CRUCIAL CRM

REFLECTIONS FROM TAFE NSW, NORTH COAST RTO

LIESL BOUWER
CATHY SONG
PATRICK TOBIN
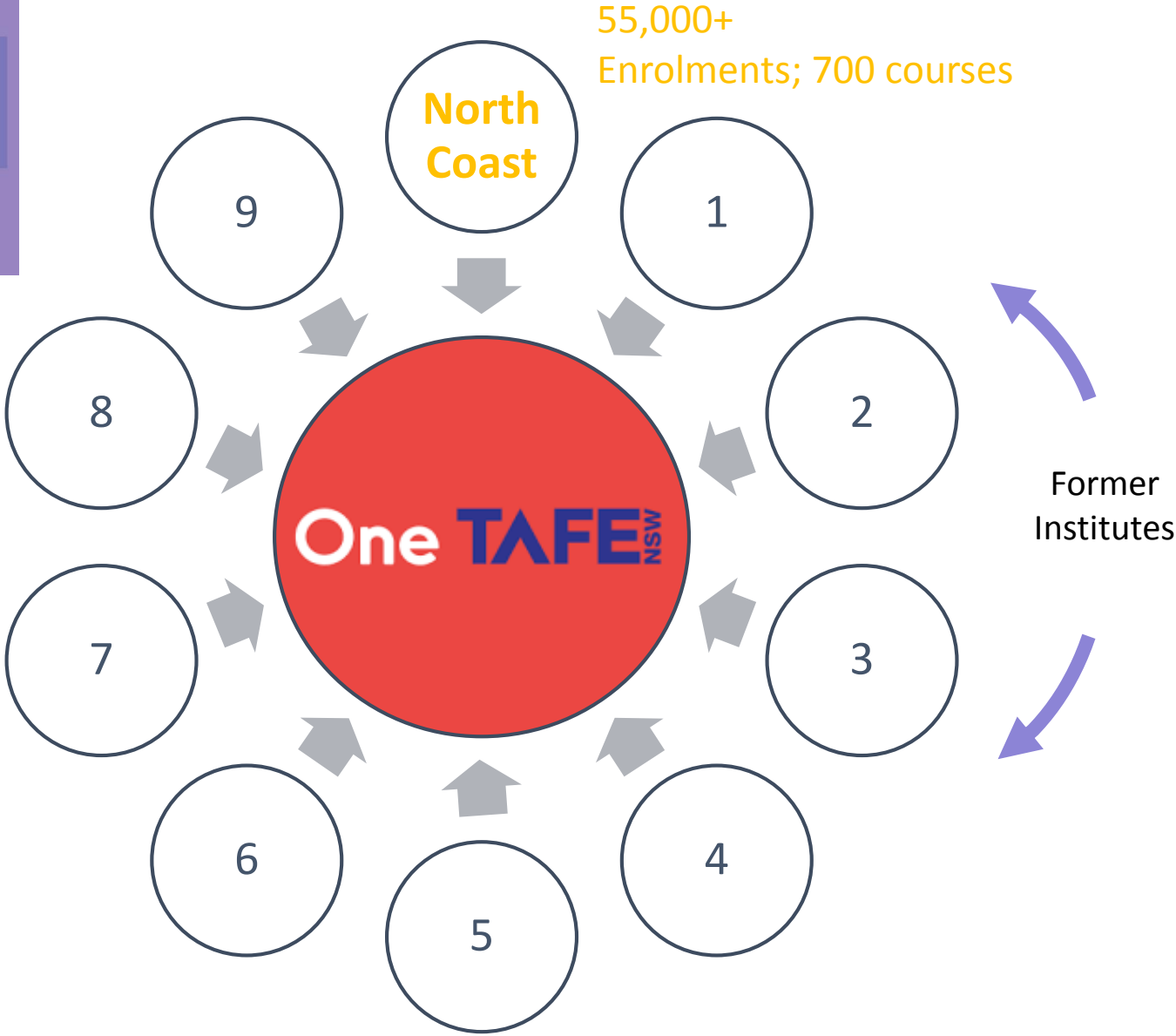
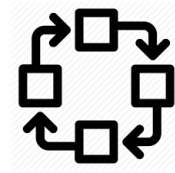NSW GOVERNMENT | TAFE NSW

EXPLORE
OUR 2018 COURSES

VIEW COURSES
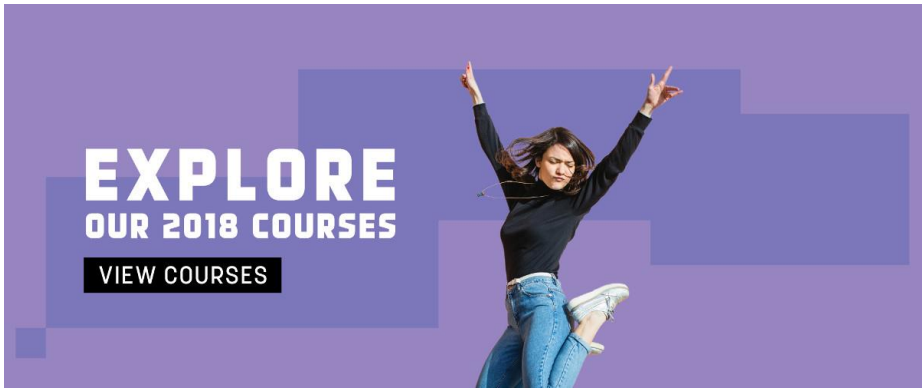
From March 1ˢᵗ, 2017

TAFE NSW
500,000+ Enrolments
1200+ courses

5 internal administrative regions for delivery
Corporate functions providing support

TAFE NSW

55,000+
Enrolments; 700 courses

North Coast

9

1

2

8

One TAFE NSW

3

7

4

6

5

Former
Institutes

2014

45,000 enrolments
1500 staff
80 'admin' staff located on 17 campuses

Complex, complicated, disjointed enrolment processes

Multiple, archaic, disparate systems for enrolment and student administration

1 Jan 2015

Radically new funding model

Challenging state-wide SMS implementation

CRM

2016

58,000 enrolments
Enrolment centralised in a dual location Contact Centre; Concierge assisted self-service at campuses

