CRM and MA Program

Version 1.0

March 2021
Purpose and Contents

The CRM and MA Program is part of the Customer Experience (CX) Program and aims to implement a sales Customer Relationship Management (CRM) and Marketing Automation (MA) platform across the University of Queensland (UQ).

The multi-year program will bring people, processes and technology together to improve the way we work and engage with our customers.

The purpose of this document is to share the vision for CRM and MA, to give an overview of the program and to raise awareness and alignment across UQ.

The 7 key customer groups of the CX Program are:
1. Prospective Students
2. Current Students
3. Alumni
4. Donors
5. Partners (Research and corporate)
6. Community
7. Staff (professional, marketing and customer facing)

This presentation covers:
1. What is CRM and MA in our context?
2. Overview of the CRM and MA Program
3. How will the CRM and MA program help?
4. Customer data at the university today
5. Bring customer data together
6. What are the values for customers?
7. What are the values for staff?
8. Create changes beyond technology
9. How you can help
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11. Program highlights and 12-months outlook
12. CRM and MA Program Governance
13. CRM and MA frequently asked questions
What is CRM and MA in our context?

**Our goal** is simple -
to improve experiences and relationships through streamlined processes and access to one view of customer.

CRM stands for **Customer Relationship Management**. A CRM platform allows the University to manage all its relationships and interactions with customers and potential customers.

Marketing Automation (MA) is a marketing platform that UQ will use to plan, coordinate, manage and measure all of our online and offline marketing campaigns to offer right information to right people at the right time to drive decision-making.

Why?
- Uplift in experiences and relationships
- One-stop shop for customer data visibility
- Automated and coordinated processes
- Optimised customer interactions

What?
- Secure
- Integrated with other systems
- Simple and accessible

How?

**For whom?**

CRM and MA are complementary. In fact, a seamless CRM and MA integration will help UQ to:
- Generate new lead opportunities
- Tailor the engagement with existing customers
- Score and identify high quality leads
- Nurture leads throughout the customer journey
- Cross pollinate opportunities across the university
- Make data-driven decisions
- Streamline business processes and automate workflows
- Optimise sales and marketing efficiency

Current Students
- Staff

Customer-facing staff

Prospective Students*

Marketing staff

Professional staff

Donors

Alumni

Current Students

Community

Partners

*Note – ‘prospective’ students is the term for a customer group or segment while ‘Future Students’ refers to an organisational unit within UQ. 
# Current students as a customer segment are currently out of scope for the CRM and MA Program
Overview of the CRM and MA Program

The CRM and MA Program is part of the CX Program, which is led by Marketing and Communication.

**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?

## Current State

UQ does not have a full picture of the interactions with customer and enough information to understand the effectiveness of the marketing activities and engagement efforts.

As there is no centralised view of customer interactions and many email platforms in UQ, communications lack consistency with no control of sending frequency resulting in ineffective marketing and channel fatigue.

Different parts of UQ are talking to the same organisation about research partnerships, sponsorships, student placement opportunities, corporation donations. Now, there are silos across different functions and departments and there is no way to know the overall relationship between the organisation and UQ.

## Future State

Enable full line of sight across the customer experience, including the history of every event, application, course, enquiry, appointment, communication, request, contact preference, grant and donation. It will provide access to the 360-degree customer view that allows the business to make more data-driven strategic decisions and improve the effectiveness when engaging the customers.

The digital **Marketing Automation (MA) platform** will enable more targeted and coordinated approach to outbound communication. It will ensure our customers only receive the relevant communication and improve quality of engagement.

The new CRM will help build more engaged and strategic partnerships and improve our partner experience by providing a single view of customer and organisation with an overview of the existing relationships. Staff at UQ can understand who is talking to whom, and who is the custodian of the partnership. It will also help streamlining the contract negotiation processes and creates opportunities.
How will the CRM and MA Program help?

