**La Trobe University**

**HEUG 2018 presentation submission proposal**

**Customer Relationship Management (CRM) dynamic form builder**

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It may seem strange, but prior to 2018 La Trobe University had very few options to provide a fully digital submission experience for students. Paper and PDF based forms seemed to be the quickest way receive specific administration requests from students. Past attempts to deploy a digital end-to-end solution for students had failed due to complex business demands and a changing online environment.

By leveraging the power and flexibility within the Oracle Service Cloud CRM, La Trobe has been able to create its own online form builder with a robust and scalable solution that keeps getting better. This presentation will show how this was achieved with some surprisingly simple techniques. We will show how the technical changes and operational optimisations led to an elegant solution that requires very little maintenance.

The transformation and digitisation process consisted of some smart and creative thinking around internal business processes, but it was made simple by the power of the Oracle Service Cloud CRM functionality.

Now anyone can build an online student facing form that:

* creates a CRM incident
* routes directly to the correct department
* provides tailored and critical student communications
* provides relevant SLA rules
* generates detailed service analytics
* takes a novice business user less than 20 minutes to build.

**Some key facts about the La Trobe form builder:**

* Each new online form can be infinite in size but only uses four custom fields in the CRM tables.
* We use smart logic to prevent duplicate contact creation.
* inbuilt privacy features to mitigate risk
* Incident routing is tailored to the student and submission data.
* No additional CRM configuration is needed to create a new form.
* It only took four people to build the system but transformed processes and simplified procedures for 150 staff.
* In some cases, processing times dropped from an average of six days to 30 minutes.

**Form builder features:**

* SLA resolution times and exceptions
* Frequency and tracking of submission data
* Campus or course specific detail
* Auto allocation of skills or departmental specific submission data
* Long and short-term forecasting of submission data
* Agent performance and processing times.

In the coming months the custom form builder will include new features to further improve student and staff experience. This will include a sophisticated rules engine to enable a highly dynamic user interface. Integration with Student Management System (SIS TechOne) will be developed to fully automate the processing and data entry. Integration with external course and subject databases will provide students with a richer personalised experience and enable even more possibilities for administrators.