Change Network On-boarding
CRM and MA Program – Phase 1

17 February 2021
Objectives of today

- Share what we are doing in the program
- To give you an understanding of your role
- Understand our change framework
- Establish an engagement cadence
- Get your feedback

Agenda

- Welcome
- Overview of the CRM and MA Program
- Change framework
- Change Network
- How we will work together
- Next Steps

From the CX Program…

Jeremy Medina
Head CX, Marketing and Digital

Umer Syed
Program Manager

Alison van der Wiel
Change Manager
Welcome – Jeremy Medina

- Why change matters
- The importance of change leaders and champions
- How I will support you
CRM and MA solution recap

Umer
CRM and MA will improve experiences and relationships through streamlined processes and access to one view of customer

**CX Program Objectives**

- Uplift in stakeholder experience
- Increased effectiveness of efforts
- More efficient operations

**What will be delivered?**

- Optimised customer interactions
- One-stop shop for customer data visibility
- Automated and coordinated processes

**What are the main activities of the CRM/MA Program?**

- Deliver the technical capabilities in the CRM and MA platforms
- Support the business to streamline and transform their business processes
- Work with other UQ teams to deliver the data and integrations (e.g. CX data strategy, CX event management, ITS telephony system)
How will the CRM and MA Program help?

**Future**

**Students and Partners**
- UQ already knows who I am when I ask a question
- It is easy to stay up to date with things I need to know
- I get the information I need, when I need it.

**Past**

**Students and Partners**
- Any time I have a question, I get bounced around and I get different answers depending on who I talk to
- I get so many emails; I don't know what is important and much of it is not relevant to me
- I have to tell my story many times

**Staff**
- I have no way to know what advice the student already received
- I wonder who can help with this issue...
- I don't know if the issue will be resolved or when

**Future**

- I can easily provide guidance on when the issue will be resolved
- It is easy to triage an enquiry and do a soft transfer to the team that is best positioned to help
- I can see full engagement and program history and can provide relevant advice

**Past**

- I wonder who can help with this issue...
- I can see lead score and focus my efforts on leads that are most likely to convert
- I can deliver communications in a consistent, compliant, and coordinated manner that avoids duplication and over-communication

Who is most likely to convert? Should I focus my effort on this prospective student or on someone else?

I wonder if they will even see my emails and if anyone else already communicated about it…
CRM and MA - Scope of Phase 1

In Phase 1 we will roll out to:

- CX MA team
- FS int. marketing
- FS int. recruitment
- FS-I onshore
- FS dom. recruitment
- FSCC
- International Admissions*
- FS outreach

In scope for Phase 1:

**Foundations**
CRM & MA will set up the solution architecture and fundamental capabilities in the platform.

**Campaign**
CRM & MA will enable targeted and personalised communication across multiple channels.

**Lead management**
CRM & MA will enable users to track pipeline activities, tasks and targets, all the way from prospect through to conversion.

**Single customer view**
The solution will integrate with key UQ systems and provide a consolidated view of customer information.

**Enquiry management**
The solution will enable staff to better service customer enquiries with access to a staff knowledge base and integrated workflows.

**Appointments**
The solution will enable customers and staff to easily schedule, change and manage appointments.

**Reporting**
Information will be aggregated and presented in intuitive, meaningful ways that can be customised based on team and individual priorities.

We will be able to scale up quickly once this is rolled out.

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* The details and number of users to be rolled out to International Admissions are to be confirmed.
** The full list of integration is to be finalised with the partner.
*** Some integrations will be unidirectional.
High-level program roadmap

The program will roll out the solution by customer cohorts in order to ensure the consistency of customer experience. The foundation of the platforms will be built by reusable and scalable components and functionalities, allowing the future phases to be implemented in a timely manner when possible.

* Please note the priority beyond Prospective Students International has not been finalised and will be finalised by the SteerCo in a checkpoint planned for early 2021.

Phase 1
Build a foundation

- A small-scale implementation to build the platform foundations and improve student engagement.

Phase 2
Extend the foundation

- Extend initial outcomes to additional customer cohorts and continuously improve the foundation capabilities.

Phase 3
Scale Upwards

- Scale the outcomes through the prioritisation of backlog across the organisation.

