Change Collective
CRM and MA Program
Meeting #3

16 March 2021
Agenda

• Welcome
• Update on the CRM and MA Program
• Change resistance
• Lets talk

From the CX Program...

Umer Syed
Program Manager

Alison van der Wiel
Change Manager
Headlines - since last meeting

• We have appointed a key role – CRM and MA Product Owner – **Colleen Stillman-Cheng** (as part of her new role Manager, Strategic Initiatives). She represents the customer (you) in the project and helps us to determine the priorities.

• Change Readiness Survey released – **closes today**

• Good progress with contract negotiations with the Implementation Partner

• Future state co-design workshops being booked
CRM and MA solution update

Umer and Alison
What we have done:
- Final decision on supplier
- Steering Committee endorsement of final supplier
- Engaged legal representation (for contract drafting)

Next steps:
- Finalise and sign contract (in progress)
- Planning for Design Validation phase (in progress)
- On-boarding IP (in preparation)
- Commence Design Validation

After Design Validation we will:
- Make the final selection of the technology platform
- Communicate the implementation plan and timeframes
- Commence build of the system
CRM MA Program Phase 1 indicative timeline*

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

**Notes:**
- Timing TBC – subject to resourcing and finalisation of scope with the implementation partner.
- Release of functionality – timing TBC.

**Communications | Engagement**

- **P1 Awareness Sessions**
- **Establish Change Collective**

**CRM MA Program Phase 1**

- **Q1:** Workshops & interviews
- **Q2:** CRM MA Procurement
- **Q3:** Implementation Partner on-board
- **Q4:** Co-design solutions with business

**Scope:**
- Enquiry Management Framework
- Conversion Process and Lead Management Framework
- Opportunity Management Framework
- Data and Data Governance Framework
- Subscription Management Framework

**Implementation Partner on-board**

- **2020:**
  - Q4: Workshops & interviews

- **2021:**
  - Q1: CX Working Group – monthly meetings
  - Q2: Prep for co-design
  - Q3: Build and Deliver
  - Q4: Build and Deliver

**Communications | Engagement**

- **P1 Awareness Sessions**
- **Establish Change Collective**

**Release of functionality – timing TBC**

**Change Network #2 | March 2021**

**Awareness Session** for staff
- Can arrange later this month
- Maybe out of date after Design Validation
Future state co-design - how will the co-design workshops work?

Current processes
Pain Points

Use Stories

Future state co-design

Solution design

Go through the workshop pre-reading

Write down your ideas (optional)

Attend the future state co-design workshops (in person – may break down to 2-4 workshops depending on complexity)

The program team will translate the future state design into requirements

The program team will validate the feasibility of the future state with the implementation partner. If major changes are required, we will circle back to the relevant group.

Implementation

Outputs:

Understanding of the component we are going to co-design and the existing pain points

Ideas on the Miro board

Finalised future state process maps and refined user stories (agreed by the group)

Approved user stories and acceptance criteria (approved by product owner)

Updated user stories and acceptance criteria (if required)
### Future state to be co-designed – nominees agreed with team leaders

