Marketing Automation Platforms in Higher Education

Role & Lessons Learned

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University of Windsor

HEUG
HIGHER EDUCATION USER GROUP
TM

University of Windsor

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Engage. Renew. Advance.

- Review Project
- Constituent Relationship Management (CRM) & Marketing Automation Platforms (MAP)
- UWindsor Approach: Student Engagement CRM
- Implementation Insights
- Q & A

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Foundational systems:

- Lack functionality to meet needs of current & future stakeholders;
- Aging, lag behind technology at peer institutions;
- Separate, disparate, challenging to maintain and integrate with other campus systems;
- Unable to meet growing institutional requirements for timely, accurate information and reporting; and
- Inhibit the University's ability to deliver timely service

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Enterprise System

- Improve foundational systems capabilities;
- More integrated, user-friendly interfaces;
- Increase mobile functionality;
- Better access to accurate, timely data;
- Enhance reporting & analytic tools to support decision making;
- Facilitate institutional efficiencies & productivity;
- Improve end-user experience for all stakeholders

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Increase Student Recruitment and Retention Rate

Understand pain points and critical touch points across student lifecycle to increase student recruitment and retention rate

Streamline Communication Effort

Provide standardized communication experience across faculties

Build Loyal Student and Alumni Base

Send highly personalized messages and content in a timely manner to ensure better engagement

ROI

Measure individual campaigns to ensure maximum return on investment of marketing resources

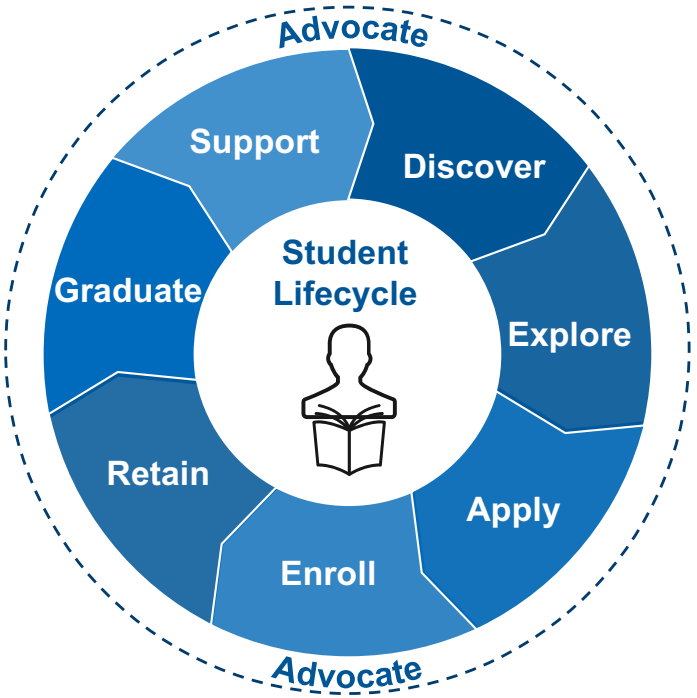
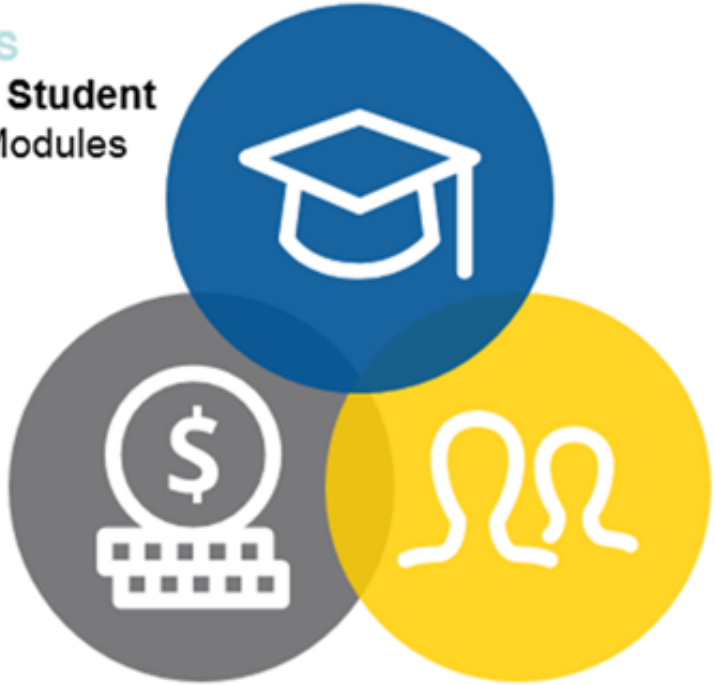


Photo Credit: *Deloitte Touche Tohmatsu Limited*

Oracle PeopleSoft and Cloud solutions are being implemented for this project:

Replace SIS
On Premise Oracle **Student Administration** Modules



NEW
Oracle Cloud **Student Engagement** Modules

Replace FIS
Oracle Cloud **Finance** Modules

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- Resourcing
- Space
- Administrative infrastructure, governance (CRM)
- Communications
- Governance & cadence
- Concurrent operations and development

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Project Overview
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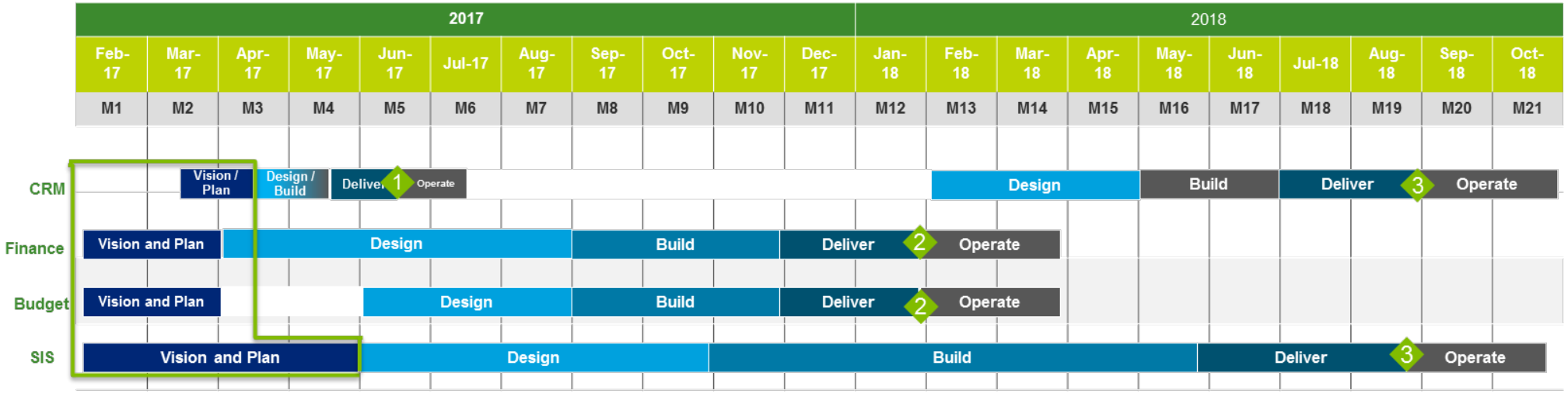
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CRM
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Design / Build
Deliver
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Operate
Design
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3
Operate
Finance
Vision and Plan
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Build
Deliver
2
Operate
Budget
Vision and Plan
Design
Build
Deliver
2
Operate
SIS
Vision and Plan
Design
Build
Deliver
3
Operate

