CRM SYSTEM STRATEGY

Introduction

Griffith commenced its Right Now CRM implementation in 2010, with a strategic priority of enabling student-related business processes. The system has improved the efficiency and effectiveness of a range of prospective and current student business processes through deployment of 24/7 Tier 0 self-service FAQ's, inquiry management allowing users to raise questions with response tracking metrics; campaign management, event registration and prospective student surveying for prospective students by OMC; multi-channel surveys and feedback for current students.

Key users of the system include Student Administration; Student Success, Griffith International, OMC, HDR Student Centre, Information Services (IT Help and Library) and Campus Life. Attachment 1 summarises the implementation journey, key users and selected performance metrics to date.

Ideally, by 2020, Griffith will have moved from a predominantly transactional business model for student services to one that predicts, anticipates and influences business activities using CRM technology. Leveraging CRM capacity across the University will depend on better coordinating and monitoring operational support for the CRM system and clear definition of business roles and responsibilities to ensure responsible access to and use of system functionality.

Vision and Business Goals

Griffith's vision is to provide an excellent educational experience to attract and retain students who, regardless of their background, will succeed at University and become graduates of influence (*Academic Plan 2013-17).* Student-related business goals are focussed across the student lifecycle in 4 key areas supporting the vision:

- **Student recruitment** – grow Griffith's share of Queensland and Northern NSW prospective student markets; grow Griffith Online [Marketing Plan]
- **Student experience** – provide an excellent Griffith student experience particularly orientation and transition, student advising and retention (Academic Plan]
- **Student employability** – create environments and managed relationships that develop the student employability (Employability Plan]
- **Alumni engagement** – manage long term relationships with Griffith graduates, employers and industry to promote lifelong learning and enhance philanthropic opportunities [Engagement Plan]

Moving Forward 2017-18

To achieve these goals, the next steps in leveraging CRM functionality would be to extend access to the system beyond central administrative units to Academic Groups in targeted priority areas. Future deployments must be cognisant of new and emerging technologies ie cognitive computing, mobile technologies.

Academic Advising: broader access to inquiry management by selected academic and administrative staff in Academic Group ie Program Directors; School Administration Officers. Inquiry management allows students to raise questions with Subject Matter Experts. Response tracking enables consistent and transparent information to be delivered to users; inquiry volumes and turnaround times can be tracked.

Action: Nature and scope of academic advising at Griffith to be defined; content created where gaps exist and roles and responsibilities defined for system access and operation.

Student Employability: capture of industry and employer contacts and inquiries for enhanced relationship management with external partners ie industry partners, employers, internship partners

Action: Define high priority industry partners ie GC2018 and develop roll-out plan for capture of key partnerships; define roles and responsibilities for system access and operation.

Schools Outreach and Student Recruitment: capture and tracking of relationships and enhanced digital engagement for schools outreach and student recruitment ie ENABLE Schools in Logan; Griffith Connect

Action: Consolidate and expand existing school contact database; prioritise high value recruitment partners and develop digital engagement strategies; define roles and responsibilities for system access and operation

Automating Assessment: explore OPA functionality to automate and streamline application processes ie scholarship application, LOA etc. Oracle Policy Automation is a solution for capturing, managing and deploying complex legislation/policies and other document based materials across channels and processes

Action: evaluate applicability of the tool for existing application processes and provide report on business opportunities for deployment.

Operational Support Model

Timely and flexible operational support is critical to the extending access to the CRM and protecting the integrity and security of records and the management of digital communications to users ie avoiding spamming of users. Strategies to enhance operational support include:

- empower organisational units to champion CRM practices and operations in their business areas; designate local *power users*
- define roles and responsibilities to manage access to the CRM system
- monitor central capacity to support extended access to the CRM system
- establish a community of practice to ensure consistency of knowledgebase content and inquiry management protocols
- schedule routine metric and analytics to business areas to track effectiveness and facilitate decision-making

ORACLE CX CRM at Griffith University

'Ask Us' knowledge base

Multi channel enquiry management

Targeted communications

Organisation management

Milestones

2016
- Event management
- Student complaints and review of decision process integration
- Careers and employment industry relationship management
- Online admissions application integration (UGRD direct)

2015
- PeopleSoft data integration - Phase 2 Cohort framework
- myGriffith portal integrations
- Enquiry managment expansion - Griffith International
- Online admissions application integration (HDR)

2014
- PeopleSoft data integration - Phase 1 Point to point
- Online admissions application integration (PGRD direct)
- Student feedback webform
- Enquiry management expansion - OUA services, Graduations, Exams & timetabling

2013
- Student Success Advisor deployment
- Ask Us knowledgebase collections to Funnelback
- Enquiry management expansion - Scholarships, Uni-Skills, Sports College

2012
- Ask Us - Staff
- Enquiry management expansion - HDR, Student Services, Campus Life
- Student Success call campaign functionality

2011
- OMC event campaigning
- Ask Us - Future Students
- OMC school relationship management
- Enquiry management - Student Admin future student contact centre