CRM enabled workflow across 80+ departments

Single, cohesive customer-facing enrolment system

TAFE NSW

Purchased
Oracle CX
Cloud

Redesign
Complete

New funding model
& SMS

CX

CX

Planning for
Enquiry
Management

Initial
Enrolment
functionality
Developed

Lead to
Enrolment
functionality
& Continuous
improvement

Customer facing
functionality
developed

Marketing campaigns

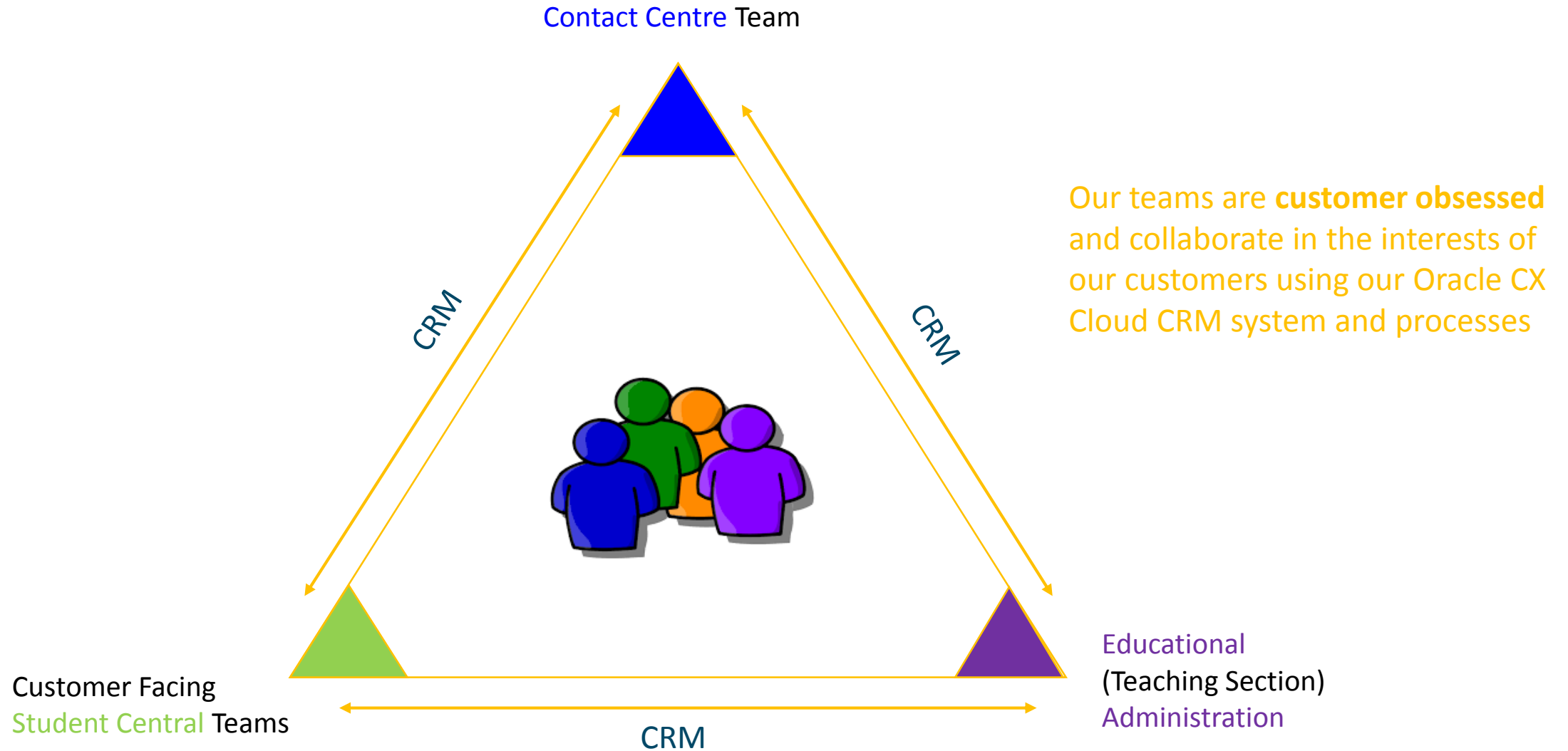Q4 2014 | Q1 2015 | Q2 2015 | Q3 2015 | Q4 2015 | Q1 2016

2 weeks

12 months
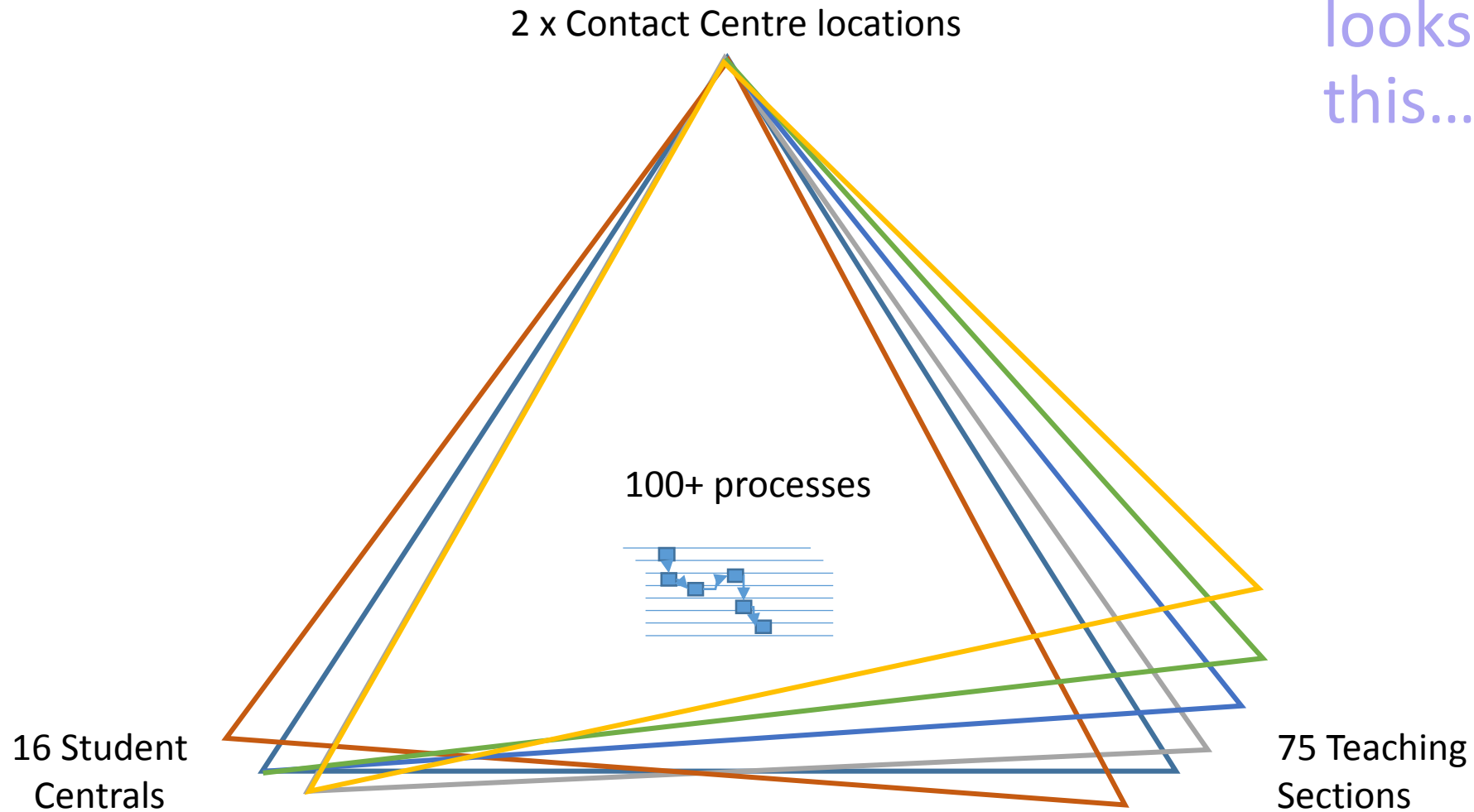
TAFE NSW

From this…

To this ➞

MANAGING SALES, CX & ENROLMENT CONVERSION

Contact Centre Team

CRM

CRM

Our teams are **customer obsessed** and collaborate in the interests of our customers using our Oracle CX Cloud CRM system and processes

