UQ Engage Release 2 Showcase
29 March 2022
## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 – 1:45 pm</td>
<td>Introduction of UQ Engage and Phase 1</td>
</tr>
<tr>
<td>1:45 – 1:55 pm</td>
<td>Introduction of Release 2</td>
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<tr>
<td>1:55 – 2:30 pm</td>
<td>Introduction to Key Concepts</td>
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<tr>
<td>2:30 – 2:55 pm</td>
<td>Demonstration</td>
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<tr>
<td>2:55 – 3:30 pm</td>
<td>Questions</td>
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</table>

We will be recording this meeting and share the recording after the showcase.

If you have any questions during the presentation, please ask in the chat. Our team will answer them in the chat or at the end of the session.
UQ Engage

Phase 1
What is UQ Engage?

UQ Engage is the CRM and Marketing Automation platform our program is delivering. Salesforce is used to deliver the CRM and Marketing Automation (MA) functionalities in one platform. The functionalities are delivered by different Salesforce components but work and integrate with each other seamlessly within one ecosystem.

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

Key Salesforce components: Sales Cloud, Service Cloud

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.

Key Salesforce component: Marketing Cloud

‘UQ Engage’ is the name of the upcoming CRM and MA platform.
The Goals of UQ Engage

Our objectives:

- Uplift in stakeholder experience
- Increased effectiveness of efforts
- More efficient operations

Our key deliverables:

- One-stop shop for stakeholder data visibility
- Automated and coordinated processes
- Optimised stakeholder interactions
Phase 1
Prospective Students International
Objectives of Phase 1

Phase 1 of the program is focused on delivering the solution for Prospective Students, with International Prospective Students being the prioritised cohort. The foundation of the CRM and MA platforms will be built with reusable and scalable components and functionality, enabling future phases to be implemented in a timely manner.

In Phase 1 we aim to:

- Achieve significant improvements in how our prospective students experience and engage with UQ
- Allow UQ to proactively engage with prospective students at the appropriate times to optimise conversion
- Improve operational efficiency through systems and process improvements
Scope of Phase 1

In Phase 1, we will roll out to:

M&C Team
- Marketing Automation
- Customer Analytics

Future Students Team
- International Marketing & Communication
- Contact Centre
- Recruitment (Australia)
- Recruitment (International)
- Outreach/YAP

Faculty
- International Admissions*
- Faculty International Recruitment Teams

* The details and number of users to be rolled out are to be confirmed.
# Scope of Phase 1

Below capabilities are in scope of Phase 1:

<table>
<thead>
<tr>
<th>Foundations</th>
<th>Campaign and bulk communication</th>
<th>Prospect management</th>
<th>Reporting</th>
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</thead>
<tbody>
<tr>
<td>Solution architecture and fundamental capabilities in the platform.</td>
<td>Enable targeted and personalised communication across multiple channels.</td>
<td>Enable users to track pipeline activities, tasks and targets, all the way from lead through to conversion.</td>
<td>Information will be aggregated and presented in intuitive, meaningful ways that can be customised based on team and individual priorities.</td>
</tr>
<tr>
<td>Single stakeholder view</td>
<td>Event engagement</td>
<td>Enquiry management</td>
<td></td>
</tr>
<tr>
<td>Integrate with key UQ systems and provide a consolidated view of stakeholder information.</td>
<td>Enable users to schedule, promote, manage and report on events</td>
<td>Enable staff to better service stakeholder enquiries with access to a staff knowledge base and integrated workflows.</td>
<td></td>
</tr>
<tr>
<td>Application view</td>
<td>Appointments</td>
<td>Partner management</td>
<td></td>
</tr>
<tr>
<td>Integrate with Si-Net to be able to view a student’s application and track progress to aid conversion</td>
<td>Enable stakeholders and staff to easily schedule, change and manage appointments</td>
<td>Enable us to capture interactions with student recruitment partners in one place.</td>
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These components are built in a reusable and scalable way for us to scale up quickly after Phase 1.
Phase 1 UQ Engage Indicative Delivery Plan

1. Q4, 2021
   - Foundations
   - Single stakeholder view
   - Campaign and bulk communication
   - Prospect management

2. Q2, 2022
   - Enquiry management
   - Eloqua campaign migration
   - Application view
   - Event engagement
   - Pilot campaigns
   - Reporting

