

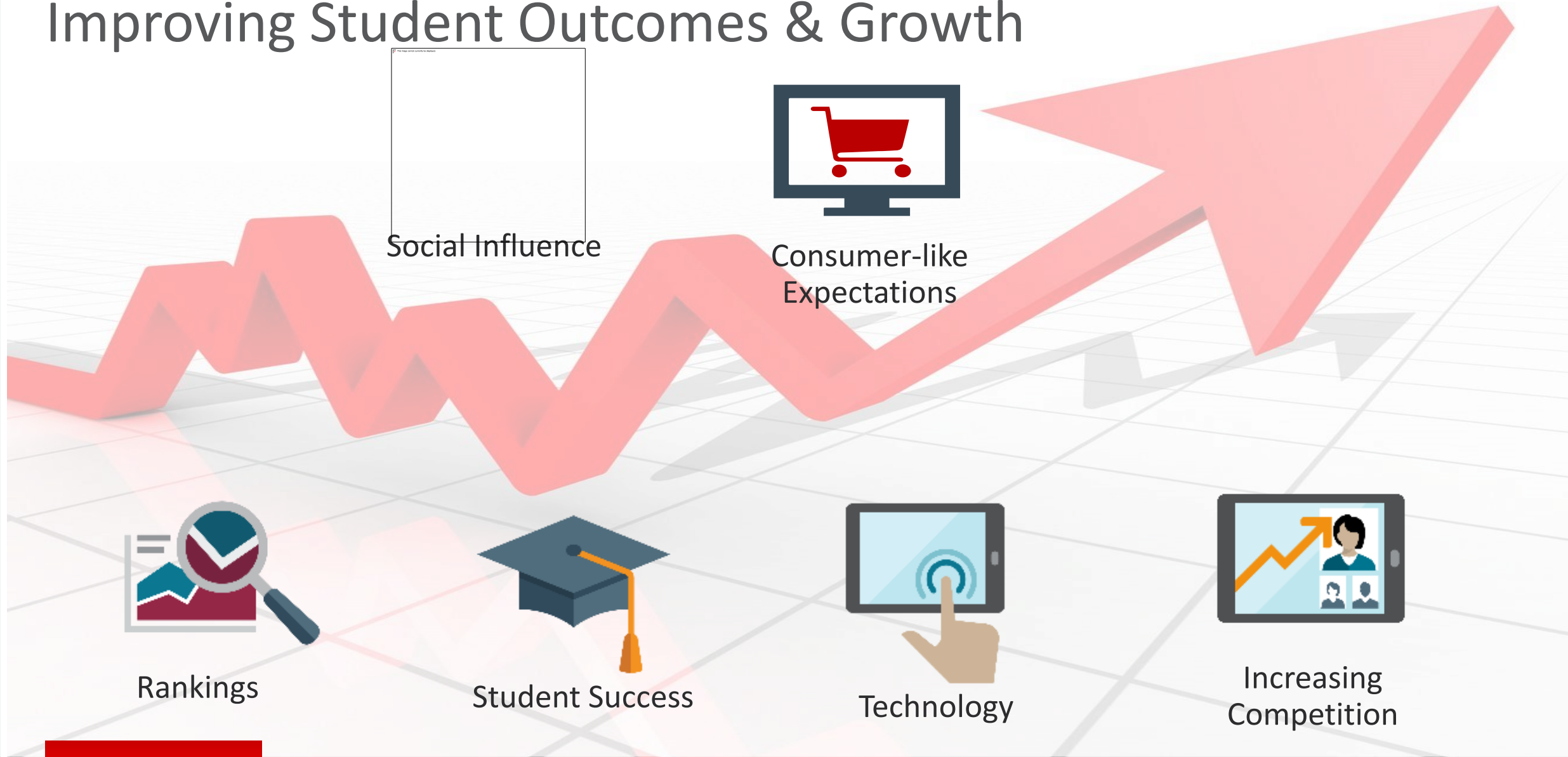
# Oracle CX for Higher Education: Strategy & Roadmap

Gary Allen  
Director, Global Product Strategy  
Oracle Higher Education  
17 October 2017

# Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

# Improving Student Outcomes & Growth







## First impressions count

Like with online shopping,  
a poor experience with  
your institution can put  
them off.



