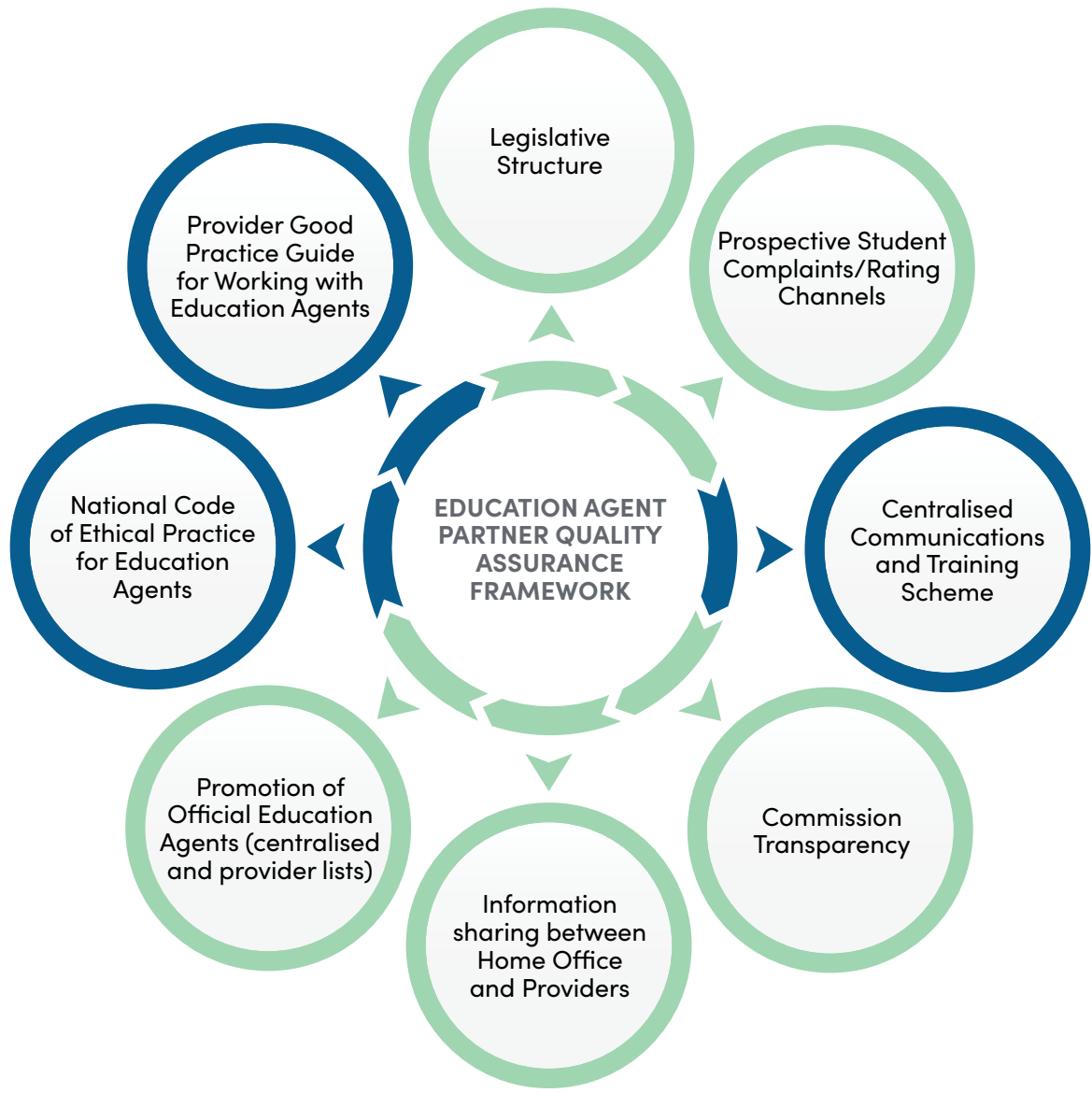
**85%** of students who used an agent agree 'the information provided by my agent was accurate'

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

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

1. [A Partnership for Quality: A route to a UK Quality Framework with Education Agents](#)

Alongside existing initiatives and legislation, they form the UK Quality Assurance Framework for UK Education Agents.



