

Presenter: Andrew Forbes

Manager Customer Relationship
Management and Records Management

The University of Queensland
a.forbes@uq.edu.au

- Andrew is a qualified chef, high-school science teacher, trainer, marketer and manager.
- Andrew has now been in Higher Education for 4 years.
- Andrew's title has 'manage' in it three times, but mostly he is just coping.
- Andrew is proud that he has lifted the profile of CRM/CX at UQ and has grown the team from 2 (in 2015) to 10 (in 2017) with 6 of these being ongoing positions.
- Andrew will not to talk about Records Management in this presentation

The University of Queensland

Students \approx 51,000

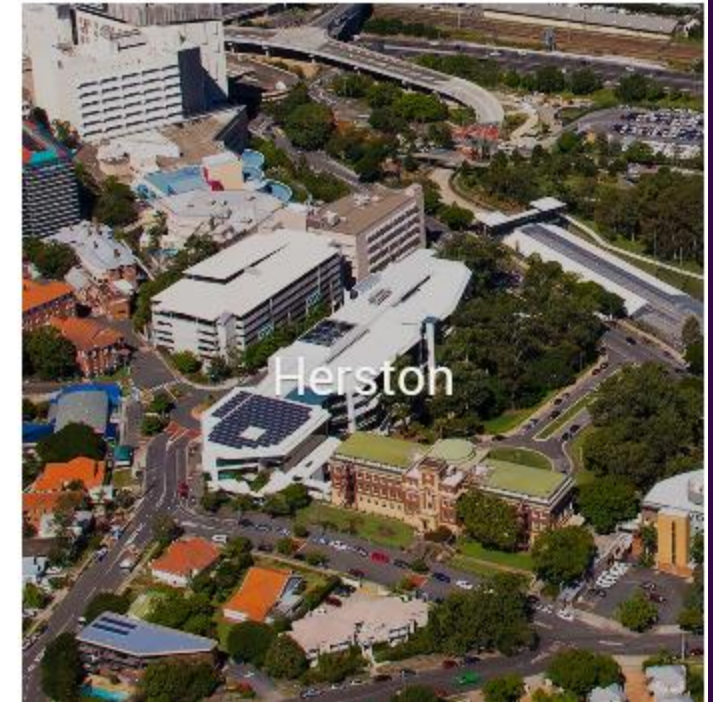
72% Undergraduate; 28% Postgraduate

28% International; 72% Domestic

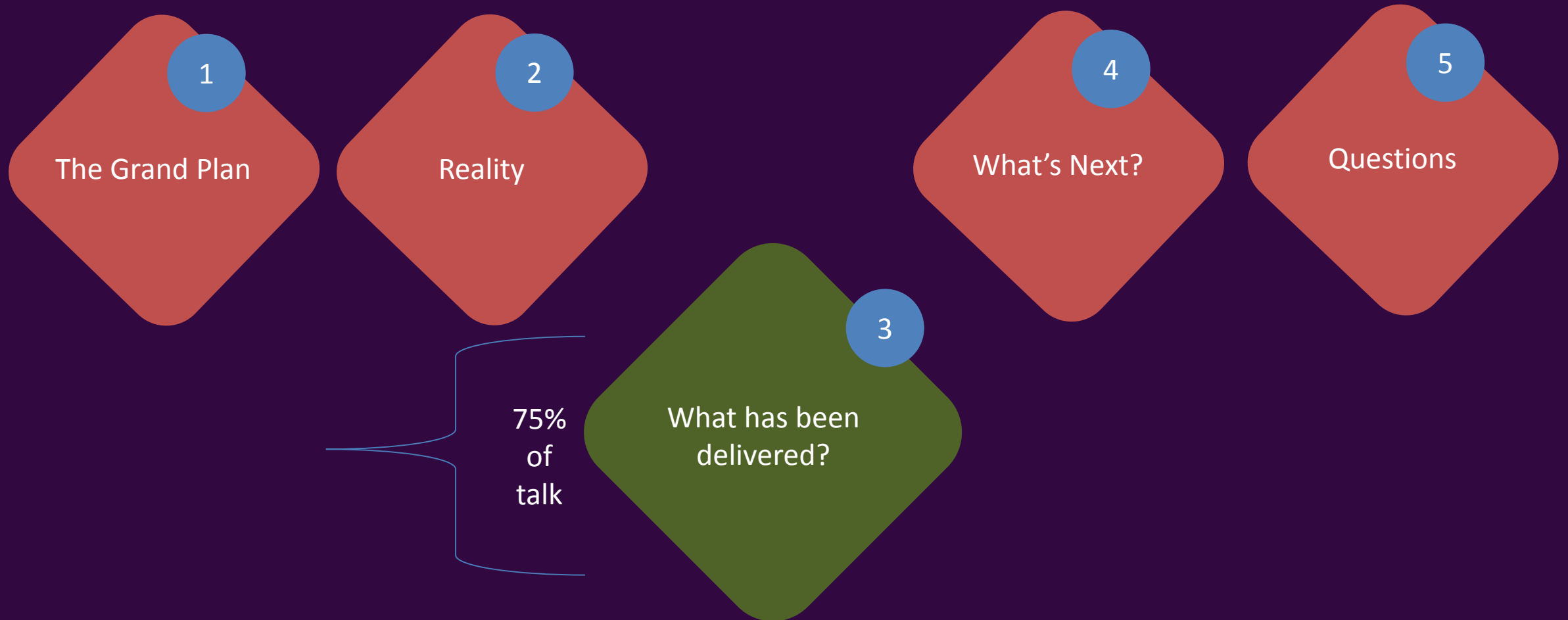
Staff \approx 6,750 FTE

Our campuses

UQ has three campuses and more than 40 teaching and research sites around the state