Future

- UQ already knows who I am when I ask a question
- I knew exactly where to go when I had a question and the first person I talked to was able to help me
- 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

- Any time I have a question, I get bounced around and I get different answers depending on who I talk to
- I have to tell my story many times
- I get so many emails; I don’t know what is important and much of it is not relevant to me
- I have no way to know what advice the student already received

Students and Partners

- I wonder who can help with this issue…

Staff

- I wonder if they will even see my emails and if anyone else already communicated about it…
- I don’t know if the issue will be resolved or when
- Who is most likely to convert? Should I focus my effort on this prospective student or on someone else?
- 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
- I can see full engagement and program history and can provide relevant advice
- It is easy to triage an enquiry and do a soft transfer to the team that is best positioned to help
- I can easily provide guidance on when the issue will be resolved

CRICOS code 00025B

CRM and MA Overview | March 2021
What value does it deliver to customers?

CRM and MA Program enables better experiences throughout the customer journey.

<table>
<thead>
<tr>
<th>Prospective Students</th>
<th>Current Students</th>
<th>Alumni</th>
<th>Partners</th>
<th>Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevant, timely, and personalised communications</td>
<td>Accessible, effective and on-demand in-person and online support</td>
<td>Increased engagement and awareness of the services provided by UQ</td>
<td>Less time and steps required to get an answer</td>
<td>Only need to tell their story once – UQ knows who they are during any further interactions</td>
</tr>
<tr>
<td>Smooth and transparent application process</td>
<td>Pro-active student support enabled by predictive analytics</td>
<td>Increased engagement in Alumni community and global networking</td>
<td>Stronger and deeper partnership through coordinated engagements</td>
<td>Promotion of short courses and activities</td>
</tr>
<tr>
<td>Increased engagement and networking</td>
<td>More employability-related activities with UQ partners</td>
<td>Easy donation process with transparent outcomes</td>
<td>Improved confidence in UQ and more research funding due to more transparency in research</td>
<td>Promotion of community events</td>
</tr>
</tbody>
</table>
## What value does it deliver to staff?

### Customer-facing staff

- **Increased effectiveness of efforts**
  - Easier to manage and collaborate on tasks to deliver timely support to the customers.
  - Tasks, events, reminders can be set on accounts and contacts.

- **Uplift in stakeholder engagement**
  - "Know" the customer and their entire enquiry and engagement history. Be more prepared to provide accurate and consistent advice.

- **More efficient operations**
  - Less time spent manually recording interactions and engagement.

### Marketing staff

- **Uplift in stakeholder engagement**
  - Understand customer journey and customer behaviour. Enable sophisticated personalisation based on the information UQ already know about the customer.

- **Increased effectiveness of efforts**
  - Proactively engage with stakeholders at the appropriate times to optimise conversion and minimise ‘noise’ from UQ.
  - Have easy access to reports and return on investment measurements of the marketing activities.

### Professional staff

- **Increased effectiveness of efforts**
  - Identify if the individual has multiple roles at UQ, including current student, staff, alumni, partner and donor. Understand who else from UQ is in touch with this individual.

- **More efficient operations**
  - Easier to identify high quality leads and opportunities based on customer interactions with UQ.

- **Professional staff**
  - Enable data-driven and timely strategic initiatives based on the actionable data insights.
  - Reports and dashboards are available at the touch of a button for staff to review their progress and identify bottlenecks earlier.

- **Professional staff**
  - Reduce the amount of manual processing and human errors by automation and sharing of data between systems and parties.
Customer data at the university today

Currently, customer data is scattered across many disparate platforms. Different business units may have different information in different systems of the same customer or organisation.
Bring customer data from different sources together

Elizabeth is a UQ customer in many ways. Different business views provide highlights from different perspectives.**

We are building a consolidated view of customer data.