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

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

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

**International student**

# The National Code of Ethical Practice for UK Education Agents



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

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

## 1. ORGANISATIONAL BEHAVIOUR

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

## 2. ETHICAL BUSINESS PRACTICE

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

## 3. OBJECTIVE ADVICE AND GUIDANCE

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

## 4. STUDENT CENTRED PRACTICE

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

## 5. ORGANISATIONAL COMPETENCE

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



# UK Agent and Counsellor Training

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

There are many benefits of completing the training:

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

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

Key updates implemented in the new training programme include:

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

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

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



To access the UK Agent and counsellor training and engagement hub and other useful British Council resources visit <https://www.britishcouncil.org/education/agents-counsellors>



## The Good Practice Guide for Providers Using Education Agents

  
The Good Practice Guide  
for UK Education Agents  
Partnering for Quality

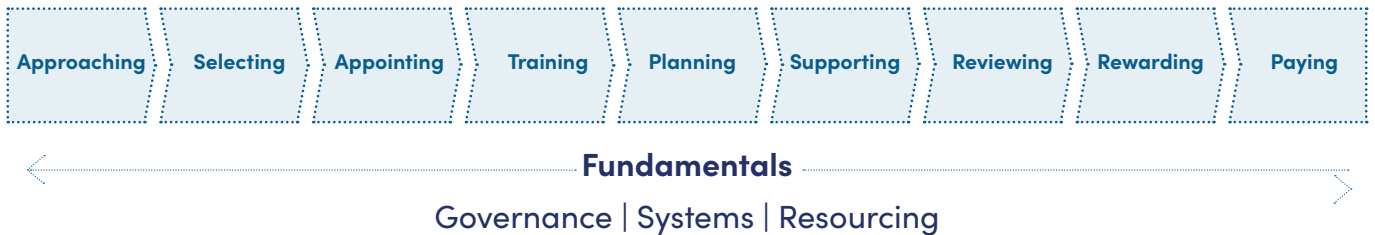
Developed by Universities UK International and BUILA, the Good Practice Guide for Providers Using Education Agents is designed to help UK institutions and education providers enhance their education agent management practices. Training has been rolled out to all sectors as the Guide has been distributed.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

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

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

# Education Agent Good Practice Guide

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



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

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

POSTGRADUATE TAUGHT  
STUDENT FROM INDIA



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

POSTGRADUATE TAUGHT  
STUDENT FROM THE USA



## THE EDUCATIONAL INSTITUTION - EDUCATION AGENT RELATIONSHIP JOURNEY - EXPERT TIPS FOR EDUCATION AGENTS

### APPROACHING PROSPECTIVE INSTITUTIONAL PARTNERS

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



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

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

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## SELECTING - NAVIGATING DUE DILIGENCE PROCESS

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### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

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

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## APPOINTING (CONTRACTING)

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



### EXPERT TIP

Use the agreed contract as your guiding document to consistently meet your partner's requirements and deliver services to prospective students that meet or exceed their expectations. This will help build trust between you and your partners. Performing well against the contracted expectations will likely lead to contract renewal.



### EXPERT TIP

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



#### EXPERT TIP

Keep in regular written communication with the institution, and notify the institution of any changes to your services you provide to students that might affect how you represent the institution.



#### EXPERT TIP

If the institution would like to change or add elements to the contract, they should use written addendums (co-signed) to reflect this.



## TRAINING - NEW AGENT INDUCTION



### EXPERT TIP

Help the educational institution to provide your company with a more tailored, relevant induction and training programme by providing them with full business intelligence, including staff roles and responsibilities.



### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

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

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



#### 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.

## PLANNING - A COLLABORATIVE APPROACH



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

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



#### EXPERT TIP

To make your objectives realistic and achievable, both education provider and education agent need to offer investment in resources and a commitment to provide ongoing support for projects. If your contract includes a service level agreement, use this to manage expectations from applicants and their families. Request a back-up contact at the institution for when staff are away or are not able to respond quickly to ensure service levels are maintained.



