

# targetconnect

an introduction for student services

# What is targetconnect?

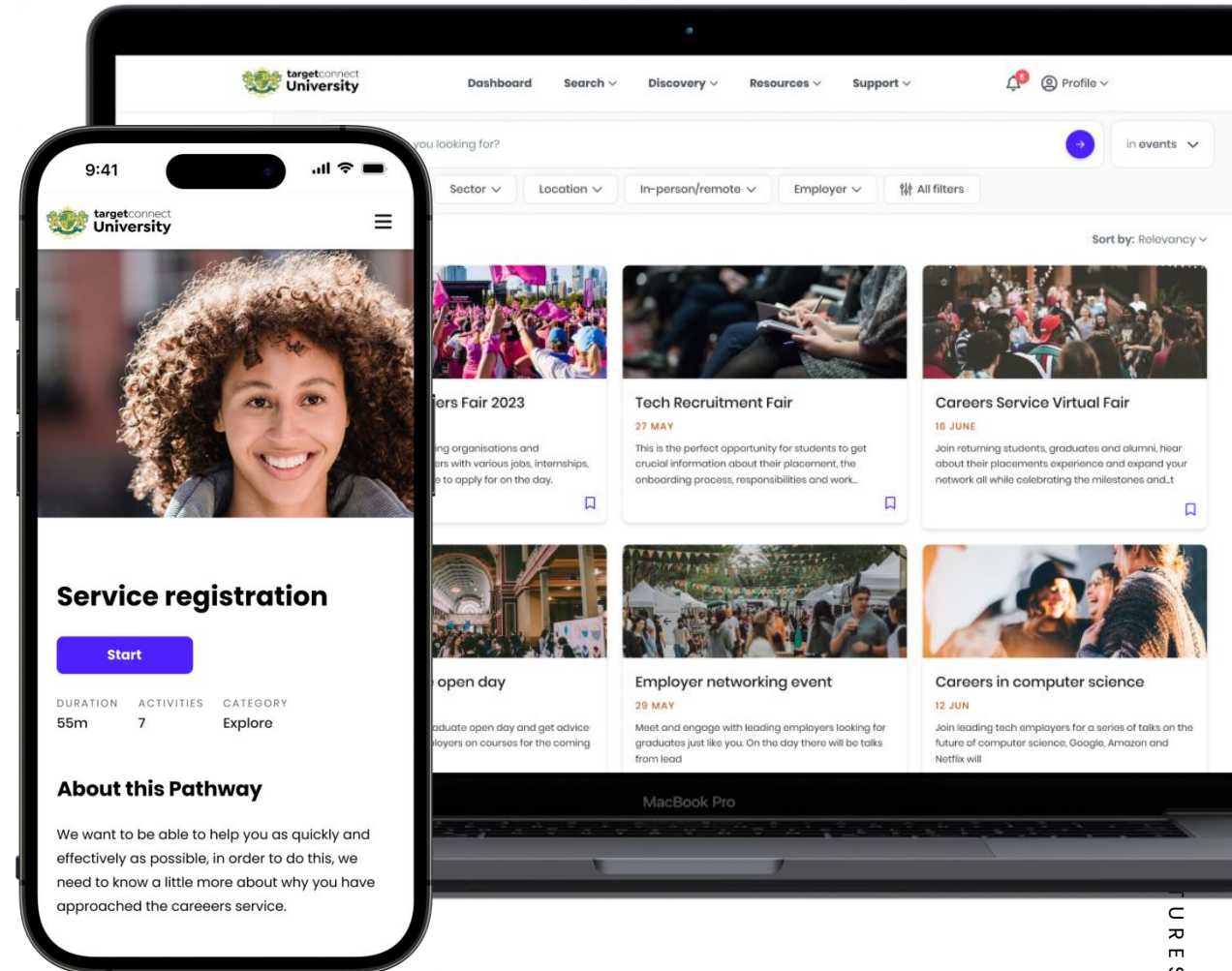
**targetconnect** is a student services and careers platform from GTI. It is used by over 100 universities in the UK, Ireland and globally.

It is designed to maximise the student experience and deliver successful graduate outcomes at scale.

The platform is SaaS cloud based and easy to use. It is flexible, so can support a wide variety of student service uses; it is white-label branded by your University; and used by over 2m+ students and users.

targetconnect began as a Careers Service management platform. It has since grown out of careers and is now used increasingly to support multiple student services.

This deck is designed to give you an insight into how our platform can be used to support your teams and your students, by providing the tools you need and the student experience that your students want.



# 101 universities, 192 services, 5m students and graduates





# Partnering with universities and supporting students



Our teams: London, Oxford, Dublin, Canberra

## gti brands



**cibyl**

**Research and Data**

Understand student career needs, wellbeing and experience.



**targetjobs and targetconnect**

The UK's largest graduate careers and jobs platform



**gti | ATS**

**Early Career Recruiting**

Attract, assess and onboard school leavers and graduates

# University feedback

"UWL are very excited to partner with targetconnect as the new provider for our student services case management platform. We have chosen this platform because it's **engaging, customisable, dynamic and encompasses all our services under one 'roof'**. We have been so impressed with the targetconnect team who are **responsive, helpful, and as passionate** as we are about continuously developing the support offered to our students. We feel that as an organization our principles are aligned, which will ensure a long successful partnership."

## Tracy McAuliffe

Associate Pro-Vice Chancellor Student Affairs  
University of West London

"We have found the **targetconnect team very easy to work with. We had a very smooth implementation experience and receive excellent ongoing support.** targetconnect has greatly improved the way we deliver our services and the team are dedicated to making things even better and are responsive to any feedback. We look forward to working with the targetconnect team to continue to improve the student experience."

## Steve Short

Deputy Director of Learning and Wellbeing /  
Head of the Advice Centre at Royal Veterinary College

# Key features



# One platform, multiple student spaces

An all-in-one destination for student support with dedicated spaces for each service and its stakeholders.

**Queries**

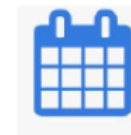
Ask questions which direct to a specialist.

**Decision trees**

Signpost students to online services.

**Pathways**

Workflows encourage students to self-assist through predefined activities and guidance.

**Appointments**

Appointment bookings including confirmations and reminders.

**Virtual workshops**

For students to discuss and learn.

**Feedback**

Students can share their feedback after sessions to allow them to reflect and share their insight.

**Workload management**

Deliver answers and one-to-one consultations.

**Casebooks**

Record status, actions and risks. Note sharing of potential issues.

**Risk timeline**

For risk-monitoring and context.

**APIs**

For integrations including student record systems, buildings check-in and canteen tills.