Key functionalities
- Omni-channel marketing campaign
- Lead management and scoring
- Single customer view and scoring
- Enquiry management
- Appointments
- Reporting
- Key UQ system integrations, e.g. Si-net, Telephony, Oracle CRM

Enablers
- CX data strategy & data integrations
- Communication framework
- Lead, enquiry and subscription management frameworks

Backlog*
(not ordered in priority)

- MBA students (prospective students, current students and alumni)
- Prospective Students Domestic (until accept offer)
- Alumni
- Business School short course students
- Donors
- Prospective Students (commencing students – until census date)
- HDR Students (prospective students, current students, alumni)
- Research & Partnerships
- Others (TBD)#

* Current students as a customer segment are currently out of scope for the CRM and MA Program

Change Network On-boarding | October 2020

CRICOS code 00025B
The CRM solution will be rolled out to the whole FS Directorate and MA team to enable better business processes and visibility.

- **Future Students International Marketing and Recruitment** are in scope for P1 of the CRM and MA solution.
- **Future Students Australia** will be involved in P1 as they support international as well as domestic students. International students' enquiries will often come through the FSCC team.
- "**UQ International Admissions** involvement will be determined once an impact analysis is done. This decision will be made later 2021.
- **CX MA** for campaigns in P1
- **Faculties** will help co-design, but out of scope in P1
CRM MA Program Phase 1 indicative timeline*

2020

Q4

CRM MA Procurement

Workshops & interviews

Scope

2021

Q1

Q2

Q3

Q4

Implementation Partner on-board

Co-design solutions with business

ACED Working Group

CX Working Group

Data and Data Governance Working Group

Subscription Management Working Group

Enquiry Management Working Group

P1 Awareness Sessions

Communications | Engagement

Change Network

Build and Deliver

Build and Deliver

Build and Deliver

Build and Deliver

Notes:

*This timeline is subject to change once the implementation partner is on-board and agreement on timing and releases

Timing TBC – subject to resourcing and finalisation of scope with the implementation partner

Release of functionality – timing TBC

2020

Enquiry Management Working Group

ACED Working Group

Subscription Management Working Group

Data and Data Governance Working Group

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Our Change Framework

Alison
**Change Management Guiding Principles**

**HOW WE SUPPORT YOU**

01. We partner and value relationships

02. We support leaders to lead the change – change is visibly led by UQ senior managers

03. We look for opportunities to provide choice and autonomy

04. Improving customer experience is at the front; staff experience is a very close second

05. We encourage open and collaborative engagement and creativity

**HOW WE COMMUNICATE**

Change activity is purposeful always focusing on what’s in it for the business

We have a coordinated approach to messaging and engagement

Messages are fit-for-purpose, timely, succinct and appropriate. Communication is direct wherever possible limiting the use of cascading as a channel

**OUR MINDSET**

01. Celebration and good news stories are a big part of our success

02. Our change process is consultative, not telling

03. We own our lessons and learn from ongoing reflection

04. UQ values and missional intent are evident in the way that the change is implemented and embedded.
Our Change Methodology - ADKAR

**AWARE**
You are aware of what is coming. Given a heads up – a taster.
Initial communications, face to face engagement and emails.

**DESIRE**
Do you want this change? Do you understand the consequences of not adopting this change?
We will communicate the WHY. Showcases to get people excited about the change. Be part of co-design

**KNOW**
Get the knowledge to enable you to execute the change.
We will provide training videos, courses, online learning and train Power Users from your team.

**ABILITY**
Can you do it when you are back at work?
We will test your ability. We will track your learning modules. We will check you are able to log on and use the new processes.

**REPEAT**
We will embed the messages. Include new processes to re-enforce the message and repeat the instructions.
We will hold regular follow ups with the teams to ensure its working.

© PROSCI
The Change Network

Alison
Change Leaders

- The **Sponsor/s** are the key driver of internal messaging
- **Formal influencers** in the business
- **Directly influence** team process, practices and ways of working
- **Confident communicators** with a passion for preparing the organisation for the future
- **Manage the change** and impacts facing their staff

Change Champions/ Change Advocates

- **Are informal influencers**
- **Grasp new technologies** easily
- **Are natural connectors and coaches**
- **Create a crucial feedback loop** between the project team and the needs of staff as they navigate the changes

CX Steering Committee

- Provide **strategic oversight, governance, direction** and resourcing to the CX Program and the CRM and MA Project.