#### EXPERT TIP

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



#### INSIGHT:

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



#### INSIGHT:

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



#### EXPERT TIP

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

## OPTIMISING THE RELATIONSHIP

### EDUCATION PROVIDER BEST PRACTICE:

- ✓ Think about the student's perspective throughout the decision-making journey and tailor your support for your education agent to meet those needs.
- ✓ Make sure the outcomes of your activity with your education agents can be measured so you can make informed decisions about future activity.
- ✓ Effective education agent relationships work as partnerships rather than supply-chain relationships.
- ✓ Be proactive and responsive, particularly in relation to making decisions on applications. Ensure the education agent always has somebody to speak to at your institution.
- ✓ Evaluate the cost benefit of using technology platforms to support your education agent management which have self-service functionality.













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





















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

AGENT
















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
















AGENT















		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)

		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	Seeding word of mouth promotion through current students and alumni.	Supply up-to-date marketing materials	Capture information requests and adapt training and information architecture to meet agent needs	Use student ambassadors to engage with the prospect pool	Provide clear and accurate tuition fee and cost of living information		
	ACTION	Engaging training (Training chapter)	Participating in promotional events and fairs	Respond quickly to enquiries	Use relevant and charismatic academics to engage with the prospect pool	Providing career outcomes information (by course) and working while studying opportunities	Provide accommodation information		
		Sharing and collaborating on content for the agent's social media channels	Refer / introduce qualified leads to a local agent for assistance			Remind agent of campus and student life aspects including safety mechanisms	Ensure website information is up-to-date and relevant		
















# DECISION

JOURNEY STAGE		DECIDE Applying for course, scholarship or accommodation		WAIT Waiting for outcome				
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?			
	FEELING	 NERVOUS	 ANTICIPATION	 CONFIDENT	 STRESSED	 SURPRISED	 DISAPPOINTED	 FRUSTRATED
	DOING	 Gathering academic and other relevant documents Completing course application forms Completing other application forms - accommodation, scholarship, funding, etc. Comparing experience with peers	 Submitting further information (as required) Improving English Participating in interviews / auditions / selection activities	 Waiting for results e.g. school, English, etc Waiting for Scholarship Talking to family and friends about decision	 Applying for finance e.g. bank loan, grants Considering offers from other providers Looking for alternatives if I don't receive any offers e.g. other country, different course			
EDUCATION AGENT VIEW	OBJECTIVE	Making the student's experience as painless as possible		Managing the student's (family's) expectations'	Getting offers on behalf of the student			
	ACTION	 Gathering and submitting the required documents /portfolios, etc Arranging and promoting provider interview sessions Document verification	 Completing application on behalf of student (some countries) Assisting student with Statement of Purpose (some countries) Translating documents	 Requesting any additional documents / items on behalf of provider Running provider interview sessions Document verification	 Chasing providers for decision Relaying information from the provider English language preparation (as required)			
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			
		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)				
		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							
JOURNEY STAGE		RE-EVALUATE Considering options		PURCHASE Confirming study plan					
STUDENT PERSPECTIVE	THINKING	I have offers from 4 other providers Why should I choose this provider over that one? Should I do the foundation course they've offered me to bridge the qualification gap?	They made me wait too long How can they say I'm not qualified? Will I be able to travel and will I be safe? COVID-19 implications What is the balance between online and face-to-face learning	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								
	HAPPY	RELIEVED	DISAPPOINTED	FRUSTRATED	STRESSED	ANXIOUS	EXCITED	HAPPY	
EDUCATION AGENT VIEW	DOING	 Wait for an outcome from the provider Receiving course offer / no offer Receiving reply to other applications - accommodation, scholarships, etc.	 Evaluating best financial offer including scholarships and discounts Checking government websites and asking people about COVID-19 situation	 Accepting offer(s) and/or deferring offer Paying tuition fees / deposit or indicate fee arrangements Accepting scholarship offer	 Accepting accommodation offer Paying accommodation fees / deposit				
	OBJECTIVE	Converting the applicant to an acceptance		Getting the student visa application in as quickly as possible					
PROVIDER SUPPORT	ACTION	 Counselling students on the benefits of different offer types from different providers Relaying any important information from the provider or destination country	 Assisting with accommodation, funding and other arrangements	 Securing student signed acceptance declarations Assisting with the preparation of visa applications Document verification	 Assisting with fee processing – loans/deposits, etc Requesting visa documents from provider				
	ACTION	CRM engagement and conversion communications  Reminders about accommodation /scholarships, etc	Provide agents with any critical information before sending to students e.g. COVID-19 updates  Facilitate opportunities to talk with current students and subject matter experts	Quickly acknowledge and process deposit payments Quickly issuing CAS					