3. Q3, 2022 (TBC)
   - Partner management
   - Knowledge Base
   - Appointments
   - Opportunity Scoring

4. Q4, 2022 (TBC)
   - YAP opportunity management
   - High school management
   - Social enquiry management

Key Integration & data migration
- Si-net, OLA, Oracle, Eloqua, QSES (migration)

Features introduced:
- FS International Marketing
- CX Customer Analytics
- FS Recruitment (International) for enquiry management only

Features planned:
- Faculty International Recruitment Teams
- International Admissions

Key Integration & data migration
- AscentOne, Si-net, Oracle, Eloqua

Feature build continues in future releases
Release 2

- Marketing Automation
- International Marketing & Communication
- Customer Analytics
- FS Contact Centre
- FS International Recruitment
Objectives of Release 2

• Develop automations, workflows and Oracle integration to enable the FSCC and international recruitment teams to manage email, website and phone enquiries
• Integrate with OLA and SI-net to make the application data available for marketing, engagement and opportunity management
• Deliver international made offer campaign to uplift the offer conversion activities for international applicants
• Allow UQ to capture event registrations and check-in attendees for in-person and online events
• Consolidate enquiry, application and event engagement into one single customer view
• Roll out new UQ study areas and update existing data
• Migrate all data from Eloqua
• Prepare for insourcing of international enquiry management within FSCC (disengage with QSES)
• Migrate subset of data from Oracle CRM and QSES database
Teams

In Release 2, we will roll out to:

**M&C Team**
- Marketing Automation
- Customer Analytics

**Future Students Team**
- International Marketing & Communication
- Contact Centre (FSCC)
- FS Recruitment (International) for enquiry management only
Anatomy of Release 2

Started on 29/11/2021

Sprint (Build) Sprint (Build) Sprint (Build) Sprint (Build) Sprint (Build)
System Integration Testing User Acceptance Testing Training

12-week build

Go Live

Hypercare
Key Concepts
Key concepts

• What is a contact?
• UQ Engagement Model and Applications
• UQ Enquiry Model
• Amazon Connect
• Integrations between UQ Engage CRM and Oracle CRM
• Integration between CRM, SI-net and OLA
• Events
• Email Blackout
What is a contact?
What is a contact?

A contact refers to a **person** in the system. The minimum criteria to create a contact is:

- First name
- Last name
- At least one contact method (Primary email, home phone or mobile phone)
- Contact source

When a new contact is created, a duplication check will be triggered to check if the contact already exists in the system. If the new record has the same first name, last name and contact method (same email or same phone number), then the system will inform the user that a duplicated record already exists.
UQ Engagement Model and Applications
UQ Engagement Model

In 2021, we co-designed a UQ Engagement Model with the CX Working Group and their nominees. The objective of the UQ Engagement Model is to provide a **One UQ approach to prospect management.**
Stages of the UQ Engagement Model

Prospective Student Lead

Collecting interest

Verifying interest

High-quality interest

Engaging

Application

Application under assessment

Offer

Awaiting acceptance

Acceptance

Finalising opportunity

These steps repeat for each opportunity

Opportunity closes after enrolment past Census Date
Stages of the UQ Engagement Model

Before an application is submitted

- Collecting interest
- Interest (converted)
- Verifying interest
- High-quality interest
- Engaging
- Application
- Application under assessment
- Offer
- Awaiting acceptance
- Acceptance
- Finalising opportunity

Interest (converted)
Stages of the UQ Engagement Model

Collecting interest

Interest (converted)

Verifying interest

High-quality interest

Engaging

Application

Application under assessment

Offer

Awaiting acceptance

Acceptance

Finalising opportunity

After an application is submitted
These three stages will be driven by the application and enrolment data in SI-net. Further details will be covered in training.
UQ Enquiry Model
"I can ask my questions in a way that works for me."

**Staff Experience**

- Auto triage
- Delayed response
- Instant response

**FSCC**

- Simple enquiry resolved
- Complex enquiry resolved

**Specific? Requires decision?**

- Specific?
  - Requires decision?
    - Yes: Prioritise and transfer case ownership to SME
    - No: Consult with the knowledge base and respond to enquiry

**Is it documented?**

- Yes: Consult with SME, respond to enquiry, then record in knowledge base
- No: Manage knowledge base

**New? Can others advise?**

- New?
  - Yes: Respond to enquiry, then update the knowledge base
  - No: FSCC Manages centralised knowledge base to reduce the times the same issue is referred to an SME.

