IMPLEMENTING DYAMICS 365 INTO A PEOPLESOFT CAMPUS SOLUTIONS ENVIRONMENT

BUILDING THE FUTURE
ALLIANCE DOWN UNDER

PRESENTERS

Frieda Maher

CRM Program Director

UNSW

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Frieda has implemented multiple CRM technologies across multiple industries over the last 25 years. For the last 4 years she has been working with UNSW on constituent engagement.

Ian Lancaster

Student Systems Technical Lead

UNSW

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Ian has been working with Peoplesoft Campus Solutions for more than 20 yesrs, most recently as technical lead for the implementation of the new UNSW calendar and update enrolment capability.

UNSW SYDNEY

UNSW Sydney is a Go8 university with a main campus in the eastern suburbs of Sydney.

UNSW | Australia's Global University

ADU 7-9 NOVEMBER 2018

PRESENTATION OVERVIEW

1

OUR AMBITION
The scope and expectations of CRM at UNSW

2

OUR PROJECT
The agile approach and implementation timelines

3

OUR LANDSCAPE
The UNSW environment and how it has evolved

4

OUR INTEGRATIONS
The detail and journey of each integration

1: OUR AMBITION

The scope and expectations of CRM at UNSW

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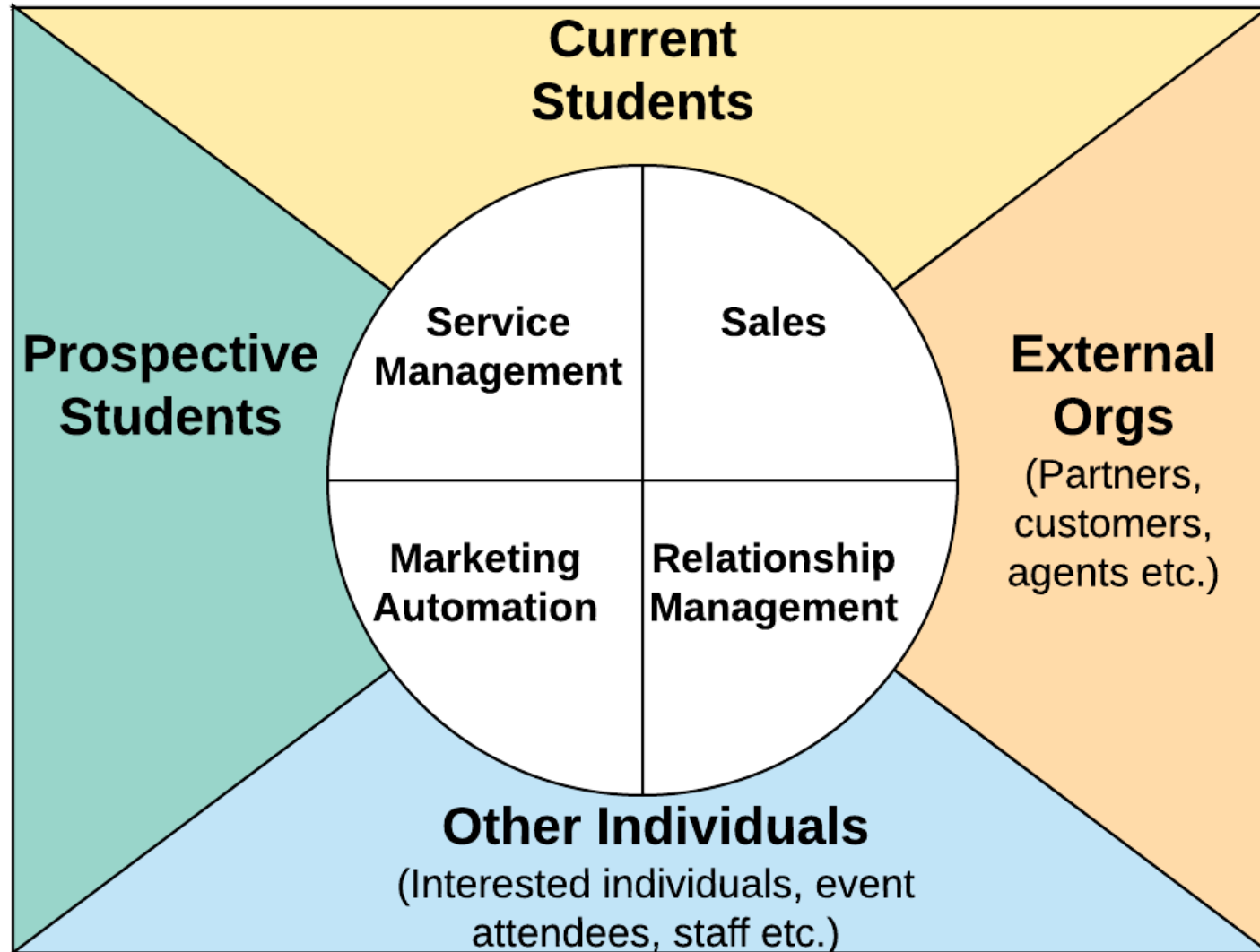SYDNEY

