CRM Community of Practice

Angelie Churchill – University of Newcastle

Session 6054 10:15 – 11am Friday 9th November 2018

Presenter

Angelie Churchill

University of Newcastle
Digital Systems Training Lead
Angelie.Churchill@newcastle.edu.au

DigiDev Team

Emily Middleton - **Technology & Systems Analyst**

Kara Upton - **Digital Systems & Training Officer**

Blessing Matore - **CRM Administrator**

Marty Mag Uidhir - **Senior Manager**

Mitchell Harris - **Technology and Systems Officer**

Tim Roots - **Technology and Systems Assistant**

The DigiDev Team

Support and develop the following systems for Student Central and UON:

- ➢ **OSVC**
- ➢ **OMC**
- ➢ **OPA**
- ➢ **SRM**
- ➢ **CS grad module**

Not part of IT, we're embedded in business unit

University of Newcastle (UON) Snapshot

5 Campuses

2,722 FTE staff

37,039 student enrolments

    24,026 Undergraduate

    5,791 Postgraduate

    7,084 International

    1,908 Higher Degree Research

    5,314 Enabling & Non-Award

Evolution of Service Cloud at UON

Campus Solutions 9.2
OSvC v18B
OPA v18B
OMC
SRM

2010 — Business led implementation – contact centre users

2013 — Retention and transition activities

2015 — Integration with CS, contact merge, commenced roll-out of CRM to high enquiry areas in Student Central

2016 — Live chat, CP upgrade / responsive design, continued roll-out within Student Central

2017 — Started using OPA, future interface, UON Global, Postgrad direct admissions, CP redesign, Proactive chat

2018 — Application/offer interface, PGCW conversion activities, Student ID upload, SSO via OKTA for current students, program catalogue, upgrade to 18B, Appeal Final Result & Review of Progress interviews, SRM to OsVC, phase 2 of CP redesign.

User group

- **8 teams (finalising set up for another team which should be live in a couple of weeks)**

- **313 users**

- **All teams doing enquiry management, but most have other unique requirements (e.g. retention calls, case management, application processing, conversion activities)**

We've gone from such a simple, basic set up to it now being quite complex and intricate

Teams using CRM and their associated email addresses

Do not 'Forward' anything to any of the below email addresses, simply change the queue to the relevant team and ensure the status is set to 'New'.

Hubs and Enquiries
- Studenthubs@newcastle.edu.au
- AskUON@newcastle.edu.au (and other Enquiry Centre aliases e.g. 15000-UON-Enquiries@newcastle.edu.au)
- PMQ-Hub@newcastle.edu.au

Fees & Enrolments
- Fees@newcastle.edu.au
- Enrolments@newcastle.edu.au
- Name-Changes@newcastle.edu.au (not triaged by Hubs & EC)

Program Advice
- Programadvice@newcastle.edu.au
- Postgradstudy@newcastle.edu.au
- BMidwifery-PO@newcastle.edu.au
- Business-bl@newcastle.edu.au
- Commerce-bl@newcastle.edu.au
- FEBE-PO@newcastle.edu.au
- FEDUA_PO@newcastle.edu.au
- FEDUA_PO_Ourimbah@newcastle.edu.au
- FSCIT-PO@newcastle.edu.au
- Law-bl@newcastle.edu.au
- Nursing-po@newcastle.edu.au
- Pharmacy-PO@newcastle.edu.au
- Postgrad-bl@newcastle.edu.au

Student Advice
- Studentadvice@newcastle.edu.au (not triaged by Hubs & EC)
- ESOS@newcastle.edu.au (not triaged by Hubs & EC)

Admissions (including Scholarships, Prizes & Credit)
- Admissions@newcastle.edu.au
- Directadmissions@newcastle.edu.au
- Postgrad_admissions@newcastle.edu.au
- Scholarships@newcastle.edu.au
- Credit@newcastle.edu.au
- Prizes@newcastle.edu.au (not triaged by Hubs & EC)