Working Groups

- **Senior leaders and subject matter experts** providing broader strategic focus and identification of whole organisation impacts, opportunities and barriers.
- **Co-design** of cross-UQ challenges needing to be solved for the new solution

Power Users

- Good at **technical use of systems and will upskill** themselves in the use of the solution and changes to business processes
- **Personable and approachable**
CHANGE LEADERS
What will you do?

01 SPONSOR
Sponsor the change within their business area. There is no doubt the change is lead by the Sponsor.

02 ROLE MODEL
Demonstrate the behaviours, mindset and culture that is required to implement the change effectively.

03 ENGAGE
Provide the motivation to change & get people involved. Create a sense of urgency, show commitment & passion about getting things done.

04 MAKE DECISIONS
Make decisions on resources such as people, budgets and equipment to enable the change.

05 BE ACCOUNTABLE
They walk the talk. They don’t let people get away with not changing. They understand to remove obstacles.

FS Change Leaders
- Alison Jenkins
- Colleen Stillman-Cheng
- Ping Khoo
MA Change Leader
- Loretta Porche
CHANGE CHAMPIONS
What will you do?

01
UNDERSTAND YOUR TEAM
And the impact the project will have. Help us understand and work with us to develop solutions that work for them.

02
COMMUNICATION
Two way communication - from project and from your team. Be positive about the benefits, and help with the WIIFM*.

03
EARLY ADOPTER
Be part of testing, showcases and training. Be curious. Use the new functionality & help others to do the same.

04
SUPPORT YOUR TEAM
Provide help and support to your team and to on-board new users.

05
PROJECT LIAISON
Attend CN meetings. Pass on feedback, incidents and keep project team updated.

*What's in it for me?

FS Change Champions
- FS Int. Marketing & Recruitment: Kate Hughes, Adriana Velez, Sylvia Streichhan
- FS Aust. Recruitment: Emma O’Mahony

FS Int. Admissions
- Chase Hardy, Mia Zhang

MA Change Champion
- Charlotte White
How we will work together

What we will cover

- Program progress update
- Two-way feedback on how the CRM and MA program is going and how it's being received
- Understanding the change framework for the program, and planning how to approach implementation
- Identifying resistance and strategies to manage
- Answer questions and myth-busting
- Build confidence in managing change

Engagement

- Meet monthly
- Email updates on anything new between meetings
- Establish a group Zoom channel for questions and immediate feedback
- One on one catch-ups to help manage issues
- Meet with those involved in releases more regularly to understand how the team is going

Expectations

How I will contribute
WILLINGNESS TO CHANGE

Will your end-users help or hinder your change?
Recognise any of these characters in your project?

**INNOVATOR**
Like an eager beaver, the innovator excitedly embraces anything new. Wants to get involved. Sees the positives. Is your advocate. These are your change champions.

**EARLY ADOPTER**
Enthusiastic pups. Happy to come when on-board. Will respond positively and are glad to be involved. Supporters of the change. Their tails are wagging for your change.

**EARLY MAJORITY**
Will follow the crowd. Will follow the crowd that shouts the loudest, whether positive or negative. Needs more communication and attention.

**LATE MAJORITY**
Your change is probably an inconvenience. They’ll adopt and change when they’re good and ready. They’ll want the change delivered on their terms. And will need more care and attention.

**LAGGARD**
The stubborn old mules. Prefers to stay put. You’ll need to push them uphill. Will only change when they are forced to.
What does change adoption and resistance in your team look like?

What can we do about it?
CMR and MA Change and Communication – Feb - April

- **February**
  - Phase 1 Communication and Engagement Plan SteerCo
  - Procurement finalisation, scope announcement *
  - CX Working Groups
  - Change Network*
  - Change readiness assessments

- **March**

- **April**

*subject to CMG budget approval
Next Steps

We will….

- Book in regular monthly Change Network meetings
- A change readiness survey will be shared with this group
- Include you in regular CRM and MA communications
Thank you!

Alison van der Wiel
Change Manager
CRM and MA Program