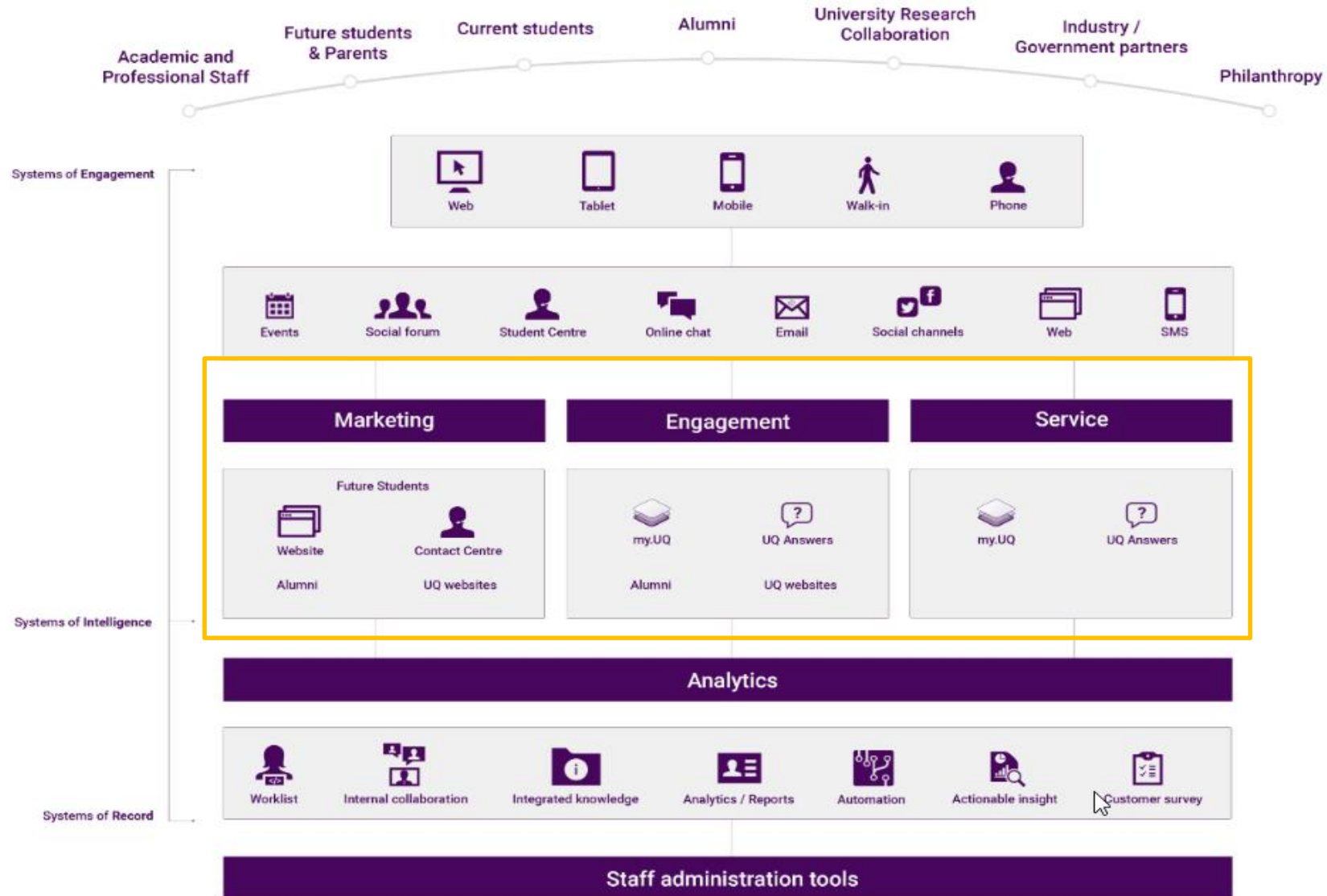
Session Overview



The Grand Vision (Nov 2016)

“The UQ CRM/CX project will improve the customer engagement experience of all *prospective students, current students, staff, alumni, donors, prospective donors, and industry partners* through improved coordination of business units and services and ensuring underpinning, *enabling technologies* are procured to support the experience, and to provide *superior reporting* to inform business decisions.”