Student Engagement CRM

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- Customer Relationship Management System
  - Makes the recruitment team more productive
  - Make the sales process simpler
  - Improves the overall customer experience
  - Provides analytics to inform business decisions
  - Generates and tracks leads

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- Marketing Automation Platform
  - Generates and qualifies leads
  - Nurtures leads from suspect to student
  - Manages email marketing campaigns
  - Reports on the success of various campaigns

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Digital Marketing Automation

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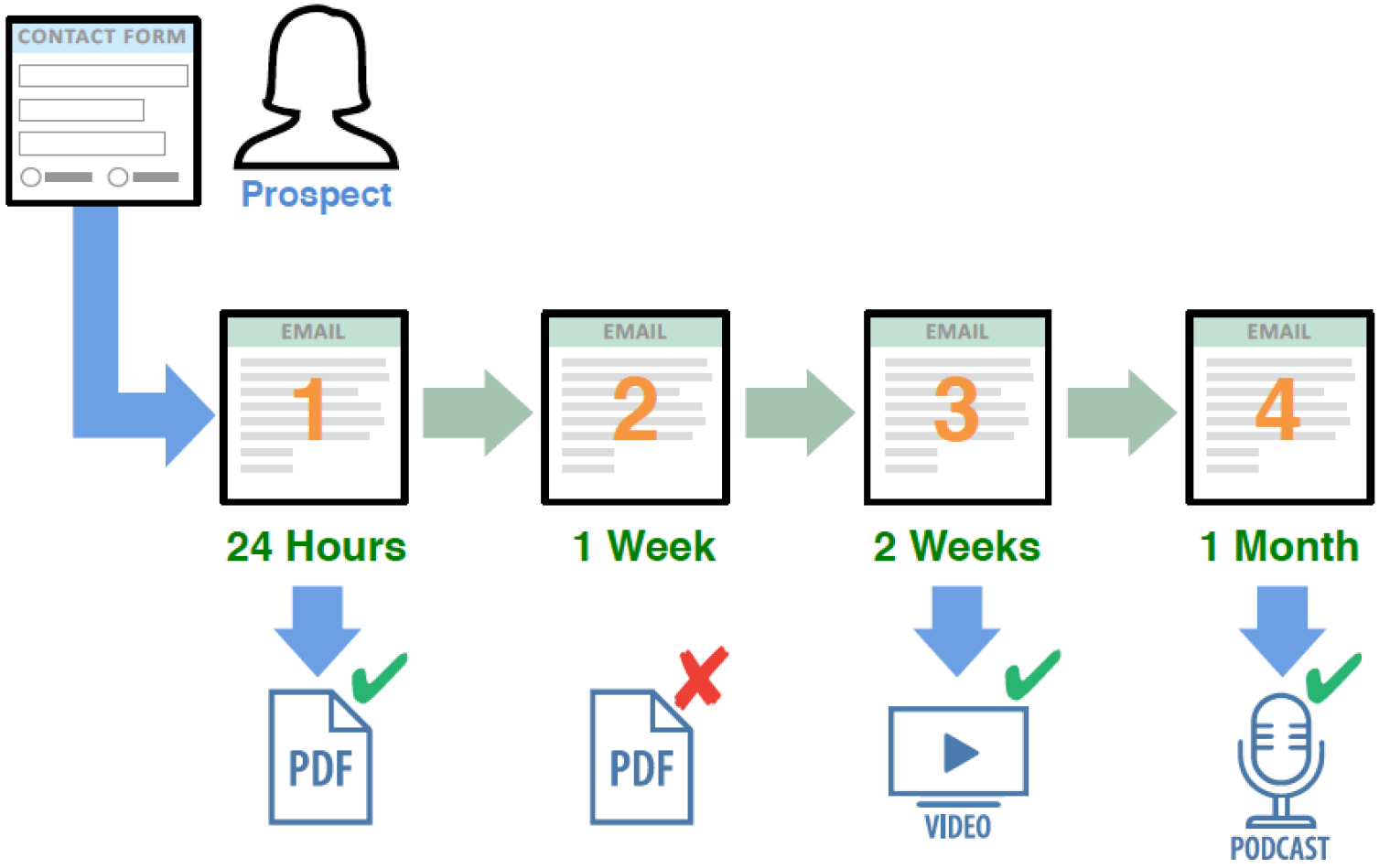

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- What is the difference?
  - Both collect and manage customer data
  - Both trigger sales and marketing actions
  - Both have elements of marketing automation
- The real difference is in the emphasis:
  - CRM emphasizes the sales process
  - MAP emphasizes online marketing

CRM & Marketing Automation Features

☑	**Lead Nurturing** Leads can be nurtured based on a variety of attributes (behavior, demographics, buying stage)
☑	**Campaign Management** Inbound marketing and outbound campaigns
☑	**Lead Management** Allows the leads to move through the entire marketing funnel
☑	**Landing Pages** Allows for the building of landing pages independently or within a CMS
☑	**Email marketing** Has a majority (if not all) of the functionality used regularly in existing e-mail marketing platforms
☑	**Social Marketing** Built-in social media marketing and management tools
☑	**Sales Intelligence** Real-time sales intelligence and insights
☑	**Visitor Tracking** Allows for the identification of companies by IP, and the individual visitors' activities on the site. Segments the database based upon those tracked activities.
☑	**Reporting and Analytics** Easily examine raw data to make business decisions

