

A Customer Centric View with CRM

UKOUG Siebel and CRM On Demand Conference 2011
Russell Fenner and Paul Findlay



Summary

- University Context
- Starting Point
- Fit with ICT Strategy
- B2B Implementation
- Benefits and Results
- Ongoing B2C Implementation
- Conclusions

University Commercial Context

- £200M Group turnover
- Commercial activities about £55M pa
 - Graduate recruitment
 - Student placement/internship
 - Collaborative projects (part state-funded)
 - Economic stimulus work (part state-funded)
 - Contract research
 - Consultancy
 - CPD and training
 - Hire of facilities – both generalist and specialised
 - Technology licensing
- All University departments are Strategic Business Units with commercial targets

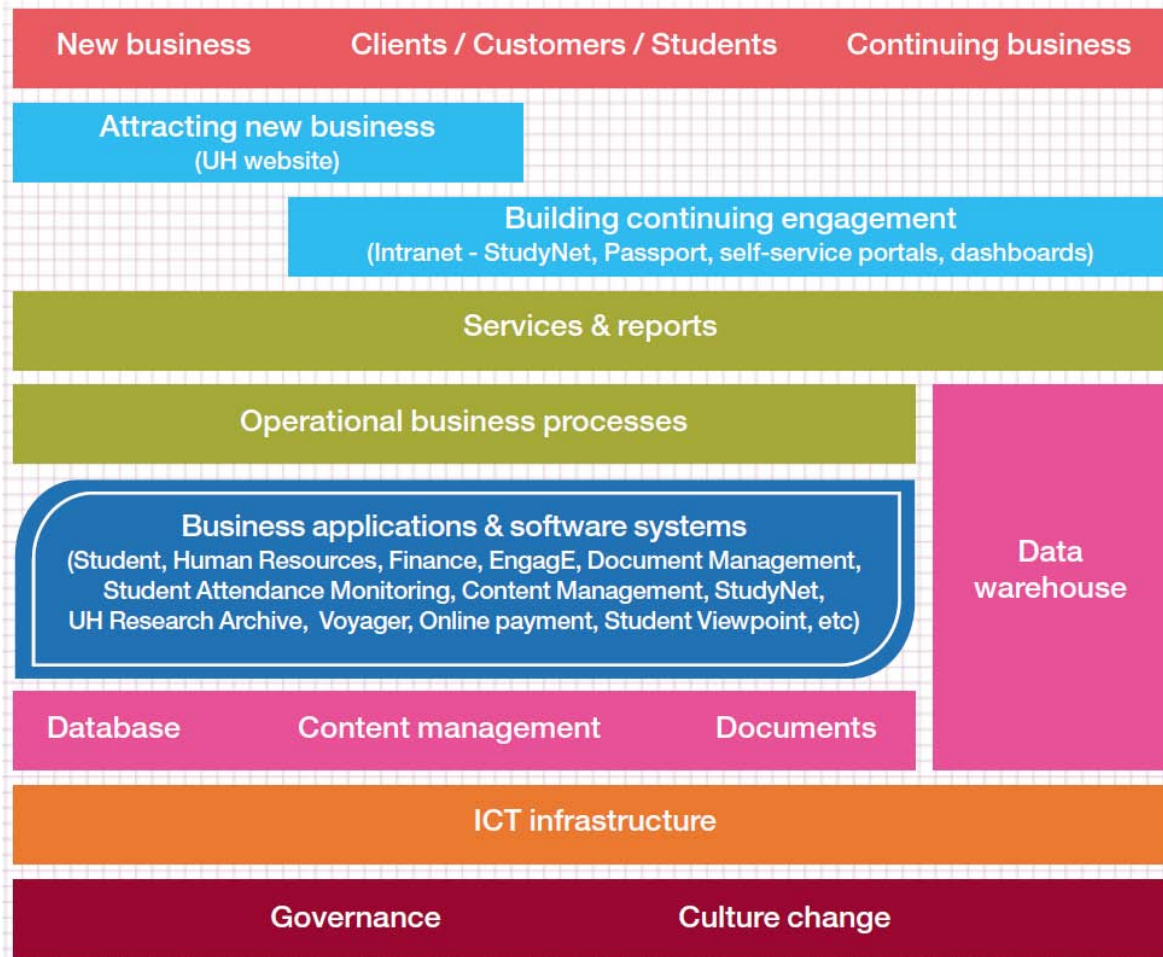
Particular Challenges

- Neither a classic product- or service-delivery scenario
- University departments like to operate independently
- A lot of delivery is bespoke
- Multiple 'points-of-sale'
- Multiple dimensions to relationships
- Changing government incentives
- Need to report KPIs to both Board and Government

CRM Starting Point: Cottage Industry


- 19 systems in use across 15 departments
- About 150,000 records and 100 users
- 6 Access-based, 2 FileMaker-based; insufficiently robust
- 8 Different proprietary systems
- 7 Internally developed systems - at least 3 with no current support
- Several unconnected single-user instances of the same platform
- One department operating 3 different unconnected systems



Enterprise Systems Strategy







The University Digital Environment



Key



-  • Easy user access via integrated UH portal