Enterprise Systems stack



2

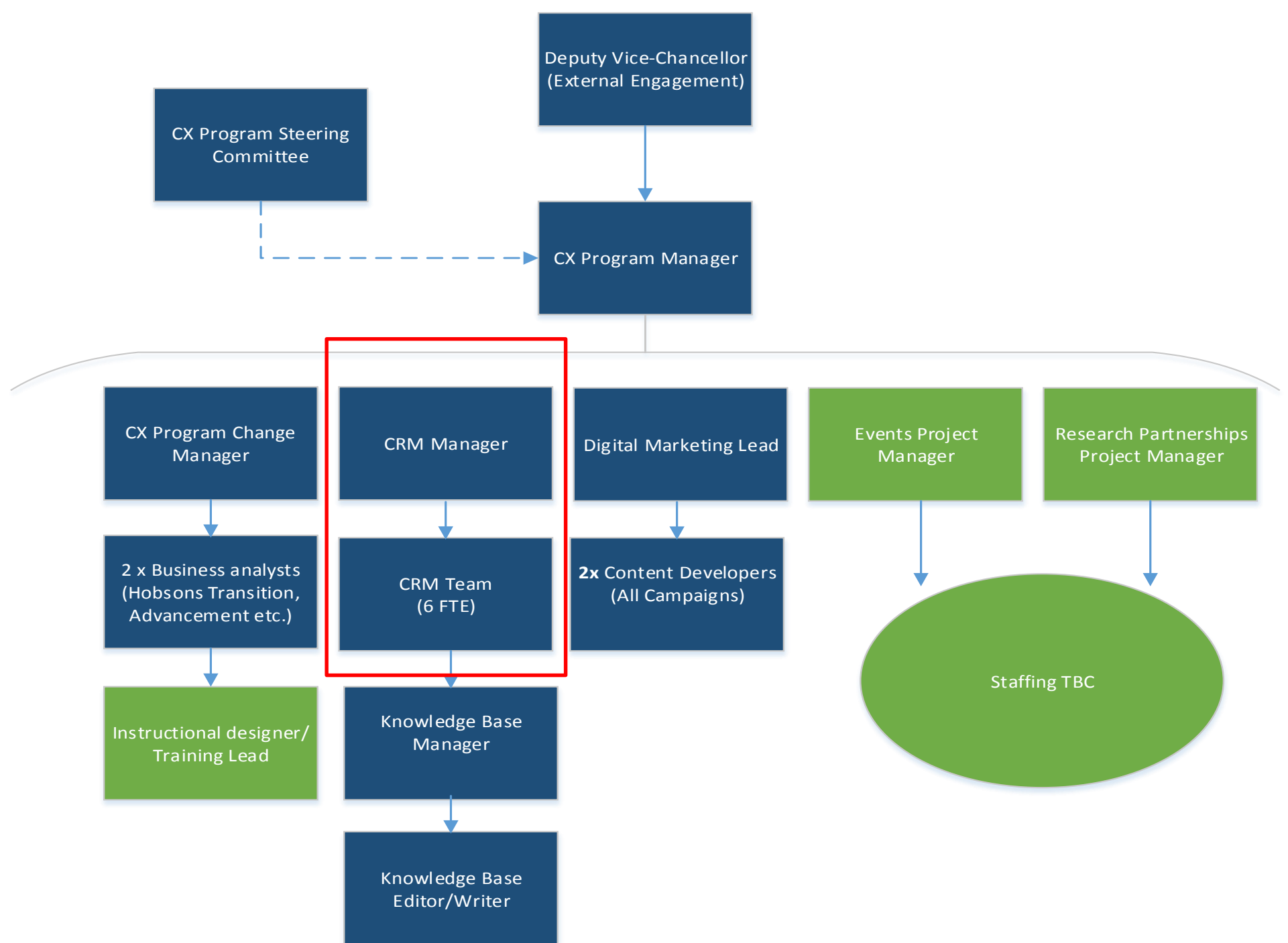
Reality

Program Staff

CORE

Q4 -2017

Q1 -2018



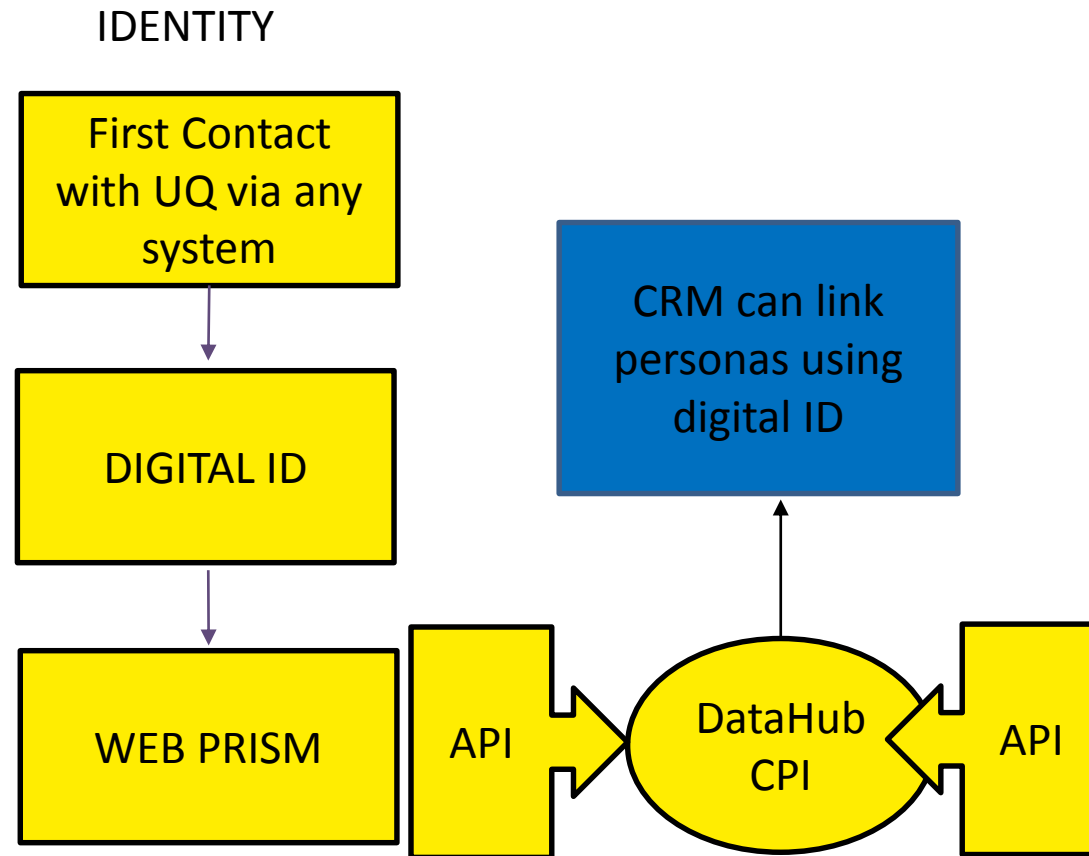
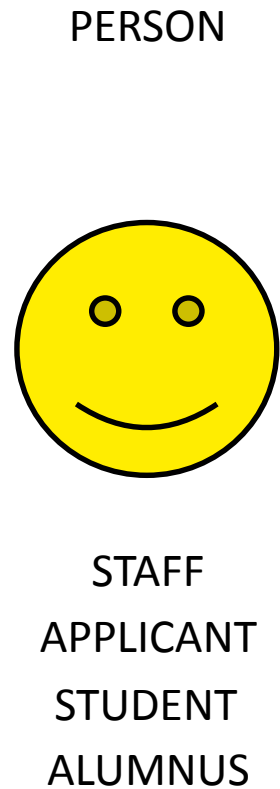
	RACI (Responsible, Accountable, Consulted, Informed)				
Deliverable/Task	OMC Delegate/s	CX Digital Marketing Lead	Digital Content Manager	CX Content Developers	3 rd Party
Development of detailed campaign brief (including goals & target audiences, success measures & interfaces within UQ Marketing Automation framework)	A	R	C	I	C
Definition of default & conditional content standards	C	C	A	C	R
Campaign design & content guidelines (including UQ voice/theme & content matrix)	C	A	C	I	R
Campaign build within Eloqua	C	A/R	C	C	C
Campaign default Asset & content development (including written, landing pages, images, video & animation) #	C	C	A	R	R
Campaign conditional Asset (ie. Faculty, discipline level) development (including landing pages, images, video & animation) #	C	C	A	R	R
Campaign written content development (conditional content) including coordination with UQ SMEs*	R	R	A	R	C
User Acceptance Testing & Deployment	C	A/R	R	I	n/a
Ongoing monitoring & management of campaign	A/R	R	C	I	n/a

3

75%
of
talk

What has been
delivered?

Identity Management (Personas)

