UNDERSTANDING ORACLE CX CLOUD OFFERINGS FOR A HIGHER EDUCATION AUDIENCE

A HEUG whitepaper from the Constituent Experience & Advancement Advisory Group

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Constituent Experience & Advancement (CXA) Advisory Group

Introduction

The purpose of this document is to help higher education institutions gain a high-level understanding of the different offerings in Oracle's Constituent/Customer Relationship Management (CRM) products which form integral parts of the Oracle Cloud CX suite. CRM and 'CRM-like' technologies are used to manage and analyse interactions with students and other constituents throughout the constituent/student lifecycle and may variously be used to encourage applications, yield, retention, alumni and donor engagement amongst many other functions. In its most basic definition, these technologies are fundamental in processes where communication, BI and differentiation are paramount.

This paper has been written during a time of extensive and rapid change at Oracle. While traditional on-premise products are still available and supported and developed, there is a rapidly increasing investment and development focus in cloud offerings, including Software as a Service (SAAS), Platform as a Service (PAAS) and Infrastructure as a Service (IAAS) offerings. Where PeopleSoft CRM, which is no longer being developed for higher education purposes, was marketed as a single CRM product that could provide a variety of functions across the constituent lifecycle, Oracle CX is a suite of products that can each be licensed separately. There may be some redundant functions, or functions not undergoing ongoing development in these discrete products, as many were acquisitions, but each has specific strengths and focuses. The cloud nature of Oracle CX shifts the fee structure from one of initial capital investment to acquire a license to varied annual subscription models.

This document will describe the products and their functions to aid higher education institutions seeking a solution of this kind. Each of these discrete products are mature, readily deployable solutions, although they are undergoing ongoing development alone and also to form core components of the Student Cloud integrated product suite for higher education. Considering that each may have its own product development and sales teams, it is hoped that this document will aid HEUG members when navigating through interest to acquisition and deployment.

For ease of understanding, the term 'constituent' will be used throughout this document to signify students, staff and other stakeholders that various parts of a university may deal with in using this type of technology.

This document is not intended to be exhaustive in discussing Oracle cloud products, or considerations for using them, and should not be used by institutions as a key decision-making tool, or in replacement of due diligence in procurement. The paper should be read as a document from a point in time and a lay person's high-level explainer.

Some of the products discussed are not CRMs in the purest definition, but they certainly warrant discussion in this document, hence the term 'CRM-like products' in usage in the paper. A general overview of Oracle's cloud strategy in higher education can be found here. A general overview of Student Cloud is available here.

CX products and related technologies

Oracle Service Cloud (OSvC)

The focus of OSvC (formerly RightNow CX) is to provide service to constituents across multiple platforms. Oracle has combined multiple products under the Service Cloud branding, including, but not limited to RightNow Chat, Oracle Policy Automation and Co-browse.

Key Functions:

Contact center - OSvC captures service requests made by constituents across multiple mediums in a central location that is accessible by multiple departments and different personnel across the university depending on profile and permissions. Service requests are captured as cases that can be assigned to university personnel with configured workflow. Cases can be tracked from origination to completion to monitor levels of service.

Phone – OSvC can be configured to work with universities' phone systems to capture the incoming phone number and compare it to those already stored in the system. In the case of a match, the record of the constituent is automatically opened with their previously captured interactions available for reference.

Chat – provides customer-initiated and proactive chat functionality between constituents seeking service and university personnel.

Co-browse – enables university personnel to see and interact with a constituent's computer screen enabling those providing support first hand access to the issue being encountered. Can be launched via chat.

Knowledge management – a knowledgebase accessible through the OSvC customer portal and through the agent desktop to facilitate enquiry deflection, community enquiry resolution and self-service. Advanced Knowledge is a new generation version which adds significant functionality including a natural language engine, and the ability to add extra knowledge repositories to the knowledgebase.

Email and web form enquiry management – OSvC can be configured to pull emails sent to specific university addresses into specific queues for discrete units to process. Enquiries can also be submitted via forms on the OSvC customer portal. If the from address matches an address stored on an already existing contact record, the email is stored as part of the constituent's incident history.

Marketing – Service Cloud does contain marketing capability and a number of institutions utilize this capability. The marketing functionality in Service Cloud is not as robust as can be found in Oracle Marketing Cloud. While it may be suitable for simple marketing purposes and certainly is appropriate for transactional or bulk mailings, acquisition of OSvC specifically for marketing is not recommended. No new enhancements are expected for this OSvC module.

Oracle Policy Automation – OPA is an end-to-end solution for capturing, managing, and deploying complex document-based policies and procedures across channels, including web 'interviews' and a chat bot to generate decisions for users. Interviews are configured, deployed and styled in Oracle Policy Modelling platform and interview rules are written in Microsoft Word and Excel.