**Configuration**

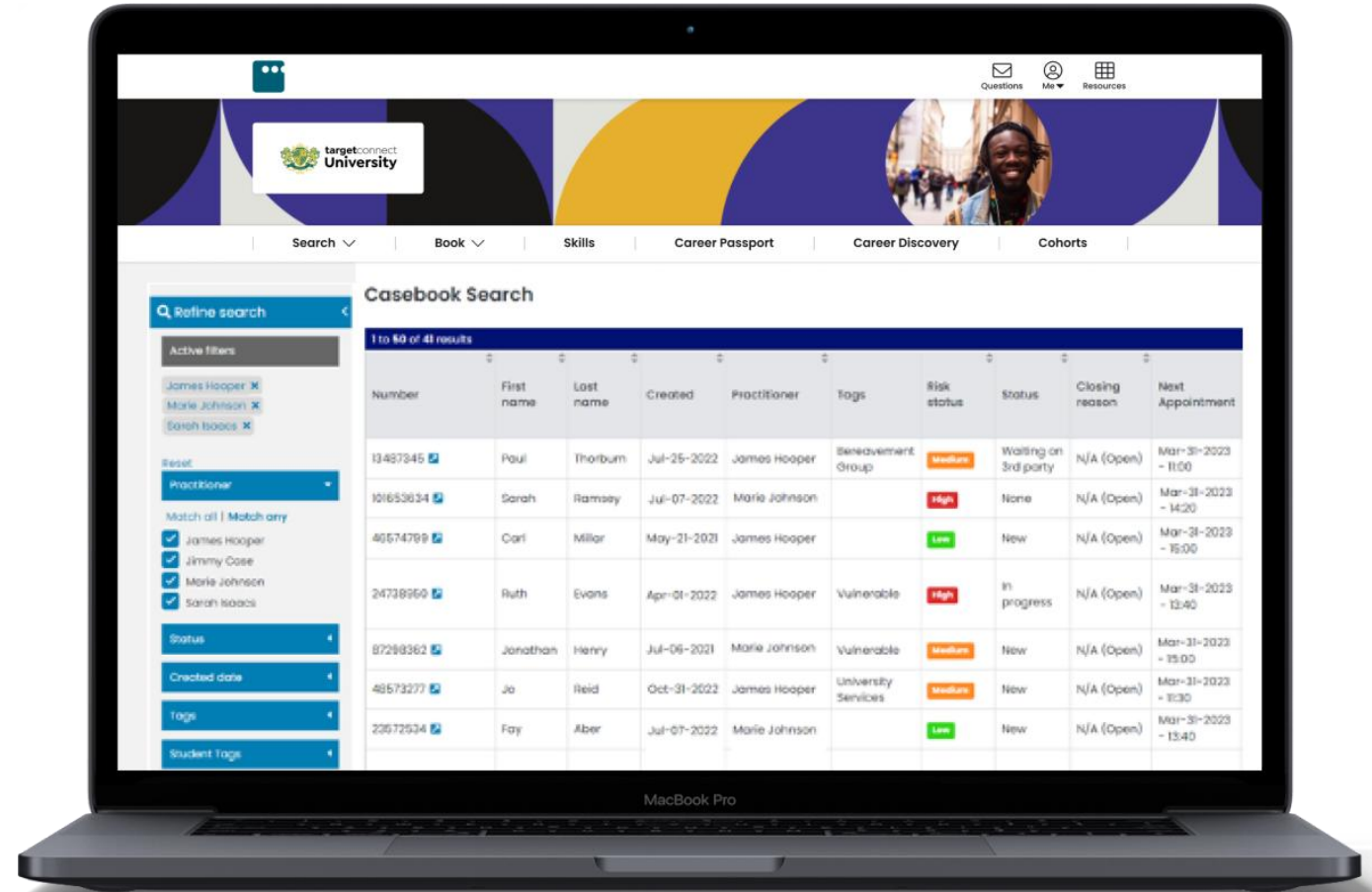
From pathways to feedback forms.

**Data and analytics**

Local service and cross-service reporting.

# Case management

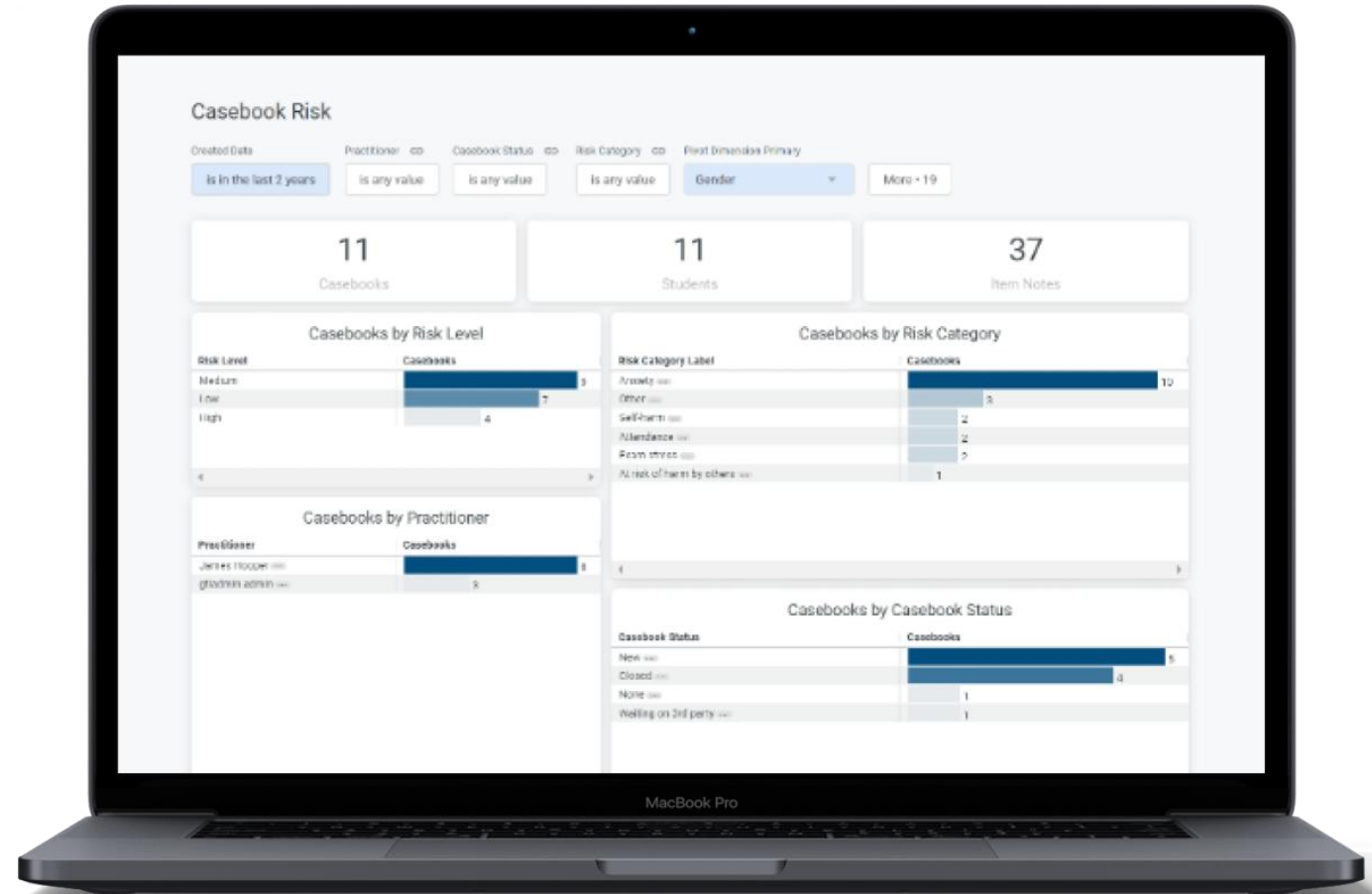
- Secure access controls and permissions
- Cross-service escalation and alerts
- Cross-service summary and reports
- Risk profile and management
- Email integration
- Subject Access Request tools
- Legacy case data import



