Change Collective
UQ Engage Project (CRM and MA)
Meeting #7

22 September 2021
Agenda

• Welcome
• Implementation
  • Planning
  • UAT
• Lets talk

From the UQ Engage Project...

Alison van der Wiel
Change Manager
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*

In scope for Phase 1:

- Foundations: Solution architecture and fundamental capabilities in the platform.
- Campaign and bulk communication: Enable targeted and personalised communication across multiple channels.
- Prospect management: Enable users to track pipeline activities, tasks and targets, all the way from lead through to conversion.
- Single stakeholder view: Integrate with key UQ systems and provide a consolidated view of stakeholder information.
- Event Management: Enable users to schedule, promote, manage and report on events.
- Enquiry management: Enable staff to better service stakeholder enquiries with access to a staff knowledge base and integrated workflows.
- Application view: Integrate with Si-Net to be able to view a student’s application and track progress to aid conversion.
- Appointments: Enable stakeholders and staff to easily schedule, change and manage appointments.
- Partner Management: Enable us to capture interactions with student recruitment partners in one place.
- Reporting: Information will be aggregated and presented in intuitive, meaningful ways that can be customised based on team and individual priorities.

Integrated Systems**

- Si-net
- 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.

To be determined

Faculty (International) Recruiters

*New*- under discussion with FEMs and faculty members – to be decided in October

This is 50-60% of capability. Once built, we will be able to scale up quickly.
Phase 1 UQ Engage Indicative Delivery Timeline* - UPDATED DRAFT (dates to be confirmed)

We are here

Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May

Eloqua ends Dec 2021
QSES ends Mar 2022

Release 1
- Go Live
- Build
- Test
- Train

Key Features:
- CRM and MA foundation
  - Data model and information stakeholders
  - Subscription management
  - CRM and MA integration
- Single customer view
- Campaign
  - Marketing automation capabilities
  - Multi-channel outbound communication
  - Commence IP warming
- Prospect and opportunity management
- Event engagement capability

Eloqua ends Dec 2021

Release 2
- Go Live
- Build
- Test
- Train

Key Features:
- Enquiry management
- Eloqua campaign migration
- Application view
- Reporting

Release 3
- Go Live
- Build
- Test
- Train

Key Features:
- Partner management
- Social enquiry management
- Appointments
- Pilot campaigns
- YAP opportunity management
- High school management

Release 4
- Go Live
- Build
- Test
- Train

Key Features:
- FSCC
- FS International
- Marketing automation
- Multi-channel marketing
- Commence IP warming
- Data model and information stakeholders
- Subsciption management
- CRM and MA integration

Integration & data migration
- Si-net, OLA, Oracle, Eloqua
- AscentOne, Si-net, Unifi, Oracle, Eloqua
- Si-net, QSES (migration), Oracle, QTAC

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Feature build continues in future releases

CRICOS code 00025B

*Note: the final release plan is still under development and may change

If agreed, Faculty Int. Recruiters would be onboarded to UQ Engage in R3

2 additional teams are added in this release:
- FS Recruitment (International)
- International Admissions*

FS Recruitment (Australia)
FS Outreach/YAP

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Feature build continues in future releases
Release 1 – detailed view, dates indicative

We are here

Sprint 1  Sprint 2  **Sprint 3**  SIT  UAT  Prod

Go-live 15/11


**Rationale as to why we are taking this training approach:**

Due to the MA team needing to start building campaigns earlier, we have a ‘work around’ to bring forward training before go-live.

New or changed

* Dates of UAT to be confirmed
## What to expect from Release 1

<table>
<thead>
<tr>
<th>Current</th>
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<tbody>
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<td><strong>CRM and MA foundation</strong></td>
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<td>• Prospective international student data held externally with QSES</td>
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<tr>
<td>• Bounce-backs from QSES managed through Oracle CRM</td>
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<td>• No integration with Oracle CRM and Eloqua</td>
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<td><strong>Single customer view</strong></td>
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<td>• Lead capture forms built in Eloqua or QSES (enquiry)</td>
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<td>• Event registration campaigns are built in Eloqua.</td>
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<td>• Marketing Cloud will be used to send event promotion with Blackthorn taking over once a registration is captured.</td>
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### Current vs Future – R1

- **Current**
  - No integration with Oracle CRM and Eloqua
  - Prospective international student data held externally with QSES
- **Future – R1**
  - Salesforce and Marketing Cloud will be jointly used for engagement with prospective students
  - Contact record data structure will be in place in CRM to enable data to be loaded to MA for IP warming
  - Organisation records and hierarchy will be built
  - Environments will be set up (DevTest, Prod)

### Single customer view

- **Current**
  - We do not have a single view of customer
  - We access multiple systems to gather the information we need
- **Future – R1**
  - For R1, there will be no integrated data in the system, only data migrated for IP warming purposes.