-  • Incorporates all self-service portals and dashboards

-  • Online services and reports for users
-  • Service delivery through end-to-end online business processes and workflows

-  • 'Best-of-breed' software systems with specialist functionality
-  • Configured and combined to deliver the user business processes and services

-  • Data, information, reporting and analytics
-  • Data sharing across systems

-  • Data communications network infrastructure
-  • Data centres with server and storage infrastructure

-  • Governance, project management, UH policies and regulations
-  • Changes to working practices

Enterprise Systems Strategy

Review of existing University business processes - looking ahead to 2015

Replacement of paper-based processes and local systems

Implementation of online end-to-end processes with workflow

Reporting via a data warehouse or from live systems according to data currency, and the level of data integration and complexity required

Key Principles

Once only - no duplication of master data sources, of processes, or of systems

Knowledge transfer from suppliers to University staff for future sustainability

'Out-of-the-box', best-practice implementations using common standards

Easy web-based user access from on and off campus with appropriate security levels

Approach to Implementation

- OJEU Tender process
 - Tried OGC – didn't work!
- Phased Process
 - B2B first in three phases, B2C later
- Knowledge Transfer
 - Oracle Consulting => in-house teams when recruited
- Project Board with Oracle representation
 - George Robey, Monica Derrington De Acha
- Stakeholder group for growing user base