2010
- Ask Us - Current Students
- Enquiry management - Student Admin current student contact centre

'Ask Us' knowledge base

- Provides Tier 0 web self service 24/7
- 2200+ FAQs that span the student lifecycle
- Presents contextual answers to students based on their interactions – Answers that others found helpful
- Provides a knowledge management framework for staff
- Contextual FAQs can be placed across entire website

Answers viewed 2010-2016

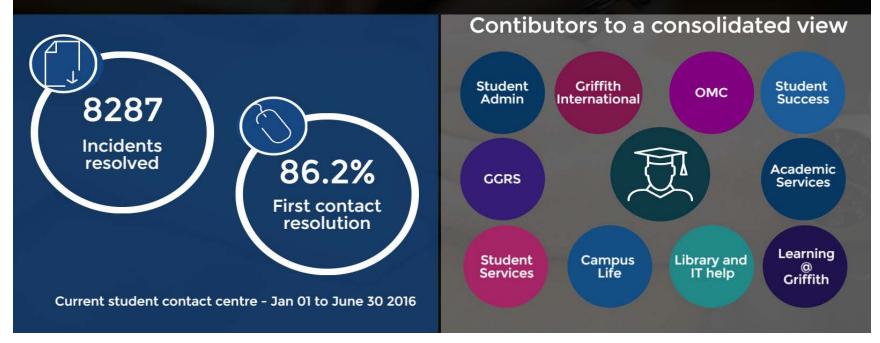|	
Current student answers viewed	3.1 Million
Future student answers viewed	1.3 Million
Staff answers viewed	291 K

Top categories viewed 2010-2016

1.1 mil	Admissions and applying
863 K	Enrolment and timetables
511 K	Exams and timetables
430 K	Learning@Griffith
404 K	Computing and technology
315 K	Pathways and upgrades
311 K	Fees and charges
231K	Credit

Enquiry management

- Student can track and review enquiry history
- Consolidated view of student enquiry and engagement history
- Consistent enquiry responses through KB integration
- Enquiry transparency across silos
- Enquiry response tracking and metrics

8287 Incidents resolved

86.2% First contact resolution

Current student contact centre - Jan 01 to June 30 2016

Contibutors to a consolidated view

- Student Admin
- Griffith International
- OMC
- Student Success
- GGRS
- Academic Services
- Student Services
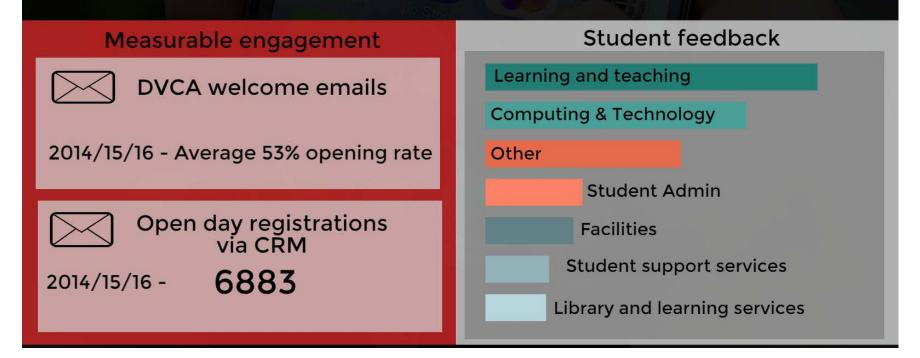- Campus Life
- Library and IT help
- Learning @ Griffith

Targeted communications

- High level of segmentation and personalisation achieved through data integration with PeopleSoft student system
- Targeted engagement and feeback through campaigns and surveys
- Measurable broadcast and transactional emailing
- All communications contribute to consolidated view.

Measurable engagement

✉ DVCA welcome emails

2014/15/16 - Average 53% opening rate

✉ Open day registrations via CRM

2014/15/16 -   **6883**

Student feedback

- Learning and teaching
- Computing & Technology
- Other
- Student Admin
- Facilities
- Student support services
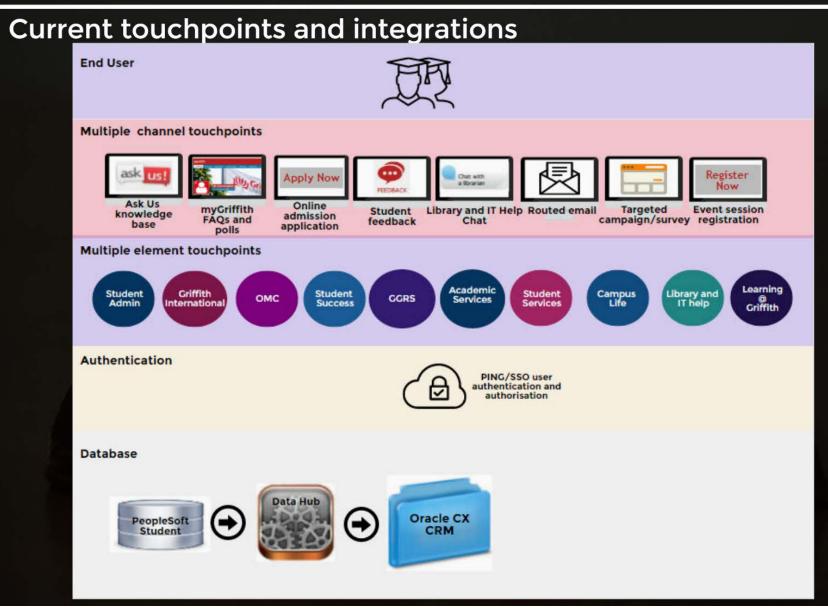- Library and learning services

