Change Collective
UQ Engage Project (CRM and MA)
Meeting #6

20 August 2021
Agenda

• Welcome
• Implementation Planning
• Salesforce
• Lets talk

From the UQ Engage Project…

Casey
Project Manager

Alison van der Wiel
Change Manager

Karyn Burger
Change Specialist
Headlines - since last meeting

- Implementation Partner contract signed - Simplus
- Technology contract signed - Salesforce
- Design validation almost complete
  - Project Resourcing
  - Technical Architecture knowledge
  - Integration complexities
Introducing Simplus and Salesforce
Our journey so far...

Oracle CRM
Oracle service
CRM ‘Right Now’ for current students and staff.

Requirements gathering
For the full implementation of the CRM and MA solution. 800+ requirements were specified.

Refocus the program
Refocused on solving customer pain points, deciding on a small MVP cohort and re-defining an MVP scope for Phase 1.

CRM & MA Phase 1
Prospective International Students confirmed as Phase 1.

Procurement process commences

CX Business Case
As part of the establishment of the CX Program, a sales CRM and MA solution proposed and approved by Executive.

ITO for technology and IP
ITO to provide technology and IP services to implement the solution over a 3 year period. After considering the offers, and with Covid-19 emerging, this was put on hold then discontinued in its current form.

Implementation Partner ITO
Procured Simplus as our IP for Phase 1 implementation.

Commence UQ Engage Design

Salesforce Contract for Phase 1 agreed

Commence Build

Phase 1 complete

UQ Engage Update | August 2021
Completed In Progress Not started

2018 2019 2020 2021 2022
We are confident our implementation partner, Simplus, has proven expertise to implement our preferred platform, the reputation to deliver in large complex organisations and they have come within our financial expectations.

**Relevant Experience – Delivering large scale integrated CRM and Marketing Automation engagements across the Australian Enterprise**

- Significant experience leading a range of enterprise Salesforce transformations across a range of industries including higher education, government, telecommunications, retail, hospitality and entertainment. Working with organisations such as University of Technology Sydney, SA Health, Laureate International Universities and one of Australia’s largest telecommunications groups.

**Higher Ed Domain Expertise with significant experience delivering similar CX programs with other Universities in Australia**

- Simplus have been working with the University of Technology Sydney since 2017 as their strategic Salesforce partner.

**Our breadth of experience across the Salesforce platform**

- UQ have a wide breadth of requirements across CRM, Communities, Marketing Automation, Data Migration, Event Management and integration.

**Partnership and Cultural Fit**

- Simplus’ core values are critical thinking, stewardship and the Underdog spirit.
- The overall benefit to UQ is a strong relationship with a stable partner, a team of specialists but also good people who will become familiar faces to you very quickly and have proven shared values and a one team approach as well as the expertise and passion to ensure this overall Salesforce program of work is a success.
Salesforce – *UQ Engage*

- World’s #1 CRM
  - Integrated platform, AI, app development, best in class apps
- Single Source of Truth
  - Connect sales, service, marketing, commerce, and IT, personalise experiences
- Fast Time to Value
  - Ease of design and implementation at speed with high ROI
- Scalable and Flexible
  - Solutions for any size company or industry
- Trailblazer Success and Community
  - 96% of customers say they met or exceeded ROI expectations
- CRM and MA
Implementation Planning
Scope of Phase 1

In Phase 1 we will roll out to:

- Marketing Automation
- International Marketing & Communication
- Contact Centre
- Recruitment (Australia)
- Recruitment (International)
- Outreach/YAP
- International Admissions*

Future Students Team

In scope for Phase 1:

- Foundations
  - Solution architecture and fundamental capabilities in the platform.
  - Campaign and bulk communication
  - Prospect management
  - Single stakeholder view
  - Event Management
  - Enquiry management
  - Application view
  - Appointments
  - Partner Management
  - Reporting

- Enquiry management
  - Enable users to track pipeline activities, tasks and targets, all the way from lead through to conversion.
  - Enable users to schedule, promote, manage and report on events.
  - Enable staff to better service stakeholder enquiries with access to a staff knowledge base and integrated workflows.
  - Integrate with Si-Net to be able to view a student’s application and track progress to aid conversion.
  - Enable stakeholders and staff to easily schedule, change and manage appointments.
  - Enable us to capture interactions with student recruitment partners in one place.
  - Information will be aggregated and presented in intuitive, meaningful ways that can be customised based on team and individual priorities.

- Integrated Systems**
  - Si-net
  - QTAC
  - OLA
  - Oracle CRM
  - QSES CRM
  - AscentOne
  - Websites
  - Zoom
  - Mailhouse
  - SMS
  - Google Search Ads
  - Google Analytics 360
  - Referral websites
  - Telephony
  - Facebook
  - Instagram
  - LinkedIn
  - WeChat
  - Data validator
  - SSO
  - Outlook
  - Event management

* The details and number of users to be rolled out are to be confirmed.
** The full list of integration is to be finalised with the partner.
*** Some integrations will be unidirectional.
Anatomy of a Release

System build is planned in 3 week blocks called 'sprints'. We have 1 or 2 sprints per release.

Each of our releases are numbered sequentially. They apply to a number of people within teams. Not everyone at the same time.

Training consists of 2 weeks:
Week 1 we finalise the training collateral in the stable, tested environment.
Week 2 we train staff.

Go Live is the day the new functionality is released into Production (Live) environment.