**Prospective Students Enquiry Management Vision Blueprint**

**Customer Experience**

- Red: Specific or requires decision
- Blue: Requires further information from SME
- Green: Can be managed by the first point of contact (FSCC)
6 key points of the vision

<table>
<thead>
<tr>
<th>Shared enquiry team</th>
<th>Simplified points of contact</th>
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<tbody>
<tr>
<td>Knowledge management</td>
<td>Transparency</td>
</tr>
<tr>
<td>Case ownership</td>
<td>Consider enquiry as a key activity in student recruitment</td>
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Amazon Connect
Amazon Connect (AWS Connect)

AWS Connect is an existing UQ CTI (Computer Telephony Integration) platform which is already used by many teams at UQ to manage incoming calls. In Release 2, we have implemented an integration to AWS Connect which will allow us to receive inbound calls and make outbound calls using AWS Connect Account from within the CRM.

After Release 2 goes live, CRM users can:

- See the relevant record details based on the caller ID, application ID or enquiry case ID when the user answers a call
- Answer incoming calls with the record and comments automatically linked to the relevant contact
- Click-to-dial by clicking a phone number or make a call using the dialing pad

The demonstration in the second half of this showcase will include the use of the AWS Connect interface and functionalities.
Integrations
Integrations between UQ Engage CRM and Oracle CRM

Enquiries and contacts which meet the below criteria are synced between UQ Engage and Oracle CRMs:

• An enquiry Case in UQ Engage CRM has its ownership changed to a queue designated for management within Oracle CRM
• An enquiry record in Oracle CRM has its queue changed to a queue designated for management in UQ Engage CRM
• Contact which is associated to a Case or Enquiry record that has its queue changed to that of the other platform (UQ Engage CRM or Oracle CRM)

The integration will have a 20 min delay.
Integrations between CRM, SI-net and OLA

There is a one-way integration from OLA/SI-net and UQ Engage CRM. The key information for draft and submitted UGRD/PGCW applications will be visible in the UQ Engage CRM.

The integration will have a 1-day delay due to the file-based integration pattern used in R2 and will take 3-4 hours across all record types. The duration of the delay will be reduced significantly after we switch to the API integration pattern in R3.

Note: HDR and Non-Awards applications are considered as out of scope for Phase 1.
Events
We can manage in-person, online and hybrid events using the event functionalities in the CRM. The CRM doesn’t host any events in the platform, instead it works as a connector to different event streaming platforms and consolidating the registration and attendance data in one view.

**CRM functionalities:**
- Event invitation
- Event registration
- Event attendance
- Event communication
- Event follow ups

Registration log, attendance, event communication log (manually for short term)
## UQ Engage event functionality roadmap

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
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<tr>
<td><strong>Event Foundation</strong>&lt;br&gt;Phase 1 - Release 2</td>
<td>- Ability to set up online, in-person and hybrid event and registration form&lt;br&gt;- Opt-in capability&lt;br&gt;- Registration/Attendee list&lt;br&gt;- Automated instant event confirmation email&lt;br&gt;- Ability to check-in attendees at events&lt;br&gt;- Marketing Cloud users to send out event communication&lt;br&gt;- Capacity management&lt;br&gt;- UTM tracking on events&lt;br&gt;- Basic event reporting</td>
</tr>
<tr>
<td><strong>International Student Recruitment Events</strong>&lt;br&gt;Phase 1 - Release 3</td>
<td>- Self-service system to set up event and event communication&lt;br&gt;- Automated event reminders&lt;br&gt;- Event follow ups&lt;br&gt;- Event reports&lt;br&gt;- Zoom Integration&lt;br&gt;&lt;br&gt;Examples:&lt;br&gt;- Webinars&lt;br&gt;- Partner visits&lt;br&gt;- Conference&lt;br&gt;- Agent training&lt;br&gt;- Events hosted by an external organisation</td>
</tr>
<tr>
<td><strong>Domestic Student Recruitment Events</strong>&lt;br&gt;Phase 1 - Release 4</td>
<td>- Recurring events&lt;br&gt;- Multi-session events&lt;br&gt;- Advanced event reports&lt;br&gt;&lt;br&gt;Examples:&lt;br&gt;- Campus tours&lt;br&gt;- Camps</td>
</tr>
<tr>
<td><strong>Phase 2 &amp; 3</strong></td>
<td>- Paid events&lt;br&gt;- Reserved Seats and Tables&lt;br&gt;- Discount Codes&lt;br&gt;- Budget and Expense&lt;br&gt;&lt;br&gt;Examples:&lt;br&gt;- Alumni / Reunion events&lt;br&gt;- Donor events&lt;br&gt;- Dinner functions</td>
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Email blackout
Email blackout

To ensure communication is not sent during a period when a contact should not be contacted, we have implemented an email blackout feature.