B2B Implementation 2009-10

Development

Phase 1 Account management, Corporate events, Graduate employment

Phase 2 Consultancy, Sponsorships, B2B Case management

Phase 3 Marketing, Analytics

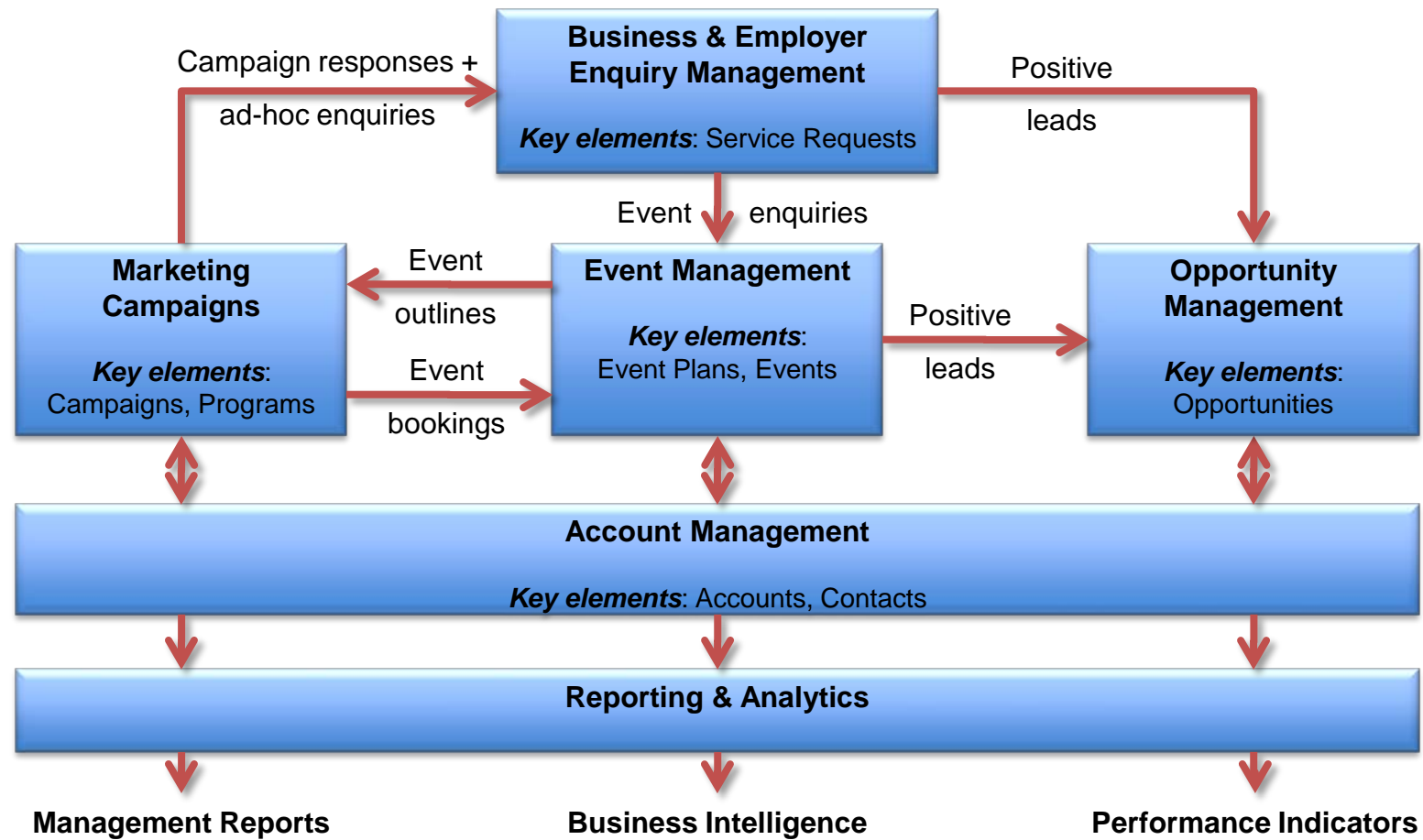
Data Migration

Phase 1 Phase 2 Phase 3

Roll-out

Phase 1 Phase 2 Phase 3

B2B Process Flows



B2C Implementation 2011-12

- Alumni
 - Approx 150,000 more contacts
 - Complex campaign management issues
 - Custom self-service updating portal, linked to Siebel via Web Services
 - De-duping with existing customer base
- CPD Courses
 - ‘Non-credit bearing’ - courses that don’t count towards a degree or academic award
 - Managed as Events
 - Approx 300 event plans, 500 events, 3000 attendees per year
 - Custom booking portal, linked to Siebel via Web Services
 - Online payment via Realex

Short Course Process Summary

Pre-launch

- Idea for a course
- Confirm market
- Confirm feasibility
- Build Business Case
- Approve course

Launch

- Target prospects
- Run campaign
- Monitor bookings
- Course admin
- Course delivery

Post-launch

- Course success review
- Business Intelligence
- Plan course portfolio

Benefits Gained

- Achieving a customer-centric view
- Managing 'multiple personalities'
- Targeted marketing capability for diverse offerings and audiences
- Better event planning and delivery
- Better analytics around projects/marketing/key sectors/key accounts
- Increased commercial return by combining multiple databases
 - Cross-selling, up-selling
- Additional application areas, not in original plan
 - IT and learning resources helpdesk, security incident handling

Conclusions

- Equipped to meet the unique Higher Education challenges
- Successfully combined, deduped and retired legacy systems
- Future strategies and plans now based on robust data
- Growing buy-in to system at all management levels
- Diverse departments able to share a customer-centric view
- Award winning implementation!

Thank you

Questions?