Customer Facing
Student Central Teams

Educational
(Teaching Section)
Administration

CRM

2 x Contact Centre locations

100+ processes

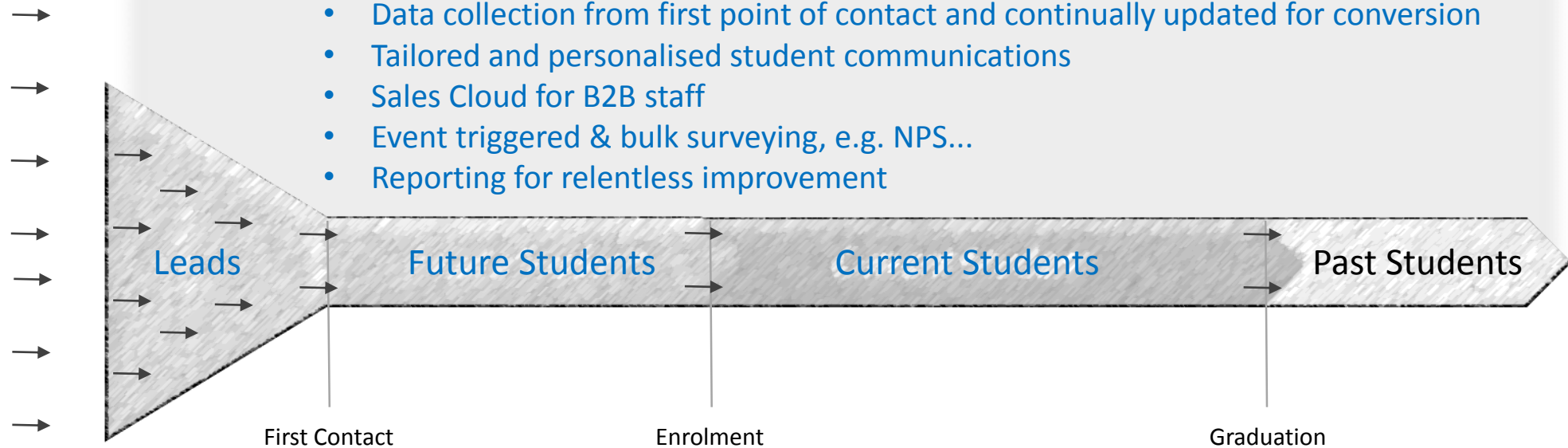16 Student Centrals

75 Teaching Sections

In reality, it looks more like this...

TAFE NSW
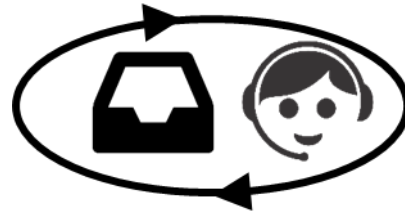
MANAGING SALES, CX & ENROLMENT CONVERSION

- Marketing Automation
- Multi/omni channel enquiry management – self-service, email, chat, phone, mobile
- Unified student contact record
- Internal knowledge base for all customer engagement staff
- Workflow and task tracking across our CX triangle
- Online and staff-assisted enrolment
- Sales agent scripting for Contact Centre staff
- Staff tailored workspaces for focus
- Data collection from first point of contact and continually updated for conversion
- Tailored and personalised student communications
- Sales Cloud for B2B staff
- Event triggered & bulk surveying, e.g. NPS...
- Reporting for relentless improvement

Leads

Future Students

Current Students

Past Students

First Contact

Enrolment

Graduation

TAFE NSW

FUNCTIONALITY SHOWCASE

1. STUDENT PORTAL AND INTERNAL KNOWLEDGE BASE

2. STRUCTURED SALES AND ENROLMENT WORKFLOW

STUDENT PORTAL & INTERNAL KNOWLEDGE BASE

IN 2014...

