Tech Check

1. PC logged in
2. Access training environment
3. Log on to Zoom
4. Take notes

Please check-in using your UQ Credentials
Log into the training environment on your PC to test your credentials. https://uqengage-uat.sandbox.my.salesforce.com/
Log into the training Zoom training channel on your laptop
Have your pen and Participant Workbook ready to take notes
UQ Engage Enquiry Management

Phase 1 Release 2
Module 1
Introduction
Acknowledgement of Country

The University of Queensland (UQ) acknowledges the Traditional Owners and their custodianship of the lands on which we meet.

We pay our respects to their Ancestors and their descendants, who continue cultural and spiritual connections to Country.

We recognise their valuable contributions to Australian and global society.

The Brisbane River pattern from *A Guidance Through Time* by Casey Coolwell and Kyra Mancktelow.
Housekeeping

- Fire Evacuation
- Facilities
- Amenities
- Notifications
- Viewing
- Recording
The benefits of UQ Engage
A message from Colleen Stillman-Cheng
What have you learnt so far?

Your training journey

- UQ Engage Introduction
- Getting to know your CRM
- Defining the Customer Journey
  - Prospective Student Applications in UQ Engage (pending)

UQ Engage Foundations

- How enquiries are created and managed
- Managing tasks and activities
- Accessing data from the integrations with OLA, SI-Net and OSC

Enquiry Management

- Where to find existing reports
- Understanding the data in the reports
- Building new reports and dashboards

Reports and Dashboards
Course description and learning objectives

This course will introduce you to the Enquiry Management process in UQ Engage and the key terminology used to respond to and manage enquiries.

By the end of this course, you will be able to:

- Open and edit an enquiry case
- Add comments to an enquiry case
- Reassign an enquiry case ownership
- Reassign an enquiry case to a team using Oracle
- Assign an enquiry case as spam
- Use Amazon Connect for inbound and outbound calls
- Convert enquiry cases to prospective student lead cases
Module 2
Enquiry Management Fundamentals
Remy’s Journey (Part1)

Let’s revisit Remy and review their enquiry journey
Enquiry Management High-Level Steps

**Contact**
A prospective student can reach us through the webform, email, phone, or walk-in.

**Triage**
Automatically performed for webform and emails based on the preferences provided. Further manual triaging for web and email enquiries.

**Respond**
Using AWS make and log outbound calls. Using UQ Engage to respond by email. Use Chatter to communicate with internal SMEs.

**Resolve**
Edit the case to indicate the status and update any details/comments provided. Create a prospective lead case where conversion criteria is met.
Key Callouts of the Vision

- Shared enquiry team
- Knowledge management
- Case ownership
- Simplified points of contact
- Transparency
"I can ask my questions in a way that works for me."

Enquiry Management Vision Blueprint

Customer Experience

Staff Experience

Delayed response

Auto triage

FSIR

Instant response

FSCC
Enquiry Management Vision Blueprint

"I can ask my questions in a way that works for me."

- Delayed response
- Auto triage
- Instant response
- Simple enquiry resolved

FSIR

Specific? Requires decision?

Is it documented?

- Consult with the knowledge base and respond to enquiry

Green: Can be managed by the first point of contact (FSCC)

Customer Experience

Staff Experience
"I can ask my questions in a way that works for me."

Delayed response

Auto triage

FSIR

Specific? Requires decision?

Simple enquiry resolved

Complex enquiry resolved

FSIR

Is it documented?

Consult with SME, respond to enquiry, then record in knowledge base

Consult with the knowledge base and respond to enquiry

Blue: Requires further information from SME

Green: Can be managed by the first point of contact (FSCC)

Subject Matter Expert (e.g. Recruitment, Faculties, Admissions, Student Services)
"I can ask my questions in a way that works for me."

Customer Experience

Staff Experience

Delayed response

Auto triage

Instant response

FSIR

Specific? Requires decision?

Simple enquiry resolved

Complex enquiry resolved

Prioritise and transfer case ownership to SME

Is it documented?

Consult with SME, respond to enquiry, then record in knowledge base

Consult with the knowledge base and respond to enquiry

Manage knowledge base

Subject Matter Expert (e.g. Recruitment, Faculties, Admissions, Student Services)

New? Can others advise?

Respond to enquiry, then update the knowledge base

FSCC Manages centralised knowledge base to reduce the times the same issue is referred to an SME.

Red: Specific or requires decision

Blue: Requires further information from SME

Green: Can be managed by the first point of contact (FSCC)

Enquiry Management Vision Blueprint

END
Let’s practice! Submit a Webform
Module 2
The Violet Scenario
Enquiry Management High-Level Steps

**Contact**
A prospective student can reach us through the webform, email, phone, or walk-in.

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**Resolve**
Edit the case to indicate the status and update any details/comments provided. Create a prospective lead case where conversion criteria is met.
Enquiry Management Vision Blueprint

Customer Experience

Staff Experience

Delayed response
Instant response

Auto triage

Specific? Requires decision?

Is it documented?

Consult with the knowledge base and respond to enquiry

Simple enquiry resolved

“Can ask my questions in a way that works for me.”

Green: Can be managed by the first point of contact (FSCC)
Enquiry Management Vision Blueprint

Customer Experience

“I can ask my questions in a way that works for me.”

Staff Experience

Delayed response → Auto triage → FSIR

- Simple enquiry resolved
- Complex enquiry resolved

Instant response → Auto triage → FSCC

- Is it documented?
- Consult with SME, respond to enquiry, then record in knowledge base
- Consult with the knowledge base and respond to enquiry

Blue: Requires further information from SME

Green: Can be managed by the first point of contact (FSCC)

Subject Matter Expert (e.g. Recruitment, Faculties, Admissions, Student Services)
Remy’s Journey (Part 2)
Let’s practice!
Module 3
Managing Email Enquiries
Let’s practice!
Module 4
Checking Application Status
Let’s practice!
Module 5
Conclusion
How do I access help after training?

**CRM Support**

- **Super Users**
  - In the first instance, contact your local Super User

- **Training Team**
  - If the Super User can’t help you, contact the Training Team via the zoom channel we have created.

**4 week hypercare period**

**Ongoing Support**

- **General Support**
  - For support with quick text, email templates, contacts, assets, journeys, emails (including bulk events), campaigns or audiences, contact [Submit a support request](#) - Current staff - The University of Queensland (uq.edu.au)

- **Technical Support**
  - For any technical/systems issues, log a job via the UQ [Submit a Support Request](#) via this form: [Submit a support request](#) - Current staff - The University of Queensland (uq.edu.au)

**From 1st August 2022**
Logging into UQ Engage

The production environment (business as usual)

To access production, use the following link:

https://uqengage.my.salesforce.com/

Use the UQ Auth option which will take you to the UQ single sign-on (SSO) screen.

Enter your UQ credentials for SSO.

Congratulations, you are in!

Bookmark the URL for easy access
How do you feel?

Let’s create a brain cloud
Conscious Competence Learning Model
Feedback
Your feedback is important to us.

Please take a few minutes to tell us what you think about today's training.
Thankyou

Collin D’Costa
Training Lead | UQ Engage
UQEngageCRM@uq.edu.au