Hypercare is where we have a dedicated team to address any systems or training issues, as they arise. This is usually for 1 week. After that time, Power Users will usually take over support.

At the end of the build sprints, we have testing. This includes User Acceptance Testing (UAT) where we have people from the business running through scenarios to check the functionality behaves as its planned to behave.

If some functionality fails UAT, it will not be released. It will be put in backlog to be worked on in another build sprint to fix it.
Testing and Training
Testing (UAT) Summary

Headline takeaways
• All teams very time poor
• All teams are impacted by black-out periods in one or both releases
• M&C Review and Recruitment Review is happening at the same as these releases so considerable change for all team and change fatigu

Key takeaways for UAT
• All would like to know what the time commitment for UAT is in advance for planning purposes
• Will attend showcases, please book in well in advance

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<thead>
<tr>
<th>Business Area</th>
<th>Representatives R1</th>
<th>Representatives R2</th>
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<tbody>
<tr>
<td>Marketing Automation Team</td>
<td>UAT tester – Mohini Mutya</td>
<td>UAT tester – Rosanna Ryan</td>
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<td>UAT sign-off – Xiaodan Lin</td>
<td>UAT sign-off – Xiaodan Lin</td>
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<tr>
<td>International Marketing Team</td>
<td>UAT tester – Adriana Velez or Lara Murray (TBC)</td>
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<td>UAT sign-off – Loretta Porche</td>
<td>UAT sign-off – Loretta Porche</td>
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<tr>
<td>Future Students Contact Centre</td>
<td>UAT tester – Shane Jackson</td>
<td>UAT tester – Shane Jackson</td>
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<td></td>
<td>UAT sign-off – New manager and Shirley Chung</td>
<td>UAT sign-off – New manager</td>
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Key takeaways for Training
• Splitting teams in 2 to allow one group to be trained while the other maintains BAU will be necessary
• All thought a R2 refresher in late January was a good idea.
• All would appreciate notice in advance of training so they can plan accordingly
Learning and Engagement Channels

To uplift capability we will use a hands on approach to training as well as leveraging communication channels to reinforce learning. Using the ADKAR framework, learning focuses around Knowledge uplift, Ability to do their job using new processes and technology and Repeating learning, messages and good news stories.

**Knowledge**
- Systems Showcases (viewing)
- CRM/MA Sandbox (testing)
- Experience Hub (playing)
- Instructor led training (teaching)

**Ability**
- eLearning e.g. UQ Learn, Trailhead… (learning)
- Quick Reference Guides (learning)
- Power Users Workplace supported learning (reinforcing)
- Leader Coaching Embedding the right behaviours in team (culture)

**Repeat**
- Social Learning

**ADKAR**

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Phase 1 Team Communication and Engagement Plan | October 2020

CRICOS code 00025B
Training UAT

**UAT PRIMER**
Document to be provided to UAT test team to help guide them through the testing process - will supplement that actual UAT training delivery, and the on-going immersion of the test group through the Release build phase.

**UAT TEST TEAM TRAINING**
Facilitation of UAT training session to prepare end users for effective UAT. Assumes the test team have had previous basic introduction to Salesforce (e.g. Trailhead), and been involved during Build stage (e.g. Showcases).

**TRAINING ENVIRONMENT PREPARATION**
Activities to set up and prepare Salesforce training environment (Developer Pro sandbox) for planned End User Training schedule associated with each release.
Training Execution

**TRAILMIXES**
Development of Trailhead mixes tailored to each persona/audience group to initiate familiarisation with the new system to help future learnings.

**INSTRUCTOR LED TRAINING**
Facilitation of End User Training Sessions as per the Training and Learning Plans.
Includes: Instructor led training
Training modules for each use case, associated business change
Roadmap to show where this training sits in the solution rollout

**EXPERIENCE HUB**
Facilitation of Experience Hub Sessions per release - time-boxed, facilitated sessions to enable hands-on experience for end users prior to live usage.
Exact details to be confirmed in Training Plan,

**eLEARNING**
Development of bespoke interactive online courses leveraging tools such as Camtasia. Course will be designed and developed as per curriculum plan
Development of bite-sized videos (that are embed into the above online course as well as used as standalone within UQ’s LMS as appropriate)
Training Material

- **USER PLAYBOOKS**
  Modularized document that provides guidance on specific solution components that end users can refer to during live usage post their training.

- **QUICK REFERENCE GUIDES (QRGs)**
  Development and update of module based Quick Reference guides as per the agreed curriculum plan.

- **FAQs**
  During UAT and training delivery, will be capture all questions that arise to ensure quick access to resolve any specific situation when the system is live.

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Let's talk…

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

- There have been some major milestones in the project and we are well on the way
  - Implementation Partner contract signed - Simplus
  - Technology contract signed – Salesforce (known as UQ Engage)
  - Design validation almost complete
- We have started to plan out the four releases of for Phase 1
  - Release 1– CX Marketing Automation and FS International Marketing
  - Release 2– Additional team FS Contact Centre, with possibility of CX Customer Analytics
  - Release 3 – Additional teams FS Recruitment (International) and International Admissions (TBC). Potential of including International Recruitment teams in Faculties under consideration
  - Release 4 -- Additional teams FS Recruitment (Australia) and FS Outreach/YAP
Next Steps

We will....

• Upload this deck to the website

Could you please...

• Share the key messages of the project with your team members

Next Meeting
Thank you!

Alison van der Wiel
Change Manager

Karyn Burger
Change Specialist
CRM and MA Program