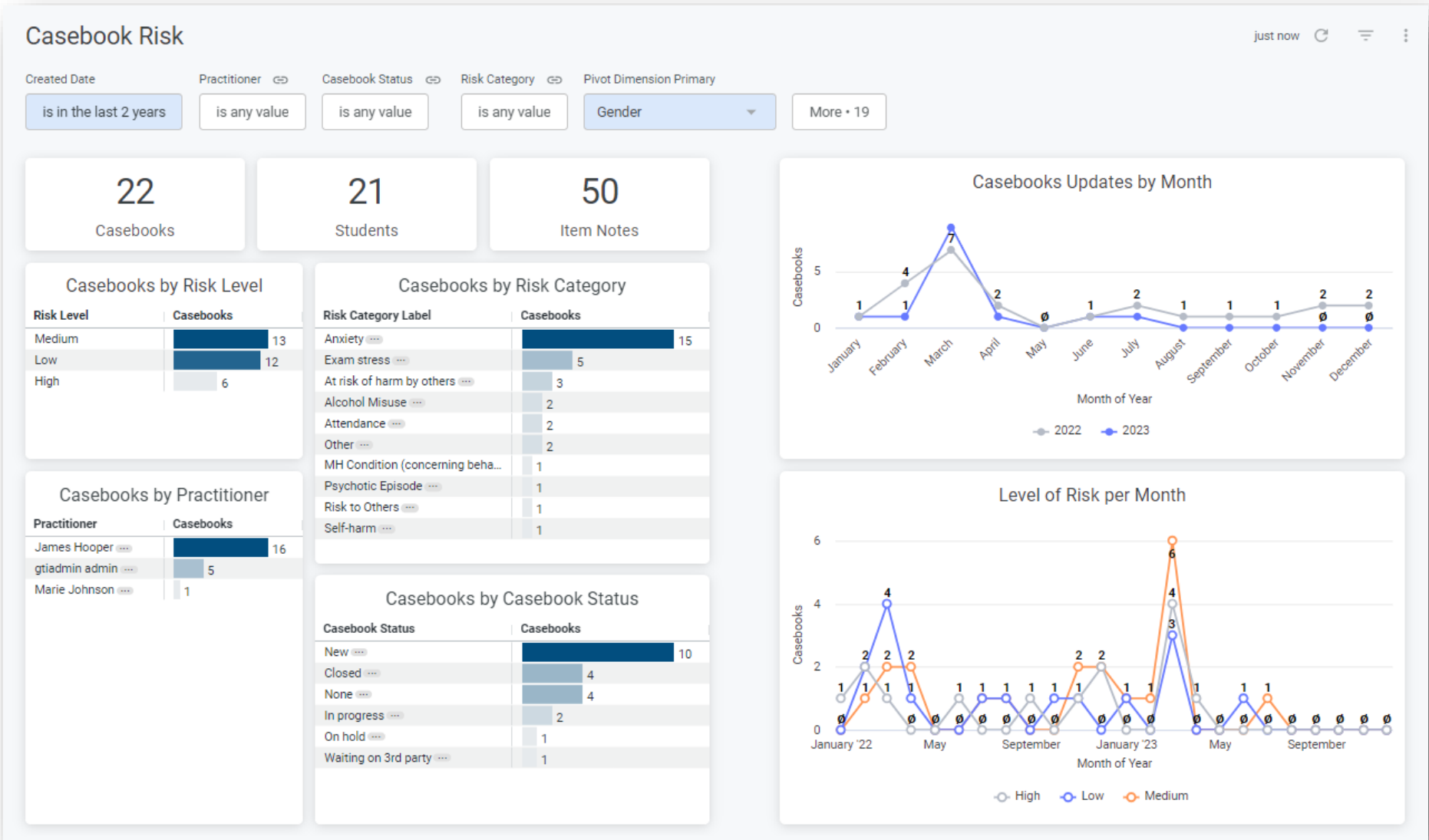


# Risk, reporting and data

- Risk tracking
  - Configurable risk levels and categories
- Cross-service view
  - Ability to see if cases raised with other teams
  - Escalate to other services
- Reporting
  - Standard reports
  - Looker
  - Advanced reporting

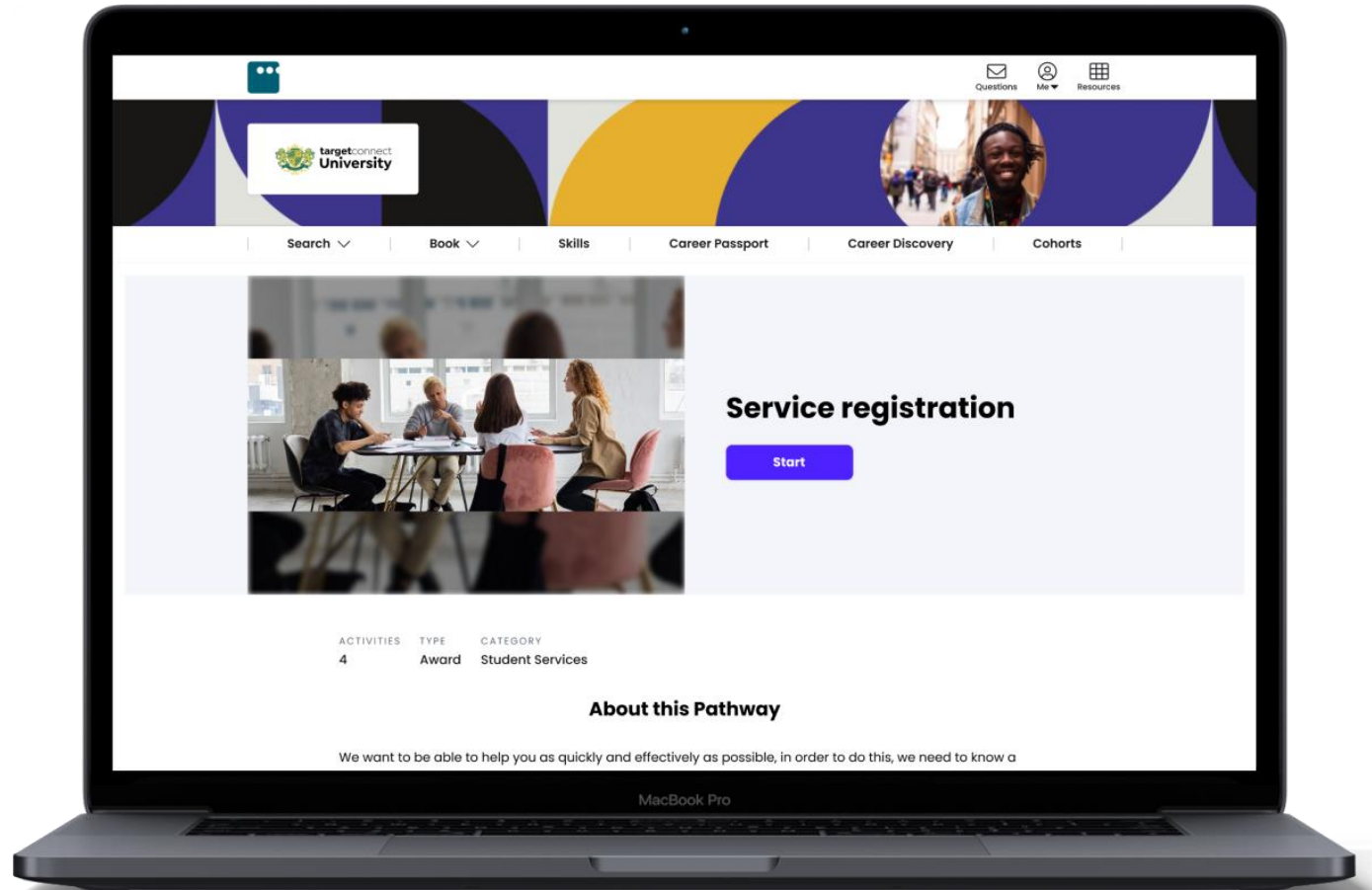


# Looker dashboard for risk



# Pathways

- Workflow module
- Service registration and triage
- Hardship fund applications
- Student support plans
- Self-direct support and learning
- Automate or restrict access
- Form builder, inc. clinical forms



# Pathways: self-referral



1

Students are directed to the self-referral pathway (or an adviser can start the pathway on a student's behalf).

2

The pathway is designed around your existing processes.

3

Collect background information about the student's presenting issues and needs.

4

Track engagement throughout the process.

5

Include clinical assessments, if required.  
(Automatic scoring included)

6

Triage, refer and open a case.



# Pathways examples

**#NeverOK**

**Active Consent Workshop**

Active Consent Workshop: How to support yourself & peers.

1h

**Meditation Group**

Meditation is an effective way to relax & bring peace to your body and mind. Regular practice can help you to combat stress, improve your health & your...

5m

**DSAs** COMPLETE

**Unsure of how to apply for DSA?**

A pathway to guide students through the stages of applying for Disabled Students' Allowances. The processes can differ depending upon which funding...

100%

**APPLICANTS ONLY**

**University Applicant Enquiry Form**

University Applicants are only to complete this form. The Funding & Money Advice Team can provide bespoke funding advice depending on your course...

**Tell us about your disability and/or long term health condition**

DISABILITY/DYSLEXIA

Tell us about a physical or sensory disability, medical condition, mental health issue or specific learning difficulty such as dyslexia.

0%

**Scholarships Awards Evening Invitation and RSVP**

A inspiring and joyful evening celebrating the success of our 2023/24 Scholars and Award Winners.

**Specific Learning Difference - Dyslexia and ADHD pathway**

Bath Spa offers screening for SpLD, such as dyslexia/dyspraxia & ADHD up to 13 weeks before your course end date. We facilitate a diagnosis so that...

**Request for Support Registration Form**

If you are not sure what service you need complete this form and we will allocate you to the most appropriate service.

**Inclusion Services Student Charter & Service Information**

**Inclusion Services Student Charter**

Our Charter outlines our expectations and the service that with offer with regard to student advice, managing appointments and engagement with our...

**Cost of Living Advice and Guidance**

Supporting students through the Cost of Living crisis and ensuring students are well-informed to navigate this challenging time

**Screening for dyslexia or another specific learning...**

DISABILITY/DYSLEXIA

Information about a range of specific learning conditions; you can indicate to us if you think any of these apply to you and you can then request a...