Organisation management

- Database of organisations with associated key contacts, enquiry and engagement history

- OMC managing high school relationships through grouped school regions and priority and value categorisation

- Careers and Employment developing capability toward database of industry partners and graduate employers

School types in CRM

School type	Percentage
Connect partner	17%
Catholic	13%
Independant	28%
State	48%
Total	100%

2016 School newletters

Average open rate **23%**

Average click through **32%**

CRM reach and footprint

Current touchpoints and integrations

Griffith University CRM Enquiry summary 2009-2016

Date range is 01/01/2010 to Oct 13 2016

Year	Users	Ask a Questions	Answers Views	Number of Answers	Ask Us Self service	Emails	Phone/counter	Enquiry totals	Tier 0 Self Service	Escalate to Tier 1/2	Initial response	Final resolve
2010	37	2982	31419	352	90.50%	2595	37	5614	82.13%	17.87%	1d2h45m	1d15h3m
2011	149	5312	204635	686	97.40%	13165	11295	29772	85.45%	14.55%	1d20h7m	2d11h43m
2012	249	6275	335691	913	98.13%	44948	35468	86691	74.17%	25.83%	1d18h58m	6d14h19m
2013	317	6162	369689	1310	99.14%	64811	57624	128597	65.21%	34.79%	1d23h12m	5d14h13m
2014	367	7044	534131	1546	98.68%	69119	54327	130490	75.56%	24.44%	1d23h3m	6d12h56
2015	412	8013	904278	1905	99.11%	84653	57286	149952	83.41%	16.59%	1d18h56m	4d15h0m
2016	486	7005	985243	2281	99.28%	76782	49334	133121	86.48%	13.52%	1d18h48m	3d15h38m

Year	Users	Ask a Questions	Answers Views	Number of Answers	Emails	Phone/counter	Enquiry totals
2010							
2011	302.70%	78.14%	551.31%	94.89%	407.32%	30427.03%	430.32%
2012	67.11%	18.13%	64.04%	33.09%	241.42%	214.02%	191.18%
2013	27.31%	-1.80%	10.13%	43.48%	44.19%	62.47%	48.34%
2014	15.77%	14.31%	44.48%	18.02%	6.65%	-5.72%	1.47%
2015	12.26%	13.76%	69.30%	23.22%	22.47%	5..45%	14.91%
2016	17.96%	-12.58%	8.95%	19.74%	-9.30%	-13.88%	-11.22%

Terminology

Users – Staff member with CRM console access. These staff are not necessarily involved in Tier 1 enquiry management

Ask a Questions – Questions received via the CRM knowledgebase web enquiry form.

Answers Views – Number of FAQs viewed

Number of Answers – Number of active answers available in the knowledgebase

Ask Us Self Service rate – Self Service percentage derived from comparing the number of answers viewed to the number of Ask a questions received.

Emails – Number of incidents created from routed email channels

Phone/Counter – Number of incident created as a result of phone or counter interactions.

Enquiry Totals – Total number of Ask a Questions +e mails + Phone/counter

Tier 0 Self-service - Self Service percentage derived from comparing the number of answers viewed to the total number of enquiries received

Initial response – The average time for an incident to be responded to

Final resolve – The average time for an incident to be closed due to resolution.

CRM adoption by element

Element	Number of Users
Academic Administration	240
Information services	88
Griffith International	41
Academic Group/Faculty	35
HDR administration	28
Marketing and Communications	26
Facilities	26
Grand Total	**484**

Knowledgebase visit activity

Below data represent user behaviour on within the Knowledgebase. Over time the trend toward directly answer links has increased due to a combination of factors.

Syndicated widget dissemination of on GU webpages

Answer links appended to enquiry responses

Knowledge returns in direct searches such as Google (See referring site data below)

Activity	2010	2011	2012	2013	2014	2015	2016
View Answer	61.9%	61.2%	71.1%	71.3%	76.7%	78.1%	76.9%
Search	21.6%	19.2%	18.9%	20.5%	16.2%	16.0%	15.9%
Search & Answer	16.3%	15.0%	14.5%	15.7%	12.8%	12.7%	12.8%

Referring Site	% of Visits
Google	71.40%
Griffith homepage	9.0%
Current student Ask Us	6.6%
Blackboard LMS	2.8%
Future student Ask Us	2.3%
myGriffith student portal	2.0%
www.bing.com	1.2%
Griffith app	0.7%