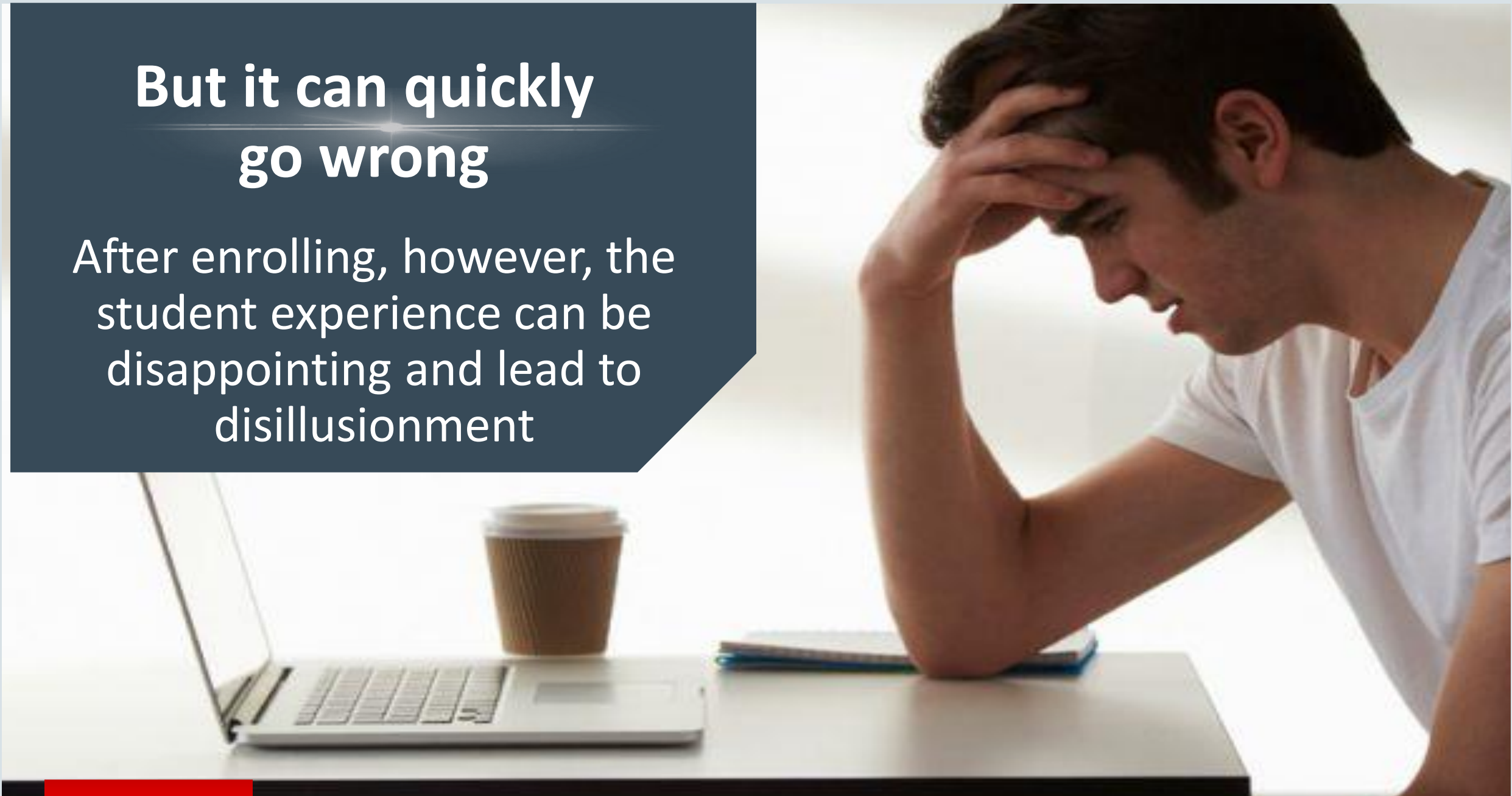
# Each student's journey is unique

Personalized attention prior to enrollment can influence which institution they choose.



# But it can quickly go wrong

After enrolling, however, the student experience can be disappointing and lead to disillusionment





Gartner

“A **personalized, integrated and coherent student experience** will become a **key differentiator** for higher education institutions, and CIOs need to start building the strategies and infrastructures to make this happen.

There is a **growing focus on the student experience in higher education**, driven by an **increasing emphasis on student success and scrutiny on educational outcomes.**”

Source: “The Future of the Student Experience is Personal”, 25 April 2017 - Gartner



ORACLE®

# A Fundamental Shift is Required...

## Managing Student Transactions Tactical

## Building Student Relationships Strategic



### Student 101

- “Traditional” student
- One-size-fits-all
- Student profile siloed
- Different office, different response
- Fragmented engagement



### Jessica Jobs

- Modern student
- Personalized experience
- Holistic student profile
- Seamless engagement across campus
- Cross-channel, multi-device



# Oracle CX: Extending the Core SIS

## Student Recruiting



- Outreach & engagement
- Recruiter & territory management
- Lead management
- Pipeline forecasting

