EVENT REGISTRATION IN THE SERVICE CLOUD

SESSION 36087
10/11/2016 3:35pm

ALLIANCE DOWN UNDER
BUILDING THE FUTURE · GOLD COAST ·

ADU 9-11 NOVEMBER 2016

PRESENTER

Stephen Mitchell

CRM Administrator

University of Southern Queensland

Stephen.Mitchell@usq.edu.au

Many university events are held over the course of each calendar year including participation across a variety of cohorts from future, current and past students - attending events as diverse as Open Day to Graduations. Unfortunately, the method of registering interest and attendance is all too often neglected with personal details being recorded across a plethora of databases, such as spreadsheets, personal local databases, external applications, paper - or even worse, not recorded at all. This haphazard approach leads to dreaded data silos and missed opportunities, which ultimately results in a poor student experience.

To help ensure the university captures event related interactions throughout the student learning journey, an event registration system was developed within the Service Cloud to record, present, report and segment event related touchpoints in a unified approach. Particular emphasis was given to empowering non-technical SME's by providing a mechanism to rapidly build and deploy custom mobile friendly event registration sites, with very limited training and technical support required.

USQ & ORACLE

Oracle Service Cloud
May 2016

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Toowoomba
Springfield
Ipswich
Online

UNIVERSITY
OF SOUTHERN
QUEENSLAND

Started by the community in 1967

29,000

STUDENTS

29

Average Age

student population representing over 90 nationalities

54%

Rural & Remote

32%

low socio-economic status

HANDS UP!

Reach for the sky!

WHY, WHERE AND HOW?

We need an online registration system that is easy to use, with low barrier to entry and is shareable and accessible

BREAK DOWN THOSE SILOS

A few of the common culprits!

IT'S A TRAP!

"The big benefit of CRM is the visibility of everything relating to customers going on in your company. If you want to provide a better service to your customer, you have to be able to manage everything from complaints to sales opportunities."

-Roger Cole, CRM Consultant

CRM FIRST STRATEGY

CRM is integral to providing good CX

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#WIIFM

LOW BARRIER TO ENTRY

We need to make it so it is easy for our users to manage, build, customise, test and deploy their own sites

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#WIIFU

DATA BABY!

Data = Potential

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WE'RE IN MARKETING AFTER ALL

Who would ever say no to a new source of leads – right?

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Follow Me?

JOURNEY MAPPING

For every touchpoint we gain further insight

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IT'S ALL ABOUT THE EXPERIENCE

Improved insights lead to improved CX

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NOW FOR THE HOW

Let's do this!

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FIRST ATTEMPT

I think we can do better

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VERSION 0.1

We initially developed a business process around the concept of submitting an event registration build request to the Digital Marketing Team, who would then create the event by duplicating and customising a Registration Campaign Template.

IT'S A TRAP!

OBJECTIVES & FEATURES

More than you can poke a stick at. Well, not really, but there are quite a few nonetheless

SYSTEM OBJECTIVES

1. Flexible

2. Customisable

3. Reusable

4. Easy to learn & use

5. Low support requirement

6. Freedom

SYSTEM FEATURES

1. CMS Functionality

2. Event Asset Management Functionality

3. Analytics

4. Web & Email Responsive Front-end

5. Front-end Security Options

6. Private Team Spaces

7. Team Roles & Privileges

8. Site Access Levels

PUBLISHING AN EVENT - WORKFLOW

- market

- build

- test

- approve

- publish

ARCHITECTURE

Outreach,
Custom Objects, CPM,
Reports and
Workspaces…

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PORTAL OR OUTREACH?