700 Courses
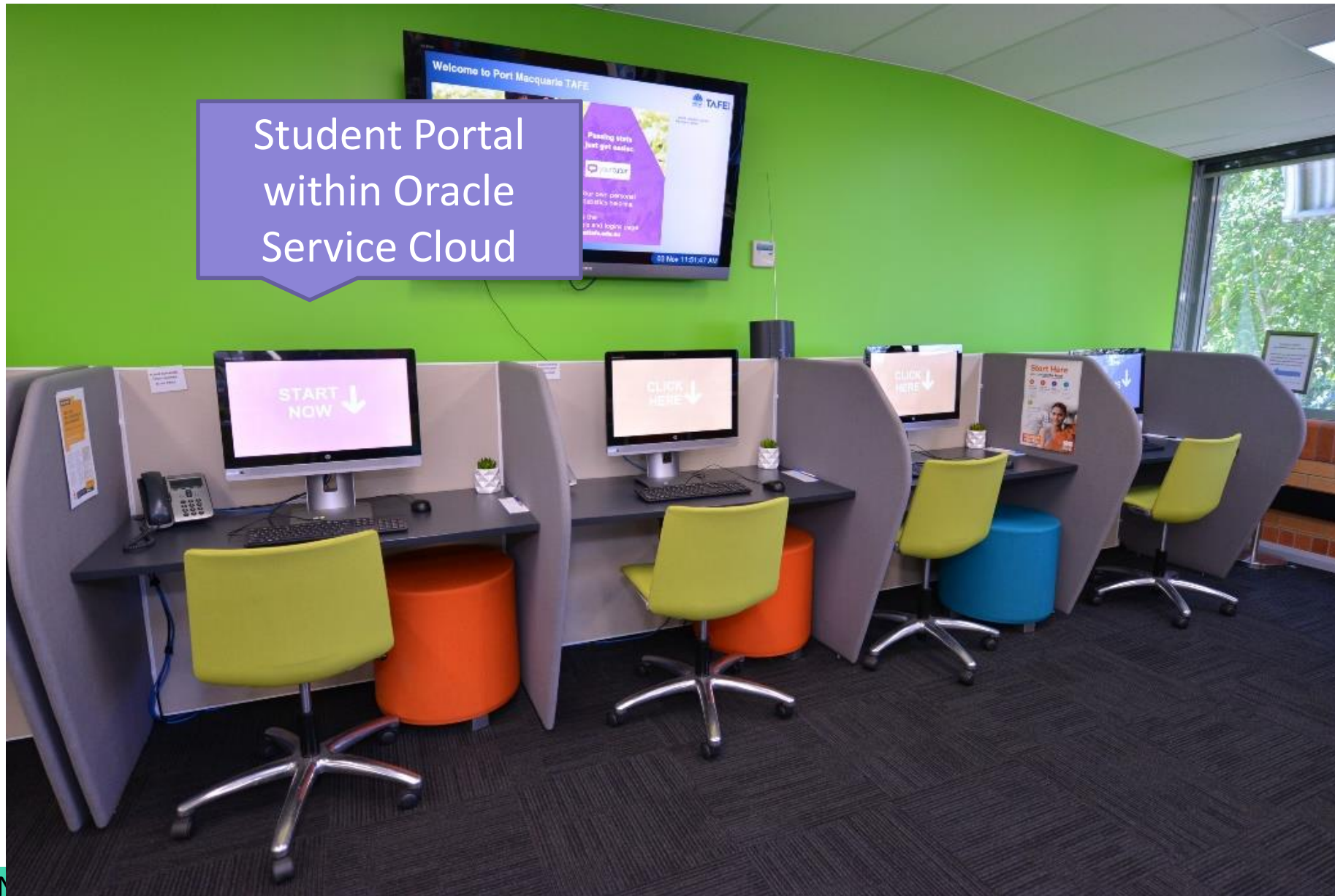45,000 Enrolments

Customer Service Centre

17 Campus
Admin Teams

Student Portal within Oracle Service Cloud

TAFE N

TAFE**NSW**

find a course   find answers   enrol now   contact us   login

Search for courses, careers or anything else

Commonly Asked Questions Surrounding VET Student Loans ›

Payment Options ›

TAFE NSW North Coast Locations and Campus Maps ›

How do I enrol? ›

Applying for a fee concession ›

Family Tax Benefit ›

Student Central at TAFE NSW North Coast ›

TAFE NSW North Coast Library information and opening hours ›

International Students - Studying at TAFE NSW North Coast ›

2017 Course Guide ›

email us ✉   live chat 💬   phone us 📞   book a call 🎧

TAFE NSW

COURSE DATA INTEGRATION

Arinum

Course data

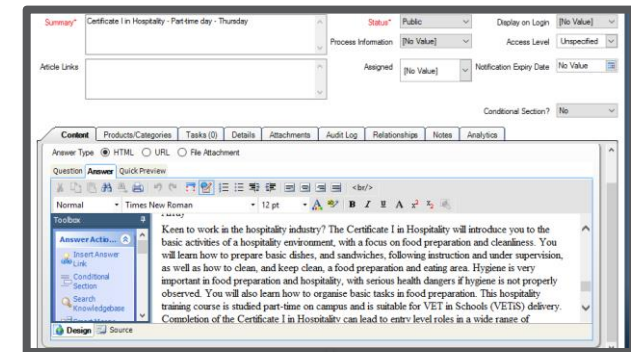Real-time integration

ORACLE
SERVICE CLOUD

Course planning system

Summary = course name +study mode

Answer = course name + course description + study mode + attendance mode + keywords + course code + dates + career path + course level + study area
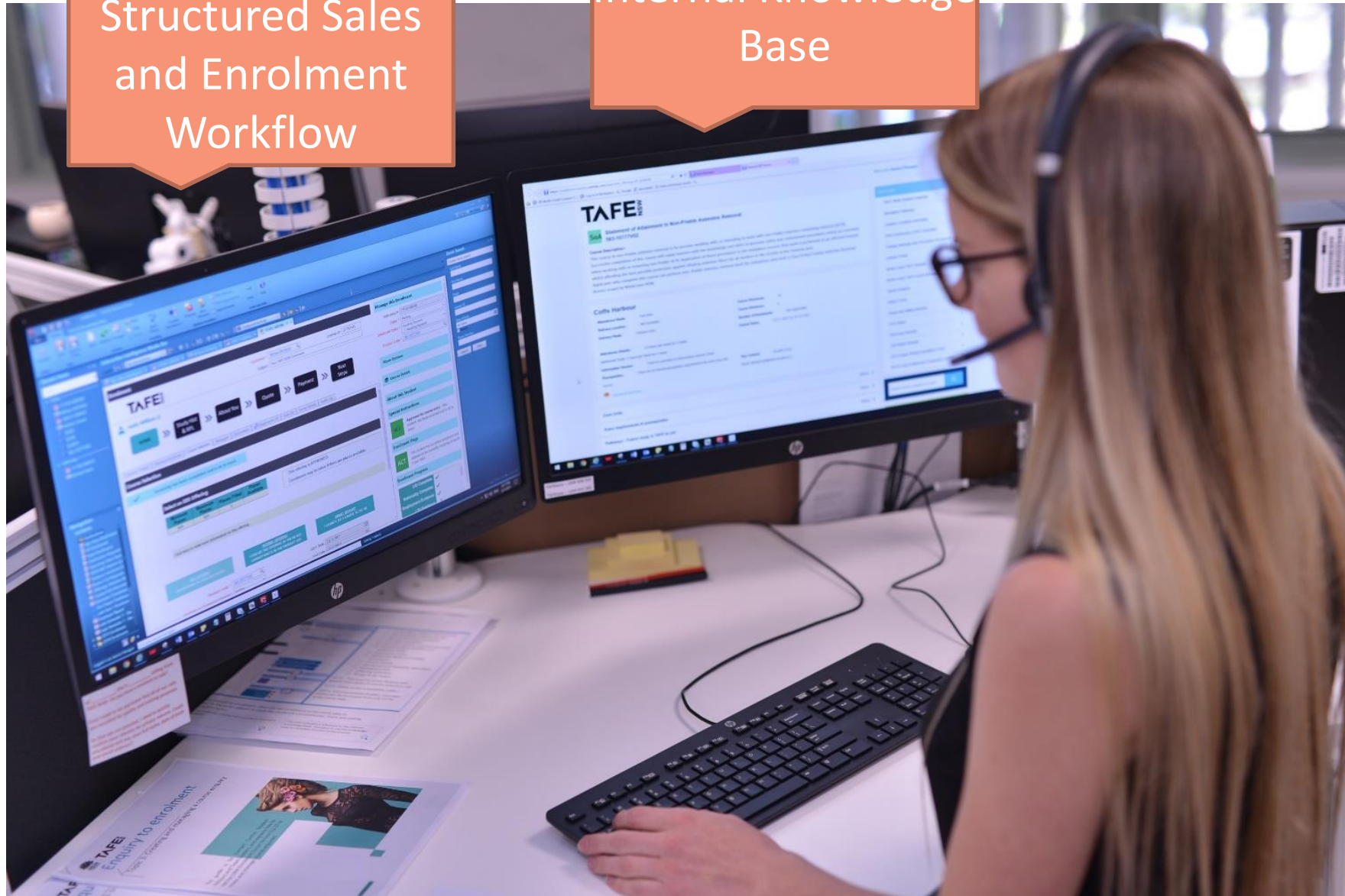
Keywords = course code + study area + location + keywords

Course Custom Object Record

Structured Sales and Enrolment Workflow

Internal Knowledge Base

TAFE NSW

TAFE NSW

Welcome Cathy

Updates and Alerts 1   Hide ⌄

Contact Centre Staff Daily Updates

Search course, campus or career 🔍

Find answers 🔍

Ho

i   Helping students with system access

i   Recognition Process Guides and Work

i   Manuals and Procedure Documents

i   Contacting Counsellors

i   How do I enrol?

View All

Common questions

?   Commonly Asked Questions Surrounding VET Student Loans

?   Payment Options

?   TAFE NSW North Coast Locations and Campus Maps

?   How do I enrol?

?   Applying for a fee concession

View All

Quick Links

TAFE NSW   ›

Aboriginal Pathways   ›

Campus Locations and Maps   ›

Civil Construction (TAFE Australia)   ›

Training Manuals and Procedure Documents   ›

Learner Portal   ›

North Coast TAFE Website   ›

North Coast TAFE Event Information   ›

Quick Contacts   ›

Quick Forms   ›

Smart and Skilled Website   ›

STS Online   ›

TAFEnow Website   ›

TAFENSW

USI (Unique

VEVO (Visa

Contacts   +

LiesL Bouwer
CRM Process Manager   📞 04587665220

Callout boxes:
- Important updates and information
- Access quick links to external sites or popular answers
- Search and browse courses and FAQs
- Quick access to training manuals and procedure documents
- Create quick contacts

OUR CONTACT CENTRE SOLUTION

STRUCTURED SALES AND ENROLMENT WORKFLOW

A dedicated contact centre, with purpose built workspace and structured sales and enrolment process

Make the complex simple.