# SIS

**ORACLE®**  
**PEOPLESOFT**  
CAMPUS SOLUTIONS

**ORACLE®**  
Student Cloud

## Advancement



- Alumni & donor engagement
- Events
- Fundraising campaigns

## Student Engagement



- Social listening & engagement
- Multi-channel campaigns

- Personalized outreach & engagement
- Event management

## Student Support

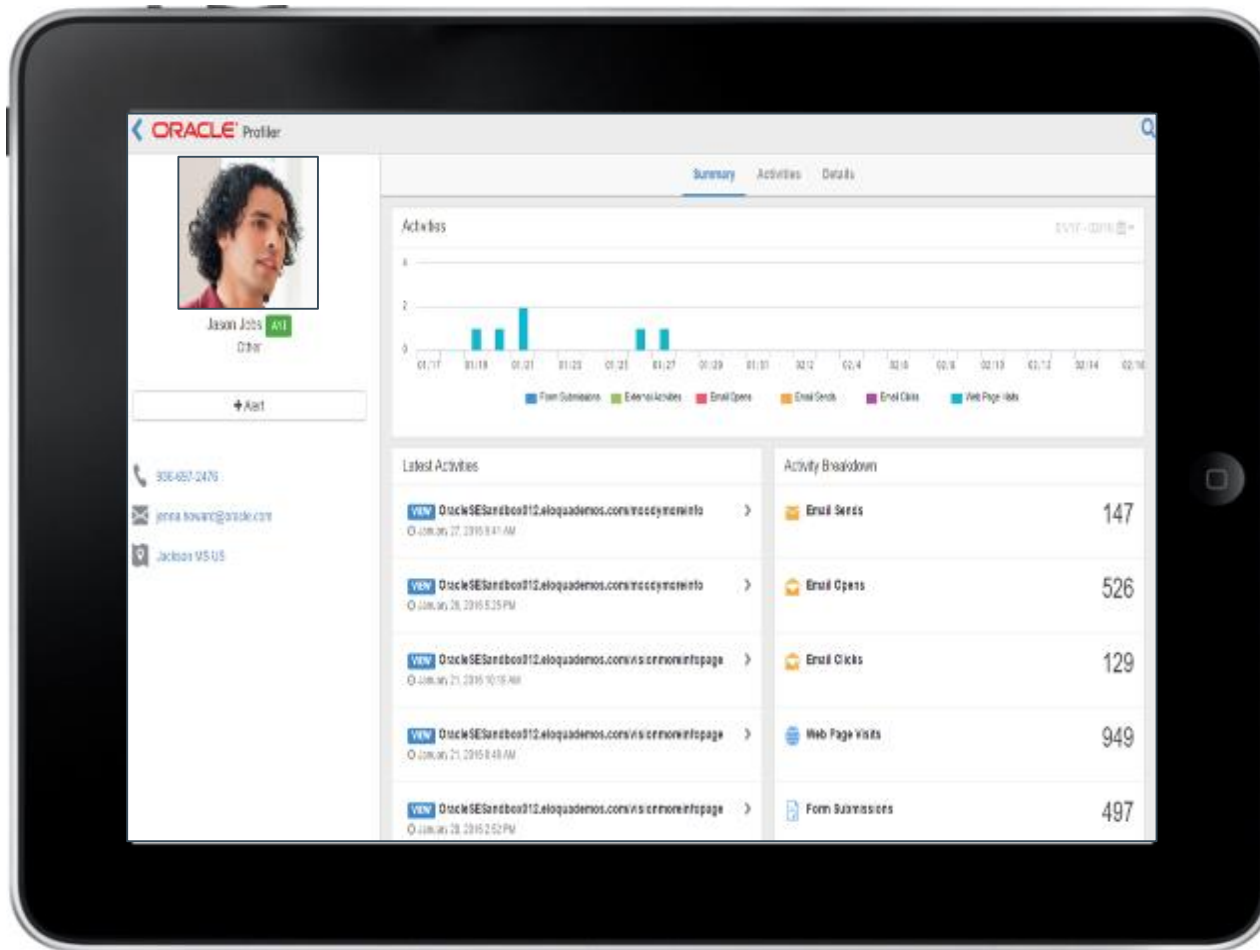


- Student help desk/case management
- Self service knowledgebase
- Online chat

- Agent co-browse
- Policy automation

# Oracle Student Engagement

**Meet your student's expectations with modern Outreach and Social Interactions**



- Engage constituents with personalized and targeted communications and social interactions, delivered via multiple channels according to the recipient's preferences.
- Personalize your outreach by tracking user's online activity to build rich profiles of their digital behavior and preferences.
- Create and manage digital content such as HTML landing pages, forms, and email templates to maintain a consistent and unified identity.
- Leverage the power and reach of social media with integrated marketing efforts, publishing your content to a variety of social sites.
- Improve outreach and campaign effectiveness with robust and actionable analytics.



# Modern Student Engagement

## Cross-Channel Outreach



- Multichannel engagement & outreach campaigns
- Dynamic content
- Integrated social monitoring & engagement



## Social Listening & Engagement



- Listen and monitor social activity using proprietary language keyword searches
- Monitor sentiment, locations, source and other attributes of social postings
- Respond and engage via social media

## Digital Profiles



- Track digital activity & behaviors
- Comprehensive student profiles across the lifecycle
- Integrated with outreach campaigns

# Oracle Student Recruiting

## Attract and enroll best-fit students and improve Recruiter effectiveness

- Improve Recruiter effectiveness by focusing time and energy on qualified, high-value prospects.
- Support Recruiters on the go with mobile accessibility to view inquiries, calendars, events, and other activities and generate emails from a mobile device.
- Engage prospective students with targeted and personalized communications and social interactions.
- Collaborate across campus to provide the seamless engagement and coordinated support.
- Improve outreach and campaign effectiveness with robust and actionable analytics.





# Modern Student Recruiting

## Outreach & Engagement



- Multichannel engagement & outreach campaigns
- Dynamic digital content
- Integrated social monitoring & engagement



## Recruiter Effectiveness



- Inquiry management
- Prospect qualification & assessment
- Recruiting events, tasks, activities
- Guided coaching
- Online team collaboration