- Contacts and customer data are shared across UQ as per an agreed data governance model*.
- Customer views in the CRM are designed specifically for different business units**, staff can see relevant customer data within a single system in a timely manner.
- Data governance will control data visibility and ensure data security.
- A privacy model to ensure individual engagement and sensitive conversations are kept private.

* The data available in the 360° customer view will be informed by the CX data strategy.
** The number and the details of the business views will be co-designed with the business stakeholders.
Create change beyond technology

The successful implementation of a new CRM and MA solution requires change that goes beyond technology. It is about how we operate as ‘One UQ’ to work together to ensure a seamless customer experience. These **change principles** are underpinned by UQ’s values.

1. **Putting customers first**
   By enabling team structures and processes that make it easier for staff to make customers the priority.

2. **Sharing data and insights to improve customer experience**
   Sharing customer data allows us to make connections where we couldn’t see them before. Under an agreed-upon governance framework that protects sensitive information.

3. **Simplify and streamline UQ processes**
   By enabling processes that make your job easier to do so we can better serve our customers.

4. **Being open to learning new skills and ways of working**
   We will automate low value activities to enable our staff to focus on adding value for our constituents.

5. **Adopt the ‘One UQ’ culture**
   We will collaborate and coordinate our efforts to provide consistent experience to our customers.

6. **Commercial sustainability**
   We will streamline operations and improve efficiencies and look for ways to diversify our income base.

**Pursuit of excellence**

**Creativity and independent thinking**

**Honesty and accountability**

**Mutual respect and diversity**

**Supporting our people**
How can you help?

To create the change beyond the technology, we will all need to do things a little differently which may mean:

1. I will … put the customer first in all that I say and do
2. I will … take responsibility for solving my customer’s problem or escalating to someone who can
3. I will … share data and insights with others to improve my customer’s experience
4. I will … record all the customer data, so they only need to share their story once
5. I will … look for ways to simplify and improve processes
6. I will … work with colleagues from other areas to improve customer experience
7. I will … learn and adopt new ways of working
To create a sales CRM and MA solution, our design principles are:

1. We put customers at the centre.
2. We value progress over perfection.
3. We make complex simple.
4. We keep our eye on the end goal.
5. We strive for data-driven decisions.
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.
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.
CRM and MA Program Governance
Who is involved in the CRM and MA Program?

CX Program Steering Committee

- Rongyu Li, DVCEE
- Kelly Robinson, CMO
- Rob Moffatt, CIO
- Joanne Wright, DVCA
- Katie Farley, School Manager, Business School
- Marni Jacoby, Faculty Executive Manager, Faculty of Medicine
- Neville Plint, Institutes Director, Sustainable Minerals Institute
- Jennifer Karlson, Advancement

CRM and MA Program Leadership

- Jeremy Medina, Head of Marketing, Digital and Customer Experience
- Umer Syed, CRM and MA Program Manager
- vacant, Marketing Automation and Engagement Manager
- Alison van der Wiel, Change Manager

As at 15/10/2020
## CX Program Working Group membership

### Why we need the CX Program Working Group (CXWG)

This group provides subject matter expertise and leadership from the business to solve for issues facing the CX Program. Taking a ‘One UQ’ approach, the Working Group will provide solutions to enable the CRM/MA platform to commence building based on transformed business processes.

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### Office of the DVCCE
- **Jeremy Medina**
  - Head of Marketing, CX and Digital
  - Chair
- **Alison Jenkins**
  - Director

### Office of the PVCA
- **Jenny Pattison**
  - Director, Advancement Services & Operations
  - ADVANCEMENT SERVICES
- **Kevin Owen**
  - Business Solutions and Services Manager, Advancement Services & Operations
  - ADVANCEMENT SERVICES

### Office of the Chief Operating Officer
- **Kerrie Coogan**
  - Senior Manager, Enterprise Application
  - ITS
- **Vern Bawden**
  - Service Owner (Data and Identity Services)
  - ITS