<table>
<thead>
<tr>
<th>Section</th>
<th>Future state</th>
<th>Estimated time from stakeholders</th>
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<tbody>
<tr>
<td>A</td>
<td>Create and update person/organisation</td>
<td>4-6 hours</td>
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<tr>
<td>B</td>
<td>Opportunity management</td>
<td>2-4 hours</td>
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<tr>
<td>C</td>
<td>Consent, subscription and preference management</td>
<td>2-4 hours</td>
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<td>D</td>
<td>Agent management</td>
<td>2-4 hours</td>
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<td>E</td>
<td>Communication suppression</td>
<td>2-4 hours</td>
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<td>F</td>
<td>1-1 engagement</td>
<td>4-6 hours</td>
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<td>G</td>
<td>Manage tasks</td>
<td>2-4 hours</td>
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<td>H</td>
<td>Lead and opportunity scoring</td>
<td>2-4 hours</td>
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<td>I</td>
<td>Application (will not change the existing process, but will design how the CRM and MA solution will interact with the process)</td>
<td>6-10 hours</td>
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<td>J</td>
<td>Deferral and application change requests (same as above)</td>
<td>2-4 hours</td>
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<tr>
<td>K</td>
<td>Manage enquiries</td>
<td>(part of working group commitment)</td>
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<td>L</td>
<td>Campaign</td>
<td>6-10 hours</td>
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<td>M</td>
<td>Knowledge base</td>
<td>(part of working group commitment)</td>
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<td>N</td>
<td>Partner management</td>
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<td>Webinar</td>
<td>2-4 hours</td>
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<td>P</td>
<td>Appointments</td>
<td>2-4 hours</td>
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<td>Q</td>
<td>Events</td>
<td>6-10 hours</td>
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<tr>
<td>R</td>
<td>Web tracking</td>
<td>2-4 hours</td>
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<td>S</td>
<td>Recruitment activities</td>
<td>4-6 hours</td>
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<tr>
<td>T</td>
<td>YAP</td>
<td>6-10 hours (after May)</td>
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Enquiry Management - what is the problem?

Background
UQ does not have a consistent enquiry management approach between teams and across the business.

The Enquiry Management Framework sub-working group (EM WG) was set up to provide a OneUQ approach to manage inbound enquiries.

Challenge
During our conversation with different stakeholders, we came across different future vision of how enquiries could be managed at UQ.

Before deep diving into the detailed approach and process with the EM WG, we want to see if the CX WG members have the same vision on the enquiry management approach.

Key pain points from staff who are impacted by the lack of a OneUQ enquiry management model:

- Lack of **centralised process** when handling enquiries
- Lack of **central source of truth**
- **Duplication of effort** due to multiple enquiry channels
- Lack of organisation level SLAs and **difficulty prioritising enquiries**
Change
Alison
WILLINGNESS TO CHANGE
Will your end-users help or hinder your change?
Recognise any of these characters in your project?

INNOVATOR
EAGER BEAVER
Like an eager beaver the innovator excitedly embraces anything new. Wants to get involved. Sees the positives. Is your Change Leader and Change Advocates.

EARLY ADOPTER
GOOD DOGS
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
SHEEP
Will follow the crowd. Will follow the crowd that shouts the loudest, whether positive or negative. Needs more communication and attention.

LATE MAJORITY
ALOOF CAT
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
STUBBORN MULE
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?
Lets talk…

- Burning questions
- Myth busting
- Feedback
- Bouquets
Key Messages for your team

• We have appointed a key role – CRM and MA Product Owner – **Colleen Stillman-Cheng** (as part of her new role Manager, Strategic Initiatives). She represents the customer (you) in the project and helps us to determine the priorities.

• The CRM and MA Program is in final contract negotiations with our Implementation Partner. Once a contract has been agreed with the Implementation Partner, we will announce our partner.

• We are currently working with our Implementation Partner to plan out the design validation phase. Design Validation will be with the Implementation Partner, phase 1 business SMEs and members of the Data and Data Governance working group (to validate the integrations we need to get a single view of customer). Following Design Validation, we will have agreed scope, implementation plan and resourcing.

• Working Groups to co-design the solution are now booked in, are being run over April and May. The people and their time has been negotiated with Managers.

• We are co-designing a ‘One UQ’ Enquiries Management model with CX Working Group, plus others across the UQ business to get alignment on what enquiries management could look like in the future.
Next Steps

We will….

• Upload this deck to the website

Could you please…

• Share they key messages of the project with your team members
• Gather feedback from you people to share at next meeting
• Think about what you would like from these sessions

Next Meeting

• Change Readiness Survey results and what we can do to address the feedback
• Introduce you to Karyn – the Change Specialist joining our team
Thank you!

Alison van der Wiel
Change Manager
CRM and MA Program
Our Change Framework

Alison
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.

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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 Network

CX Steering Committee

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

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

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’Mehony

FS Int. Admissions
- Chase Hardy
- Mia Zhang

MA Change Champion
- Charlotte White

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