TAFE NSW

Start Enquiry → Enrolled

TAFE NSW
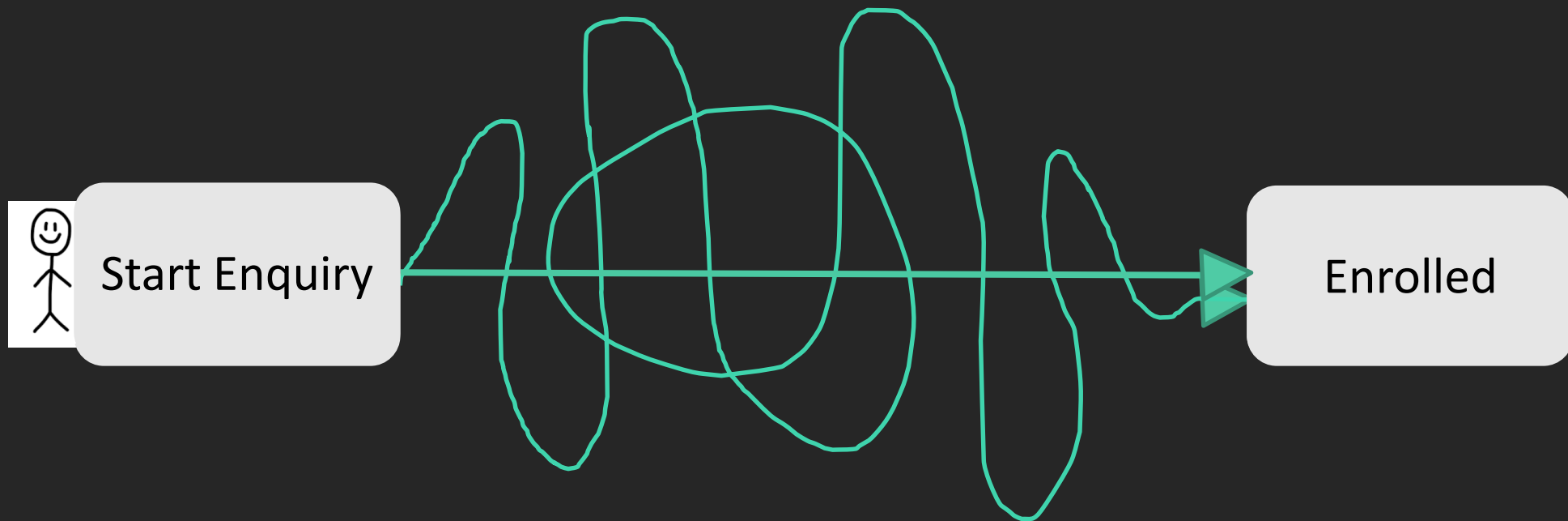
Do they have a disability? Should I refer them to a consultant?

Remember to ask the AVETMISS questions?

How will they pay? What are the conditions for this course related to payment?

Are they eligible for a fee free scholarship?

What are the smart and skilled rules?

Have I told them about support for Aboriginal students?

Have they studied before, do they owe fees, will this impact their study choice this time around?

Do they need to be referred for RPL assessment?

Is their USI valid?

What is the TAFE Policy for this again?

Do they qualify for a loan?

Is this the right course for them, can I prove that I made sure they have a good chance of success?

Where do they live or work or live and work?

TAFE NSW

Are they receiving Centrelink Benefits? Can get a concession?

Remember our sales standards!

Goals

Make it easy to give the right information to students

Make it easy for us to know what to do next and know when we have done the right thing

Help us remember the exceptions and find current process and policy

Make it faster to enrol someone accurately

Make it look and feel good for users!

TAFE NSW

TAKE A LOOK

WAYS WE'VE USED THE ORACLE SERVICE CLOUD TO MAKE OUR COMPLEX

SIMPLE

Enrolment

TAFE NSW

Customer* [Liesl Bouwer] 🔍 [Open Contact]   Learner ID [_____]

Subject [Your TAFE NSW Enrolment]

👤 **Hello Liesl (Test Account Only)**

[HOME] » [Study Hist & RPL] » [About You] » [Quote] » [Payment] » [Next Steps]

Manage this Enrolment

Reference # [171026-000000]

Status* [Unresolved]

Enrolment Status* [Contact Required / └ Ready for quote]

Product Code* [SHB30115-01V01]

More Options

📚 **Course Details**

| Customer Details | Personal Attributes | Course Selection | Messages | Attachments (0) | Documents | Tasks (0) | Survey Details | Audit Log |

Customer Details

Customer* [Liesl Bouwer] 🔍   [Open Contact]

Title [_____]   Date of Birth [12/05/1970] 📅

First Name* [Liesl]   Age [47]

Other Given Names [_____]   Gender [Female ▾]

Last Name* [Bouwer]   Email* [▾] [liesl.bouwer@tafensw.edu.au.invalid] ✉

Preferred Given Name [Test Account Only]   Mobile Phone [▾] [0456777923849]

Address [4 Nice Place

PO Box 234
Port Macqaurie NSW 2444
Australia]

Edit

Lives in NSW? [Yes ▾]

Postal Address Same [Yes ▾]

Are these contact details current?

Yes. These details were recently checked.

Details last checked [17/10/2017] 📅

📇 **I HAVE CHECKED THESE DETAILS WITH THE STUDENT**

[NEXT]

About this Student

DS This student has identified as having a disability, injury, or long term condition.

Special Instructions

CI **Contact Instruction:** please email or sms only. Student is deaf.

Enrolment Flags

Enrolment Progress

USI Complete:	✔
Nationality Complete:	✔
Employment Evidence:	✔
LTU Evidence:	✔
Screening Complete:	✔
Fee Quoted:	✘
Fee Evidence:	✘
Payment Received:	✘

Enrolment

TAFE NSW

Customer* Liesl Bouwer
Subject Your TAFE NSW Enrolment

Hello Liesl (Test Account Only)

HOME » Study Hist & RPL » About You » Quote »

12/05/1970

Age 47

Female

liesl.bouwer@ta

0456777923384

Details last che

I HAVE

NEXT

Manage this Enrolment

Reference # 171026-000000
Status* Unresolved
Enrolment Status* Contact Required
└ Ready for quote
Product Code* SHB30115-01V01

More Options

Course Details

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LTU Evidence:	✔
Screening Complete:	✔
Fee Quoted:	✘
Fee Evidence:	✘
Payment Received:	✘

Enrolment Status to track detailed progress

This section provides info at a glance when you are in the 'home page'.

These buttons reveal a structured script to guide the advisor through an enrolment.

Bright icons to identify specific student needs. Consistent colour coding is used to show when a particular process is complete.