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PEOPLESOFT

CAMPUS SOLUTIONS

ORACLE

eloqua

ORACLE

SERVICE CLOUD

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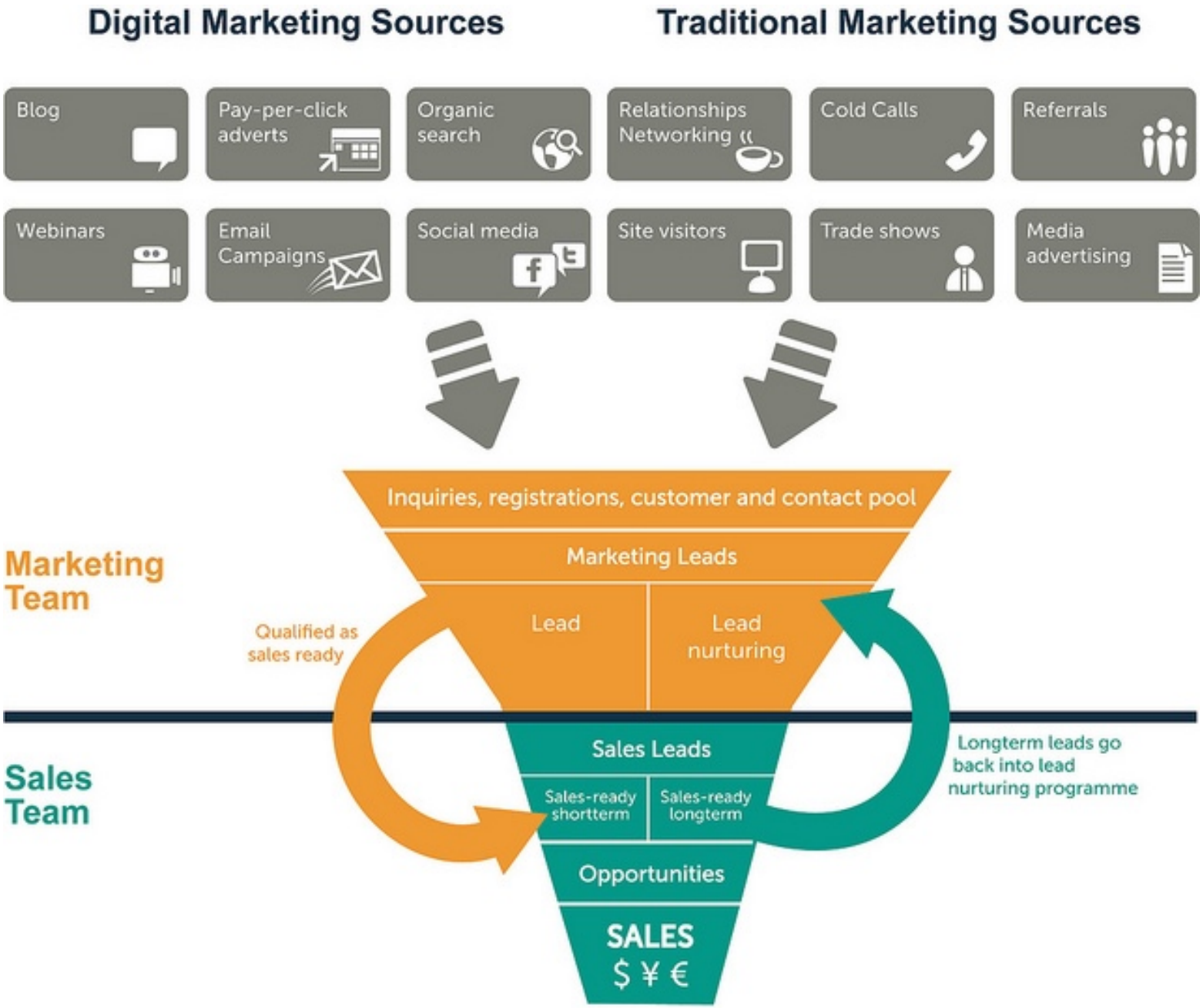
Digital Marketing Sources
Traditional Marketing Sources
Blog
Pay-per-click adverts
Organic search
Relationships Networking
Cold Calls
Referrals
Webinars
Email Campaigns
Social media
Site visitors
Trade shows
Media advertising
Inquiries, registrations, customer and contact pool
Marketing Leads
Marketing Team
Lead
Lead nurturing
Qualified as sales ready
Sales Leads
Sales Team
Sales-ready shortterm
Sales-ready longterm
Longterm leads go back into lead nurturing programme
Opportunities
SALES
$ ¥ €

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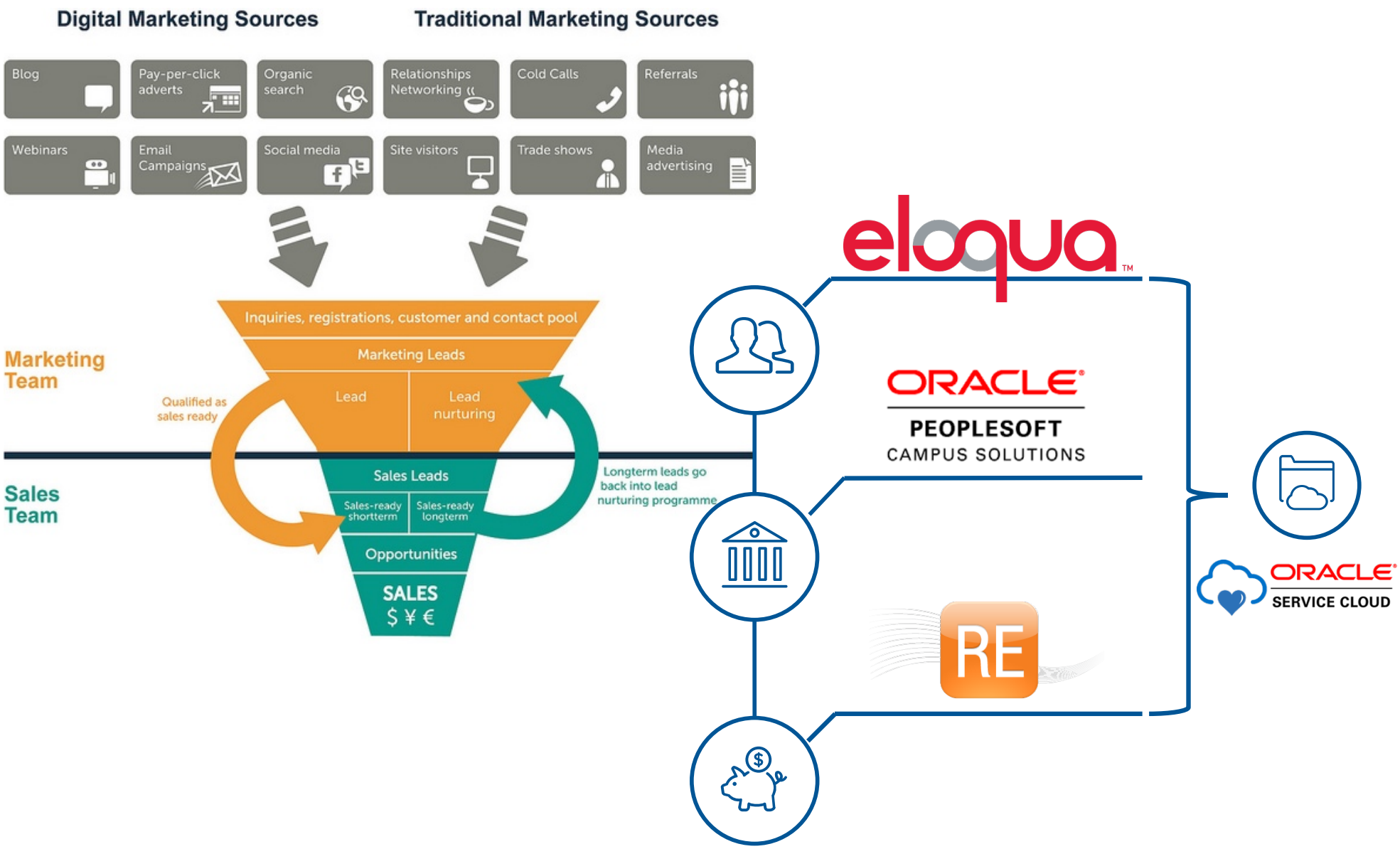
Digital Marketing Sources
Traditional Marketing Sources
Blog
Pay-per-click adverts
Organic search
Relationships Networking
Cold Calls
Referrals
Webinars
Email Campaigns
Social media
Site visitors
Trade shows
Media advertising
Inquiries, registrations, customer and contact pool
Marketing Leads
Lead
Lead nurturing
Qualified as sales ready
Marketing Team
Sales Team
Sales Leads
Sales-ready shortterm
Sales-ready longterm
Longterm leads go back into lead nurturing programme
Opportunities
SALES
$ ¥ €
eloqua
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CAMPUS SOLUTIONS
RE
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SERVICE CLOUD