### Office of the Provost
- **Kate Swanson**
  - Senior Manager, HDR Development

### Office of the DVCA
- **Greg Winslett**
  - Deputy Director (Digital Learning)
  - ITALI
- **Andrea Strachan**
  - Director
  - STUDENT SERVICES
- **Dino Wilcox**
  - Director
  - Student Employability
  - STUDENT AFFAIRS

### Office of the DVCRA
- **Sasenka Abeysooriya**
  - Sr Strategic Adviser (Data Strategy & Governance)
  - ITS

### Office of the DVCRA
- **David Stockdale**
  - Deputy Director
  - ITS

### Office of the Provost
- **Julie Baglot**
  - Engagement Manager

### Office of the Provost
- **Julie Waldron**
  - Senior Manager (Academic Administration)

### Faculties
- **Chantal Henderson**
  - Marketing Manager
  - BUSINESS SCHOOL
- **Helen Woodman**
  - RMBT Program Manager
  - RESEARCH

### Libraries
- **Kathleen Smeaton**
  - Associate Director (Data, Digital, Learning and Publishing)
  - LIBRARY

### Office of the Provost
- **Hayden Gill**
  - Associate Director
  - Business Intelligence

### Office of the Provost
- **Stephanie Jillett**
  - Deputy Director (Operations)
  - AIBN

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As agreed by CX SteerCo, 15/10/2020

Updated 16 March 2021

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CRM and MA Overview | March 2021
Frequently Asked Questions

Q How long will it take to implement the CRM and MA solution?
A Planning is still underway; however it is expected to take approximately 2 years. It could take less (or more) time, depending on size and complexity of agreed Phase 1 deliverable. Over an additional two years we will be enhancing the system to include all desired functionality.

The new CRM and MA will be an enterprise solution that will need to be iterated and improved ongoing to ensure UQ remains a world class university.

Q What about the Oracle CRM?
A Oracle CRM (or OSC) is a service CRM. This platform has been operating at UQ since 2013 and holds and processes existing student data which will continue to operate.

The plan is to create a single view of customer that includes customer journey from being a Prospective Student, to a Current Student, to an Alumni etc. We can achieve that through multiple ways, e.g. integration, data migration, and the solution will be determined with our system integration (SI).

Q Which area will be the first to transition to the new CRM?
A In April 2020, the Steering Committee agreed we would roll the new system out by customer segments. The customer segments are Prospective Students, Current Students, Alumni, Donors, Research and Corporate.

It has been agreed that Prospective Students, with initial focus on international students will be first to transition to the new CRM and MA solution due to the need to prioritise recruitment to the University.

Q What will happen to the current Marketing Automation system I use now?
A For a period of time we will be using two different systems, i.e. the current Marketing Automation (MA) system (Eloqua) and new MA platform. The in-flight campaigns will be completed in existing MA. All new campaigns will be designed and executed in the new MA and once all the existing campaigns are concluded, that is when decommissioning and final migration will be considered. We will speak to you in detail about what is needed and how best to access the data you need.

Q How will I run marketing campaigns in the new MA platform?
A We are still working out how the marketing campaigns from different marketing departments will come together in the new MA platform. One of the goals of the CX program is to provide better coordination between different marketing campaigns in order to ‘reduce noise’ for our customer. We will be discussing a communication strategy and framework with key stakeholders to decide what is the best operating model to collaborate and run marketing campaigns in the new MA platform.

Q Who do I talk to get more information on the CRM/MA and how it will affect me and my team?
A Your business area key contact or leader in the first instance. Shortly, we will be setting up formalised Change Leaders and Change Advocates in business areas to ensure information is shared and these people can give feedback to the project team.
Thank you
CRM and MA Program

Umer Syed | Program Manager
Alison van der Wiel | Change Manager
Winky Lau | Senior Business Analyst
Mailes Banks | Senior Business Analyst
Natalia Khamenskaia | Service Design Specialist
Tiju Thomas | Integration Specialist
Shyni Joseph | Test Analyst