MAKE OUTREACH PLAY NICE

```
1   var remove_rn_underlines = function() {
2       // Remove RN's forced inline styling on load.
3       $(function() {
4           $("a").css("text-decoration", '');
5       });
6   };
7
8   var reformat_input_fields = function() {
9       $(function() {
10          // Copy placeholder text to input fields from labels
11          $("form[name=_main] label").each(function() {
12              var linkedInputID = $(this).attr('for');
13              $("#" + linkedInputID).not("input[type=radio], input[type=checkbox]")
14                  .attr('placeholder', $(this).text());
15          });
16          // RN doesn't set input type for text fields
17          $("form input").filter(function() {
18              return ($(this).attr("type") === undefined);
19          }).attr('type', 'text');
20      });
21  };
22
```

CUSTOM OBJECTS AND OUTREACH

Outreach & Analytics – CO Accessibility

Docs	Analytics	Merged Reports	Merged Fields	Data Fields	Segments Conditionals	Campaign Fields	Campaign Conditionals
Email	✓	✓	✗	✗	✓	✗	✗
Web	✓	✓	✗	✗	✓	✗	✗

Outreach & Analytics – CO Usage

Analytics	Merged Reports	Merged Fields	Data Fields	Segments Conditionals	Campaign Fields	Campaign Conditionals	Analytics
Read/Logic	Read/Logic	Read	Read/Write	Logic	Write	Logic	Read/Logic

OBJECT EVENT HANDLERS - CPM

COB's PERMANENT STORAGE

CPM

CONTACT FIELD TEMP STORAGE

WEB FRONT END

CAMPAIGN

EMAIL

REUSABLE, FLEXIBLE AND CUSTOMISABLE

EVENT SYSTEM ENTITY RELATIONSHIP DIAGRAM

CAMPAIGN ENGINE

REDACTED

ASSIST CAMPAIGN - SSO

This Campaign handles the Staff and Student login to the Events Registration System

Contacts are directed to the Auto Submit page from the Event Registration Campaign via UConnect through SSO.

The Auto Submit page contains a script which auto submits the webform.

The redirect url contains the contact's email address which is passed back to the Study Site and pre-filled in another auto submit campaign web page.

REMINDER TO ATTEND CAMPAIGN

SYSTEM INVENTORY

Inventory 1		Inventory 2		Inventory 3		Inventory 4	
Part	**Quantity**	**Part**	**Quantity**	**Part**	**Quantity**	**Part**	**Quantity**
Interfaces	2	Delivered Object Fields	4	Campaigns	3	Mailings	2
Delivered Objects	2	Custom Object Fields	>100	Web Documents	17	Email Merged Reports	25
Custom Objects	21	Workspace Custom Reports	>85	Email Documents	3	Web Merged Reports	85
CO Custom Menus	11	Workspace Rules	>200	Email Templates	1	Dashboards	4
Workspaces	21	Custom Process Managers	2	Web Templates	1	HTML/JS/CSS PHP (lines of code)	~4000

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EVENT ADMIN INTERFACE

Backend

EVENT TEAM DASHBOARD

EVENT TEAM DASHBOARD

Top Level > **USQ Test Schools Team**

Team Events

		Event	Description	Mode	Type	Status	Event Launched	Event Suspened
1	🔒	2016 USQ Student Experience Day @ Toowoomba	This event offers a great opportunity for Year 11 and 12 stud... More	On-Campus	On Campus Schools Event	Test	01/11/2016 07.00 AM	07/11/2016 06.00 PM
2	🔒	Test Event IO Training	IO Training	Off-Campus	Face to face	Test	01/09/2016 12.00 PM	03/09/2016 12.00 AM

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TEAM MANAGER INTERFACE

TEAM MANAGER INTERFACE - ASSETS

TEAM MANAGER INTERFACE - ROLES

TEAM MANAGER INTERFACE – ROLE TYPE

TEAM INTERFACE –STAFF ASSIGNED ROLE

TEAM MANAGER INTERFACE - EVENTS

EVENT MANAGER INTERFACE

EVENT STATUS

EVENT SESSIONS

EVENT SESSIONS

EVENT SESSIONS – ACTIVITIES TAB

SESSION ACTIVITIES

2016 USQ Student Experience Day   Session 1   Archaeology Workshop ✓ ⊘ ⊡

Session Activity

Session Activity

Name* | Archaeology Workshop   Active* | Yes ▼   ID 18

Description | Open a window to the past in our Archaeology lab. Learn about the tools archaeologists use to investigate excavation sites and discover how people lived in the past.