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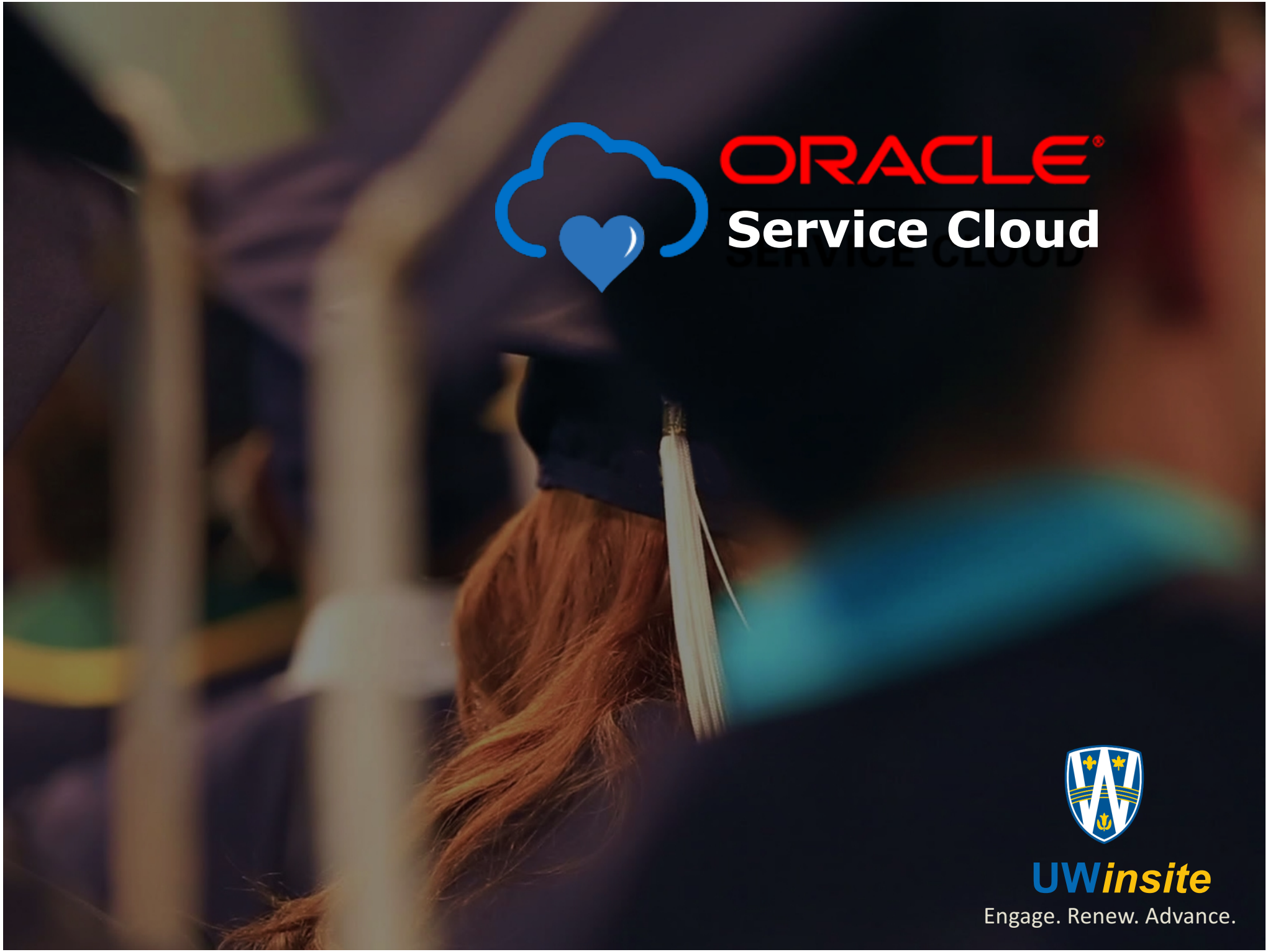
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Service Cloud
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Channels, Devices, Technologies & Behaviors

More Channels, More Choice, More Access

Most Students Cross Many Channels

75% of students use 3 or more channels

25% of students use less than 3 channels

1 channel | 2 channels | 3 channels | 4 channels | 5 or more channels

*Source: Ovum

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ACQUISITION
(INCREASE REVENUE)

- INCREASE OPPORTUNITIES
- IMPROVE CONVERSIONS
- DRIVE MORE SALES

RETENTION
(STRENGTHEN RELATIONSHIPS)

- INCREASE SATISFACTION
- IMPROVE LOYALTY
- DRIVE HIGHER ADVOCACY

EFFICIENCY
(LOWER EFFORT)

- INCREASE PRODUCTIVITY
- IMPROVE SELF SERVICE
- DECREASE OPERATION COSTS

Modern Customer Service

1 Engage Customers

Make it easy for customers to engage with your brand

2 Empower Employees

Make it easy to serve customers

3 Adapt Quickly

Easily adapt to the changing needs of your business

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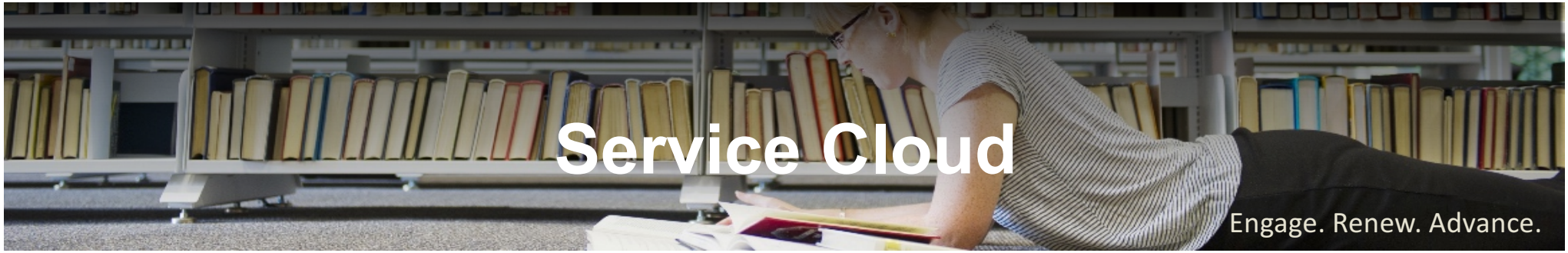

ORACLE MARKETING CLOUD | ORACLE COMMERCE CLOUD | **ORACLE SERVICE CLOUD** | ORACLE SALES CLOUD | ORACLE SOCIAL CLOUD

Web Customer Service

Cross Channel Contact Center

Knowledge Management

Policy Automation

Field Service Management

Service Cloud Platform

Registrar's Office

Student Finance
(Awards/Financial Aid & Cashiers)