Graduation (including Academic Dress Hire)
- Graduation@newcastle.edu.au
- Ad-hire@newcastle.edu.au (not triaged by Hubs & EC)
- Transcripts@newcastle.edu.au

UON Global
- International-Enquiries@newcastle.edu.au (not triaged by Hubs & EC)

Foundation Studies
- Enabling@newcastle.edu.au
- OF-Online@newcastle.edu.au
- CCC-Enabling@newcastle.edu.au

Overview

1. What is a Community of Practice (COP)

2. Creation and formation of the Service Cloud CoP at UON

3. Benefits

4. Challenges

5. Lessons

6. What else we'd like to do

A Community of Practice (CoP)

"A Community of Practice (CoP) is a group of people who voluntarily engage with each other in a particular subject domain for a sustained period of time, developing aligned practices and imaginations of what is (and is not) possible."

(Wenger 1998)

Community of Practice cont.

They are groups of volunteer participants that have an ongoing interaction around a shared concern.

CoPs provide an environment in which professionals can share their practice experiences, develop and discuss areas of interests and build a sense of community.

The key elements are...

We formed a CoP

The need for a forum to collaborate, bring users together and keep them updated was identified.

Components of our CoP:

- **Members/champions**

- **Monthly catch-ups/agenda**

- **Actions**

- **Dev list**

- **Notes**

- **SharePoint group**

CRM Community of Practice (COP)

Date: 13/06/2018
Time: 2 – 3:30pm
Attendees: Lillian Courtney-Pratt, Samantha Harcombe, Kylie Ebert, Daniel De Lore, Josh Seymour, Teegan Robertson, Erin Knox, Daniel Studden, Blessing Matore, Barbara Stanley, Cathie Shanahan, Angelie Churchill, Marty Mag Uidhir

Agenda items

1. Questions and suggestions – from user group
   a. Subpoena process

2. Hints and tips/how-to – from user group and Digi Dev
   a. Merging duplicate contact records

3. What's new/work completed/work underway – Digi Dev
   a. First name = '.' Workaround trialled with Student Advisors
   b. Rollout of CRM to Foundation Studies team
   c. Upgrade to 18B

4. Knowledgebase content – Digi Dev
   a. Is content up to date?

Benefits

— Allows users to get together to share questions and suggestions

— Provides and opportunity for users to get ideas for their own teams use of the CRM e.g. Appeal against final result

— Our team can update the group with what's being worked on and how it will benefit them

— They've picked up on things we haven't – they have noticed errors or rules that weren't working. E.g. First name = .

— Identify training gaps and inconsistencies in how it's being used (good and bad). E.g. some people are CCing outlook…

— Process review and agreement across teams

Challenges

— Participation is sometimes a bit low due to time of year/lifecycle

— Getting a collaborative culture takes time and some would still prefer to sit around and whinge

— Non-engagers (users and managers)

— Requests not approved by managers

— Other locations (zoom isn't the same as being in the same room)