OPA can be separately purchased and used, and indeed there is an on-premise version. The cloud version is very well integrated with OSvC however, and also has an upcoming chat bot functionality that will work with OSvC Live Chat or in other platforms, e.g. Facebook Messenger or WhatsApp.

Considerations:

- This product was originally built on a .NET platform and requires Microsoft Internet Explorer and a Windows operating system. Oracle is rapidly developing a new browser user interface (BUI) however, which is close to having the full functionality of the .NET version (at the time of this paper's writing).
- Some integrations do exist between OSvC and the Sales, Social and Marketing Cloud applications, but these are still undergoing development. Integrations are not typically costed when purchasing the product.
- OSvC licencing is complicated. It is billed on a combination of users, interfaces and web sessions, plus extra costs associated with some of the other modules mentioned above.

Oracle Sales Cloud (OSC)

OSC is designed to be the cornerstone of the CRM platform designed to drive institutional growth. OSC provides strong tools to support an institution's ability to interact, track and monitor with its current and potential constituents on the programs and services that they are interested in.

In the Higher Education ecosystem, Oracle has positioned OSC from two perspectives: student recruitment and donor management. As you consider the development of engagement from prospect to alumni, OSC is able to track that relationship allowing for a full lifecycle of interaction.

Key components of OSC include the ability to gain a better understanding of prospects so that they may be ranked with a low, medium, or high interest in the institution. The ability to

forecast future opportunities is another area of strength. OSC allows the institution to manage recruiters, constituents, prospect inquiries and manage calendar and activities from one central location. Workflow to complement business processes is strong as institutions seek to automate and provide consistent messaging to their constituents. These particular strengths of OSC are not as well delivered in other offerings.

OSC has strong bi-directional interfaces with Oracle Marketing Cloud. Lead scoring within Marketing Cloud will automatically move prospects into OSC resulting in immediate high touch activities. At the same time, constituents can be moved into pre-defined automated communication flows in Marketing Cloud based upon data points uncovered during interactions within OSC.

Considerations:

- Sales performance management and partner relationship management are critical parts of Sales Cloud that are not delivered as well in other offerings.
- Sales Cloud is licenced per user per month and there are a number of different editions.
- For institutional advancement staff, gift management is not currently covered by Sales Cloud. This functionality seems to be around two years away at the time of writing.

Engagement Cloud

Engagement Cloud includes the existing Sales Cloud functionality but adds new service capabilities built on the same platform and delivered as a single product.

Existing Sales Cloud customers may remain with their existing product with no change, or, can choose to expand their existing contract (i.e., add more users) and renew their contract as usual. A new contract is required, but no upgrade, migration or re-implementation (provided they are on release 17D or later). As with other cloud offerings, the functionality will become available for configuration.

New customers will now subscribe to Engagement Cloud and will have the full range of sales and service functionality available to them.

Oracle have also stated clearly that this change has no impact on the existing Service Cloud product (the service functionality of Engagement Cloud is built-out on the same platform as Sales Cloud). Engagement Cloud is not a replacement for Service Cloud and development and investment in Service Cloud continues unchanged.

Marketing Cloud (OMC)

Oracle Marketing Cloud (also known as Eloqua) enables institutions to develop marketing plans 'across multiple channels including email, display search, web, video and mobile.' The main function is to enable universities to develop automated marketing campaigns personalized to constituents based on their interests and characteristics.

This product is extremely user friendly and institutions can go from purchase to live campaign very quickly indeed.

Simple and effective lead scoring is an integral part of this product allowing institutions to set up multiple lead scoring schedules depending on lead characteristics, e.g. a score for likelihood to apply vs a score for likelihood of attrition, as well as a comprehensive view of a contact's 'digital body language' through Eloqua Profiler.

Similar to the other products, there are numerous apps and add-ons available, free and billed that can be seamlessly added to the product.

Considerations:

- Eloqua is billed on number of contacts and engaged users.
- Eloqua has delivered connectors for the Sales and Social Clouds and integrations available, if not as mature at the time of writing, for Service Cloud.
- There is a higher education specific version of Eloqua currently available and undergoing further development.

Oracle Social Cloud/Social Relationship Manager (SRM)

SRM (Social Relationship Manager) is used to manage social media monitoring and outreach. The product can be configured to listen for specified key information on multiple different social media channels. This is a particularly powerful tool for tracking and engaging your social media presence across numerous platforms and web content.

Social Listening
The social listening functionality enables institutions to search for content across multiple social media platforms and online content based on specific keywords and other criteria. The clearest use case of this functionality is to identify what is being posted about the institution, to identify the tenor of the postings and common themes.