Recruitment

Alumni

Advising

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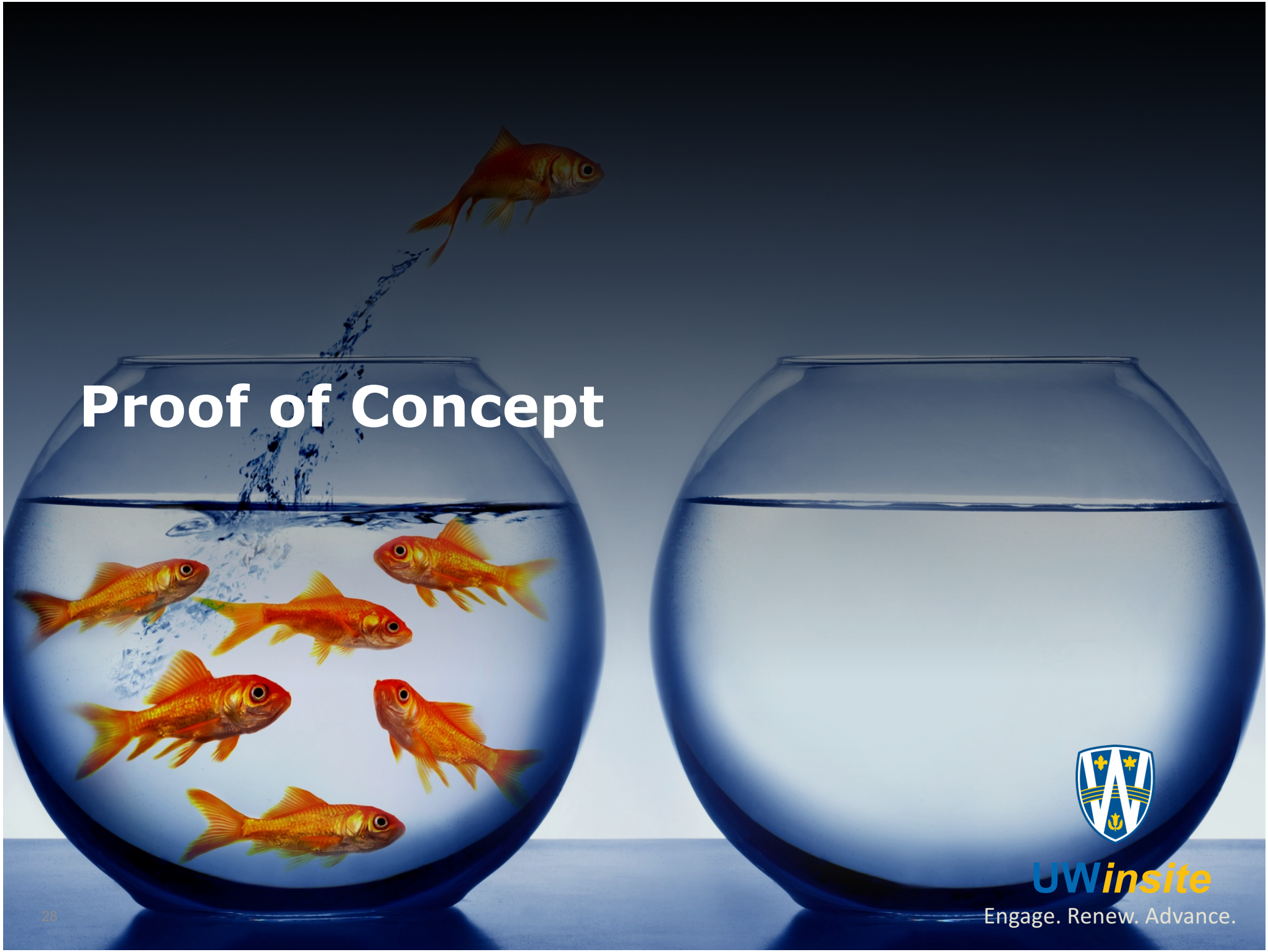
Proof of Concept



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Preliminary Work

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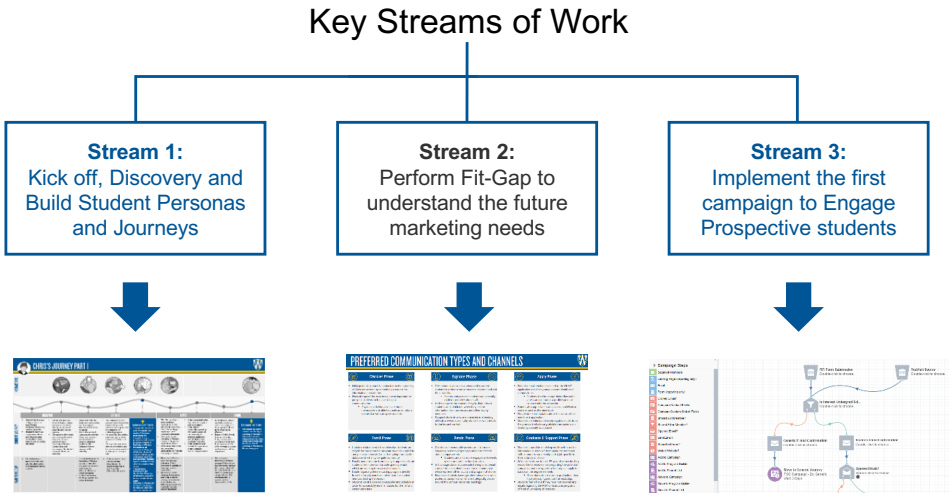
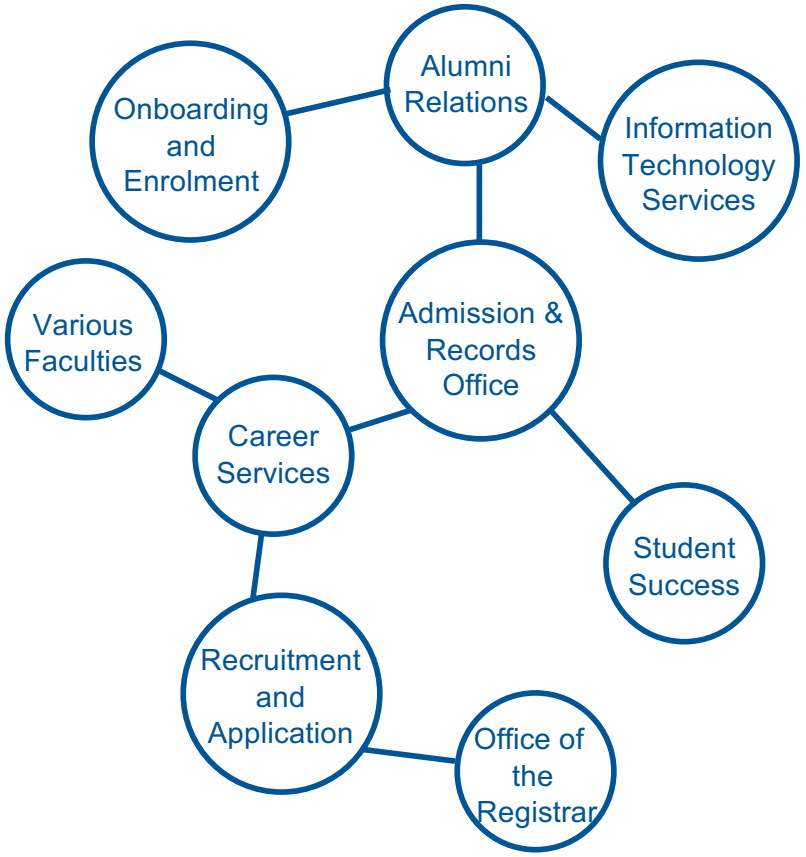
Over the past few Months, we have conducted multiple sessions to **explore, create and refine** key streams of work to support University of Windsor in it's over arching vision to becoming more student centric and increase engagement by creating meaningful personalized communication