		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	<ul style="list-style-type: none"> <li>Involve education agent in pre-departure briefings or support their briefings</li> <li>Provide a simple 'what to bring check-list'</li> <li>Details of airport pick-ups and welcome programmes</li> </ul>	<ul style="list-style-type: none"> <li>Quickly refund deposits where student cannot travel – visa refusal/compassionate circumstances, etc</li> <li>Easy access to and innovative orientation materials (including book lists)</li> <li>Translated orientation/welcome for EFL students</li> </ul>	<ul style="list-style-type: none"> <li>Notify agent of student arrivals</li> <li>Produce student arrival videos for use by the agent</li> </ul>	<ul style="list-style-type: none"> <li>Promoting buddy schemes and facilitating peer to peer interactions</li> <li>Remind education agents of provider contacts for problem solving</li> </ul>

# COMMENCE

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

## REVIEWS AND RECOGNITION



### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

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

## RENEWAL / NON-RENEWAL DECISIONS



### EXPERT TIP

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

## REWARDING



### EXPERT TIP

Be open and honest with education providers when it comes to discussions about recognition and rewards. Make sure you understand the educational institutions plans for recognising and rewarding your company. Make them aware of any organisational or cultural factors to consider and your relevant local legislation

## PAYING



### EXPERT TIP

The financial relationship between an educational institution and education agents must comply with several UK laws, and education providers and education agents must be fully aware of this. In addition, you must be mindful of your responsibilities to comply with the Competition and Markets Authority regulations. Of particular importance is that you are honest about the commercial relationship you have with your educational institutions, ideally through a signed contract with them. You do not need to state the value of your commission, just that you receive a commission for helping a student to enrol at that institution and that that pays for a defined set of services you will provide the student.



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



### EXPERT TIP

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



### EXPERT TIP

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



### EXPERT TIP

It would be unethical and against agent good practice to refuse to submit applications for fully qualified prospective students simply because you are non-contracted and may not receive a commission from an education provider. Educational institutions have a rigorous selection, appointment and contracting process and trying to bypass that forcefully reduces the likelihood of the education provider considering your appointment for a future enrolment cycle.

## FUNDAMENTALS

### GOVERNANCE



#### EXPERT TIP

Focus on embedding a student-centred approach across your company - Educational Institutions' agent governance and policies are developed using the prospective students' perspective to increase the likelihood of students receiving excellent service. This will ensure that you continue to meet both your own and the education providers' requirements.

### RESOURCES (STAFFING)



#### EXPERT TIP

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

### SYSTEMS AND BUSINESS ANALYTICS



#### EXPERT TIP

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



#### EXPERT TIP

Web analytics is a powerful tool that you can use to gather more insights on prospective students. You can share those insights with your education provider partners to contribute more to their marketing strategy and generate additional value. They may wish to engage your help similarly to test potential market demand for certain courses or other things indicated by their web analytics

## STUDENTS FEEDBACK FROM BUILA & UKCISA REPORT

The original research that informed much of this work is available to download from UKCISA website:



[A Partnership for Quality: A route to a UK Quality Framework with Education Agents](#)

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



**INSIGHT:**

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

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



**INSIGHT:**

Be more transparent about the overall process and fees.

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



**INSIGHT:**

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

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



**INSIGHT:**

Publish/share student placement success rates and stories.

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

We will leave you with a few student quotes:

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

**UNDERGRADUATE STUDENT  
FROM SOUTH AFRICA  
WHO USED AN AGENT**



“It is common for someone who is not familiar with the process to feel overwhelmed and therefore it is very important for education agents to be able to properly communicate with international students...”

**UNDERGRADUATE STUDENT  
FROM MALAYSIA  
WHO DIDN'T USE AN AGENT**



“Be more transparent in the process, give honest suggestions and do not make the decision for students.”

**POSTGRADUATE  
TAUGHT STUDENT  
FROM CHINA WHO  
DIDN'T USE AN AGENT**



“Deeply understand the personality of a student and also what the student wants from the University they wish to go to.”

**UNDERGRADUATE  
STUDENT FROM  
INDIA WHO DIDN'T  
USE AN AGENT**