### Campaign

- **Current**
  - All UQ campaigns built in Eloqua or through QSES
  - Lead capture forms built in Eloqua or QSES (enquiry)
- **Future – R1**
  - Marketing Cloud will be used for marketing automation of UQ campaigns
  - New Future Students lead capture form on program, study area and major pages
  - Ability to capture leads and convert to contacts (with opportunities)

### Prospect and opportunity management

- **Current**
  - No UQ wide approach to managing prospects and opportunities
  - Different language used across UQ
  - Multiple systems used to manage prospects
- **Future – R1**
  - Opportunity record will be created
  - Affiliations between contact, organisation and opportunity
  - Agreement as to key terms

### Event engagement capability

- **Current**
  - Event registration campaigns are built in Eloqua.
  - We have multiple event management systems that are not linked and do not centrally store event information.
- **Future – R1**
  - We will use Blackthorn Events within UQ Engage to schedule and manage event registrations and attendance.
  - Marketing Cloud will be used to send event promotion with Blackthorn taking over once a registration is captured.
Example of Training Plan for each release

**Sprints (building the system)**
- System
- UAT
- Refine Materials
- Training Sessions
- Business Showcase

### Training Plan

#### Develop Materials
- User list
- User roles
- Lesson plans
- Trail mixes/F2F orientation
- UAT training packs
- Session training packs
  - Playbooks, FAQs, QRGs, eLearning videos
  - Survey
- Review materials
- Coordinate & support UAT sessions

#### Refine Materials
- Finalise materials
- Publish materials
- Coordinate sessions
- Collect questions and feedback answers. Use to tailor training

#### Finalise eLearning
- Finalise videos
- Publish

#### Review
- Analyse survey
- Training review
- Topic review
- Maintenance plan

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**Teams in R1**

**Marketing Automation**
- Pre-work (UAT)
  - Trail mixes
  - F2F orientation
  - UAT sessions
  - UAT support
- UAT Training
- Pre-work all others
- End user sessions – ~6 hours
  - F2F training
  - Survey
- Training
- Hypercare
- Masterclasses
- Weekly 1 hour Q&A and best practice sessions with users

**FS International Marketing**
- Trainer co-located with teams to allow for adhoc training/Q&A throughout
Training collateral

- Customised Trailhead mixes
- Quick reference guides
- Scenario playbooks
- eLearning videos (post Go-live)
- FAQs
- Post training survey
Let's talk…

Burning questions

Myth busting

Feedback

Bouquets
Key Messages
Key Messages for your team

• UQ Engage has completed Sprint 1 and are in Sprint 2

• We held our first ‘technical showcase’ last week and we now seeing our system emerge. Thanks to all who have been involved in the co-design workshops as we are now seeing your hard work being incorporated into UQ Engage.

• Due to UQ resourcing, we have had to add in additional time to build the system in Release 1. This means Release 1 will start on 15 Nov (TBC). With the later go-live, the R1 teams will still be trained and be able to start building campaigns to allow us to migrate off Eloqua by the end of the year.

• Training has been planned for Marketing Cloud in Release 1. We will start with basic training and then do intermediate and advanced training as required by the MA and IM teams.
Thank you!

Alison van der Wiel
Change Manager

Karyn Burger
Change Specialist
CRM and MA Program
Release 1 – detailed view, dates indicative

**We are here**

- **30 Aug**
- **6 Sep**
- **13 Sep**
- **20 Sep**
- **27 Sep**
- **4 Oct**
- **11 Oct**
- **18 Oct**
- **25 Oct**
- **1 Nov**
- **8 Nov**
- **15 Nov**
- **22 Nov**
- **29 Nov**
- **6 Dec**

**Go-live 15/11**

**Sprint 1**
- **SIT**

**Sprint 2**
- **UAT**
- **Prod**
- **Build Materials**
- **Training**
- **Hypercare**

**Sprint 3**
- **Testing**
- **UAT**
- **Hypercare**
- **IP Warming**
- **Build campaigns**

**Rationale as to why we are taking this training approach:**

Due to the MA team needing to start building campaigns earlier, we have a ‘work around’ to bring forward training before go-live.

**MA Team**

- **Build Materials**
- **UAT**
- **Hypercare**
- **IP Warming**
- **Interme date**

**Basic - Create, send email, simple journey**

**FS IM Team**

- **UAT**
- **Date TBC**
- **Date TBC**
- **Date TBC**
- **Interme date**

**Create, send email, simple journey**

New or changed

Dates of UAT to be confirmed