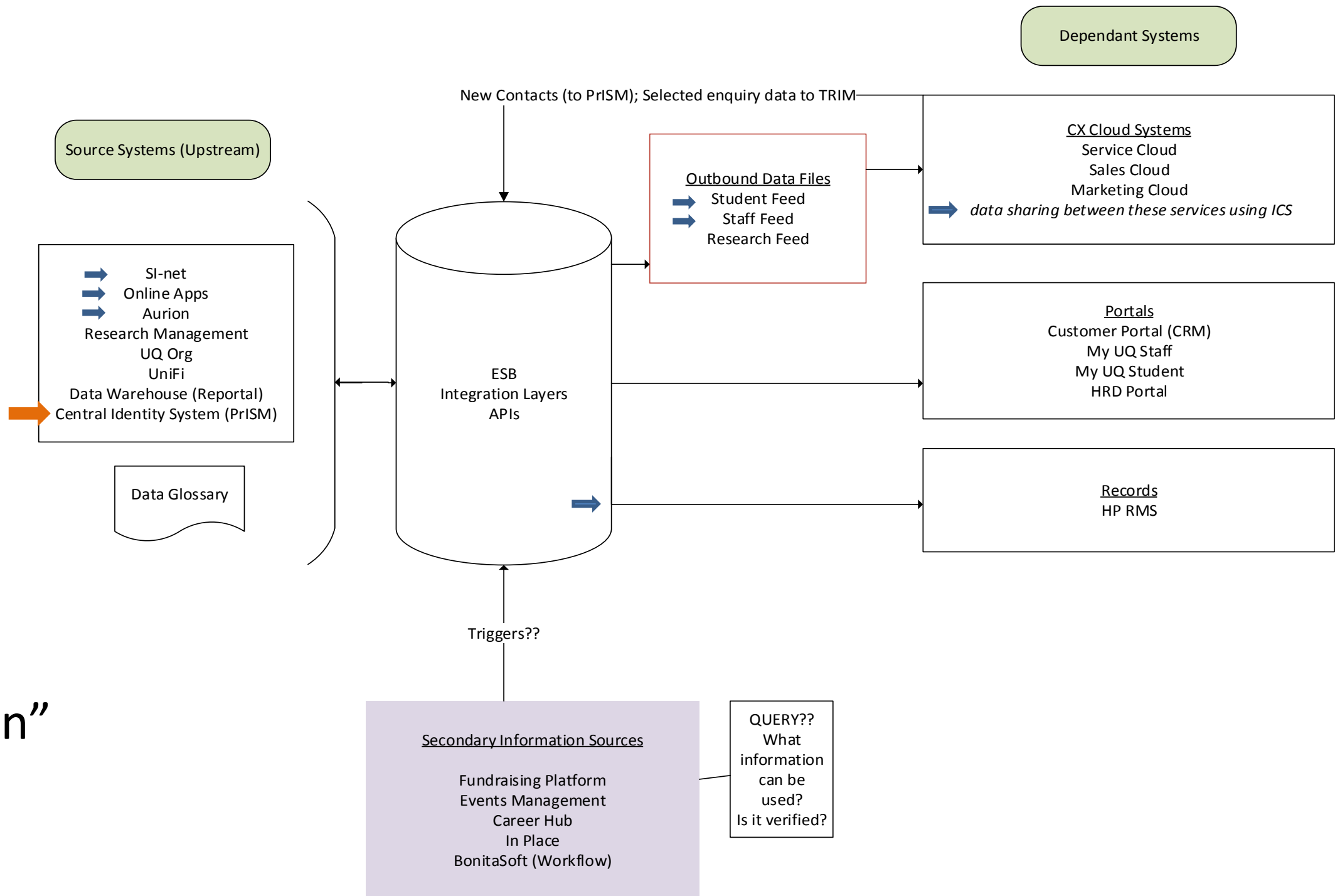


~~AUTHENTICATION
AND
AUTHORISATION~~

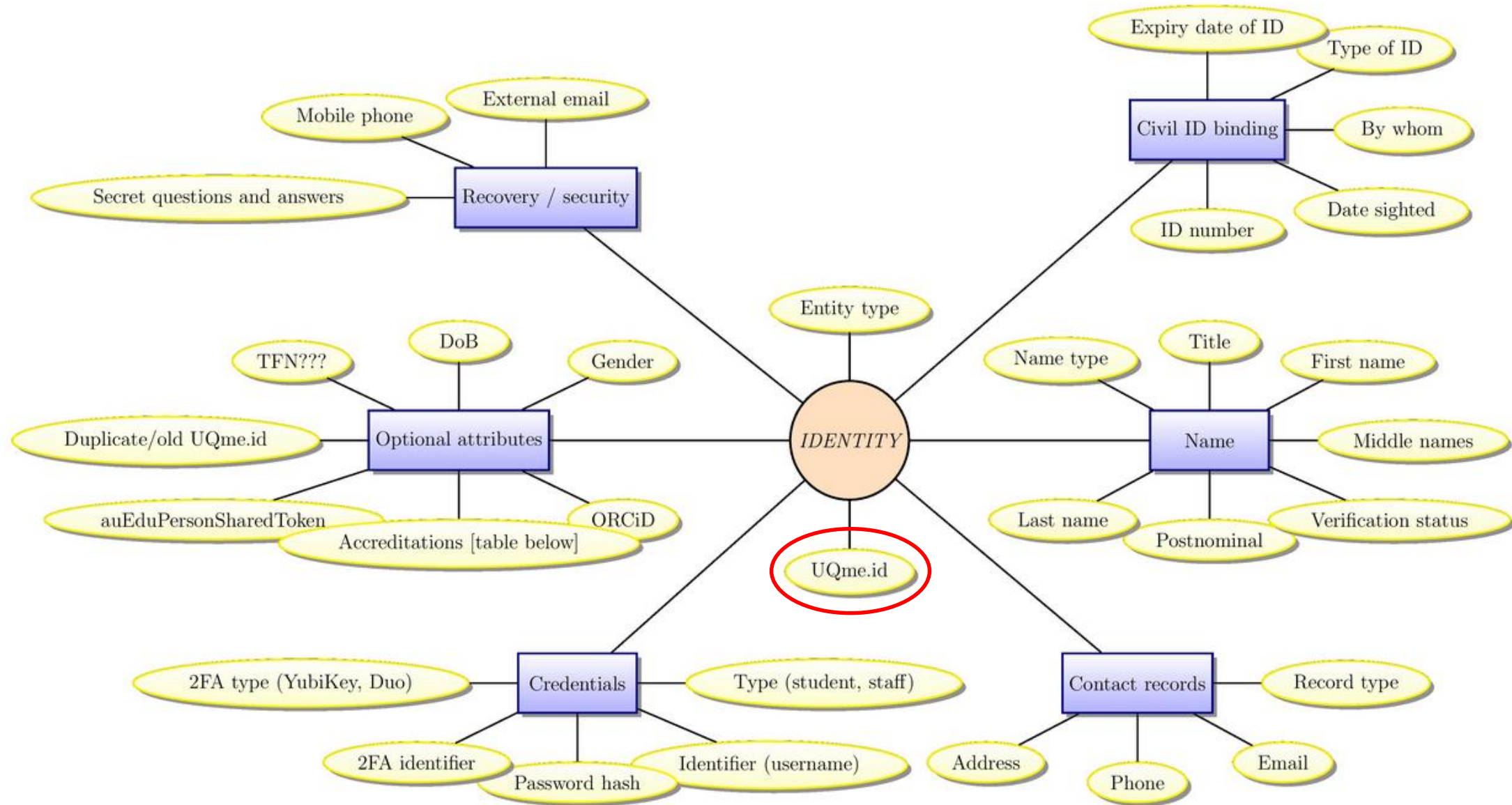


ADU 9-11 November 2016

“Its all
about
Integration”



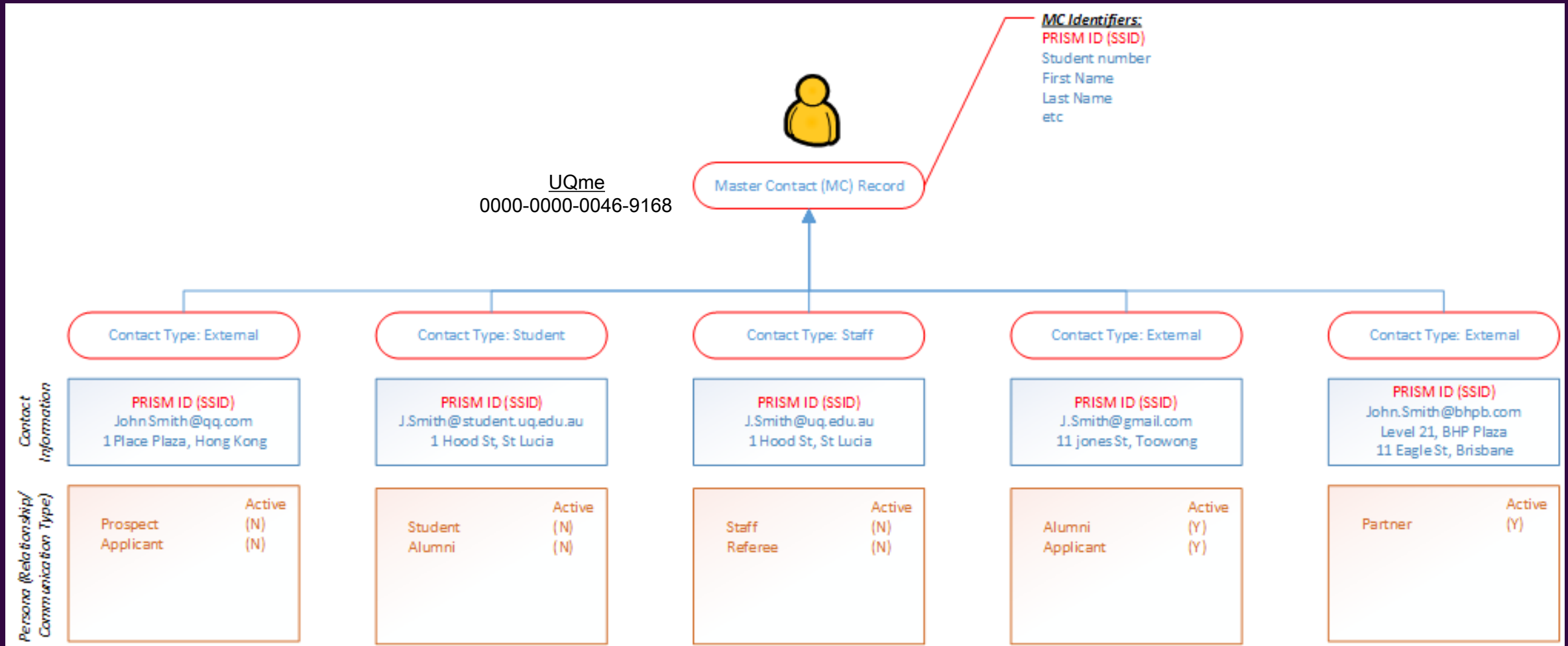
“We need
a Master
Identity”