This progress report visually shows what's left to complete

Hello Liesl (Mary)

Refere: 000000

STUDY HIST / RPL ≫ About You ≫ Quote ≫ Payment ≫ Next Steps

Making the most use of our data. Visibility encourages our advisors to use our student's name and build rapport

ACCESS THE COMMUNICATION BUILDER

Messages (+)

n going to ask a few more questions about your study history.

ol level?

Highest school level [Year 12 or equivalent ▼]

In which year did you complete this level of study?

Year achieved qualification [2009 ▲▼]

Have you completed any post school qualifications?

Post School Qualifications [No Value]

▶ Go to Recognition of Prior Learning Questio

Consistent icons so that advisors know what words to "say" or what things to "do"

Next steps are easily identified.

Study History

<< BACK

✓ COMPLETE ENROLMENT

Hello Liesl (Mary)

Reference #: 171026-000000
Course: Certificate III in Beauty Services
Campus: Port Macquarie
Start Date: 30/01/2017
Product Code: THR C3 Beauty Serv PTD P20780

HOME » STUDY HIST / RPL » About You » Quote » Payment » Next Steps

Enrol Info (+)

ACCESS THE COMMUNICATION BUILDER

Recognition of Prior Learning (RPL)

Messages (+)

+ Comms Builder

You may be able to get recognition for your skills if yo...   ...entary area. Doe

RPL

(+)

RPL

Study History   RPL

<< BACK   NEXT >>

✓ COMPLETE ENROLMENT

Our Comms Builder allows us to use multiple standard texts to build a really relevant and customised message

Buttons to make it easy for our advisors to provide more detail when needed

Our "hide and show" messages tab

Hello Liesl (Mary)

Reference #: 171026-000000
Course: Certificate III in Beauty Services
Campus: Port Macquarie
Start Date: 30/01/2017
Product Code: 59678

HOME » Study Hist & RPL » About You » QUOTE » Payment » Next Steps

Enrol Info (+)

ACCESS THE COMMUNICATION BUILDER

Quote

Messages (+)

⚠ PRESS THIS BUTTON TO RESET THE QUOTE PAGE

The student may be eligible for a fee exemption and have supplied evidence of their condition. Their evidence is currently being assessed by a Disability Consultant/Delegate. Please quote provisional $0.00

Banners to show our advisors an outcome as well as what to do next

Personal Attributes

This student has declared a disability, illness or long term condition.

The student has declared a disability and evidence of their condition is currently being reviewed.

Do you have a disability, injury or long term condition?* Yes

📁 ADD / VIEW - Disability Details

DSP

Quote | Attachments (0) | Document Bank

<< BACK

✓ COMPLETE ENROLMENT

SOME CULTURAL STUFF

Design Thinking
"Fall in love with the problem, not the solution"
Forrester

CRM as a business strategy, not a system
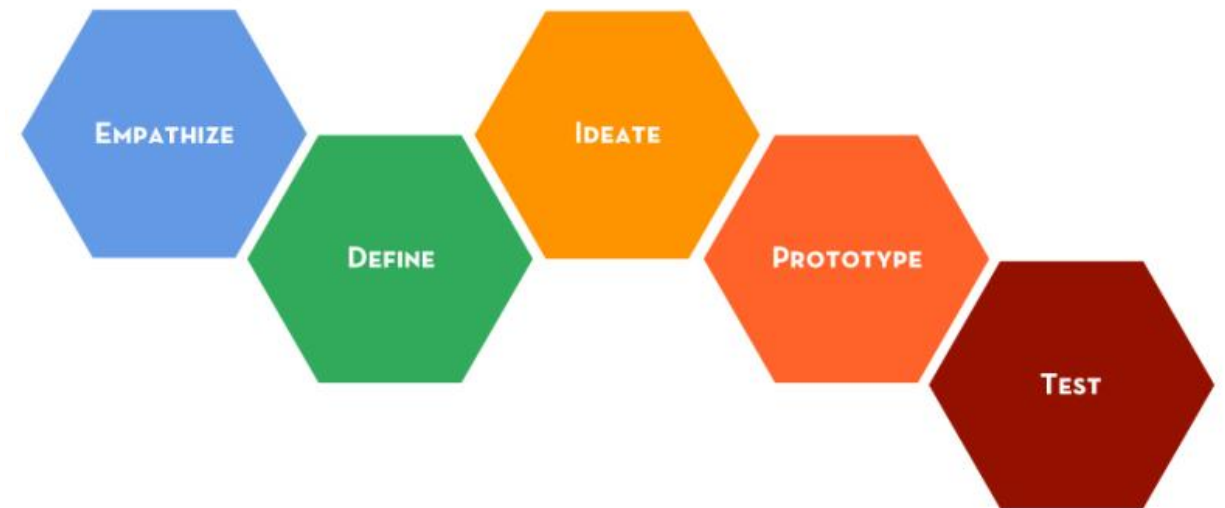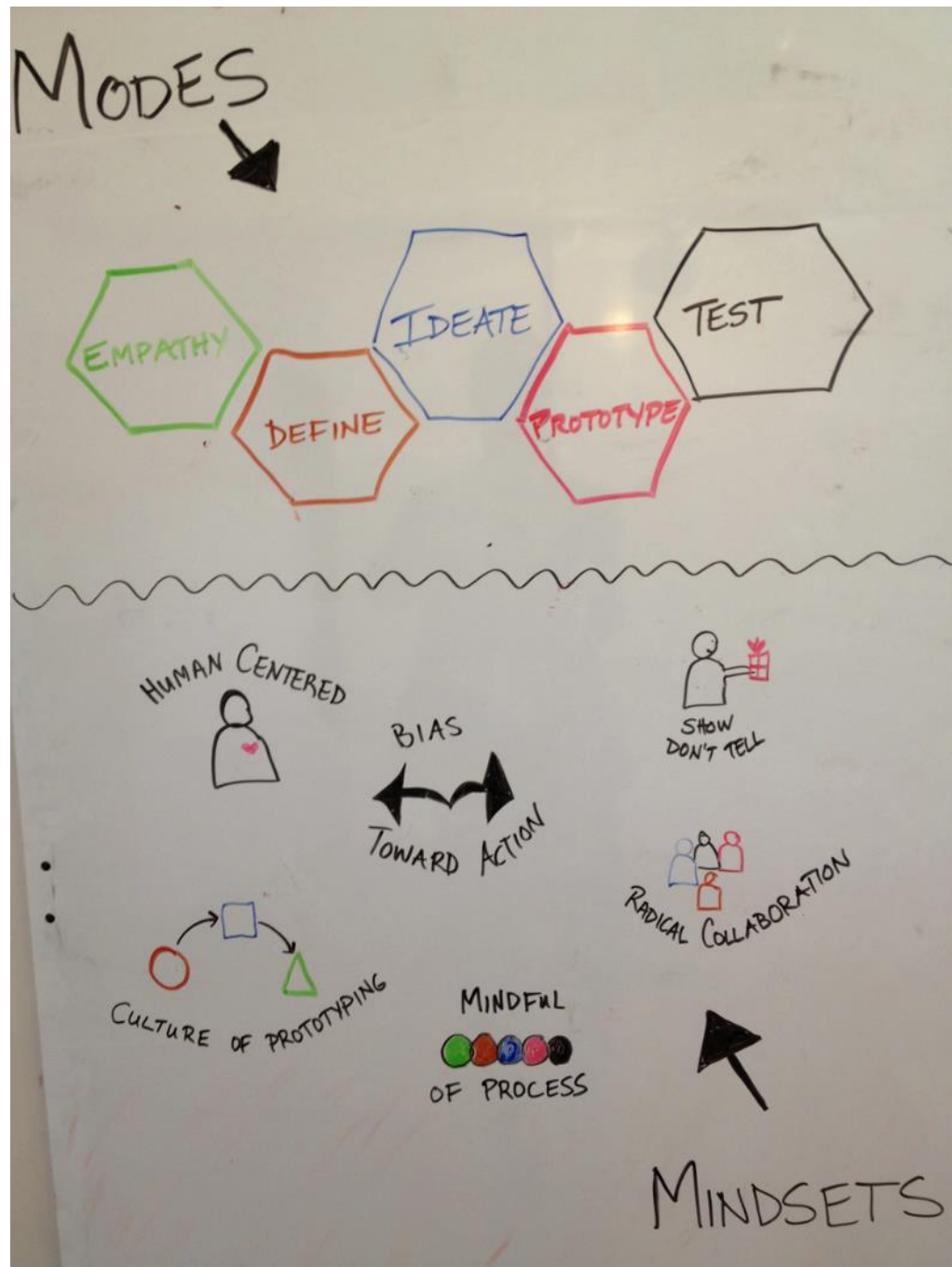Gartner