THREE PRIMARY GOALS

Improve the constituent experience

Grow revenue

Increase operational efficiency

CRM STAKEHOLDERS AND SCOPE

Current Students

Prospective Students

External Orgs (Partners, customers, agents etc.)

Service Management

Sales

Marketing Automation

Relationship Management

Other Individuals (Interested individuals, event attendees, staff etc.)

SIMPLIFIED LANDSCAPE

CRM
MS Dynamics
365

SIS
Peoplesoft
Campus
Solutions

MA
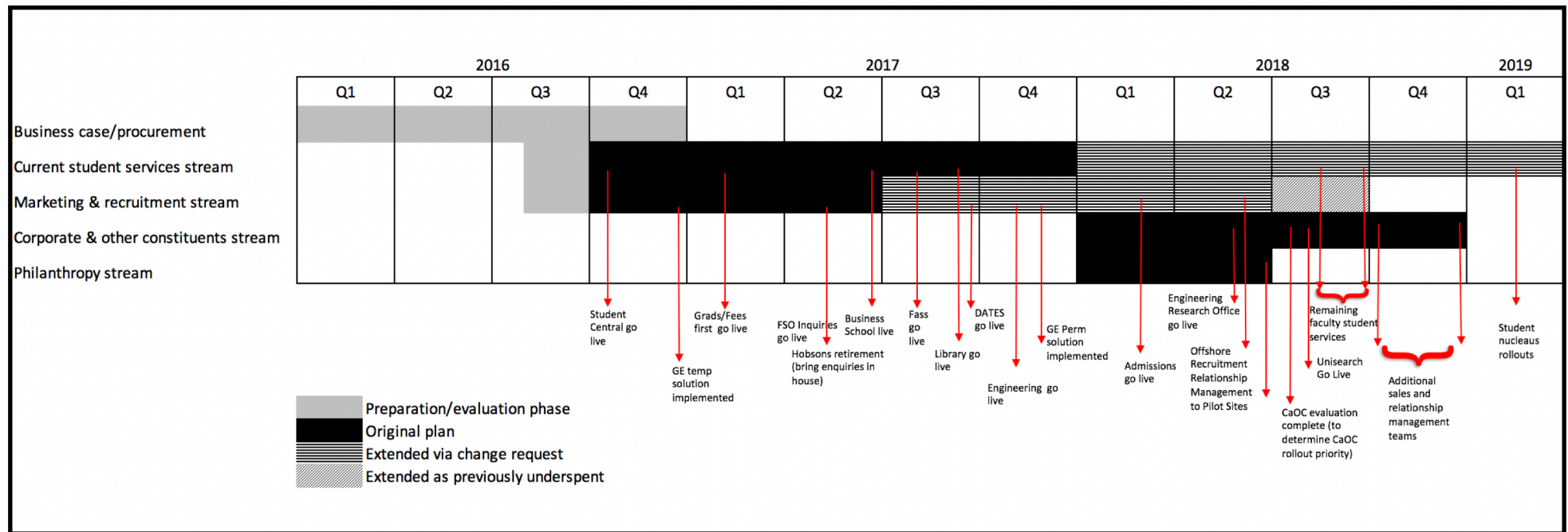Click Dimensions
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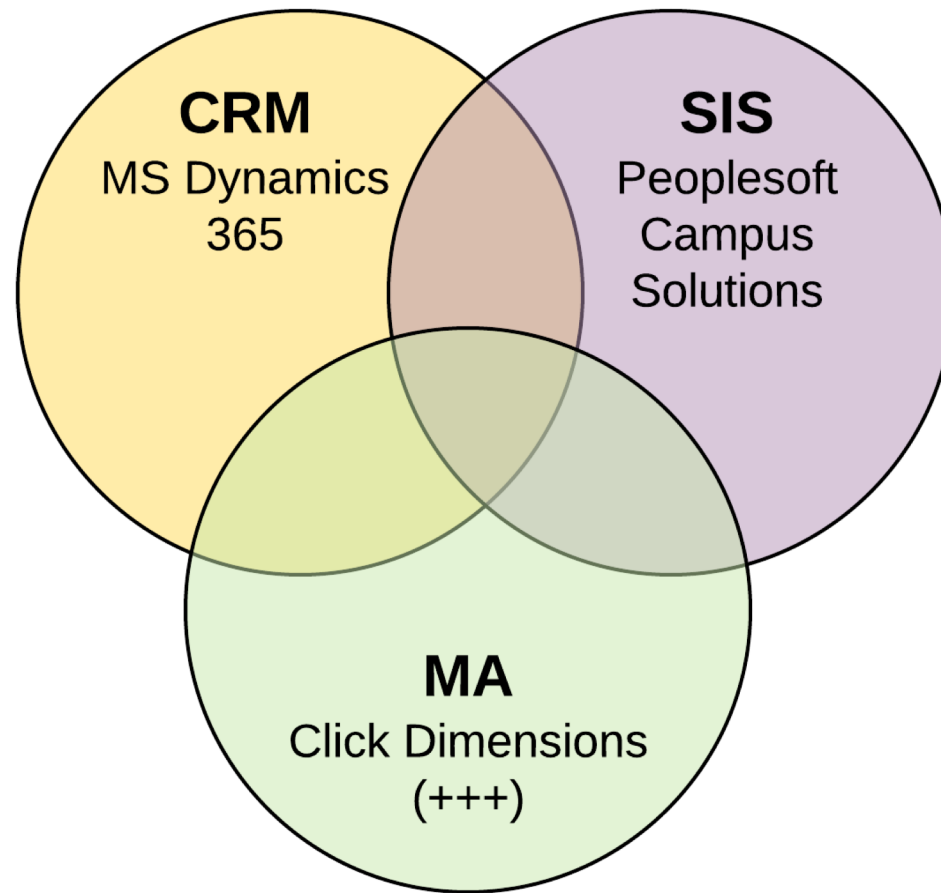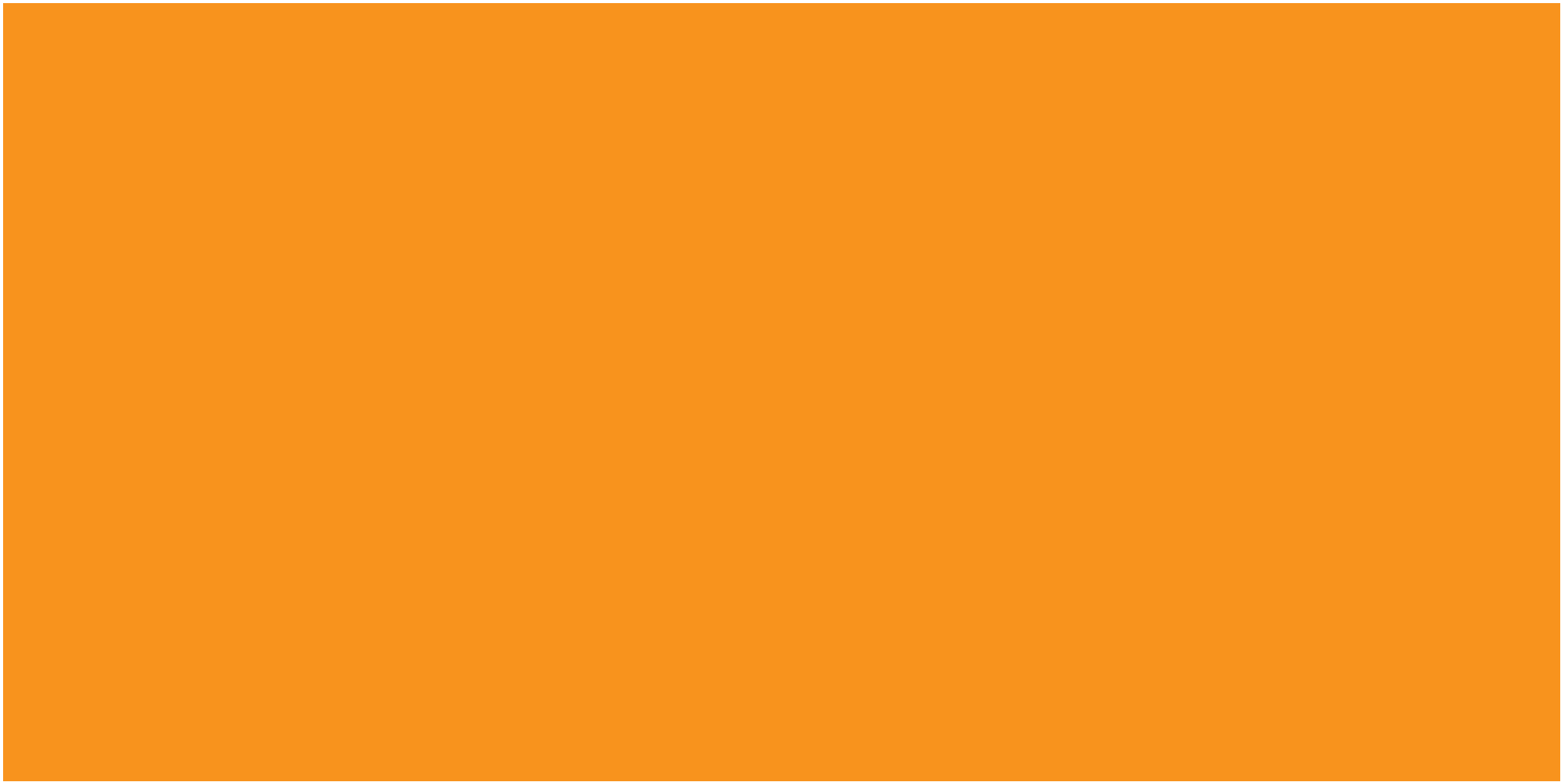
2: OUR PROJECT