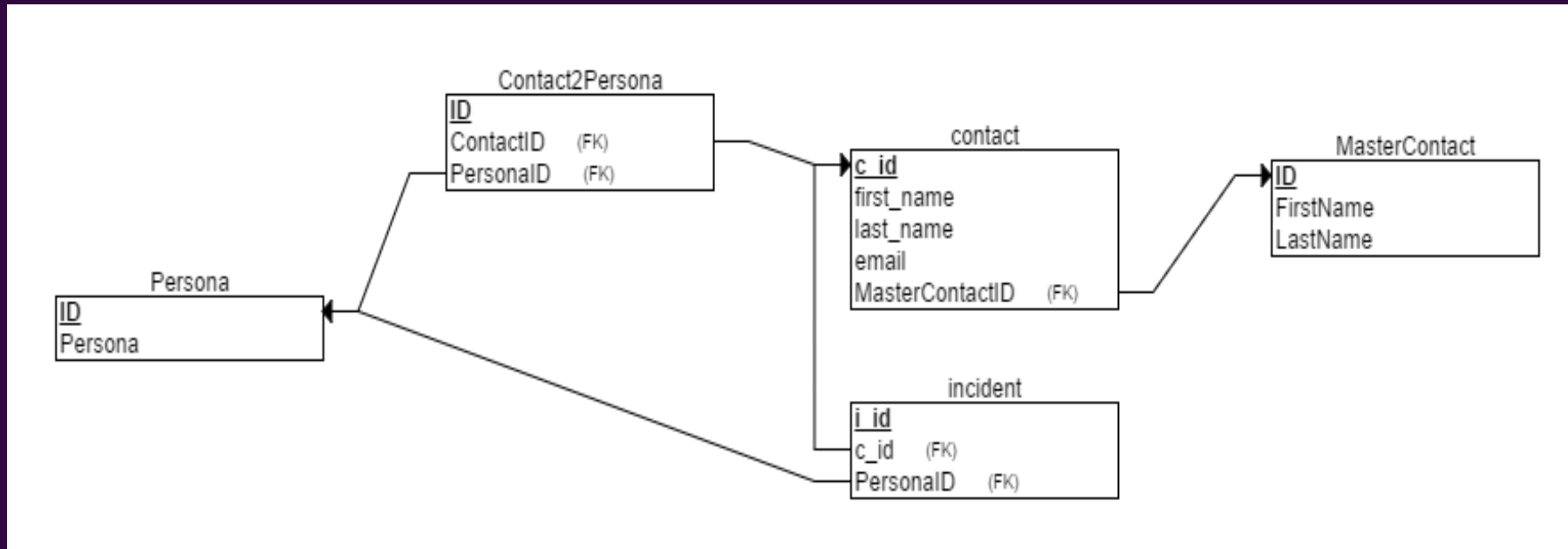
We have settled on using an [ISNI](#) as this "top level" identifier. An example ISNI is 0000-0000-0046-9168

Personas

- Using UQme.id as the Master Contact ID we then create linked personas



The diagram below depicts the actual custom objects and entity relationships to be configured in the system to support the Persona implementation.



These are the Personas we are starting with.

We have identified about 3000 Student records that are also Staff records

Search Text

[No Value]

Current Student

Prospective Student

Parent

Staff

Community

Alumni

Agent

Referee

Education Partner

Business Partner

Integration of content and knowledge

Ultimately, knowledge and the KMS should supplement and deepen the information a user encounters on the CMS.

The integration of the systems will support enquiry management and compliment a University-wide service model moving forward.

CMS

What 'most' people need to know
(Program Info, Maps, Timetable Info etc.)



KMS

Context specific, more granular, accessed less frequently, could 'clutter' the CMS.
(Specific Information, Processes, SMEs.)

“We want a TRIM button”

“It must send the meta data and all the attachments”

“We want to know that it got there”

View Incident Rule

Viewing Rule in Function: Send Incident Information to TRIM

Rule Name

Send to Records Management TRIM

Notes

Add Options

If

1

Enquiry.Status

equals

Solved

Forwarded Solved

Unresolved

Updated

☐ Delete Condition

2

Enquiry.TRIM Status

equals

Pending

Staging

Processing

Success

☐ Delete Condition

Logical Expression (& = and, | = or; e.g. 1 & (2 | 3))

1 & 2

Then

1

Execute Object Event Handler

RM_Staging

☐ Delete Action

Else

Cancel

Enquiry

Contact Information

Contact*

Last Name

Email

@student.uq.edu.au

Mobile Phone

Student Number

Login

42695330

s4269533

Contact Type

International Student

Current Student

[No Value]

Enquiry Information

Enquiry Status*

Solved

TRIM Status

[No Value]

Queue*

ASD – Academic Progression

Subject REMINDER - Census Date for Semester 1, 2013 - - 42695330

- Message
- Enquiry Files
- Enquiry History
- Forward to SME
- Academic Information
- SI-net Comments
- SI-net App Info
- TRIM
- Report S

Reference #	Subject
130708-000430	Completion letter, transcript, certification of documentation for the Chinese Consulate
130507-000167	Provided student with a replacement id card form and IELTS test application form
130318-038805	REMINDER - Census Date for Semester 1, 2013 - Ms Liji Liu - 42695330
130314-000541	family entry letter
121128-000411	wishes to apply for supplementary, system does not allow. sent to uq business school with referral slip obo adv bus school.
121012-000149	study dates letter
121009-000137	enrolment status report
120731-034503	REMINDER - Fees Due and Census Dates for Semester 2, 2012 - Ms Liji Liu - 42695330

“We want reports, reports and more reports”

Reports Explorer x Research Applications not submitted x

List of all RHD Applicants who have not submitted applications

App Com	Ful	Emai	Country	Citizenship St	O	Application last updated	OLA Application Code	Action
Research Q	Eli	No		Australian Citize		11/11/2015 09:18 AM	5040682590	Open
Research Q	N	nsch		Australian Citize		11/11/2015 09:18 AM	6555510314	Open
Research Q	Ly	lyna		Australian Citize		11/11/2015 09:18 AM	4067823650	Open
Research Q	N	kelly		Australian Citize		02/01/2017 06:03 AM	8403775468	Open
Research Q	Ad	delr		Australian Citize		11/11/2015 09:18 AM	4351772862	Open
Research Q	Ni	n.fox		Australian Citize		02/01/2017 06:03 AM	5039292749	Open
Research Q	G	ghas		Australian Citize		13/12/2015 07:43 AM	5937010307	Open
Research Q	Ka	k.teh		Australian Citize		04/03/2016 10:04 PM	5598039907	Open
Research Q	Ch	charl		Australian Citize		02/01/2017 06:03 AM	9690162082	Open

Reports Explorer x Incident Effectiveness x

Incident Effectiveness

Interval	Enquiries	RPA	FCRR	Assigned Count (Within 2 Hours)	%	Response Count (Within 6 Hours)
2017/10/05	2155	0.4	86.8 %	1362	63.2 %	441
2017/10/06	1677	0.4	84.8 %	1111	66.2 %	321
2017/10/07	295	0.5	89.3 %	45	15.3 %	3
2017/10/08	271	0.6	84.3 %	34	12.5 %	0
2017/10/09	2192	0.4	87.0 %	1492	68.1 %	429
2017/10/10	2018	0.4	89.1 %	1343	66.6 %	414
2017/10/11	1391	0.3	92.9 %	1070	76.9 %	337
Total	9999			6457		1945

Reports Explorer x This Week's Enquiry Activity (Student Centre) x

Enquiry Activity - Past 7 Days

Interval	Enquiry Created	Unass.	%	Assign.	%	Resolved	%
2017/10/05	1781	0	0.0 %	1781	100.0 %	1663	93.4 %
2017/10/06	1413	0	0.0 %	1413	100.0 %	1319	93.3 %
2017/10/07	220	0	0.0 %	220	100.0 %	187	85.0 %
2017/10/08	221	0	0.0 %	221	100.0 %	199	90.0 %
2017/10/09	1802	0	0.0 %	1802	100.0 %	1655	91.8 %
2017/10/10	1706	0	0.0 %	1706	100.0 %	1516	88.9 %
2017/10/11	1159	0	0.0 %	1159	100.0 %	960	82.8 %
Total	8302	0		8302		7499	