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Behavioral Tracking

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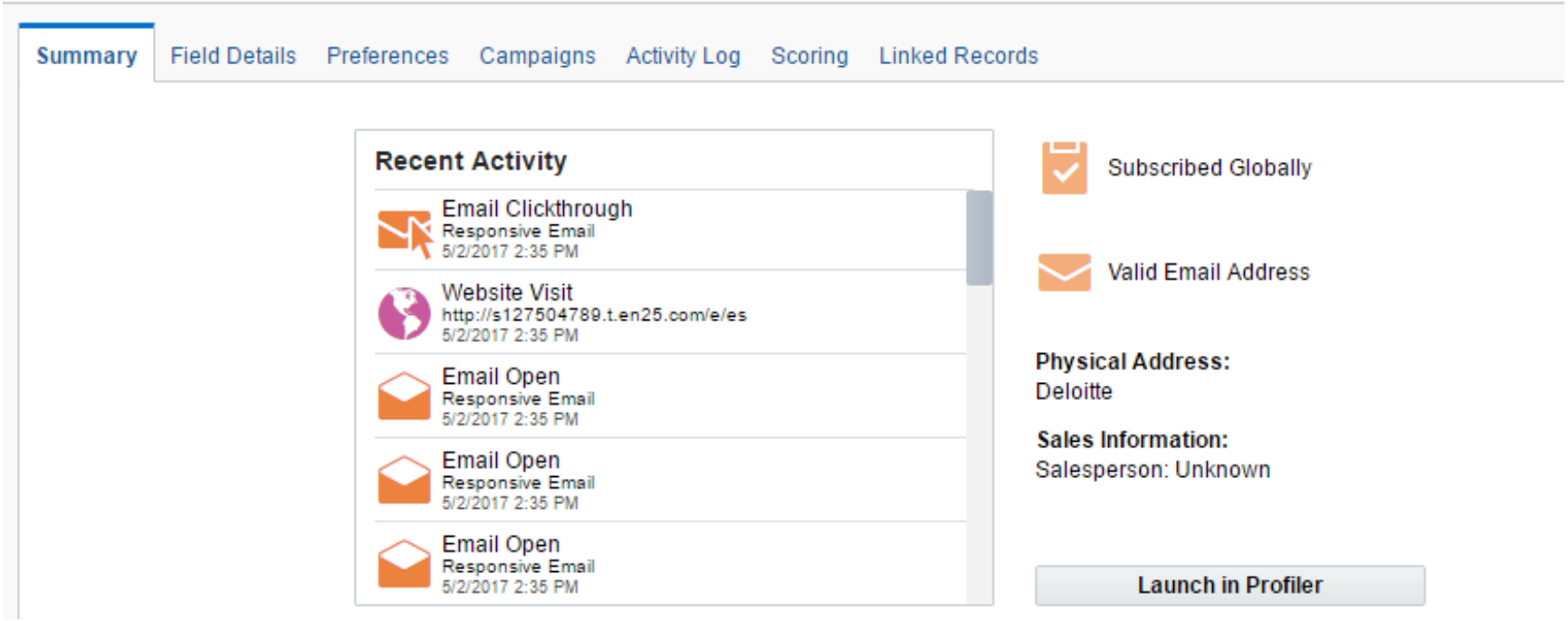

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Segmentation

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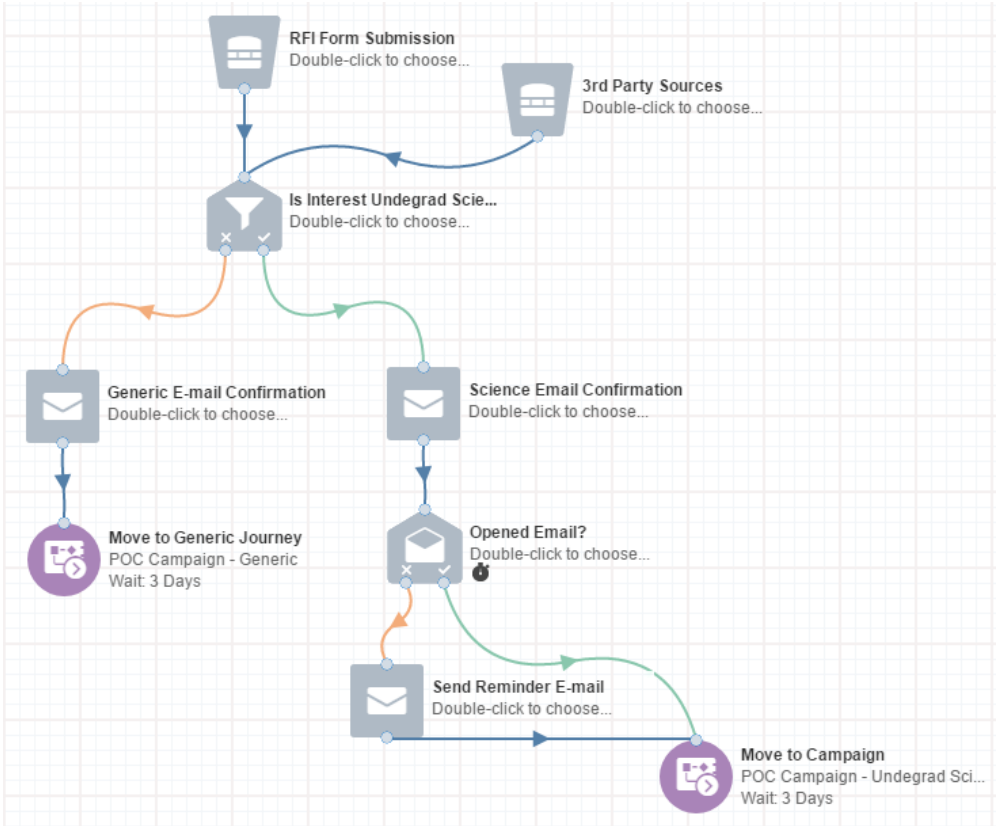