We can set the dates of when a contact or a group of contacts should not be contacted with an email blackout start date and email blackout end date. Those contacts’ primary emails will be added to an automatic suppression list during the blackout period, and they will not receive any promotional emails from UQ.

Note: The contacts will still receive transactional emails from UQ during the blackout period.

Promotional Emails (proactive)
- Event promotion (pre-registration)
- Progressive profiling
- Lead nurturing
- Any cross-sell / up-sell of UQ scholarships, events and offers

Transactional communication (reactive)
- Post event registration communication
- Auto reply
- Communication triggered by user actions
- Enquiry communication
- Administrative communication, e.g. fees
- Presidential and emergency
Demonstration
Revisiting Remy's journey so far (from Release 1)

Remy is a high school student in India looking to go abroad for university in 2022.

Remy is researching programs on the UQ Future Students website and completes the lead form on the Bachelor of IT program page.

As Remy's form submission qualifies him for an UGRD opportunity, his lead is automatically converted and an opportunity is created.

Remy's details are passed from the CRM to Marketing Cloud.

Remy is dropped into the welcome journey automatically and receives a welcome follow up email.

Remy's details are passed from the CRM to Marketing Cloud.

Remy's updated information is also updated in the Marketing Cloud, which qualifies him for a different journey stream.

Remy clicks on the preference centre link in the email to update his communication preferences as he is also interested in Community Events.

A new campaign is being built by the marketing team in Marketing Cloud to promote the upcoming UQ in India Open Day events, by using the CRM data to build targeted campaign segments and journeys.

Remy meets a UQ recruitment staff, Alex, at an agent's office in Delhi. Alex looks up Remy's details in the CRM.

Alex updates Remy's opportunity in the CRM based on their conversation.

Remy clicks on the preference centre link in the email to update his communication preferences as he is also interested in Community Events.

A month later, Remy submits another lead form on the UQ website to express his interest in the Bachelor of Computer Science.

Remy submits another lead form on the UQ website to express his interest in the Bachelor of Computer Science.
Demonstration (Release 2)

Remy receives a targeted event invitation to invite her to the UQ in India Open Day event. She clicks on the link and register.

Remy receives a confirmation email with check-in link. When Remy arrives at the event, she checks in by showing her QR code on the check-in link. Her friend, Sarah checks in by filling in a check-in form as she didn’t register for the event.

After attending the event, Remy see a targeted Facebook Ad of an UQ webinar related to pathways for Indian high school students. She clicks the Ad and registers for the webinar.

Remy receives a confirmation email with the webinar link. She joined the webinar from the email at the time of the seminar. Her attendance is automatically recorded in the CRM.

Remy is very close to applying for university. She creates an application in OLA and her draft application is passed to the CRM.

Remy has a question about a course in the program. She fills in the enquiry form on the Future Student website. Remy receives a confirmation email.

Remy's enquiry is routed to the corresponding queue automatically. A FSCC staff, Sam, picks up her enquiry and goes through Remy's past engagement and enquiries to understand the context.

Sam uses Chatter to ask for some clarifications from his team leader, Dennis. After he gets the input from Dennis, he responds to Remy’s enquiry.

Remy receives an email with the response. She still has some questions so she decides to give UQ a call.

Sam answers Remy’s call in the CRM. Sam can navigate to Remy’s case and realise he needs to find out more information from the Faculty. Sam created a callback request for himself to follow up.

Remy receives feedback from Faculty and calls Remy back via the CRM to provide her with an update.

Sam believes Remy’s enquiry demonstrates high quality interest in UQ, so he triggers the creation of a prospective student lead record for Remy. The lead record is matched and linked to Remy’s contact record.

After talking to Sam, Remy feels confident and informed with her decision of studying IT and submitted the application. Her application and opportunity stage are updated in the CRM accordingly.

Remy receives an offer to study at UQ and she is weighing up different options at this stage.

Sam receives feedback from Faculty and calls Remy back via the CRM to provide her with an update.

Remy receives communication from UQ to talk to the student adviser. She clicks book a call back in the email and fill in a booking form.

Remy also receives emails with information about the lecturers of her program she applied for, the campus she is going to attend and a lot of information about studying at UQ.