**Support Available**

Check your eligibility for different bursaries and learn how course changes affect funding.

**FMAT Support and Top Tips**

The Funding and Money Advice Team (FMAT) supports both current and prospective students with any financial queries.

**Considering changing course, suspending or withdrawing?**

INFORMATION SHARING

Speak to our Student Funding Advisors before making a final decision

**Extenuating Circumstances**

Are you needing to apply for Extenuating Circumstances but do not know where to start or how to apply.

**NHS**

**Opting Out of Funding**

**NHS Bursary & Opting Out**

Step-by-step guide to opting out of NHS funding

**REGISTRATION**

**Counselling and Mental Health Registration Form**

Complete this short form to register with the Counselling and Mental Health Service. Once this has been completed you will be offered a consultation...

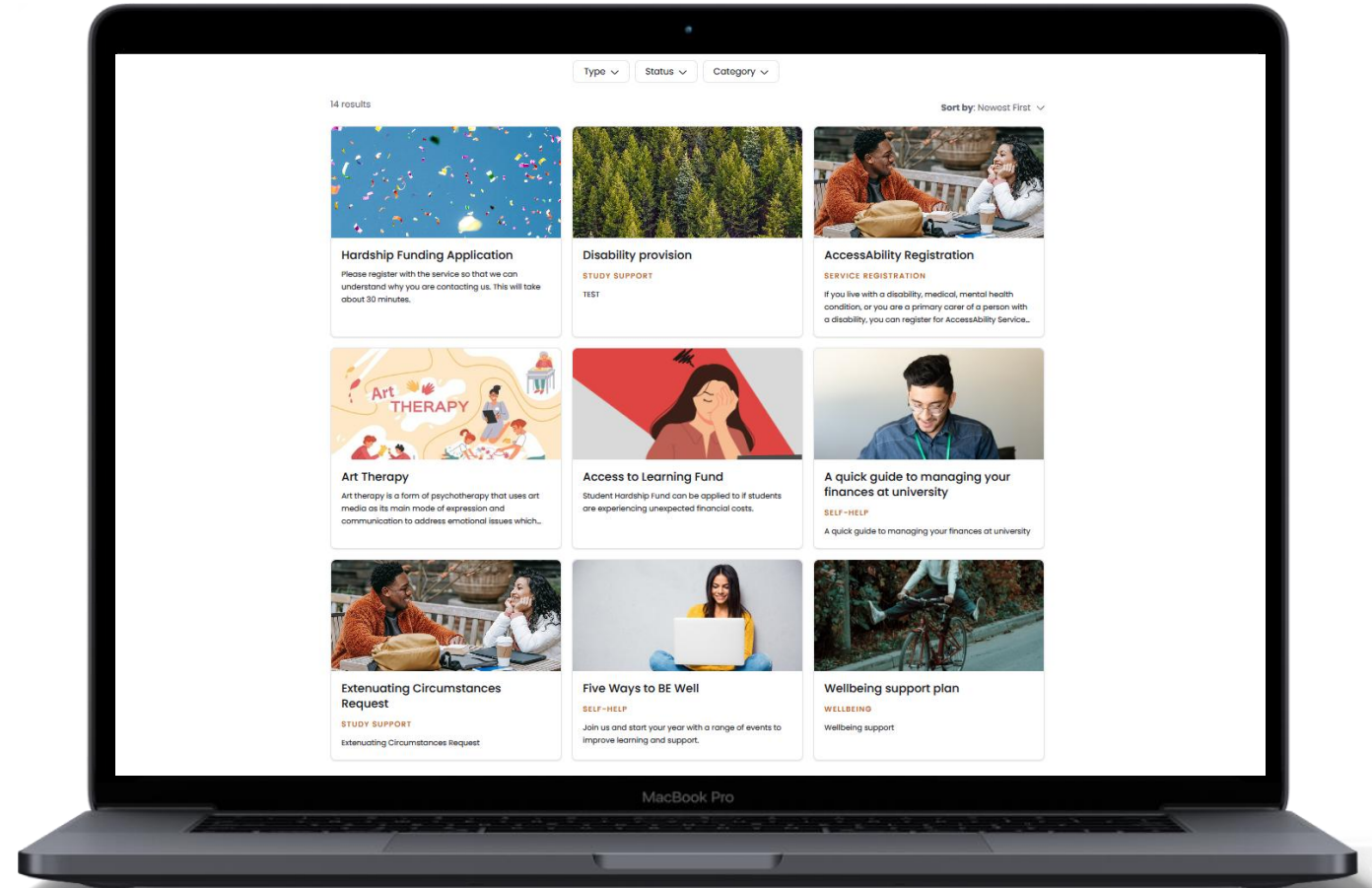
10m

**Update consent or submit additional medical evidence**

Please complete the registration and consent form for the team.

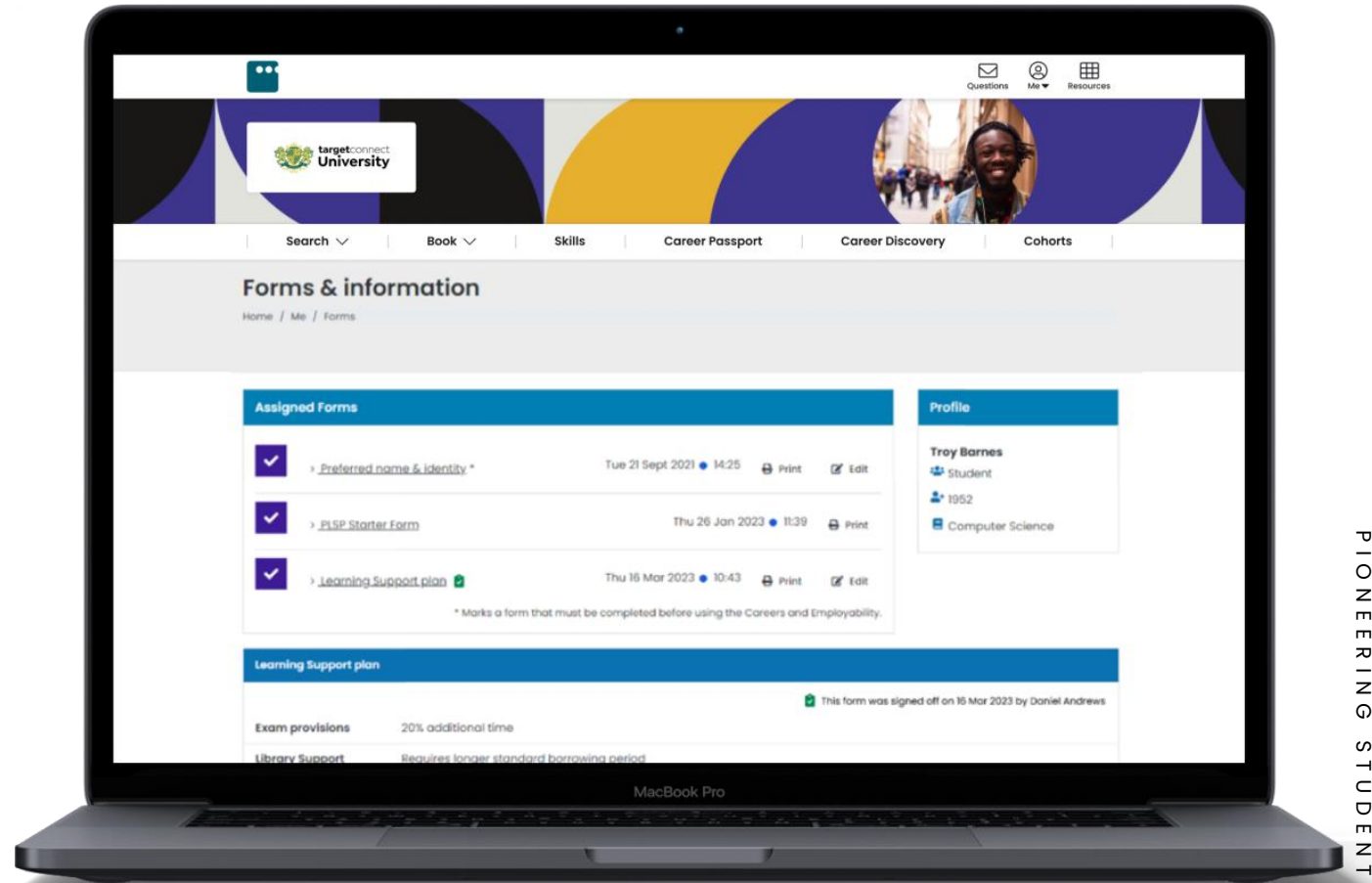
# Self-service support

- Structured workflows and resources
- Self-directed learning and support
- Initial triage and signposting
- Increase and track engagement with students
- Resources library
- Appointment finder / service guide