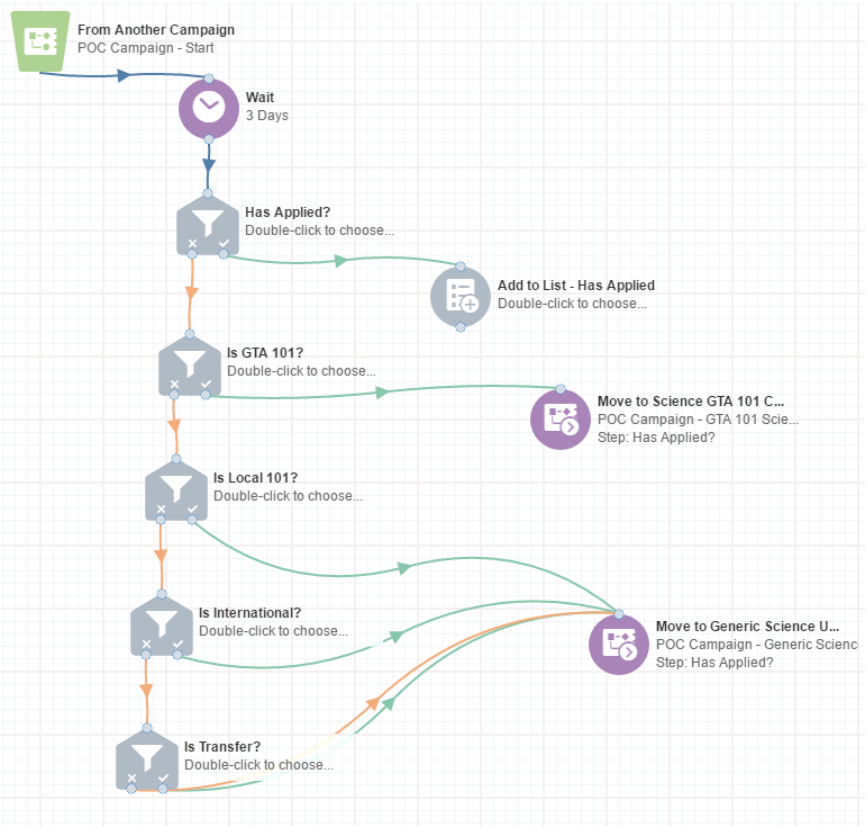

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Progressive Forms

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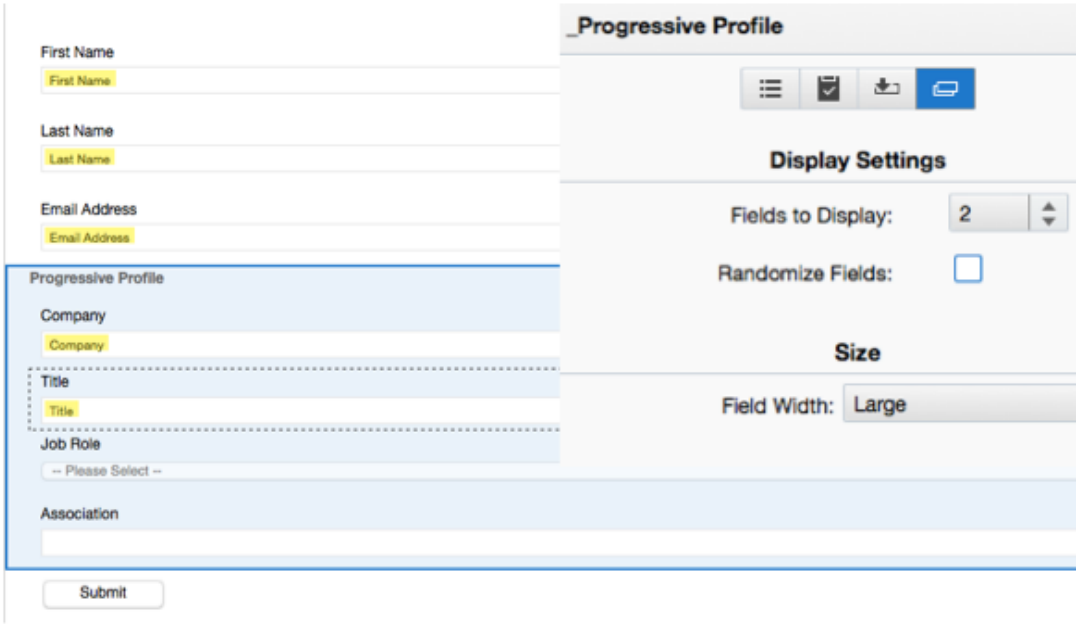

Prospective Student

Parent or Guardian or Friend of Prospective Student

Guidance Counselor or Teacher

Other

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Responsive

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Reply | Reply All | Forward | IM

Wed 4/26/2017 3:58 PM

UniversityofWindsor1 <newclient@en25.com>

University of Windsor Template

To Vasileski, Hristijan (CA - Ottawa)

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

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Please insert the content of the email here.

BUTTON

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Subscription Management

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People
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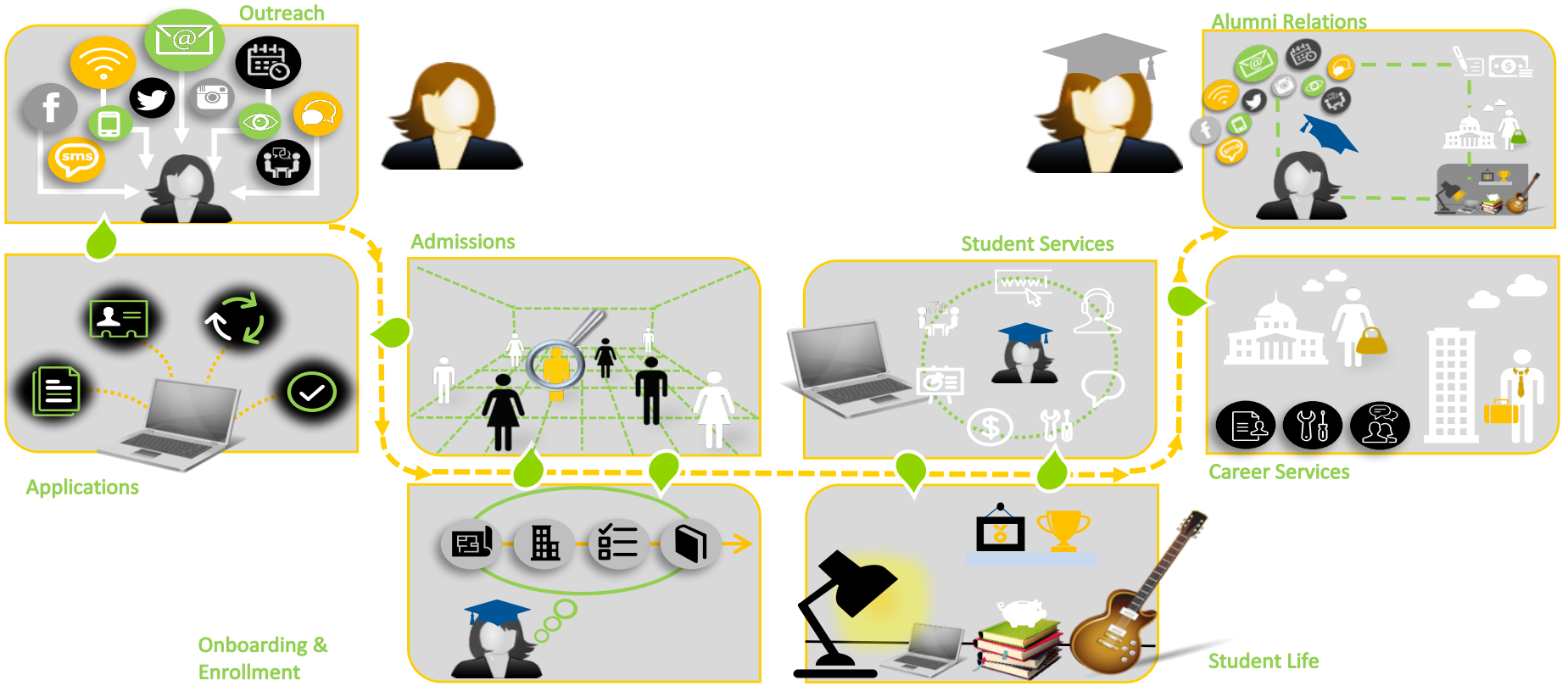
Outreach
Alumni Relations
Admissions
Student Services
Applications
Career Services
Onboarding &
Enrollment
Student Life
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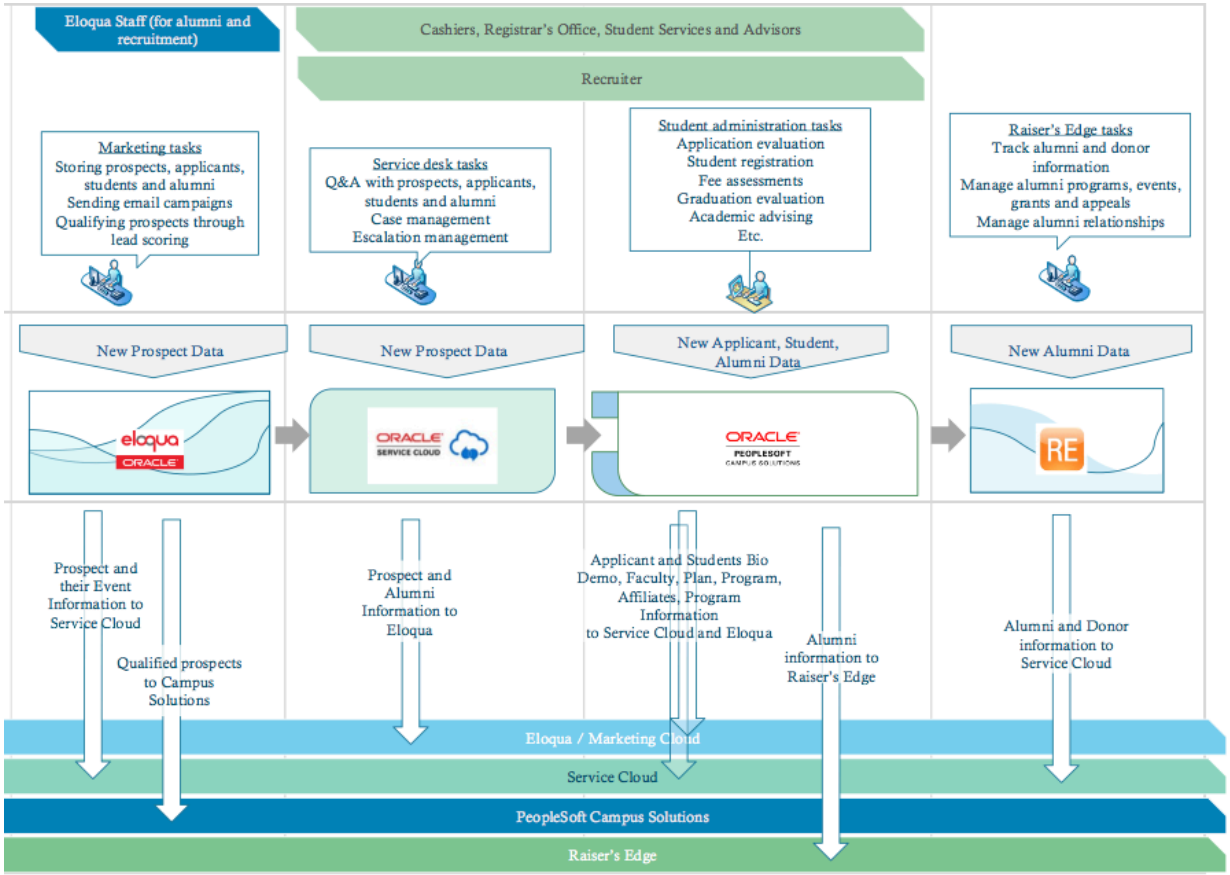
Data Model