UQI Today's Enquiry Activity Dashboa

Enquiry Activity

Interval	Enquiry Created	Unass.	%	Assi
2017/10/12	102	94	92.2 %	
Total	102	94		

Reports Explorer x Knowledge Base Performance Dashboard x

Questions Avoided

Date	Questions Submitted	Questions Confirmed	Questions Avoided	%
2017/10/05	73	73	0	0.0 %
2017/10/06	35	35	0	0.0 %
2017/10/07	21	21	0	0.0 %
2017/10/08	27	27	0	0.0 %
2017/10/09	55	55	0	0.0 %
2017/10/10	54	54	0	0.0 %
2017/10/11	52	52	0	0.0 %
Total	317	317	0	

Record Count: 7

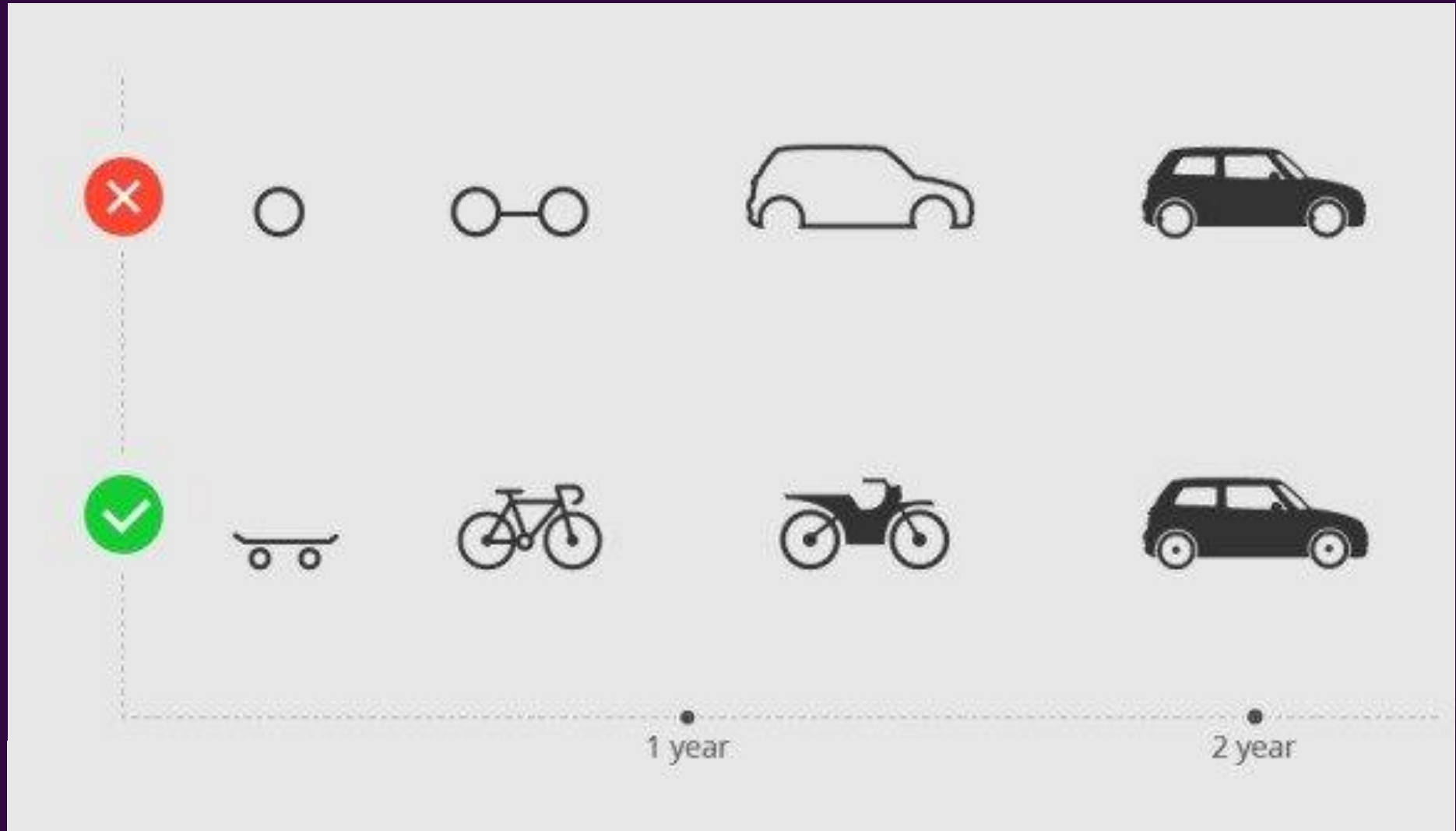
Question Submittal

Visit Type	Submit Visits	Confirm Visits	Resolve Visits
Question Only	219	219	0.0 %
Answer Only	41	41	0.0 %
Search Only	29	29	0.0 %
Search and Answer	28	28	0.0 %

Keyword Search

Phrase Stem	Search Count
TIMET	1947
ACCOMMOD	20
IMET	17
FEE	14

- “We heard you have purchased Eloqua!”
- “We want to use Eloqua!”
- “Eloqua will make really cool campaigns”