The agile approach and implementation timelines

TIMELINE

APPROACH

100% led by UNSW

Agile

Risk based testing and deployment
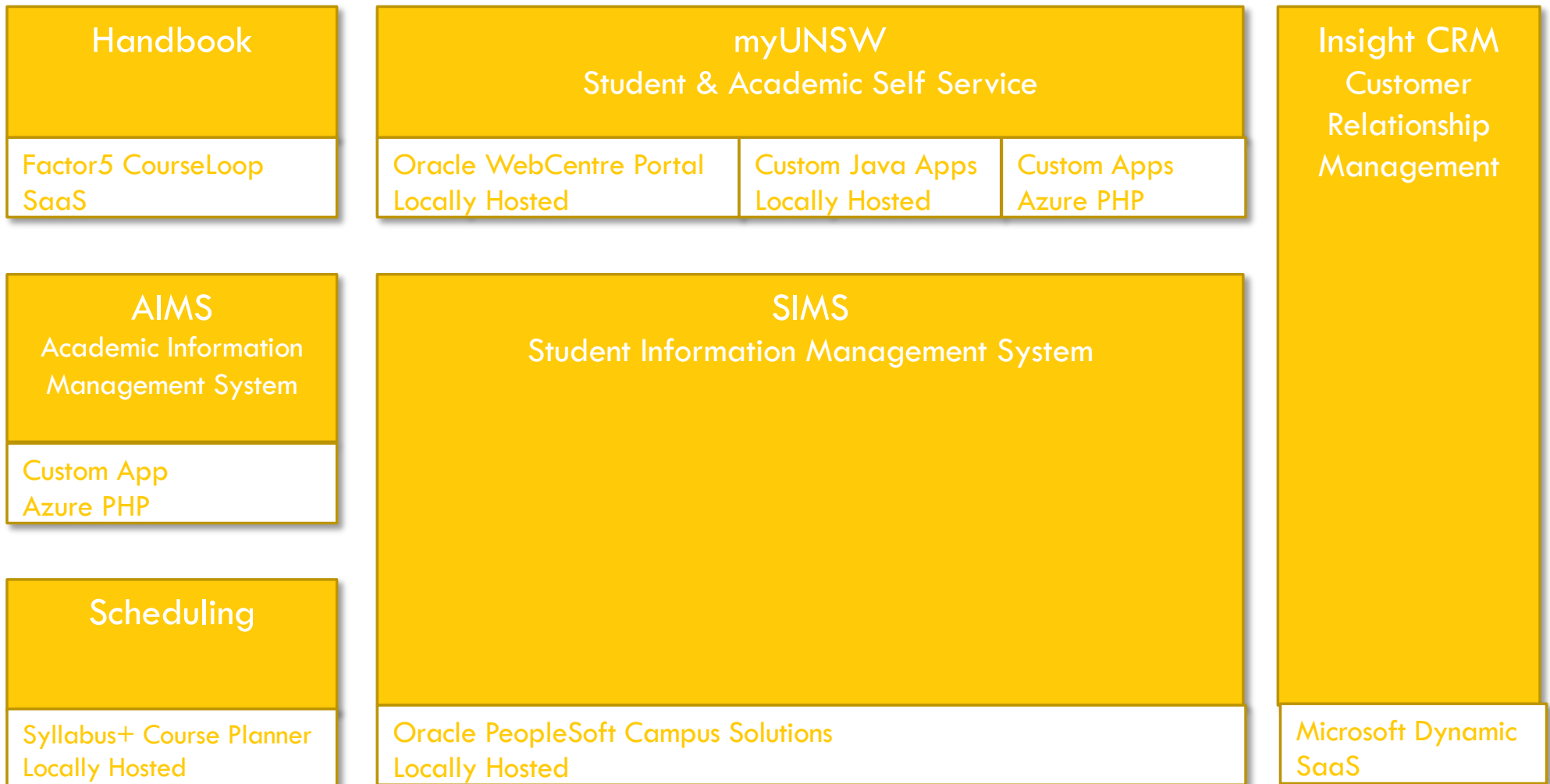
On the bus/off the bus

TEAM AND GOVERNANCE

Insight CRM Program Board

Chair: DVC (Academic) → DVC (Enterprise)

Business Advisory Groups

Program Manager
Frieda Maher

Centrol project services
- **PMO**
- **Change lead and team**
- **Architecture and IT integration**