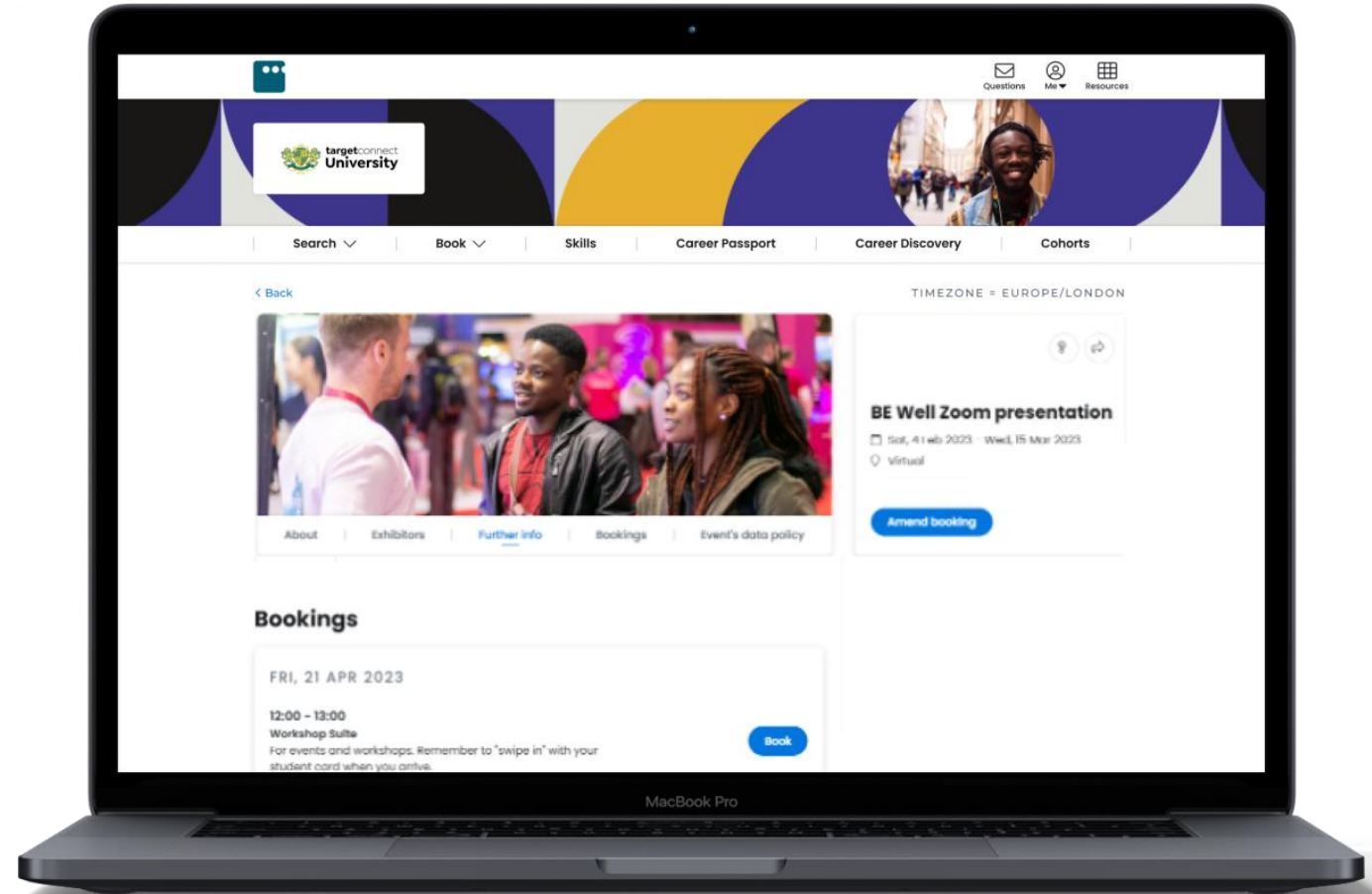
# Student support plans & ECs

- Easy to build forms for support or ECs
- Assign the form to a student
- Student completes and signs off their information
- Operator reviews and approves form
- Share with personal tutor or other custom user
- Track and manage completion and approvals



# Appointments & workshops

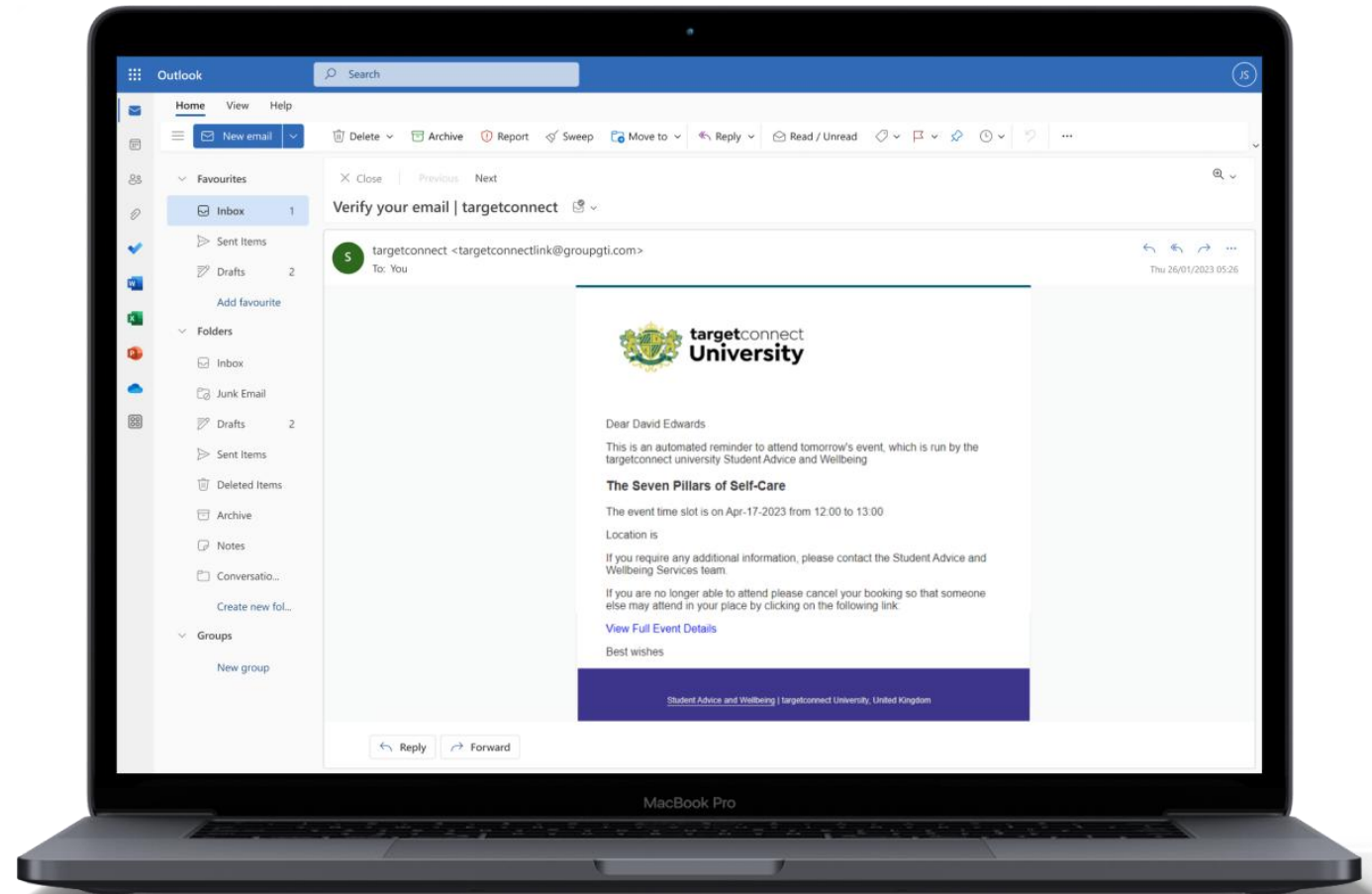
- Virtual and in-person delivery
- Appointment referrals
- Microsoft Teams integration
- Calendar integration
- Webinars
- Secure notes and feedback
- Build into workflows
- Automated confirmations and reminders





