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
https://uqz.zoom.us/j/84606092566

Have your pen and Participant Workbook ready to take notes
UQ Engage Managing Events

Phase 1 Release 2
Module 1
Introduction
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
What have you learnt so far?
UQ Engage training
Your training journey

UQ Engage Foundations
✓ Getting to know your CRM
✓ Defining the customer journey
• Prospective Student Applications in UQ Engage (pending)

Events Management
Using events:
• Setting up an event
• Running an event
• Reporting on an event

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

Reports and Dashboards
• Where to find existing reports
• Understanding the data in the reports
• Building new reports and dashboards
How do you feel?

Let’s create a brain cloud
Getting to know your CRM quiz!
Defining the Customer Journey Quiz

UQ Engage Quiz!
Enter the PIN you see on the screen to the right.

Enter

Game PIN

UQ Engage Quiz!
Enter the PIN you see on the screen to the right.

Enter

Game PIN
Agenda

This course will run for approximately 2 hours and will cover:

01 Introduction
02 Set up an online event
03 Set up a hybrid event
04 Event Promotion
05 Attendees report for an event
06 Conclusion
Course description and learning objectives

UQ Engage Managing Events is provided to Future Students International Marketing and Communications and the Marketing Automation teams to improve experiences and relationships through streamlined processes.

By the end of this course, you will be able to:
• Set up an online and an in-person event
• Set up a hybrid event
• Report on an event
# UQ Engage Events functionality roadmap

## Event Foundation

**Phase 1 Release 2**
- Ability to set up online, in-person and hybrid event and registration form
- Opt-in capability
- Registration/attendee list
- Automated instant event confirmation email
- Ability to check-in attendees at events
- Marketing Cloud users to send out event communication
- Capacity management
- UTM tracking on events
- Basic event reporting

## International Student Recruitment Events

**Phase 1 Release 3**
- Self-service system to set up event and event communication
- Automated event reminders
- Event follow ups
- Event reports
- Zoom integration

**Examples:**
- Webinars
- Partner visits
- Conference
- Agent training
- Events hosted by external organisation

## Domestic Student Recruitment Events

**Phase 1 Release 4**
- Recurring events
- Multi-session events
- Advanced event reports

**Examples:**
- Campus tours
- Camps
Having all their data in one place so they don’t have to tell us their story to everyone they speak to

Understanding where they are in the journey so we can anticipate what they need next to optimise conversion

Answering their questions with the right information and at the right time

Examples of how IMC and MA can now support UQ
Module 2
Set up an online event
# Event set-up terms

## Event

<table>
<thead>
<tr>
<th>Event items</th>
<th>Online Event</th>
<th>In Person</th>
<th>Hybrid Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>28th June</td>
<td>12th July</td>
<td>28th November</td>
<td>2nd December</td>
</tr>
</tbody>
</table>

## Register

- **Online Event:** 28th June
- **In Person:** 12th July
- **Hybrid Event:** 28th November, 2nd December

## Event set-up terms

- **Register**
- **Registration form**
- **Custom forms**
Setting-up events in UQ Engage

CREATE ONLINE EVENT
Create a New Event
Create Event Item
Preview with the Final Checklist
Publish

CREATE IN-PERSON EVENT
Create a New Event
Create Event Item
Preview with the Final Checklist
Publish

CREATE HYBRID EVENT
Create a New Event
Create One Event Item
Create Two Sessions (1 for online, 1 for in-person)
Create Event Item session for each session link to the same event item created in step 2
Preview with the Final Checklist

UQ Engage | Innovation in Customer Engagement
We are setting up an **online** event for international prospective students.

We are targeting people who are interested in studying for an undergraduate degree in science.
Let’s practice!
## Final checklist

<table>
<thead>
<tr>
<th>Online Events</th>
<th>In-person Events</th>
<th>Hybrid Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The URL of the webinar/meeting URL is filled in under the Webinar/Meeting URL section of the event record</td>
<td>• The address of the venue is filled in under the Venue section of the event record</td>
<td>• The address of the venue is filled in under the Venue section of the event record</td>
</tr>
<tr>
<td>• One event item is set up</td>
<td>• One event item is set up</td>
<td>• The URL of the webinar/meeting URL is empty under the Webinar/Meeting URL section of the event record</td>
</tr>
<tr>
<td>• The name of the event item is the name of the event</td>
<td>• The name of the event item is the name of the event</td>
<td>• The URL of the webinar/meeting URL is filled under the Webinar/Meeting URL section of the online session record</td>
</tr>
<tr>
<td>• A thank-you page URL or message is specified</td>
<td>• A thank-you page URL or message is specified</td>
<td>• One event item is set up</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The name of the event item is the name of the event</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Two sessions are set up</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Both sessions have the correct start and end dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Both sessions have an 'Event Item Session' which is linked to the 'Event Item'</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A thank-you page URL or message is specified</td>
</tr>
</tbody>
</table>
An event is related to a contact via an attendee record.

A contact can have multiple attendee records. Each attendee record has a registration status and an attendance status.

An attendee record reflects what the contact enters in the registration form for the event.
Event data: attendees converted to prospective student leads

*One attendee will only create one prospective student lead. If a lead already been created, it will not be created again.

The reason we are converting attendees to prospective student leads is to ensure the attendee details are included in the lead and opportunity records, so we don’t miss out on data we captured via event registration and attendance.

**Event Purpose:** Outreach, Student Recruitment  
**Event Audience:** Prospective Domestic Students and/or Prospective International Students, Current Students, Parents/Guardians  
**Registration/Attendance Status:** Registered, Attended

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**Event Purpose:** Educational, Extra-curricular, Professional Development, Training, External Relations (B2B)  
**Event Audience:** B2B contacts, Mixed  
**Registration/Attendance Status:** To invite, Invited, Cancelled, Pending, No-Show
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
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 Salesforce URL for easy access
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