Remaining Seats

0

Session* | Session 1   🔍   This is a limited seating activity* | Yes ▼

Activity* | Archaeology   🔍   Standby seating is available* | No ▼

Venue | L206   🔍   Multiple seat booking allowed* | No ▼

Start Time | 09/11/2016 10.00 AM 📅 Duration | 15 ⇕   Total Seating Allocation | 1 ⇕

Details   Bookings (1)   Notes   Attachments   Audit

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ACTIVITY

ACTIVITY CATEGORY

ADU 9-11 NOVEMBER 2016

ACTIVITY TOPIC

ADU 9-11 NOVEMBER 2016

ACTIVITY CHANNEL

ACTIVITY FACILITATOR

SESSION ACTIVITIES – BOOKING TAB

SESSION ACTIVITIES – BOOKING

SESSION BOOKING - REGISTRATION

REGISTRATION — BOOKINGS TAB

EVENT - PLANNER

EVENT CMS — IDENTITY MANAGEMENT

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EVENT CMS – SEATING MANAGEMENT

EVENT CMS — COMMUNICATIONS EMAIL (1)

EVENT CMS – COMMUNICATIONS EMAIL (2)

EVENT CMS – COMMUNICATIONS - SMS

ADU 9-11 NOVEMBER 2016

SMS SYSTEM – MAIN INTERFACE (MANAGER)

CMS – SITE LAYOUT – PERSONAL DETAILS (1)

CMS – SITE LAYOUT – PERSONAL DETAILS (2)

ASSET UPLOAD WORK REQUESTS

ASSET UPLOAD - DM TEAM DASHBOARD

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WEBSITE

Let's take it for a spin

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LANDING PAGE

University of Southern Queensland

EVENTS AT USQ

USQ Event Registration

Please provide an email address to continue to your event registration page. Make sure you check your email before the event as this is how we will contact you with any updates prior to the event.

Email Address:

Submit

USQ is collecting the personal information on this form for support for students and prospective students and for marketing purposes. Your personal information will not be disclosed to any third party without your consent unless required or authorised to do so by law. Further information concerning privacy is available.

WEB FORM VALIDATION

SECURITY

It's obviously important to secure student and staff data. It is equally important to offer a security solution for "non-members" accessing the system from the web interface.

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SECURITY 1 — NON-IDENTIFYING INFO

Steve's 2016 USQ Student Experience Day

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

What will I gain from attending the day?

We recommend you attend this event if you are considering university, but are unsure of the field that you would like to study. On the other hand, if you know exactly what you are interested in studying, this is also a perfect opportunity to find out more before you make your decision. Some of the topics you will learn about include:

•What university life is like
•What you can study at USQ
•The benefits of studying a university degree
•What study areas interest you

You will also have the opportunity to speak with current USQ students about their experiences.

Email Address: stephen.mitchell@usq.edu.au

First Name: Steve

City: My Town

Post Code: 4350

Submit ❯

SECURITY 2 – EMAIL CONFIRMATION

Enter the code we just emailed to you to register:

4187

Submit

Your privacy is important to us, so to help us protect your information we need you to confirm your identity by entering the challenge code we just sent to your USQ primary email address (stephen.mitchell@usq.edu.au).

The email address you entered on the previous page may differ from your Primary USQ email address if you have contacted USQ from both of these email addresses in the past.

If you are a USQ student or staff member we recommend that you return to the USQ Event Registration page and enter your UMail address into the email field (Students can find it in your Student Centre).

Enter the code we just emailed to you to register:

Submit ❯

usqstudy@custhelp.com

USQ | Event Registration - Identity Confirmation Code | 2016 USQ Student Experience Day

Mitchell

re problems with how this message is displayed, click here to view it in a web browser.

❓ Ask USQ FAQs

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🧭 usq.edu.au

isplayed below into the provided fie
enter the correct code and click th
ttend the 2016 Usq Student Experie

2016 Usq Student Experience Day

4187

digit code displayed below into the provided field on the webpage to
y. After you enter the correct code and click the Submit Button you can
stration to attend the 2016 Usq Student Experience Day being held on
2016.

4187

SECURITY 3 – ACTIVE STUDENTS/STAFF SSO

PERSONAL DETAILS PAGE

Steve's 2016 USQ Student Experience Day

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

What will I gain from attending the day?