Project functional streams (led by PM/Product Owner)
- **Current students**
- **Marketing and recruitment**
- **Corporate and other constituents**

Student Services
Working Group

Marketing & Recruitment
Working Group

Corporate and Other Constituents
SME teams

UNSW Business Analysts

KMPG
Scrum master
Functional and development consultants

Test team
Access HQ test team
UNSW test resources

SCRUM TEAM(S)

3: OUR LANDSCAPE

The UNSW envioronment and how it has evolved

UNSW STUDENT ADMIN LANDSCAPE

Handbook

Factor5 CourseLoop
SaaS

myUNSW
Student & Academic Self Service

Oracle WebCentre Portal Locally Hosted	Custom Java Apps Locally Hosted	Custom Apps Azure PHP

Insight CRM
Customer
Relationship
Management

AIMS
Academic Information
Management System

Custom App
Azure PHP

SIMS
Student Information Management System

Scheduling

Syllabus+ Course Planner
Locally Hosted

Oracle PeopleSoft Campus Solutions
Locally Hosted

Microsoft Dynamic
SaaS

CRM TECHNICAL ARCHITECTURE

UNSW INSIGHT PROGRAM SOLUTION ARCHITECTURE
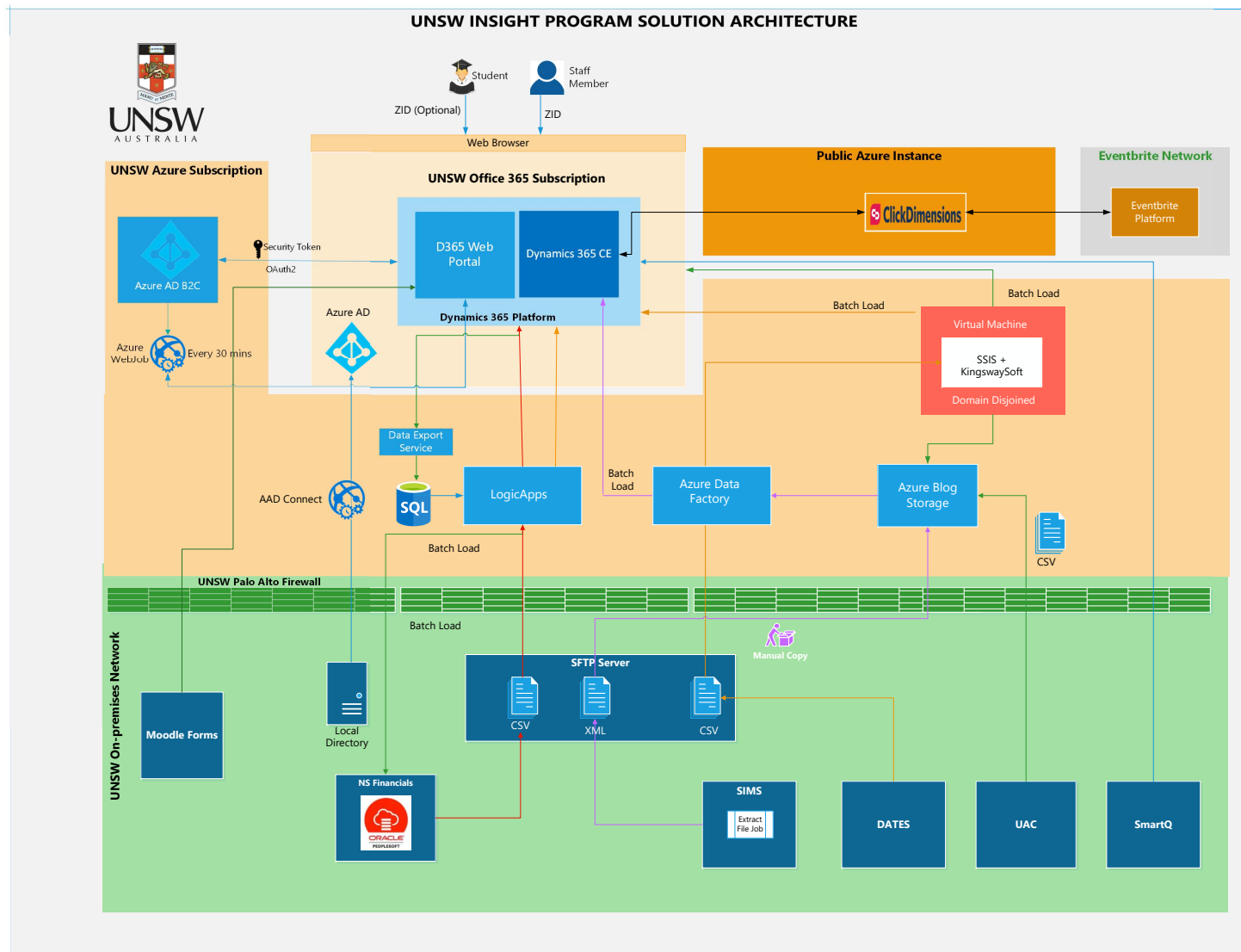
4: OUR INTEGRATIONS

The detail and journey of each integration

SOME KEY INTEGRATIONS

Core student data (from SiMs to CRM)

Offer data to support conversion (from SiMs to CRM)

Invoices (sales transactions from CRM to NSF)

UAC (if we have time)

CORE STUDENT DATA (SIMS TO CRM)

Frequency: Once Daily

Approach: Full data extract sent daily

- V1: For first go-live. Outcome: single row per student record in CRM

  - Detail: file based on full existing student extract (XML file) dropped in a Azure blob container, to be picked up by Azure Data Factory; converted into staging SQL tables in Azure (student and extracted and extracted master data); read and processed by Dynamics Web APIs to load into CRM

- V2: Late 2017. Outcome: separate rows per student program; more robust master data

  - Detail: same approach, added additional program and application rows, + additional master data files, using the same process/approach

