CXWG Briefing Note – Enquiry Management Framework

8 December 2020

Executive summary

This body of work was initiated to introduce a more consistent One UQ approach to manage inbound enquiries.

According to the customer research conducted by the CX Program in 2019 and 2020, students are frequently not getting a response to their enquiry in a timely or accurate manner, causing confusion and stress. Their experiences include:

- Difficulty in identifying the right person to contact
- Students are 'bounced around' between teams, re-telling their story over and over
- Students receive different or incorrect information from UQ staff

Further investigations reveal the causes of the situation, including:

- Lack of centralised process when handling enquiries
- Lack of central source of truth
- No visibility on enquiries across all teams and channels

This body of work proposes to improve the customer experience by creating a consistent and effective framework to improve the enquiry management processes at UQ, enabled by an integrated CRM and MA solution. To align with the delivery priorities of the CRM and MA program, it is recommended to start the foundation of the framework from the prospective students' customer cohort, so the new processes can be utilised by the new Sales CRM platform.

Objectives

They key objective of this framework is to provide a One UQ approach to manage inbound enquiries to enable an outstanding customer experience. It will provide guidance to:

- Set up and maintain a UQ-wide approach to manage enquiries across different channels
- Improve collaboration of different areas when managing enquiries
- Capture customer data and enquiries in a useful and consistent way
- Consolidate existing knowledge and implement effective knowledge management
- Set up required workflows and interfaces within the UQ systems

Benefits to the University

- **Service delivery**: A responsive enquiry process will increase the quality of service delivery, leading to better customer acquisition and retention.
- **Staff efficiency**: Staff will spend less time on triaging enquiries if the enquiries could be redirected to the right team the first time.
- **Decision support**: Enable UQ to understand the customer enquiries and behaviour in a unified way, allowing the data to be analysed to make data-driven decisions.
- **Reputation**: Increased sense of professionalism and a One UQ approach when customers get consistent answers and high quality of services from UQ.

Scope

This body of work aims to provide a scalable framework to manage enquiries across UQ. The initial scope of the framework will cover the enquiries from customers who are:

- Prospective students who are interested in studying an undergraduate, postgraduate coursework, exchange or study aboard program at UQ, until their enrolment passed census date
- Influencers of prospective students, e.g. parents, teachers
- International UQ agents who are supporting prospective students
- Partner who are involved with prospective students, e.g. sponsors, partner institution

UQ stakeholders who do not support enquiries from prospective students will also be invited to participate in the framework development process to validate the framework's scalability to ensure it could support other customer cohorts, such as HDR students and alumni.

Key Deliverables

- High-level end to end enquiry process (service blueprint) - related to customers identified under scope
- Detailed process maps for prospective student enquiries Detailed process maps for knowledge management RACI and business rules of enquiry management
- Process and governance to capture and use enquiry data
- Process and governance of the enquiry management framework
- Strategy and matrix for evaluation and success measurement
- Transition plan
- Benefits analysis
- Glossary

Project team members (sub-working group members)

Project team members are SMEs who will be the core members driving the planning, design and execution of the framework. They will participate in all key workshops and activities, including reviews of draft deliverables.

Project team members are required to allocate 4-6 hours a week to participate project-related activities.

Advisors

Advisors are SMEs from specific functional or business areas which will be impacted by the framework. They will be invited to the high-level blueprint and design workshops and reviews of draft deliverables. Different SME will participate in the delivery of specific deliverables as listed under 'Role and responsibilities'.

Advisors are required to allocate 2-4 hours a week to participate project-related activities.

Other Stakeholders

Stakeholders are individuals or teams who will be impacted by the outcome of the project. They should be aware of the development of the framework and given opportunities to provide feedback along the journey.

Stakeholders are required to allocate 2-4 hours a week to participate project-related activities.

Membership

The membership of the Enquiries Management sub-Working Group can be found at the CRM and MA Program/Library/Working Groups webpage here.

Timescale

The timing for delivery of the ACED Management Framework will be determined according to the number of planning sessions required to accommodate the number of nominees received.

Tasks, activities and deliverables	
Project plan	- Kick-off meeting - Project plan
Business analysis	- Plan for evaluation and success measurement - Baseline current performance - Plan expected performance
Governance	- Governance - Framework approval process - Process to update or change
Ideation	- High-level future state ideation workshops - Delivery of high-level end to end enquiry process (service blueprint)
Scenario development	- Scenario - Identify scenarios of enquiries - Identify critical scenarios - Identify ideal workflows and data of each scenarios - Identify business rules of each scenarios - Business rules testing with exception scenarios
Agree standards	- Standards - Define enquiry types and owner of each enquiry types - RACI workshops (owners and delegates) - minimum data of enquiry - common data fields and definitions - Finalise RACI, business rules and definitions
Process maps	- Detailed process maps, including: - Handover - Escalation - Systems
Knowledge management	- Identify existing knowledge documentation for enquiries - Process to maintain knowledge
Transition Plan	- Impact analysis - Transition plan - Change communication

Version Control

Version	Date	Reviewed by	Endorsed by
0.1 Initial draft	29/10/2020	Umer Syed	Umer Syed
1.0 CXWG review	2/11/20 20	Alison van der Wiel	Umer Syed
1.1 Incorporate feedback	8/12/2020	Alison van der Wiel Natalia Khamenskaia	Jeremy Medina and CXWG