Remy is ready to accept the offer. She logs into OLA and accepts the offer. The preference status is updated in the CRM.

Remy sends an email to FSCC asking about an orientation event hosted by Student Services. Sam assigns the enquiry to the Student Services queue and the enquiry is sent to Oracle automatically.

Remy enrols in 4 courses under the program and she enjoys all of them. After Census date, the CRM automatically check Remy’s enrolment units and mark the opportunity as “Opportunity closed – converted”.

Henry in the Conversion team receives the call back booking in the CRM. Before making the call, Henry can view Remy’s entire enquiry history and key information of her application in the CRM.

Remy sends an email to FSCC asking about an orientation event hosted by Student Services. Sam assigns the enquiry to the Student Services queue and the enquiry is sent to Oracle automatically.
Other release 2 features which were not covered in the demonstration:

- Full journey of the International Made Offer Campaign – will be demonstrated in a separate campaign showcase
- Create contacts in Salesforce when a prospective student is created in Oracle CRM
- Create enquiries in Salesforce by assigning an enquiry to a queue in Oracle (opposite direction as demonstrated)
- Book a callback when the enquirer is on hold or calling outside the business hours
- ‘Do not contact’ and email blackout
- Facebook Ad form integration
- Parent lead capture and automation
- Record event attendees for events hosted by external parties
- Event registration platform domain (register.uq.edu.au)
- Event registration capacity management

- Organisation records
- International recruitment agents details in application
- Credit card details masking
- Auto populate intake year when intake semester is entered
- Improved Marketing Management App homepage
- Data migration and roll out of new study areas
## Release 2 key features

### Current

<table>
<thead>
<tr>
<th>Enquiry management</th>
<th>Application view</th>
<th>Marketing Automation</th>
<th>Reporting</th>
<th>Event engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Domestic enquiries are managed in Oracle</td>
<td>• No integrated application data</td>
<td>• Ability to capture leads and convert to contacts (with opportunities) to drop into journeys</td>
<td>• Limited reporting on enquiry management</td>
<td>• Event registration campaigns are built in Eloqua.</td>
</tr>
<tr>
<td>• International enquiries and call-backs are managed by QSES (with bounce backs (out of scope enquiries) managed through Oracle)</td>
<td>• Available to staff by accessing SI-Net or Reportal (for reporting purposes)</td>
<td>• Marketing Cloud to be used for marketing automation activities from January 2022</td>
<td>• No real-time report on event registration and attendance</td>
<td>• We have multiple event management systems that are not linked and do not centrally store event information.</td>
</tr>
<tr>
<td>• No visibility to UQ staff of international enquiries</td>
<td></td>
<td>• International campaigns continue through QSES</td>
<td></td>
<td>• Attendance is not captured for most events</td>
</tr>
<tr>
<td>• Phone enquiries are not recorded consistently</td>
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### Future – R2

| • Create cases for enquiries received and relate to contact (via email, phone, website, walk in) | • File-based integration with OLA, SI-Net to view application (including preferences) data and create opportunities | • Data migration (QSES) for IP warming campaigns | • Limited reporting on enquiry management | • Event registration campaigns are built in Eloqua. |
| • Manage case assignment following new enquiry handling vision (including auto triage/routing) | • File-based integration for program and term data | • Data migration of Ochsner segment | | • We have multiple event management systems that are not linked and do not centrally store event information. |
| • Combined website form to capture enquiries for domestic and international students | • International recruitment agents set up and related to application | • Migration of Eloqua campaigns to MC | | • Attendance is not captured for most events |
| • Integration of enquiries between SF and Oracle CRM | • Contact matching logic for enquiry | • Future Students program and major webforms will be updated to submit to SF | • Enquiry dashboards to enable efficient management of enquiries (individual v team) | • Marketing Cloud/Blackthorn Events will be used to send event promotional and post-registration emails |
| | • Navigation to SF CRM | | | • Registration and attendance are capture and stored against the single customer view |
| | • Amazon Connect integration with SF for phone enquiry (including IVR) | • Detailed error logging for preference centre | • Enquiry dashboards to enable efficient management of enquiries (individual v team) | • Marketing Cloud/Blackthorn Events will be used to send event promotional and post-registration emails |
| | • Enable track a call back functionality via webform, IVR, or during call | | • Contact duplication reporting | • Registration and attendance are capture and stored against the single customer view |
| | • Standard text set up | • Auto communication suppression | • Real-time attendee data available for reporting | |
Thank you

Presented by

UQ Engage Team