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- Policy for the Use of University Electronic Mailing Lists
- Terms and Conditions for Use of the University Website
- Subscription management
- Canada Anti-Spam Legislation (CASL)

Photo by Matteo Vistocco on Unsplash

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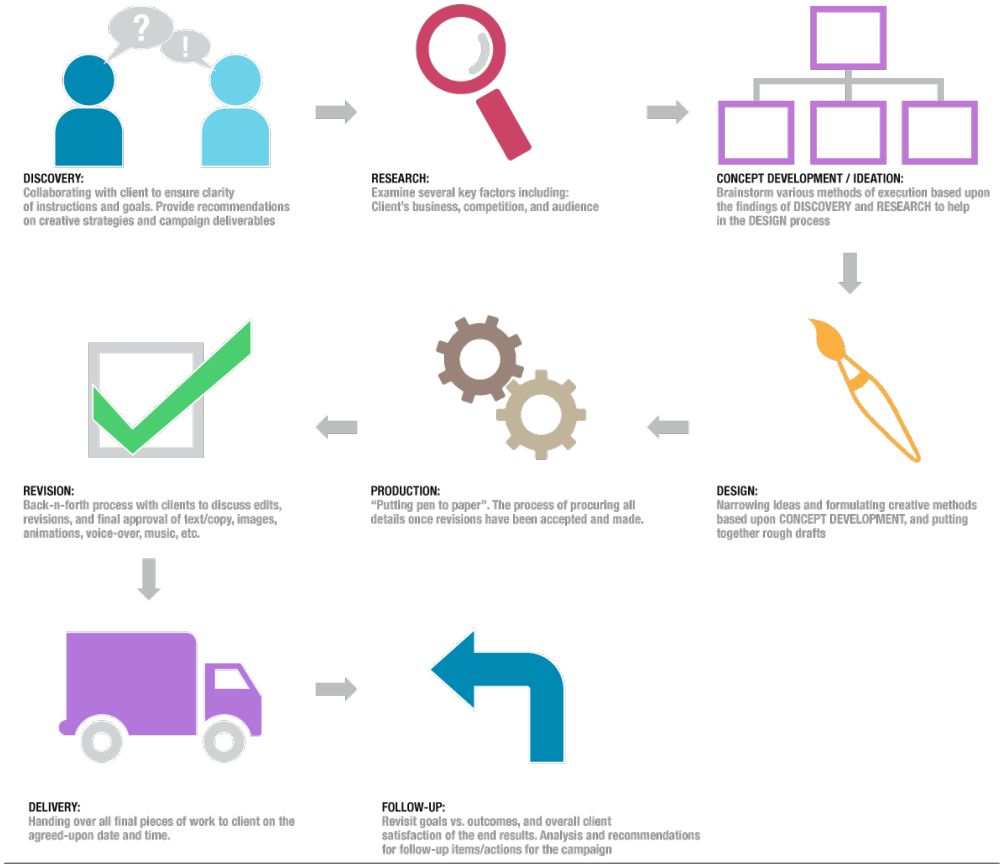
THE CREATIVE PROCESS



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Brand Conformance

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POWERING PERSONALIZATION

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- Justification
- Training requirements

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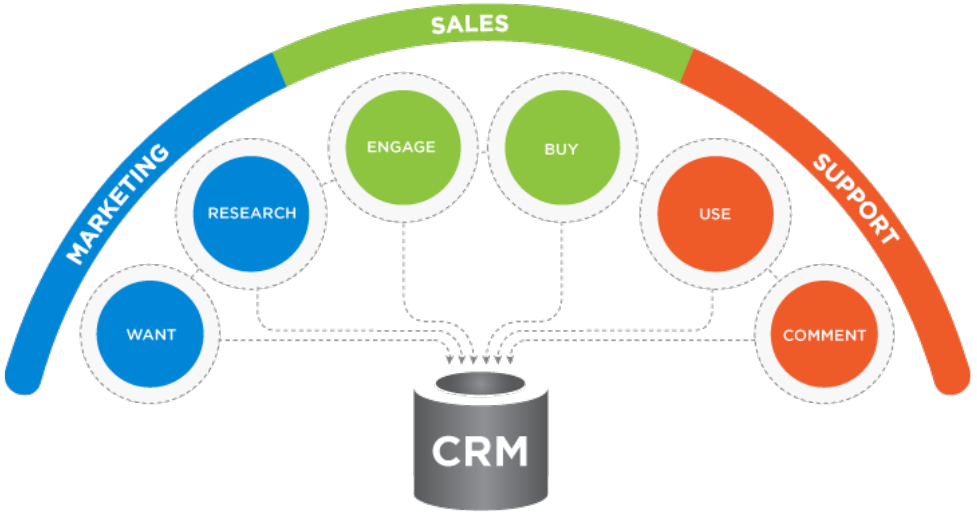
Data Stewardship



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Questions?
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