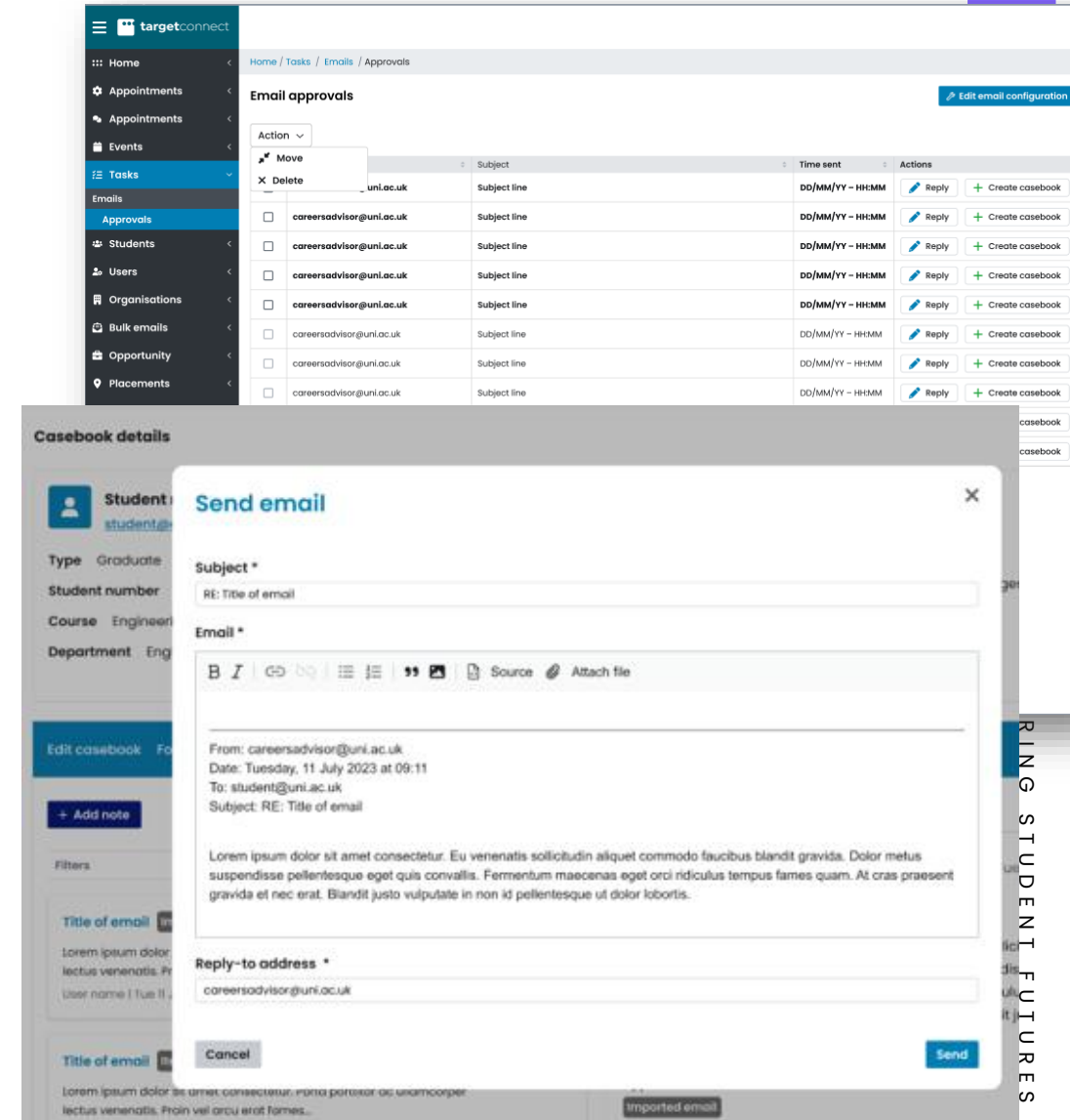
# Communication

- Automated email notifications
- Automated calendar updates
- In-platform messenger module – “Queries”.
- Bulk email module plus WYSIWYG email designer and email templates
- Case management email integration



# Email integration

- Emails captured in a holding area
- Automatically added to student history
- Added to casebook
- Replies to casebook go directly into the casebook
- Includes access restrictions





# Single applicant > student history

- Managing the transition from applicants > undergraduates > postgraduates
- Pre-registered users are merged into student account
- Start workflows and forms as an applicant and continue as a student.

**Selected master record**

First Name	Wyatt
Last Name	Jones
User Type	Prospective Student
Active Account	Yes
Email	wyatt.jones@groupgti.com
Amount of Appointments	2
Number of Pathways	3
Amount of Queries	0
Amount of Casebook Issues	10

**Selected for merge**

1 To 1 of 1 results

Name	Status	Student number	Preferred email address	Course	Select for merge
Wyatt Jones	Active Student	10569844	wyatt.jones@university.ac.uk	English Literature	<a href="#">Remove</a>

25 50 75 100

« »

✓ Merge selected into master

# Reporting & dashboards



## Standard Reports

- In platform
- HTML reports
- Excel downloads
- Simple to use
- Easily accessible
- Access controls

## Looker Dashboards

- In platform
- Looker BI Dashboards
- Simple and filterable
- Can be scheduled
- New dashboards & updates
- Based on all customer needs

## Advanced Reporting

- External BI Tools via API
- PowerBI, Tableau, Looker, etc
- Flexible: your tool, any design
- Blend with other datasets
- Bespoke to each customer
- PowerBI templates available



# KEY FEATURES

## Standard reports & tools

### • Casebooks search

- View practitioner case loads
- Balance risk in portfolios
- Filter on key casebook fields
- Customisable filters and view

Refine search

Active filters

Reset

Practitioner

Status

Created date

Tags

Student Tags

Risk status

Match all | Match any

☐ high (7)

☐ low (8)

☐ medium (5)

☐ moderate (5)

☐ severe (5)

No. of appointments required

Last case review meeting

Type of referral

Secondary practitioner

External provider status

Return to previous page

### Casebook Search

1 to 50 of 60 results

Number	First name	Last name	Created	Practitioner	Tags	Risk status	Status
13487345	Paul	Thorburn		Head of Student Services	Bereavement Group	Severe	Waiting on 3rd party
35235253	Rob	Hughes		James Hooper	Vulnerable	Severe	On hold
83648462	Romesh	Hoque		James Hooper		Severe	None
5478595	Chester	Bennington		gtadmin admin		Severe	None
91827363	Emma	Charles		James Hooper		Severe	None
235708	Holly	Golightly		gtadmin admin	2nd screen waiting list, External therapy waiting list	Moderate	Closed
35675655	Laura	Foster		James Hooper	Vulnerable	Moderate	New
28935620	Ann	Wilson		James Hooper		Moderate	New
48573277	Jo	Reid		James Hooper	University Services	Moderate	New
82739857	Alan	Brooke		James Hooper	Bereavement Group	Moderate	New
28735827	Maia	Tsimikas		James Hooper		Moderate	New
78563412	David	Edwards		Marie Johnson	Financial Hardship - Grants	Moderate	In progress
86235864	Anne	Andrews		James Hooper		Moderate	Closed
1582	Troy	Barnes		gtadmin admin		Low	None
46574799	Carl	Millar		James Hooper		Low	New
93737343	Lucy	Bywater		gtadmin admin		Low	Closed
23672534	Fay	Aber		James Hooper		Low	New
2353525235	Owain	Hughes		James Hooper		Low	None
23525252	Ben	Sankey		James Hooper		Low	New
23891645	Emma	Davies		James Hooper		Low	None
87298362	Jonathan	Henry		James Hooper	Vulnerable	Low	New
101653634	Sarah	Ramsay		James Hooper		High	None