Agile, not waterfall
…but maybe *WAGILE*
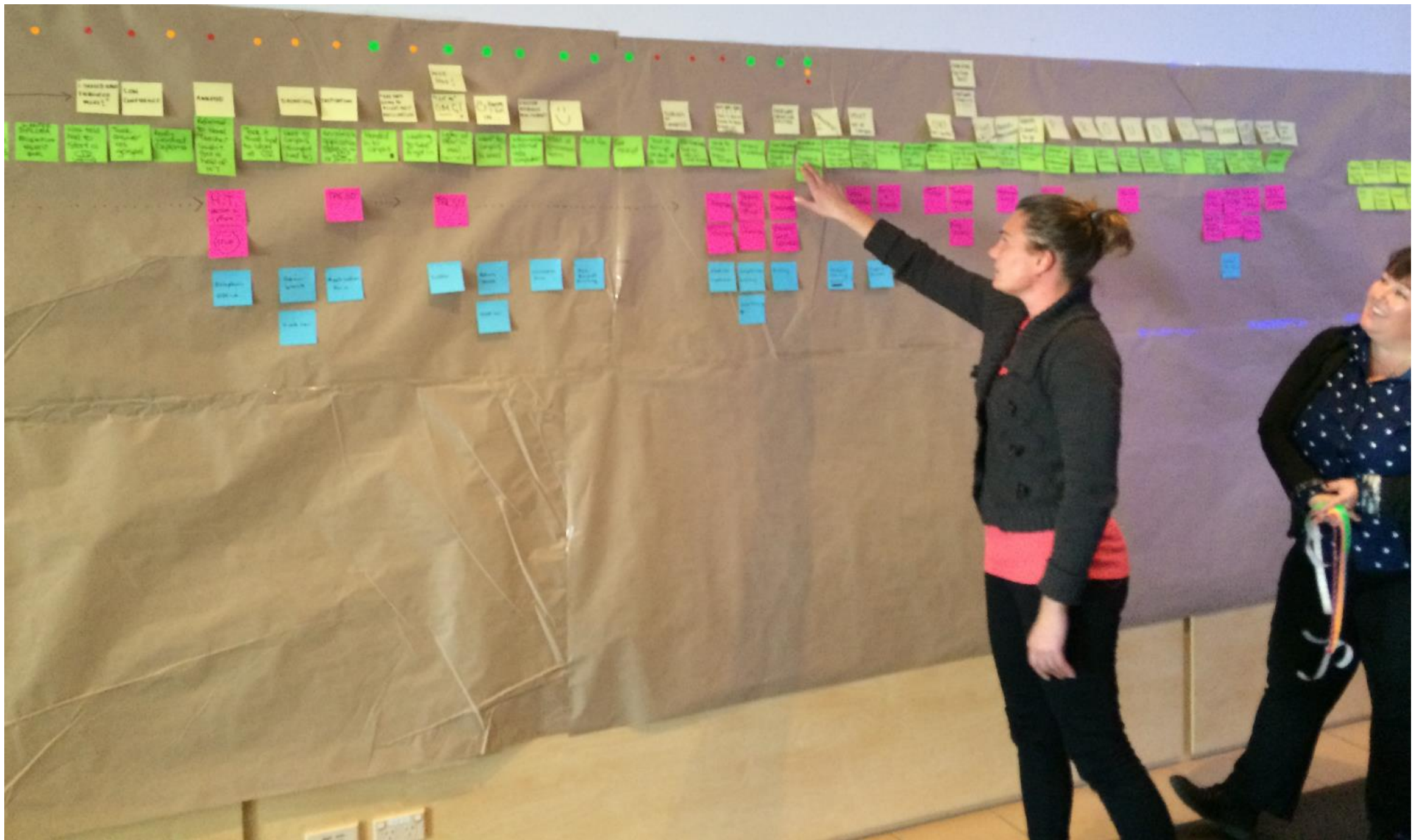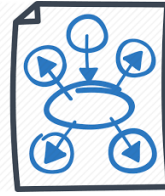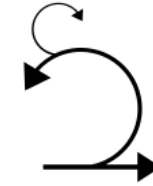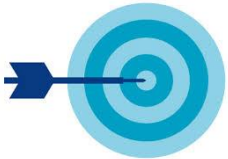
Excellence as a habit not an act. Relentless improvement.
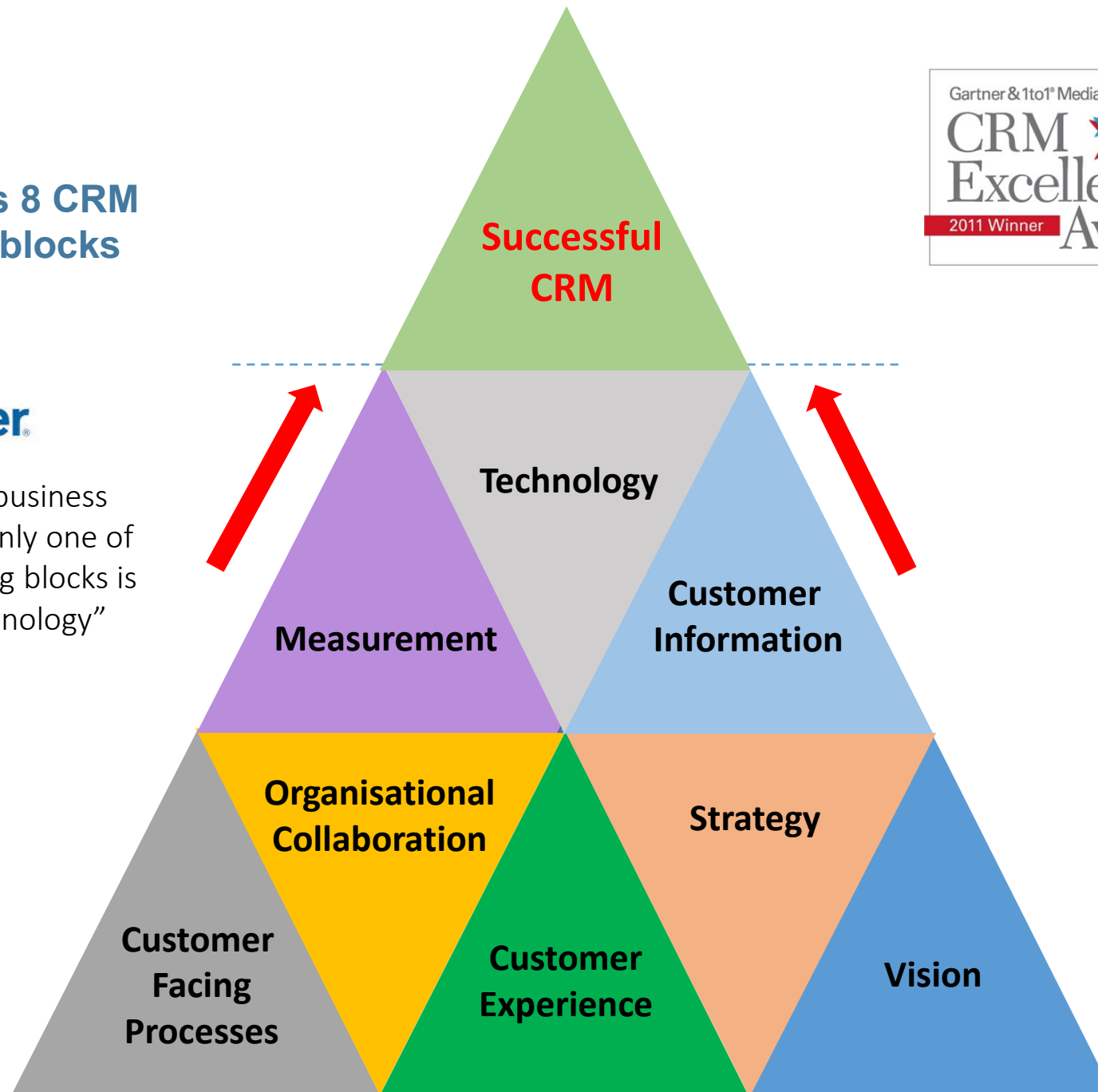
What gets measured gets done