## Team Efficiency

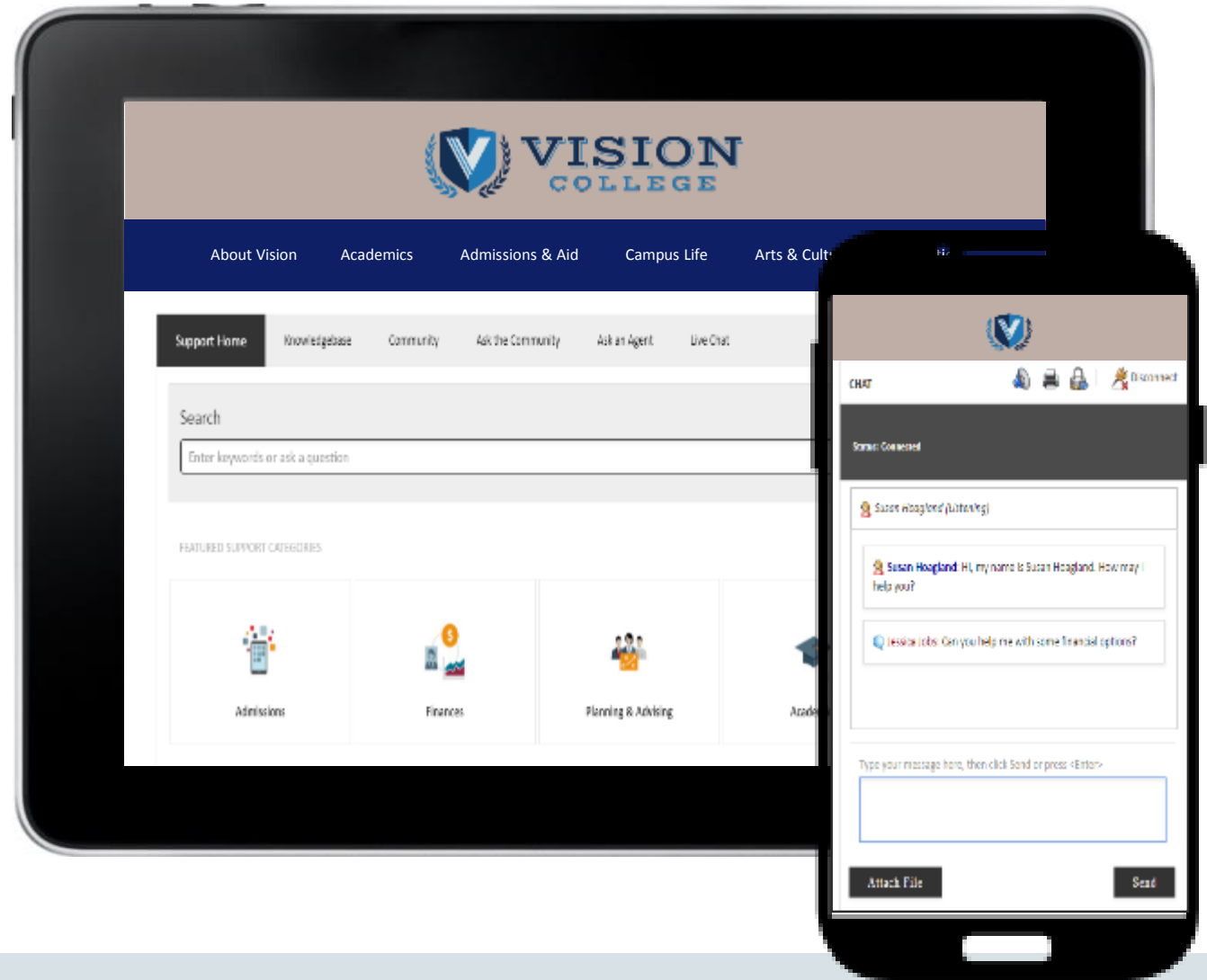


- Team calendar
- Recruiter management
- Recruiter, territory, and team assignments
- Organization management
- Real-time analytics

# Oracle Student Support

## Deliver modern service and empower users and staff

- Empower students, faculty, staff, alumni, and visitors to search for information and find answers on their own.
- Display content that is timely and relevant based on user profile and permissions.
- Enable users to search for resolutions to issues and if not found, to submit a new request. Track and route the issue for satisfactory resolution.
- Improve search results and content with user feedback and analytics to track usage and helpfulness of knowledge articles.
- Provide immediate assistance with live Chat capabilities. Chat activity is tracked for reporting and analysis.



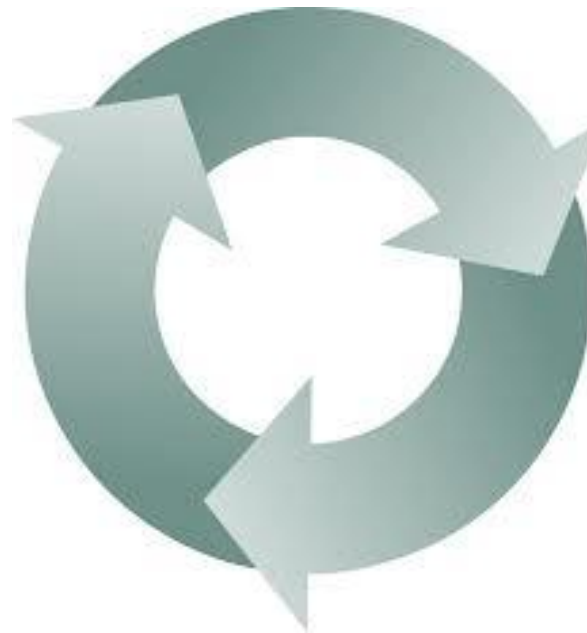


# Modern Student Support

## Empower



Empower students and other constituents to find information and answers to their questions on their own schedules.



## Engage



Make it easy for students to ask questions and engage with the institution to resolve outstanding issues.