OFFERS FOR CONVERSION SUPPORT

Frequency: sent every 5 minutes

Approach: new transactions only

- Used existing offer extract to support conversion campaign including personalized web pages (Drupal development)

- CRM side: built using on-premise SSIS (+KingwaySoft), consider Data Factory/Web API approach but was very resource heavy to build.

- Fed a Click Dimensions Marketing campaign

INVOICES FOR SALES TRANSACTIONS

Frequency: end to end every 3-4 hours

Approach: New transactions only

- When an invoice is submitted (at the end of a sale), CRM generates an pro-forma invoice for distribution to the customer

- Native Dynamics export to Azure SQL

- LogicApps integration side picks up every 3 hrs, converts to CSV to be processed into NSF

- Returned confirmation processed with similar data flows as student data

UAC DATA FOR MARKETING AND ENQUIRY HANDLING

Frequency: Daily

Approach: full load every day

- SSIS from blob container (first instance from internal sourced – in first instance transferred manually every day)
- Converted to inbound web api and solved security issues around automated inbound transfer (kept it all within UNSW Azure infrastructure)

CONCLUDING THOUGHTS

ANY QUESTIONS?

SUMMARY

Voltaire, the French writer, said, "The best is the enemy of the good."

Confucius said, "Better a diamond with a flaw than a pebble without."

And, of course, there's Shakespeare: "Striving to better, oft we mar what's well."

Effective work is about moving toward the desired destination, and not necessarily about ensuring that nothing gets spilled or knocked over in the process. Mistakes will happen. Missteps will occur. It's momentum that matters, and ensuring that time is not wasted obsessing over the little things that won't end up moving the needle anyway.

-Deep Patel (Forbes magazine)

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

THANK YOU!

ANZ HEUG
Australian and New Zealand
Higher Education User Group

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