We recommend you attend this event if you are considering university, but are unsure of the field that you would like to study. On the other hand, if you know exactly what you are interested in studying, this is also a perfect opportunity to find out more before you make your decision. Some of the topics you will learn about include:

•What university life is like
•What you can study at USQ
•The benefits of studying a university degree
•What study areas interest you

You will also have the opportunity to speak with current USQ students about their experiences.

Email Address:

stephen.mitchell@usq.edu.au

First Name:

Steve ✓

*I am interested in studying...

☐ Business & Commerce
☐ Creative Arts & Media
☐ Education
☐ Engineering & Built Environment

PERSONAL DETAILS CONT..

*I am interested in studying...

☐ Business & Commerce
☐ Creative Arts & Media
☐ Education
☐ Engineering & Built Environment
☐ Health & Community
☐ Humanities & Communication
☑ Information Technology
☐ Law & Justice
☐ Sciences
☐ Pathways Program

☐ I'm still undecided

☐ I'm currently studying year 12

Or the last year I attended school:

1991	✓

My School Year Level

12	✓

OP Eligibility:

OP eligible	✓

My School or the last school I attended (Select from the list below or type to search):

A.b. Paterson College
Aboriginal & Islander Independent Comm
Agnew School (toowoomba)
Agnew School (warwick)

☐ My school is not listed

☑ I'm a USQ Change Maker
☑ I'm the first in my family to attend uni

Dietary Requirements:

--	❗

Other Dietary Requirements:

Additional comments including any special access requirements:

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

Submit

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MOBILE FRIENDLY

Steve's 2016 USQ Student Experience Day

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

DYNAMIC SCHOOL SEARCH FEATURE

1. Full Listing

My School or the last school I attended (Select from the list below or type to search):

```
A.b. Paterson College
Aboriginal &amp; Islander Independent Commu
Agnew School (toowoomba)
Agnew School (warwick)
```

☐ My school is not listed

2. Filtered by "bris" search

My School or the last school I attended (Select from the list below or type to search):

```
bris|
```

```
Brisbane Adventist College
Brisbane Bayside State College
Brisbane Boys' College
Brisbane Broncos Ltd
```

☐ My school is not listed

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BOOKING PAGE

USQ Student Experience Day - 2016

Steve's booking details...

> This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

What is the USQ Student Experience Day?

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

> **Session 1**
> **Day 1|Wednesday Morning**
> **09:30 AM - 09/11/2016**

> **Session 2**
> **Wednesday Lunch**
> **11:30 AM**

> **Session 3**
> **Wednesday Afternoon**
> **01:00 PM**

What will I gain from attending the day?

We recommend you attend this event if you are considering university, but are unsure of the field that you would like to study. On the other hand, if you know exactly what you are interested in studying, this is also a perfect opportunity to find out more before you make your decision. Some of the topics you will learn about include:

ADU 9-11 NOVEMBER 2016

BOOKING PAGE CONT..

·What university life is like
·What you can study at USQ
·The benefits of studying a university degree
·What study areas interest you

You will also have the opportunity to speak with current USQ students about their experiences.

Submit ❯

USQ is collecting the personal information on this form for support for students and prospective students and for marketing purposes. Your personal information will not be disclosed to any third party without your consent unless required or authorised to do so by law. Further information concerning privacy is available.

ABN: 40 234 732 081 CRICOS: QLD 00244B, NSW 02225M TEQSA: PRV12081 Right to information
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SESSION ACTIVITIES

Session 1
Day 1|Wednesday Morning
09:30 AM - 09/11/2016

Students to break into pre-selected groups. Session 1 commences at 9.30 AM

Accounting Workshop

Start: 09:30 AM
Duration: 15 mins
Venue: R113
Location: The Univeristy of Southern Queensland - Toowoomba Campus
Facilitator: Steve Mitchell
Bio: This is a test facilitator bio.

You'll be amazed at where accounting can take you. Join us to explore the range of roles accountants perform in the global business community.