## Intervene

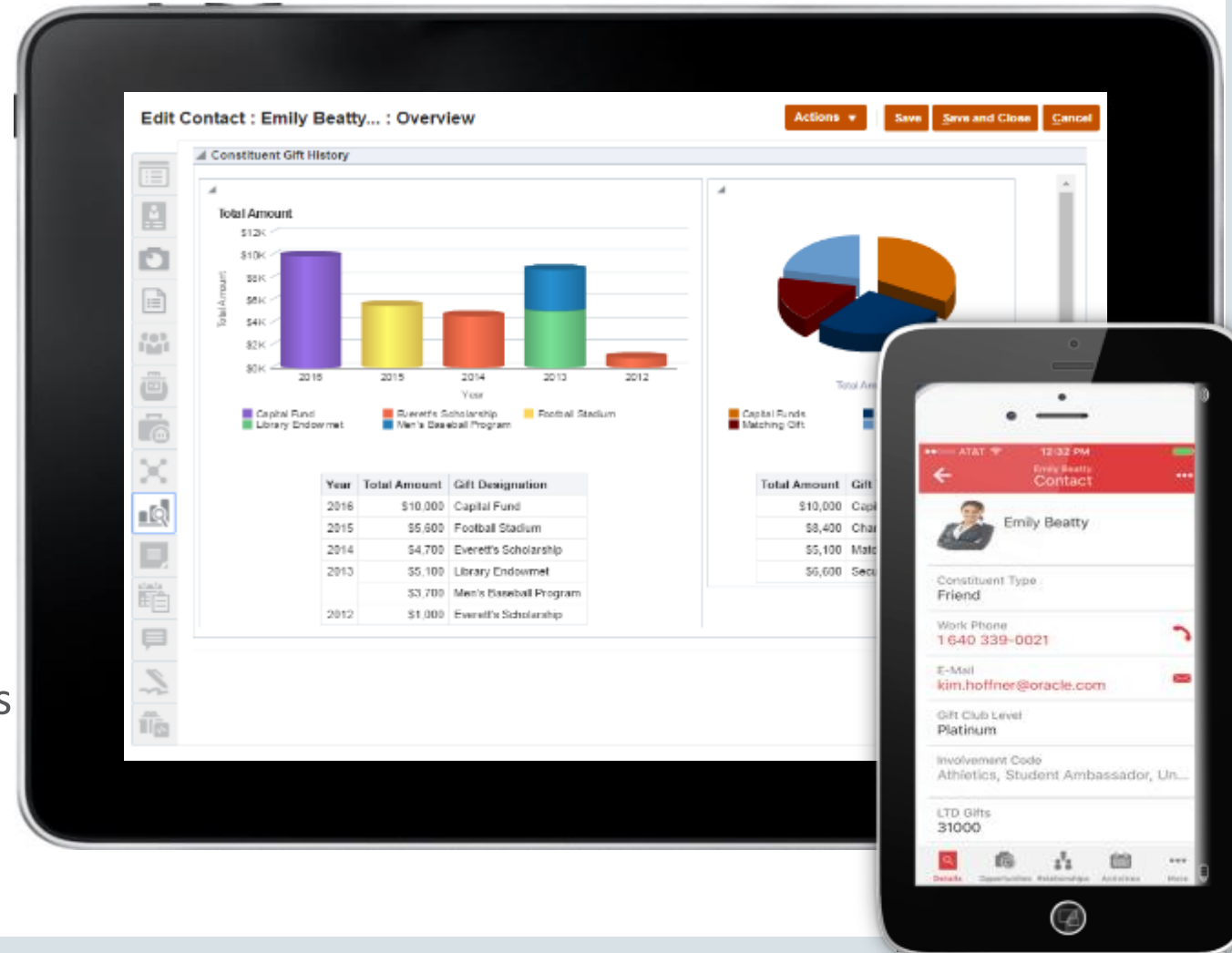


Proactively reach out and engage with students when it becomes clear they need assistance.

# Advancement

## Engage and nurture alumni and donors

- Engage and nurture alumni, friends, and donors with targeted and personalized communications, social interactions, and events.
- Improve Fundraiser effectiveness by focusing time and energy on qualified, high-value donors.
- Support Fundraisers on the go with mobile accessibility to view inquires, calendars, events, and other activities and generate emails from a mobile device.
- Collaborate across campus to provide seamless engagement and coordinated support.
- Improve outreach and campaign effectiveness with robust and actionable analytics.



# Modern Advancement

## Outreach & Engagement



- Multichannel engagement & outreach campaigns
- Dynamic digital content
- Integrated social monitoring & engagement



## Fundraiser Effectiveness



- Fundraising events, tasks, activities
- Trip planning and management
- Mobile-ready
- Guided coaching
- Online collaboration

## Team Efficiency

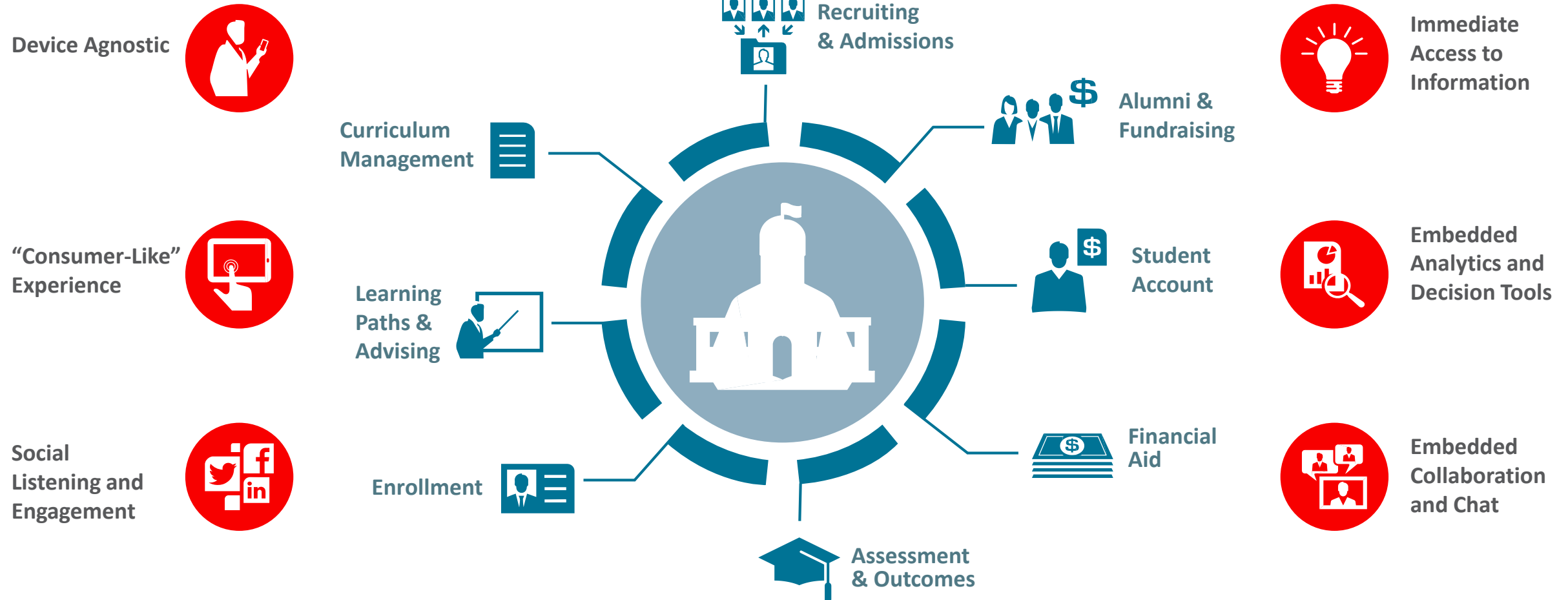


- Team calendar
- Fundraiser, territory, and team assignments
- Organization management
- Real-time analytics