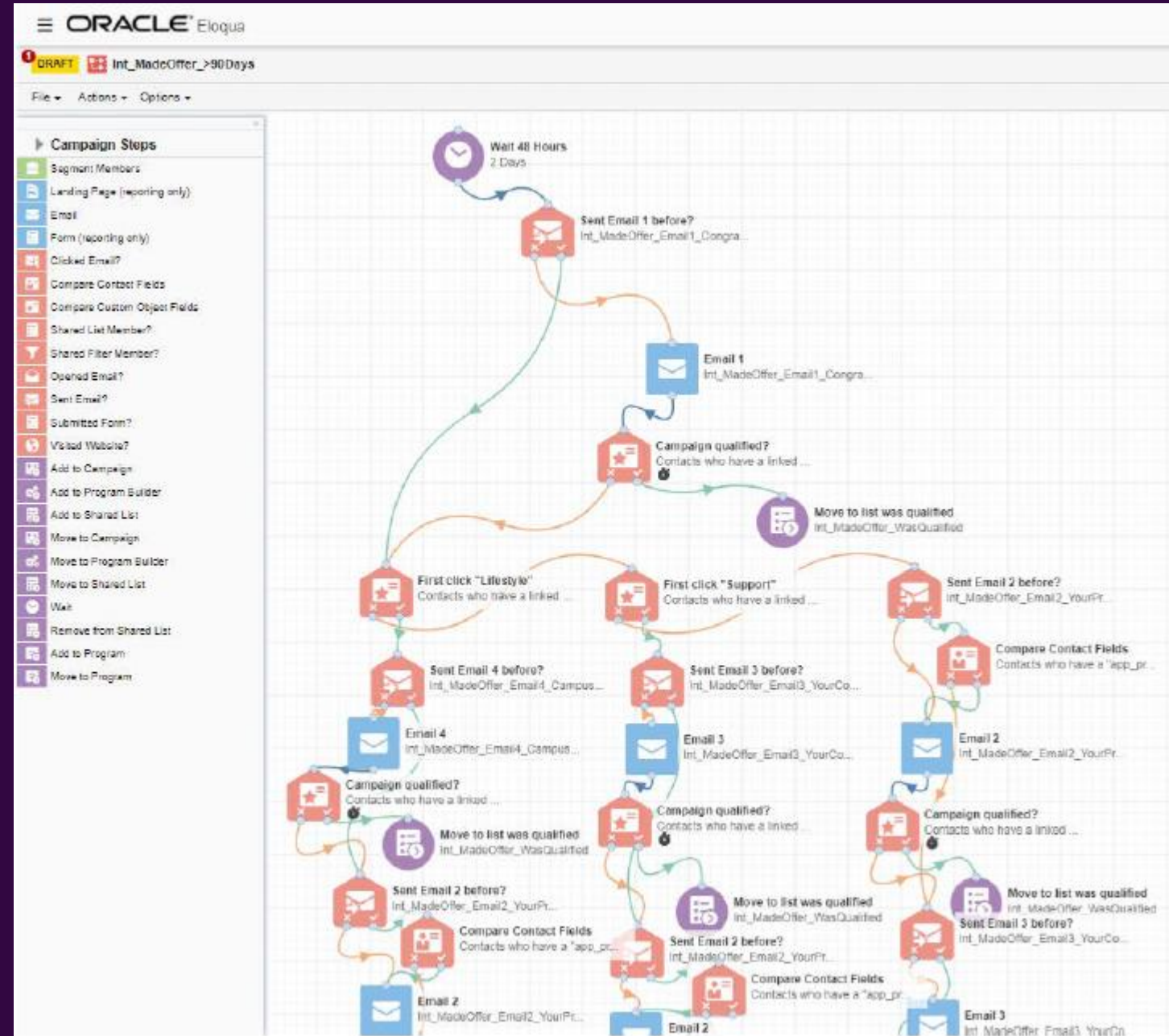


Marketing automation

Common features and functions include:

- campaign management
- email marketing
- forms and landing pages
- lead capture and nurture
- progressive profiling
- prediction/scoring
- marketing analytics

International 'Made offer'



Marketing automation

Key Learnings

- Usable data fields are essential (where is the data)
- Content needs to be purpose built (for each segment and message)
- Have recorded, actionable outcomes from every meeting (Changing Requirements)
- Stick to one Program management tool (JIRA, Asana, Dapulse, Outlook)
- Keep saying MVP

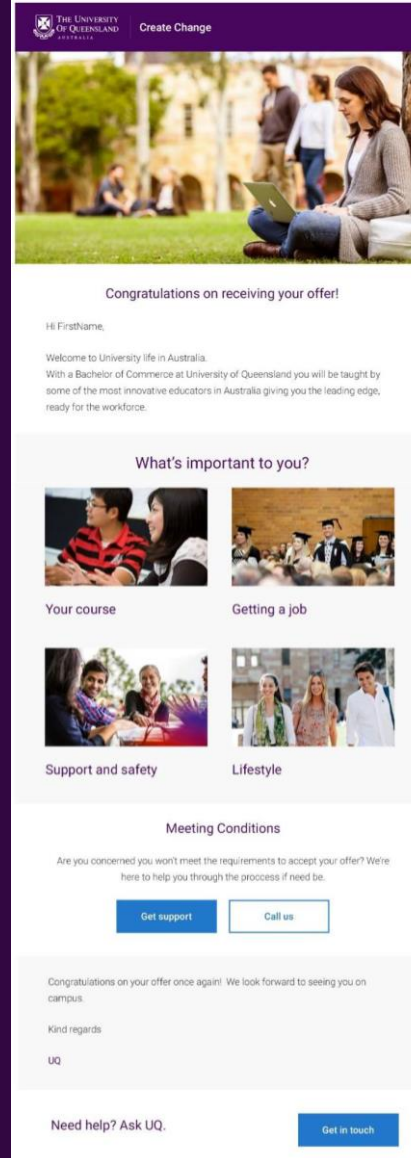
↻ Persistence

Went live on October 26th

Bulk Uploaded ≈ 8000 offers

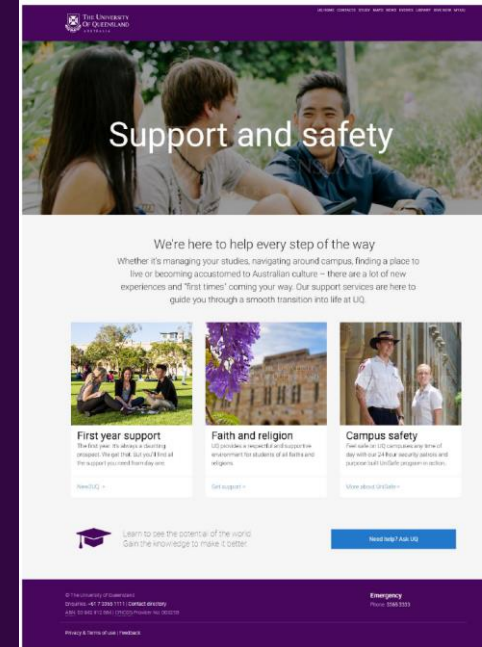
ICS now passing data (e.g. offer status) in real time.

Email 1



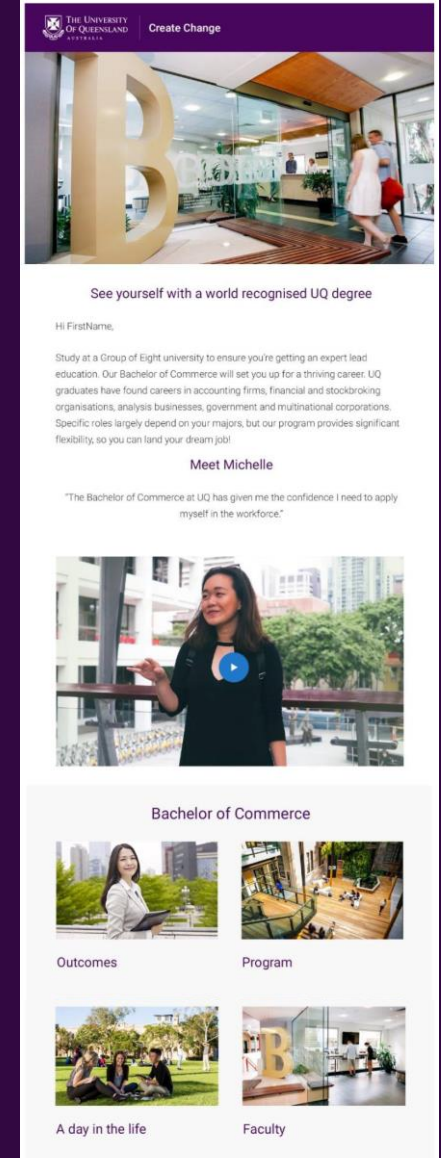
The screenshot shows the first email from The University of Queensland. It features a purple header with the university logo and 'Create Change' text. The main body has a large image of students on a lawn. Below this, it says 'Congratulations on receiving your offer!' and 'Hi FirstName,'. The email welcomes the student to university life in Australia and mentions the Bachelor of Commerce program. It includes a section titled 'What's important to you?' with four sub-sections: 'Your course', 'Getting a job', 'Support and safety', and 'Lifestyle'. Each sub-section has a small image and a link to 'Get support'. At the bottom, there is a 'Meeting Conditions' section with a question about meeting requirements and two buttons: 'Get support' and 'Call us'. The footer includes 'Kind regards', 'UQ', and a 'Need help? Ask UQ.' link with a 'Get in touch' button.

Landing page



The screenshot shows the landing page for the Bachelor of Commerce program. It features a purple header with the university logo and 'Create Change' text. The main body has a large image of students sitting and talking. Below this, it says 'Support and safety' and 'We're here to help every step of the way'. It then lists three key areas: 'First year support', 'Faith and religion', and 'Campus safety', each with a small image and a link to 'Get support'. At the bottom, there is a section titled 'Learn to see the potential of the world' with a link to 'Head to UQ' and a 'Need help? Ask UQ.' button.