### • Standard report: Casebook Details

- Instant view of risk
- Include custom fields
- "Live" view of data

Student Last Name	Student First Name	Student Number	Active	Status	Risk Level	Risk Category	Closing Reason	Lead Practitioner
Barnes	Troy	1582	Yes	None	Low	Anxiety	N/A (Open)	gtadmin admin
Millar	Carl	46574799	Yes	New	Low	Anxiety	N/A (Open)	James Hooper
Peppard	George	213487	No	New	High	Anxiety	N/A (Open)	gtadmin admin
Rollins	Penny		No	Closed	High	Anxiety	Finished	gtadmin admin
Smith	Tanya	12344456	No	New	High	Exam stress	N/A (Open)	James Hooper
Edwards	David	78563412	Yes	In progress	Medium	Anxiety	N/A (Open)	Marie Johnson
Thorburn	Paul	13487345	Yes	Waiting on 3rd party	Medium	MH Condition (concerning behavior)	N/A (Open)	James Hooper
Bradley	Niamh	93748474	Yes		High	Exam stress		gtadmin admin
Davies	Emma	23891645	Yes	None	Low	Alcohol Misuse	N/A (Open)	James Hooper
Hughes	Rob	35235253	Yes	On hold	Low	Anxiety	N/A (Open)	James Hooper
Andrews	Anne	86235864	Yes	Closed	Medium	Anxiety	N/A (Open)	James Hooper
Lynch	Benjamin	23789580	Yes	New	High	Other	N/A (Open)	James Hooper
Evans	Ruth	24738950	Yes	In progress	High	Risk to Self - Suicidal ideation	N/A (Open)	James Hooper
Bennington	Chester	5478595	Yes	None	Medium	Anxiety	N/A (Open)	gtadmin admin
Henry	Jonathan	87298362	Yes	New	Medium	At risk of harm by others	N/A (Open)	James Hooper
Brooke	Alan	82739857	Yes	New	Medium	Anxiety	N/A (Open)	James Hooper
Sankey	Ben	23525252	Yes	New	Low	Anxiety	N/A (Open)	James Hooper
Tsimikas	Maia	28735827	Yes	New	Medium	Exam stress	N/A (Open)	James Hooper
Dundee	Sarah	37343357	Yes	In progress	High	Anxiety	N/A (Open)	James Hooper

# Looker dashboards

Available reports

> Appointments

> Appointments | Detailed

> Bulk Emails

> Casebook Risk

> Casebooks

> Custom Forms

> Events

> Events | Detailed

> Logins

> Operator Permissions

> Operators

> Pathways

> Queries

> Students

> Third Party Tools

Queries

1m ago

Operator Name

Created Date

Query Type

Query Status

Querying User Type

is any value

is on or after 2019/08/01

is any value

is any value

is any value

More • 23

Queries by Operator and User Type

	User Type	dynamic	student	Total
	Operator	Query Count	Query Count	Query Count
1	James Hooper	3	21	24
2		0	3	3
3	Daniel Andrews	0	1	1
4	Head of Student Services	0	2	2
5	Student Services Super User	0	1	1
6	gtiadmin admin	0	7	7
Totals		3	35	38

Queries Created

4

2

0

2020

2021

2022

2023

Created Month

Queries by Status

47%

8%

45%

0%10%20%30%40%50%60%70%80%90%100%

RESPONDED

PENDING

CLOSED

Queries by Type and User Type

	User Type	dynamic	student	Total
	Query Type	Query Count	Query Count	Query Count
1	Concern for a student	2	0	2
2	Student conduct	1	0	1
3	Advice or Wellbeing	0	8	8
4	Disability - Appointment Request...	0	1	1
5	Disability - Learning Support	0	3	3
6	Financial Hardship - Grants	0	2	2
7	General Query/Help	0	8	8
8	Mental health - appointment req...	0	7	7
9	Mental health - general query	0	5	5
10	Reporting concern about a stude...	0	1	1
Totals		3	35	38

Schedule Delivery

Settings

Filters

Advanced options

Schedule Name

Queries

Recurrence

Daily

Time

06:00

Destination

Email

Email addresses

James Hooper <james.hooper@targetconnect.net>

Format

PDF

Test now

Cancel

Save

# Advanced reporting: waiting times



## Appointments

Start Date

Last

1

Select

No filters applied

Appointment Status

All



targetconnect

Distinct Users

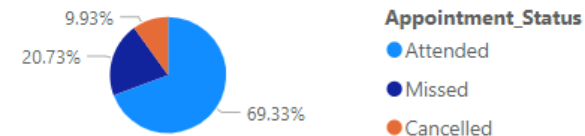
1500

Appointments Attended

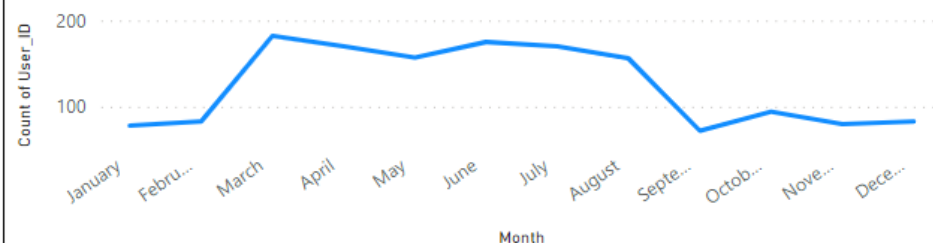
1040

Average Waiting Time Duration

69.76



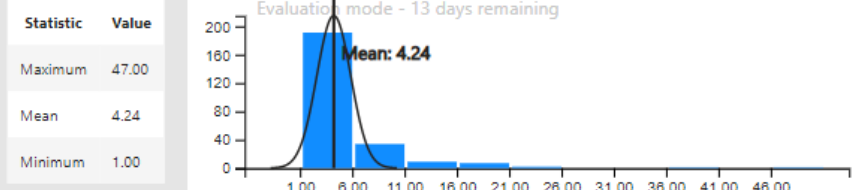
### Pathways Started Each Month



### User Analysis

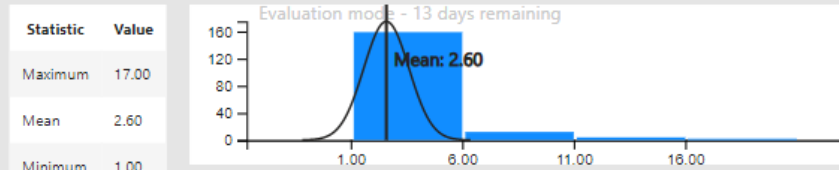
User_ID	Pathway_Name	Appointment_Type	Appointment_Status	Waiting Time
100696	Service Registration	Service Registration	Attended	66
101688	Service Registration	Service Registration	Attended	18
101983	Service Registration	Service Registration	Attended	2
102023	Service Registration	Service Registration	Missed	246
103177	Service Registration	Service Registration	Attended	90

### Waiting Time in Days (Attended Appointments)



### Waiting Time in Days (Cancelled/Missed Appointments)

#### Still Waiting



# Configuration

## Configurable modules and features

- Appointments
- Events
- Pathways
- Messages (query module)
- Operators and user groups
- Email notifications (content-based rules)
- Forms
- Student branding

## Configuration tools

- Custom fields
- List management
- Location management
- System settings:
  - Some back-end module configuration
  - Branding
  - Custom panes
  - Welcome page texts
- Partner configuration (if using API)

Our Customer Success team trains key users on the configurable modules and tools in targetconnect.



# How we work with you

# Teams & roles



## Key Account Manager

- General queries
- Strategic developments
- Health checks
- Monthly service calls
- Licences and renewals
- Questions about tickets
- I don't know who to contact...