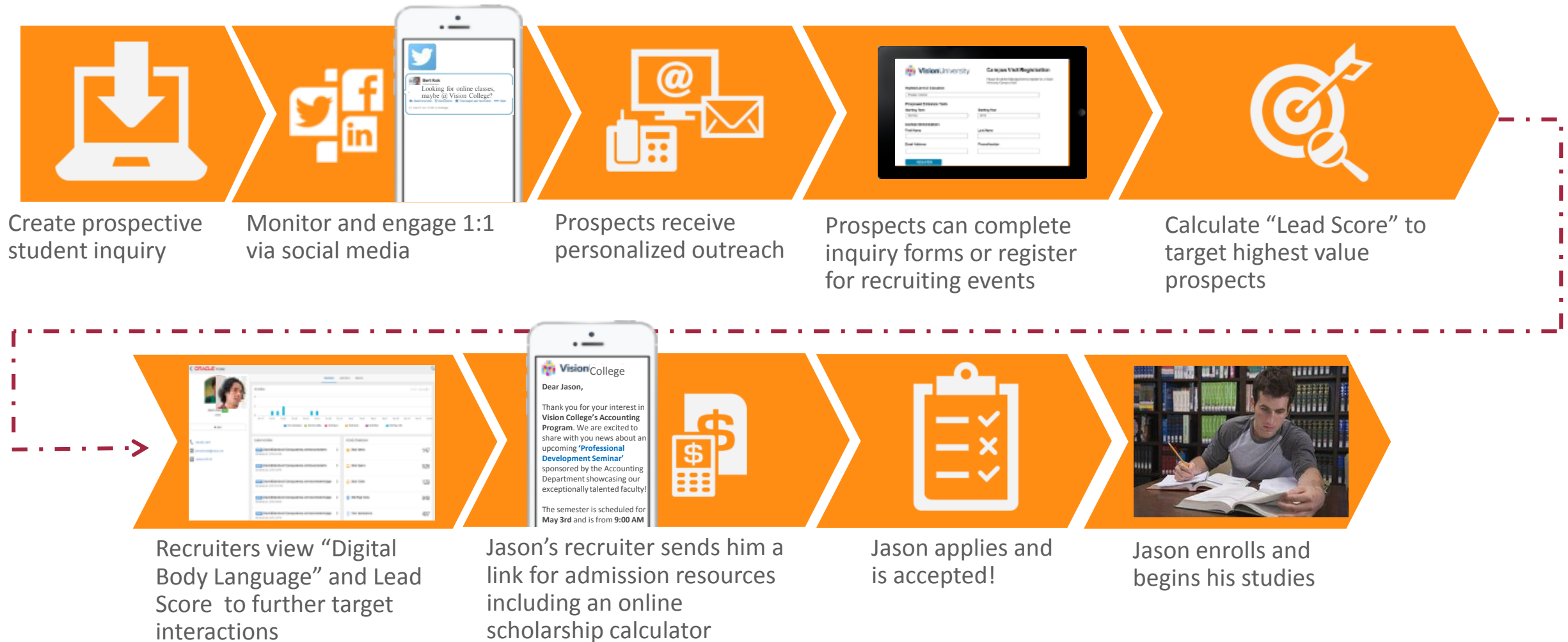


# Today's SIS Student Lifecycle Management

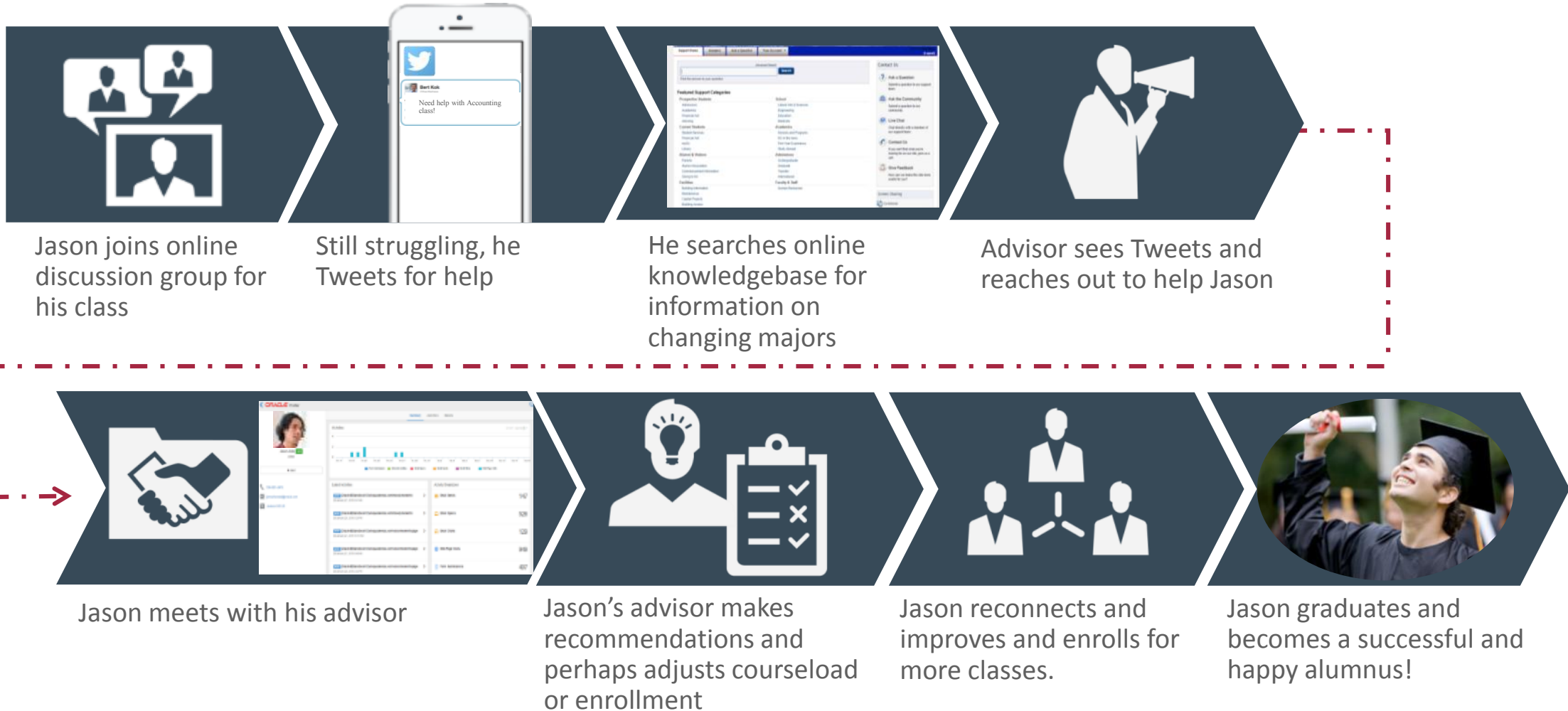
## SIS enhanced with CX/CRM



# Vision College Prospective Student Journey



# Vision College Enrolled Student Journey





# Roadmaps

# Oracle CX for Higher Education Roadmap *(as of October 2017)*

## Currently Available

- Pre-configured HED data model to support Student Engagement and Student Recruiting
- Student Support configuration
- Advancement configuration



## Current Release + 1

- Integrated marketing and outreach capabilities with custom objects
- Integration with Campus Solutions
- Integration with Student Management Cloud



## Future

- Complex external file loads
- Support for Admissions (built as part of Student Management and integrated with CX)
- Recruiter trip planning
- Enhanced search capabilities
- Remote access for high school counselors and agents
- Integrated service capabilities
- Comprehensive 360-Degree view
- Student Retention and Success interventions

The above is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle. This information is for Oracle Cloud offerings and should not be relied upon for on-premise offerings.

# Oracle Marketing Cloud

## Current Release and Roadmap

### Current Q1 FY18

#### Cross-Channel Orchestration

- Message Center for Mobile Apps (Inbox)
- Split View Editor
- Holdout Groups in Program

#### Marketing Automation & Content Marketing

- Bulk API: Lead Scores Export
- Content Marketing & Brightcove
- LinkedIn Campaign Manager app (GA)
- Responsive Engage (GA)
- Content Portal

#### Social Marketing

- Social marketing engagement enhancements with Service Cloud
- Free Back-scoring of Listen Messages with Twitter Sample
- Eloqua Campaigns Display in Social Calendar

#### Testing & Optimization

- REST APIs
- Stats Engine for Low Traffic

#### Oracle Marketing Cloud Integrations

- Add Maxymiser Campaign to Responsys Program
- Maxymiser + DMP Integration (GA)

### Next

#### Cross-Channel Orchestration

- Multi-channel Dashboard
- Responsys Mobile App
- Content Widgets
- 3rd Party Apps for Program

#### Marketing Automation & Content Marketing

- Responsive Email Editor
- Eloqua Sales Tools for Microsoft Outlook
- Service Cloud ICS-based Integration
- Insight OBIEE
- Sales Cloud Integration App

#### Social Marketing

- Enhanced UX for reporting with combined owned and earned data
- Additional Listen data sources Tumblr & Instagram (GA), etc.
- Free Back-scoring of Listen Messages with full Twitter Firehose
- New simplified topic creation experience including real-time search

#### Testing & Optimization

- Campaign Designer (GA)
- Self Serve Custom Attribute Creation