Booking Details

Allocated Seats: 0
Remaining Seats: 0

Add Booking

Archaeology Workshop

Start: 10:00 AM
Duration: 15 mins
Venue: L206
Location: The Univeristy of Southern Queensland - Toowoomba Campus

Campus Tour

Start: 10:30 AM
Duration: 15 mins
Venue: The Quadrangle - The Quad
Location: The Univeristy of Southern Queensland - Toowoomba Campus

Biology Workshop

Start: 11:00 AM
Duration: 15 mins
Venue: L209
Location: The Univeristy of Southern Queensland - Toowoomba Campus

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BOOKING A SINGLE SEAT

Campus Tour

Start: 10:30 AM
Duration: 15 mins
Venue: The Quadrangle - The Quad
Location: The Univeristy of Southern Queensland - Toowoomba Campus

Explore USQ Toowoomba on a guided tour by a current university student and find out firsthand what university life is like!

📅 **Booking Details**

Add Booking

Session 1
Day 1|Wednesday Morning
09:30 AM - 09/11/2016

Accounting Workshop

Campus Tour

Start: 10:30 AM
Duration: 15 mins
Venue: The Quadrangle - The Quad
Location: The Univeristy of Southern Queensland - Toowoomba Campus

Explore USQ Toowoomba on a guided tour by a current university student and find out firsthand what university life is like!

📅 **Booking Details**

Cancel Booking

MULTIPLE SEATS

CONFIRMATION

USQ Student Experience Day - 2016

This event offers a great opportunity for Year 11 and 12 students to experience what university is all about. You will participate in a range of interesting and inspiring sessions tailored to your areas of interest.

Congratulations! Mitch, you've successfully registered to attend the 2016 USQ Student Experience Day.

We have your email registered as:

 *stephen.mitchell@usq.edu.au
 usqsystst01@mail.com

* We'll contact you via this email address.

CONFIRMATION CONT.

A booking confirmation email has been sent to your address as indicated above. Please review the email to make sure your booking details are correct. If you need to make any changes simply click the link in the email to update your booking details.

We look forward to seeing you there! In the meantime, have a look at what Your Future could be like with the support of USQ.

Don't forget to print out or take a screenshot of your personal QR code below. Remember that you can always come back to this page by clicking the link in your confirmation email.

Steve's Program:

10:30 AM	○	Campus Tour
11:30 AM	○	Business Economics Workshop
01:00 PM	○	USQ Scholarship Information Session
02:30 PM	○	Statistics Workshop

What will I gain from attending the day?

We recommend you attend this event if you are considering university, but are unsure of the field that you would like to study. On the other hand, if you know exactly what you are interested in studying, this is also a perfect opportunity to find out more before you make your decision. Some of the topics you will learn about include:

•What university life is like
•What you can study at USQ
•The benefits of studying a university degree
•What study areas interest you

You will also have the opportunity to speak with current USQ students about their experiences.

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ADU 9-11 NOVEMBER 2016

CONFIRMATION PROGRAM & QR CODE

Steve's Program:

10:30 AM — **Campus Tour**

Explore USQ Toowoomba on a guided tour by a current university student and find out firsthand what university life is like!

Duration: 15 Min
Location: The Univeristy of Southern Queensland - Toowoomba Campus
Venue: The Quadrangle - The Quad
Seats: 1

11:30 AM — **Business Economics Workshop**

Economic changes can arise quickly and impact on business and governments around the world. Learn how understanding business economics can assist with sustainable business practices.

Duration: 15 Min
Location: The Univeristy of Southern Queensland - Toowoomba Campus
Venue: R113
Seats: 1

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CONFIRMATION EMAIL

Mon 7/11/2016 2:55 PM

usqstudy@custhelp.com

USQ | Event Registration | 2016 USQ Student Experience Day

Mitchell

re problems with how this message is displayed, click here to view it in a web browser.

2016 USQ Student Experience Day

Hi Steve

You've successfully registered for 2016 USQ Student Experience Day being held on Wednesday 09/11/2016 from 09:30am.

If you haven't already taken a screenshot of your Personal QR Code, you can access it at anytime. Don't forget to save it to your mobile or tablet then present it to register your attendance at the event.

Please check over the details below to ensure your booking is correct. You can always update your details whilst the event is still open for registration.