— Can't commit to delivering a solution on the spot, or having an answer straight away – need to manage expectations
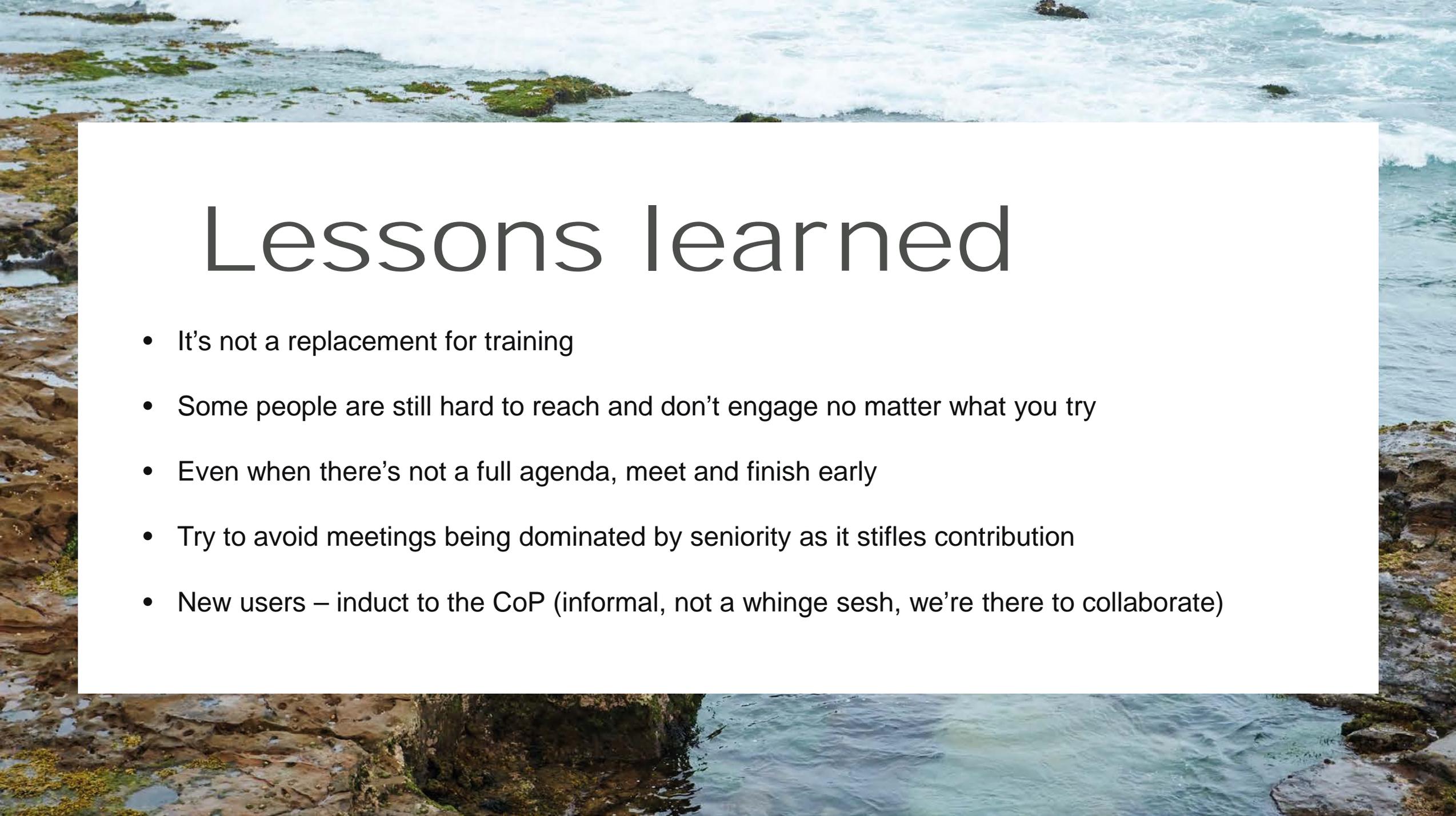
Lessons learned

- It's not a replacement for training

- Some people are still hard to reach and don't engage no matter what you try

- Even when there's not a full agenda, meet and finish early

- Try to avoid meetings being dominated by seniority as it stifles contribution

- New users – induct to the CoP (informal, not a whinge sesh, we're there to collaborate)

What else we'd like to do

- Follow-up training, create/update documentation, hints and tips,

- Build online interaction with SharePoint

- Would like to survey the group at the end of the year to see if it's been of benefit to the users, what else they'd like to do

- Investigate broader use of CoP to include other CRMs and uses – when the timing is right

Thank you & questions?

Angelie Churchill

Digital Systems Training Lead

Angelie.Churchill@newcastle.edu.au