- Self Serve Integrations
- Server Side API
- Cross Device Testing & Personalization

#### Oracle Marketing Cloud Integrations

- Responsys Integration with Oracle Loyalty Cloud via ICS Adapter

### Future

#### Cross-Channel Orchestration

- Improvements to Collaboration
- Audience Designer Improvements
- Enhancements to Interactive Dashboards

#### Marketing Automation & Content Marketing

- A/B Testing for Campaign Canvas
- Responsive Content Creation & Enhanced Calendar
- Salesforce.com Integration App
- LinkedIn Sales Navigator for Eloqua Sales Tools

#### Social Marketing

- Listen enhanced UX for topic creation and real-time search, visual image listening, paid data
- Enhanced Social Cloud Service APIs and integrations with OMC
- Instagram #Hashtag Social Listening (CA)

#### Testing & Optimization

- Automated Offer Targeting
- Visual Editing for Single Page Applications

#### Oracle Marketing Cloud Integrations

- Marketing Cloud Common Look & Feel
- Single Sign On Across Platforms



# Oracle Social Cloud

## Current Release and Roadmap

### Current Q1 FY18

#### Oracle Social Cloud

- Enhanced global support with WeChat response and analysis and sentiment for Thai and Arabic
- Added more social data from Instagram, Facebook Reviews & Offers, and improved image support with Twitter & Google+
- Enhanced historical data requests options from Twitter and added export capabilities
- New permission controls for social data analysts
- Enhanced response with follow/unfollow & multi-photo display for Twitter, message notation and collaboration, improved sorting and filtering
- Enhanced publishing support for Twitter videos, bulk actions, calendar enhancements and export options

### Next

#### Oracle Social Cloud

- Enhancing social data and reporting of Tumblr, Twitter retweets and mobile app store review sites; Enhanced historical data requests and support for visual image listening
- Enhanced global support with Chinese Networks and sentiment for Polish and Korean
- New custom report experience combining owned and earned social data with report templates, sharing and schedule exporting
- New simplified topic creation experience including support for real-time search & analysis and improved filtering
- Enhanced response capabilities with visual image improvements, content reply templates, reply attachments

### Future

#### Oracle Social Cloud

- Enhanced social insights reporting with paid data, marketing industry KPIs, campaign, content, audience, influencer analytics and Social profiles
- Advanced data analysis with OMC applications
- Enhanced image and video listening
- OMC Integrations for lead capture, audience builder and marketing segmentation