- 10:30 am , Venue: The Quadrangle - The Quad, Activity: Campus Tour (Seats 1)
- 11:30 am , Venue: R113, Activity: Business Economics Workshop (Seats 1)
- 01:00 pm , Venue: Allison Dickson Lecture Theatre, Activity: USQ Scholarship Information Session (Seats 1)
- 02:30 pm , Venue: L206, Activity: Statistics Workshop (Seats 1)

Kind Regards

The Schools Team

schools.engage@usq.edu.au

ATTENDANCE | It's the day of the event

ATTENDANCE — CHECK-IN

CONFIRMATION — CHECK-IN

USQ Student Experience Day - 2016

Super! We're please to confirm that **Steve** is checked into the activities as indicated by the filled circle below.

If you need to amend Steve's check-in details, just click the banner above and re-enter Steve's email address (stephen.mitchell@usq.edu.au) and click through to the Booking page to update the booking as required.

Steve's Program:

10:30 AM ● **Campus Tour**
Explore USQ Toowoomba on a guided tour by a current university student and find out firsthand what university life is like!

Duration: 15 Min
Location: The Univeristy of Southern Queensland - Toowoomba Campus
Venue: The Quadrangle - The Quad
Seats: 1

11:30 AM ○ **Business Economics Workshop**

01:00 PM ○ **USQ Scholarship Information Session**

02:30 PM ○ **Statistics Workshop**

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GO LIVE

Let's see how it flies…
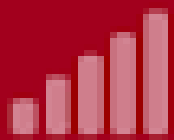
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OPEN DAY

1. Built by the Student Events Team

2. 3 hours of training & support

3. 6 Events – very complex!

4. 3 Campuses

5. QR Registration

6. Staff trained on the day

7. Session level attendance recorded

OPEN DAY — TEETHING ISSUES

Wi-Fi

On

No networks found

CAPTCHA CODE

Y U SO HARD TO READ

This is what a phone camera sees when scanning a QR Code in direct sunlight

Y U SO HARD TO READ

YEARS 7 & 8 USQ DISCOVERY DAY

1. Built by the Schools Engagement Team

2. 3 hours training & support

3. 3 Events

4. 3 Campuses

5. Attendance checked off and entered post event

6. Single Session Event

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ANALYTICS AND INSIGHTS

'The goal is to turn data into information, and information into insight'

- Carly Fiorina Ex HP President

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BETTER CX

THAT'S SOME GOOD DATA

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SUPPORTING THE SYSTEM

Have you tried turning off and on again?

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Hello, IT, have you tried turning it off and on again?

SYSTEM SUPPORT #RTFM

1. We have a small manual (over 90 pages)

2. We run face to face training sessions before first use

3. CRM Team provides usual OSC client support

4. We are thinking about creating a user group

5. We also like the concept of creating video tutorials…

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WHAT'S NEXT?

Rinse and repeat

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NEW FEATURES & CONTINUOUS IMPROVEMENT

1. Standby Seating functionality

2. Incomplete Registration Notification

3. SMS & Push Notifications

4. Improve Limited Seating options i.e. disallow more than one session booking for "by appointment only" type of events

5. Include an option to require a passcode to access the booking page on the day of the event

6. Geofence automation for security and sign-in on the event day

7. Develop a calendar interface

8. Improve Staff Resourcing functionality i.e. Student Ambassador online duty allocation system

9. Refactor code for efficiency and security improvements

THE YEAR AHEAD

Rollout across university and continuously improve the system through user feedback

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ONLINE REGISTRATIONS SCHEDULED SO FAR

1. Student Support Team

   S1 Enrolment Sessions

2. Student Enrichment Team (Phoenix Central)

   S1 2017 Orientation

3. School of Psychology & Counselling Team

   S1 2017 Interview Booking for Master of Psychology

4. USQ International have completed training and plan to use the system throughout 2017

QUESTIONS | ANY QUESTIONS?

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IN SUMMARY

HERE'S CHEERS!

PRESENTER

Stephen Mitchell

CRM Administrator

University of Southern Queensland

Stephen.Mitchell@usq.edu.au

ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR DOWNLOAD FROM THE CONFERENCE SITE

THANK YOU!

ADU 9-11 NOVEMBER 2016