Social Engagement and Publishing
Content can be generated and posted from Social Cloud and posted to multiple platforms. This includes the creation of reply messages to content identified through the social listening

functionality. Enquiries can be submitted to OSvC for consistent enquiry management and to continue to contribute to 360-degree view of a constituent.

Campaign Execution

Social Cloud can be integrated with Marketing Cloud to facilitate coordinated, automated campaigns across multiple social media platforms.

Considerations:

- Social Cloud is billed in a number of different ways including;
  - Number of platforms being 'listened to'
  - Engaged users
  - Messages used per month
  - Other costs depending on implementation
- Social publishing is in the process of moving for further development in OMC rather than SRM leaving SRM with a focus on listening and engagement.
- Social media tools are at the mercy of the platforms they are collating information from and engaging with, so changes from various platforms can restrict the efficacy of using the product, e.g. Facebook changes after 'the Cambridge Analytica scandal' and Facebook CEO Mark Zuckerberg's testimony before the U.S. congress.

PeopleSoft CRM

Higher education institutions primarily use PeopleSoft CRM as an on-premise solution integrated closely with PeopleSoft Campus Solutions. It is a full CRM solution addressing the functionality across the constituent lifecycle. It may be of interest to some universities that have policies or regulations prohibiting the storage of constituent data in the cloud or that are not ready to invest in cloud products. It is still available for licensing, but Oracle is not actively promoting PeopleSoft CRM for higher education and has publicly stated they will not be releasing further higher education specific updates to the platform. Institutions can cloud host PeopleSoft CRM with Oracle, but it is not a SaaS solution like many of the other products addresses in this whitepaper.

Platform as a Service (PaaS)

Platform as a Service refers to a cloud computing model that delivers both hardware and software tools, usually those needed for application development, integrations, business analytics, mobile applications and document storage and sharing. PaaS (like SaaS) is not a stand-alone product, rather it refers to a group of products sold by Oracle separately from their CRM products. Because Oracle CX suite of products are distinct offering and still evolving, PaaS may be an important tool in maximising the effectiveness of the discrete products in use in an institution.

A key specific PaaS offering for prospective CRM users is Oracle Integration Cloud (OIC). Many cloud implementations survive and thrive, or stall and die based on whether integration with

other systems, cloud or on premise, is easily and successfully implemented. Oracle have developed OIC to enable quick and easy integration between not only the entire cloud CRM suite, but also the Student Cloud suite and other web service enabled systems. Oracle Integration Cloud is available in two offerings:

- Oracle Integration Cloud that is user managed for tasks such as backups, patches, monitoring and development. This offering is licensed on OCPU per hour, where OCPU is defined as the CPU processing capacity per hour.
- Oracle Autonomous Integration Cloud where Oracle will maintain the system back-end on your behalf, leaving you free to simply develop and deploy your integrations. This offering is licensed on the number of messages processed per hour and can be purchased in 5000 messages/hour allotments.

It is important to stress that PaaS products are usually separately licensed products, not included as standard with Cloud CX purchases. They may also be sold by a different Oracle sales team from the team an institution deals with during procurement of an Oracle CX Cloud product.

A useful Oracle paper on integration by PaaS is available here.

Concluding Points

Oracle has acquired numerous best in class products for constituent engagement and outreach each with their own strengths and each delivering rich functionality.

Where integration is not fully delivered between all of these products (and other products) work is ongoing and progressing quickly. Some of these products have also been successfully integrated with some other non-Oracle products by member institutions.

Anecdotal evidence abounds that costs associated with integration have often been overlooked or understated during sales engagements with institutions. Members would do well to ask up front about recommended methods and indicative costs associated with integration between products.

Licencing remains a difficult thing to understand (and afford) and a discounted bundle is not currently available as standard. Cloud, contrary to what some believe, is **not** always, or even usually, cheaper than on premise solutions. Some of the licencing models, e.g. the per contact licencing of OMC, are not viewed as very well suited to the higher education industry by some members.

Most of these products upgrade automatically by quarter and the experience seems to be generally painless. Many institutions using OSvC have however been allowed to opt out of the auto-upgrade program in favour of a once a year upgrade as many customers had used RightNow CX as a comprehensive CRM solution and have made more customisations to the system than usual for a cloud product.

There are many other cloud offerings that complement the above discussed products, but it was not possible to discuss all in this paper. Amongst those of particular interest to a number of institutions already using some or much of the Cloud CX suite are Oracle Contact Data Management and Oracle Maxymiser. Click on the product name for some basic information.

Please subscribe to the CXA listserv to ask questions and give feedback.