Leadership, change management, training, hard work…

TAFE NSW

Design Thinking
In Action

Identifying where we are going wrong
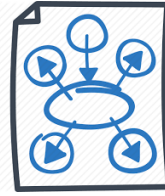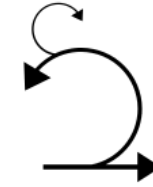Customer Journey Mapping with real customers

Design Thinking
"Fall in love with the problem, not the solution"
Forrester

CRM as a business strategy, not a system
Gartner

Agile, not waterfall
…but maybe *WAGILE*

Excellence as a habit not an act. Relentless improvement.

What gets measured gets done

Leadership, change management, training, hard work…

TAFE NSW

Design Thinking
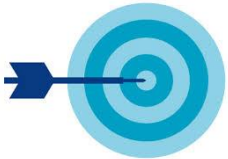"Fall in love with the problem, not the solution"
Forrester

CRM as a business strategy, not a system
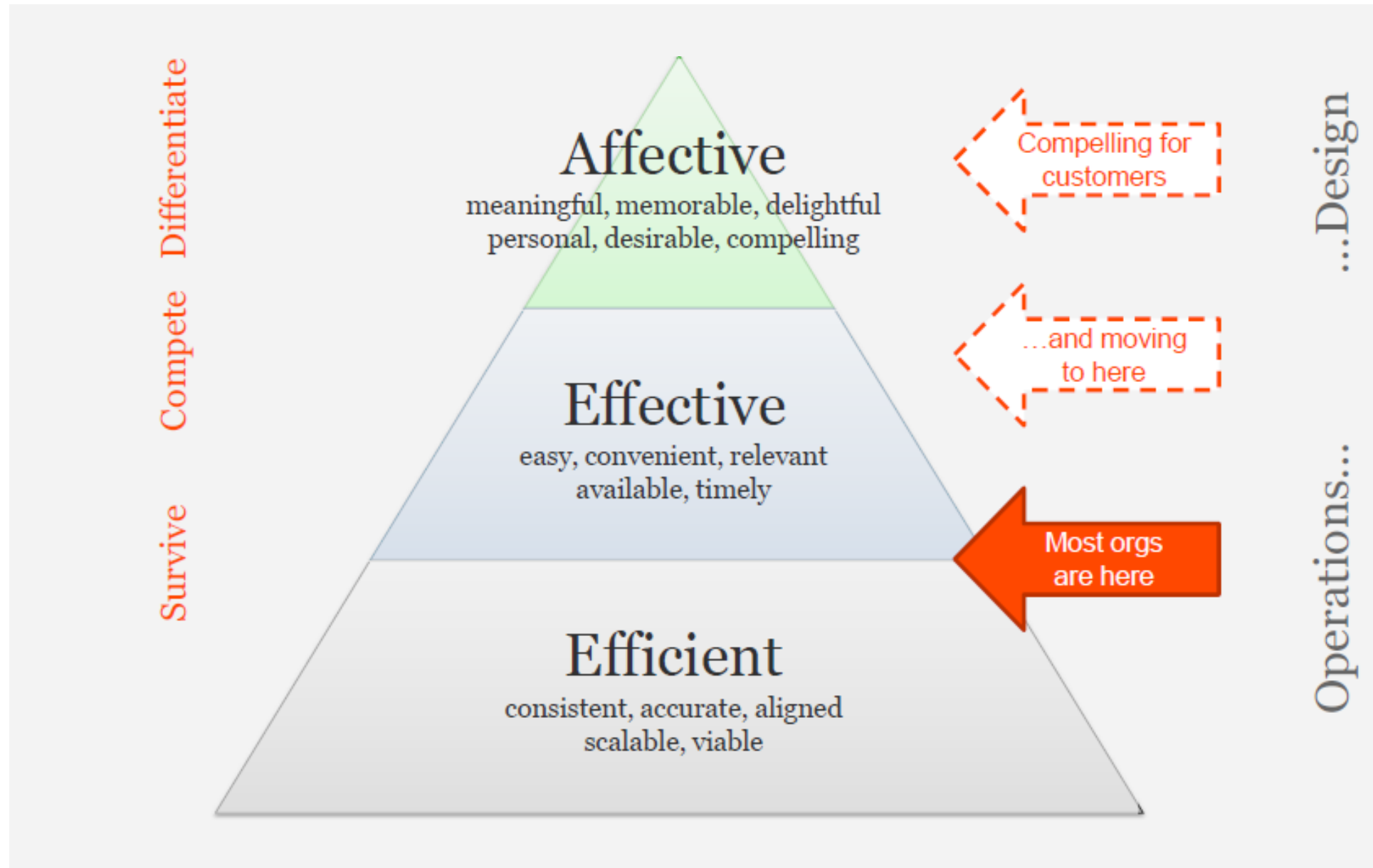Gartner

Agile, not waterfall
…but maybe *WAGILE*

Excellence as a habit not an act. Relentless improvement.

What gets measured gets done

Leadership, change management, training, hard work…

TAFE NSW

TAFE NSW

Thank you

TAFE NSW