## Customer Success Team

- Training
- Configuration
- How do I....?
- Customer success calls
- Onboardings
- Community website
- Documentation

Queries responded to within 2 working days

## Technical Support Team

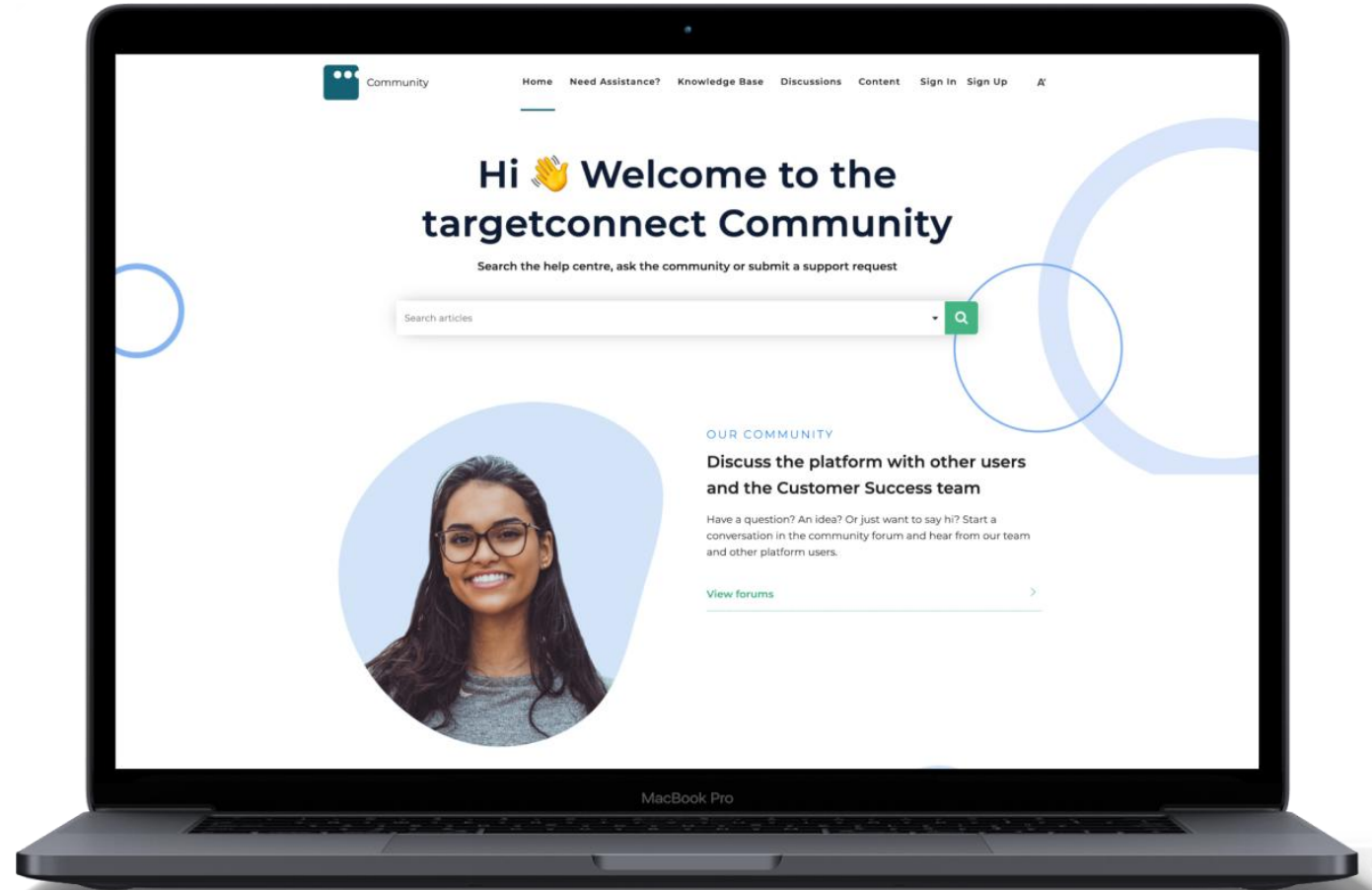
- Technical problems
- Bugs or errors
- Targetconnect is off-line or "down"
- Students can not log on or register
- Functional failure

Queries responded to within 2 working days.

If Technical support are unable to resolve the problem, they will pass to developers to fix.

# Support & resources

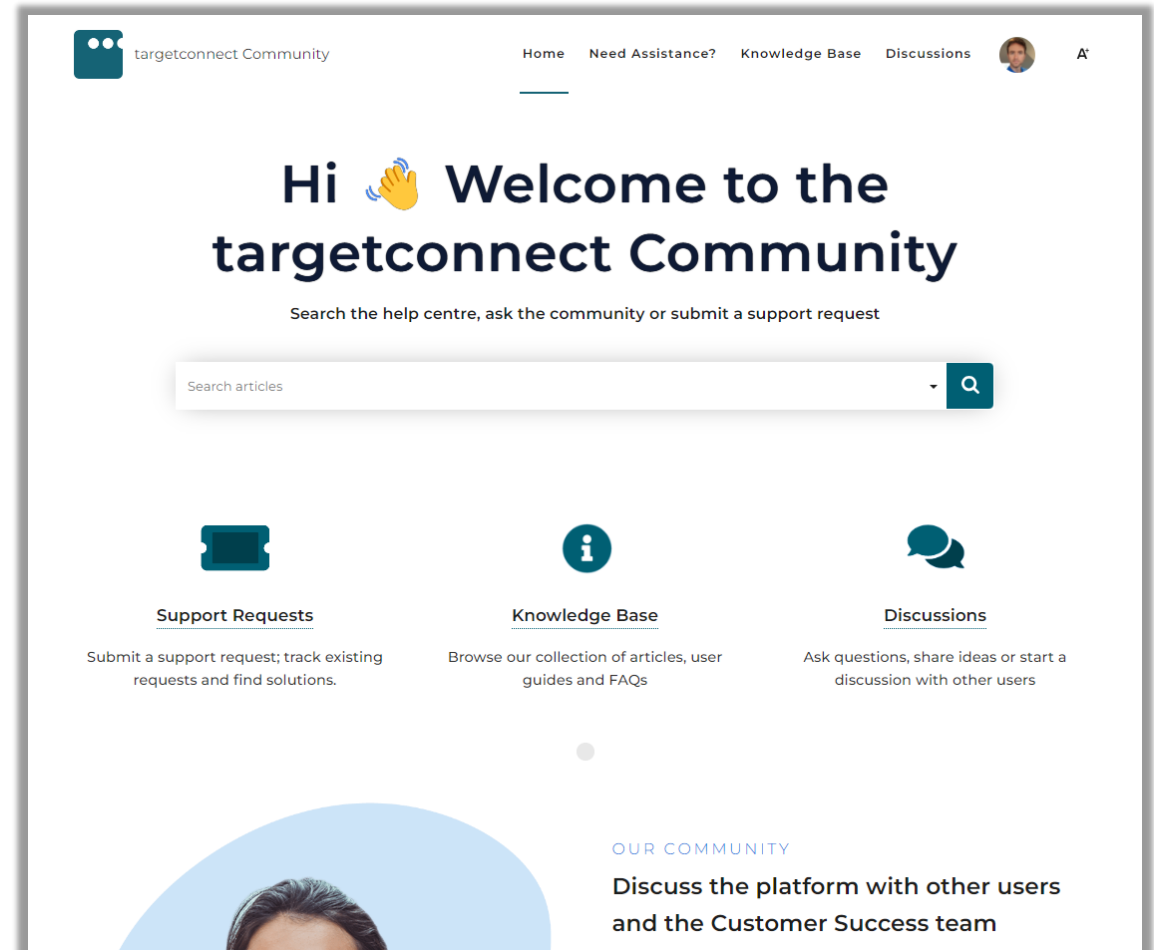
- Key account manager
- Customer success advisers
- Technical support team
- Technical integration specialist
- Monthly service calls
- Client community website
- Dedicated student services lead



# targetconnect community



- Use the *Knowledge Base* in our [client community](#)
- Access user guides and videos
- AI helpchat
- Book training sessions
- Join in on our Discussion Board



# Contacts



**James Hooper**  
Student Services Lead

+44 (0)7875 091795  
[james.hooper@groupgti.com](mailto:james.hooper@groupgti.com)

I am a Key Account Manager and Student Services Lead for targetconnect and work extensively with services such as counselling and mental health, disability, study skills and funding. I've has been working with targetconnect for over ten years and has 25 years' experience in platforms and EdTech.

As the Student Services Lead, I am the voice for Student Support Services to ensure that targetconnect continues to develop features and tools to help university teams support their students.

I am also a parent of a young person at a UK university who is receiving support from their institution's Disability and Wellbeing Services, so also sees the sector's challenges, and the impact of student support, from this perspective. I am enormously grateful for how Student Services support students at such a pivotal time of life and am proud to be a small contributor to this process.

Message me on [email](#) or connect at [james-hooper-021892/](#)



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