# Oracle Sales Cloud

## Current Release and Roadmap

### Current Q1 FY18

#### Functionality

- Complete Asset Management
- Product Eligibility for Opportunities
- Mass Update for Core Objects
- Task Template for Leads and Opportunities
- Support for Multiple Assessments
- Sales Data Visualization
- Oracle Sales Cloud for Office 365
- One-step Partner Creation
- Improved Postal Code Management for Territories
- Individualized Comp Plan Document Text

#### Integrations

- Groovy Script Actions in Object Workflow

#### Platform and API

- Dynamic Filtering on Custom Relationships
- Enhanced Field Constraints for Std Fields

#### Administration and Data Management

- Streamlined Sales Offering and Setup
- Pre-defined Role for Read-only Access
- Simplified Import for Accounts/ Contacts

### Next

#### Functionality

- LinkedIn Sales Navigator Integration
- Digital Sales Assistant
- Adaptive Intelligence for Opportunity Guidance, Next Best Action
- Integrated Sales Planning with PBCS
- Interactive List and Homepage
- Inline Editing
- Responsive UI and Desktop UX
- Dynamic Opportunity Revenue Form
- Office 365 Extensibility and Mobile add-in for iOS/ Android
- Mobile Tablet support
- Partner Workflow Approval Process
- Partner Assessment
- Territory account inclusion/exclusion

#### Integrations

- Marketing Cloud Campaign
- CPQ Quotes for Web and Mobile
- ERP/SCM Asset integration

#### Platform and API

- Scheduled batch groovy processes
- Custom object owner and owner hierarchy data security policies and configuration
- Parallel sandbox development
- Re-evaluate conditions after time delay in workflow operations
- OPA connector for customer objects
- CSM selective migration of roles and email templates

#### Administration and Data Management

- Quick Import Macros for account, contact, account hierarchy, lead, opportunity, user and sales catalog improvements
- Initial user and enterprise setup improvements
- Create accounts from D&B in real time
- New master geography reference set

### Future

#### Functionality

- Inside Sales Solution
- Adaptive Intelligence for Call Point and Lead Scoring
- Slack integration
- PRM Configuration Wizard
- Pre-built, Highly branded Partner Portal integrated with PRM
- Task-based Flows for Territory Admin

#### Integrations

- UI Mashup with Bi-Directional Client Communication

#### Platform and API

- REST metadata APIs
- Sandbox merge with conflict resolution
- Task-Based Page Flow Framework

#### Administration and Data Management

- REST Services for Data Cleanse and Match
- In-context Audit Trail
- Data profiling

# Oracle Service Cloud

## Current Release and Roadmap

### Current Q1 FY18

#### Web Customer Service

- Chat Productivity Tools

#### Cross-Channel Contact Center

- Browser Guided Assistance
- Browser Inline Edits

#### Knowledge Management

- Auto-classify external content across languages
- Expanded language support
- Community Self Service Integration

#### Policy Automation

- Mobile Assessments
- Agent Checkpoints

#### Field Service

- Routing & Optimization Enh'mts
- Enhanced Map Functionality
- Branding Updates

#### Platform

- Bulk Delete APIs – Incidents & Opts
- API QoS
- Throttling of External Apps

### Next

#### Web Customer Service

- Virtual Assistant (limited release)
- Messaging - Facebook
- Video Chat
- Browser UI Chat Productivity
- Syndicated Embedded Chat

#### Cross-Channel Contact Center

- Browser Workflow
- Browser Agent Scripting
- Browser Assets
- Browser SLA Support
- Browser Right to Left Support
- Browser Mobile Support
- Real-Time Reports
- IoT Service Monitoring

#### Knowledge Management

- Site Maps Support for External Content Acquisition
- Subscription Enhancements
- Faster content processing
- Knowledge Foundation: Versioning

#### Policy Automation

- Interview Themes
- Dynamically Load Interview Data
- Continuous Online Testing
- Browser Based Authoring
- ICS Integration

#### Field Service

- Mobility Expansion
- Inventory Enhancements
- Video Chat
- Enhanced AI Learning

#### Platform

- Bulk Delete APIs – Contacts, Custom Objects, Organizations and Accounts
- Bulk Data Extract APIs
- Element Manager
- Identity Enhancements
- Virtualized External Objects
- Agent Browser UI Accelerators
  - Sales Cloud
  - CTI & SMS (Twilio)
  - Social Relationship Management

### Future

#### Web Customer Service

- Extend Syndication Capabilities

#### Cross-Channel Contact Center

- Browser UI Administration
- Simultaneous Editing
- Browser Opportunities
- Predictive Analytics

#### Knowledge Management

- Enh'd Policy Automation Integration
- Language Translation Connectors
- Additional Analytics Reports

#### Field Service

- More Integrations
- Video Collaboration

#### Platform

- Enhanced Business Rules
- Process Scheduler
- Search Enhancements
- GDPR Alignment



# Oracle Student Experience Momentum



# Oracle Student Experience – Supporting Collateral

- Oracle Higher Education Industry Site
  - <https://www.oracle.com/industries/higher-education/index.html>
- Datasheets
  - Student Recruiting: <http://www.oracle.com/us/industries/education-and-research/oracle-student-recruiting-ds-3608324.pdf>
  - Student Engagement: <http://www.oracle.com/marketingcloud/content/documents/datasheets/higher-education-ds-oracle.pdf>
  - Student Management: <http://www.oracle.com/us/industries/education-and-research/edu-student-management-ds-3608383.pdf>
- Related Collateral
  - How to Deliver the Personalized Experience Students Expect: <http://www.oracle.com/us/industries/education-and-research/education-all-about-me-sb-2437466.pdf>
  - Modern Students. Modern Expectations: Oracle Student Cloud: <http://www.oracle.com/us/industries/education-and-research/oracle-student-cloud-brief-2479137.pdf>
  - High Impact Outreach for Higher Education: <https://www.oracle.com/marketingcloud/content/documents/guides/high-impact-outreach-higher-education-gd-oracle.pdf>

# Integrated Cloud

## Applications & Platform Services

ORACLE®