Email 2



The screenshot shows the second email from The University of Queensland. It features a purple header with the university logo and 'Create Change' text. The main body has a large image of a student walking through a modern building. Below this, it says 'See yourself with a world recognised UQ degree' and 'Hi FirstName,'. The email encourages the student to study at a Group of Eight university and mentions the Bachelor of Commerce program. It includes a section titled 'Meet Michelle' with a video player showing a student. At the bottom, there is a section titled 'Bachelor of Commerce' with four sub-sections: 'Outcomes', 'Program', 'A day in the life', and 'Faculty', each with a small image and a link to 'Get support'.



ICS Simplify Integration

Maximize the value of your investments in SaaS and on-premises applications through a simple and powerful integration platform in the cloud.

Watch Video

View eBook



Fast

Get started in minutes!

Enterprise-Grade

A secure, performant and highly available platform for your mission-critical integrations.

Simple

Build SaaS to SaaS and SaaS to on-premises integrations in just a few clicks.

Integrated

Pre-integrated with your Oracle SaaS applications.

ICS

Oracle are getting involved with our next use case – OSvC <-> Hobsons using ICS



- Not Intuitive
- Difficult to find documentation
- Required coding and testing (lots)
- ROQL Query not all compatible
- Lack of Best Practice Examples
- No-one knows OSvC, OMC and ICS
- Different contact record structures in OSvC, OMC and OSC (email field)
- Changing Requirements difficult to incorporate

UQ Business School

- Contact and Organisations
- Contact to Organisation relationship
- Event Registration
- Short Courses as Events
- MBA recruitment
- Employment History
- Industry Partnerships
- Quotes and Contracts
- Guest Speaker Arrangements
- Etc.



The screenshot shows the UQ Business School Executive Education website. The header includes the University of Queensland Australia logo, the UQ Business School logo, and the Executive Education text. Social media icons for Twitter, Facebook, Instagram, LinkedIn, and YouTube are in the top right, along with a search bar. The navigation menu includes Home, About us, Professional development, Customised programs, Executive venue, Events, News, and Contact. The main banner features a photo of three business professionals in a meeting, with the text "Learning to Lead" and "14-15 February 2018". Below the banner, a section titled "Challenging the boundaries of traditional executive education" contains three columns: "For individuals" (transforming thinking and practice in days), "For organisations" (developing custom programs), and "Industry events" (hosting business networking events).

THE UNIVERSITY OF QUEENSLAND AUSTRALIA

UQ BUSINESS SCHOOL

EXECUTIVE EDUCATION

Home About us Professional development Customised programs Executive venue Events News Contact

Learning to Lead
14-15 February 2018

Challenging the boundaries of traditional executive education

For individuals
Transform your thinking and practice in days rather than weeks by completing one of our short courses. Our professional development short courses provide best-practice business insights based on rigorous scholarship and real-world industry knowledge.

For organisations
We work with organisations to develop custom programs that blend the latest research and academic insights with practical, commercial tools and frameworks. We specialise in flexible, sustainable solutions to complex challenges.

Industry events
Each month we host a number of business networking events where thought leaders from our academic and industry community come together to share their insights and explore the most complex issues facing organisations today.

4

What's Next?

OSvC for Staff

- Knowledge Base (Advanced)
- Guided Assistance
- Indexing Content
- Enquiry Management
- Staff Portal
- Reporting and Analytics
- Engagement Engine

Includes:

- ITS
- FBS
- HR
- PBI
- Governance
- Legal
- Academics
- P&F

Industry/Research Partnerships

“We want to see a dashboard of all UQ activity that is being conducted with partner organisations!”



- Single view of an account (Contracts / Grants / Alumni / Finance / Consulting contracts) / Legal Services
- Different views for RPMs, Fundraising, Contract teams etc.
- Must be Browser UI, and interactive with e-mail
- Minimal overhead in managing the data capture

Sales Cloud for Research and Industry Partners

Sandbox ApplCoreLongSB_bc231

ORACLE

Activities

Accounts

Find Name starts with

Favorite	Name
<input type="checkbox"/>	N
<input type="checkbox"/>	P
<input type="checkbox"/>	C
<input type="checkbox"/>	N
<input type="checkbox"/>	J
<input type="checkbox"/>	Ir
<input type="checkbox"/>	G
<input type="checkbox"/>	P
<input type="checkbox"/>	A
<input type="checkbox"/>	P
<input type="checkbox"/>	B
<input type="checkbox"/>	l

Edit Account: Pinnacle Technologies: Overview

Actions Save Save and Close Cancel

Type Customer

URL <http://www.pinnacletechnologies.com>

Address 1 Clunies Ross Ct
Brisbane Queensland

Owner Lisa Jones

Primary Contact Adam Riley

Contact E-Mail anzservicecloud@g...


Contacts 10


Relationships 13


Favorite ★

Last Updated By LISA.JONES


Key Information

1
Active Contracts


6
Open Opportunities
(Amount \$4,591,450)

16
Open Leads
(5 Hot)

Requests

3
Open Service Requests
(1 Critical)

Activities

53
Open Activities

24/10/17

To do: Address Cu...

Lisa Jones

Last Completed Task

SALES REPRESENTATIVE ...

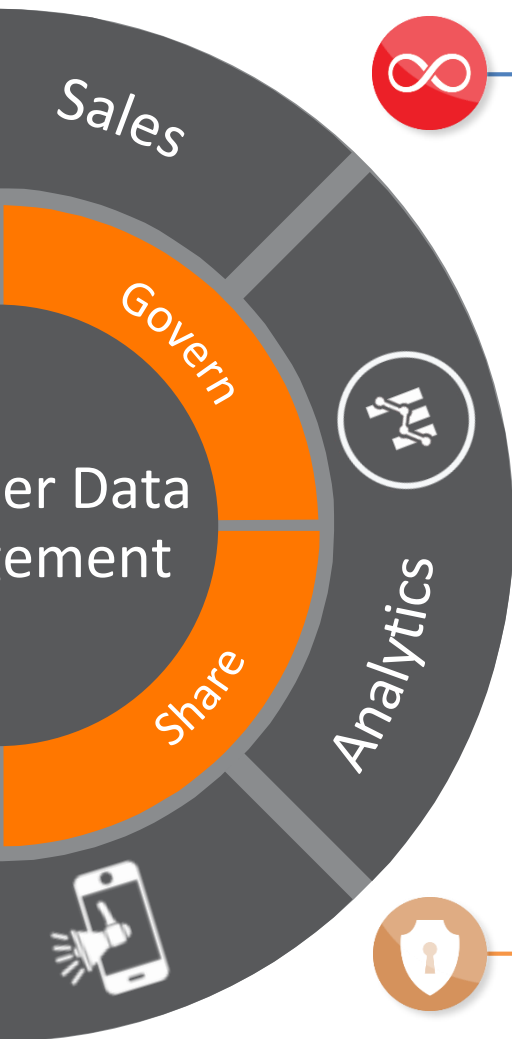
Service Requests

Create Account

Phone	Industry
-7789	High Techn
-5309	Communic
-9872	High Techn
-4780	Retail
-7400	Industrial M
-7598	High Techn
-7890	High Techn
-9201	High Techn
-8982	Engineerin
-8228	Profession
-9220	Profession

Oracle CX Cloud Suite - Higher Education

Sales Cloud



Organisation Management

Maintain Organisation Details, Relationship Management & Contact History



Sales Management

Lead Management, Pipeline/ Opportunity Management & Proposal/ Offer Generation



Contact Management

Maintain Contact Records, Relationship Management & Contact History



Partner & Research Partner Management

Partner Contract Management, Partner Order Management & Research Partner Management



Request & Loyalty Management

Receive and Manage Applications for B2B relationships

ORACLE®

5

Questions