



**QUEEN'S
UNIVERSITY
BELFAST**

CISG-PCMG22 // New solutions for a new world

How Collaboration Built the (Nearly-) Perfect CRM

Michelle McGaughey and Paul Ferguson

01 // WHO WE ARE



Michelle

Business Services Team Leader

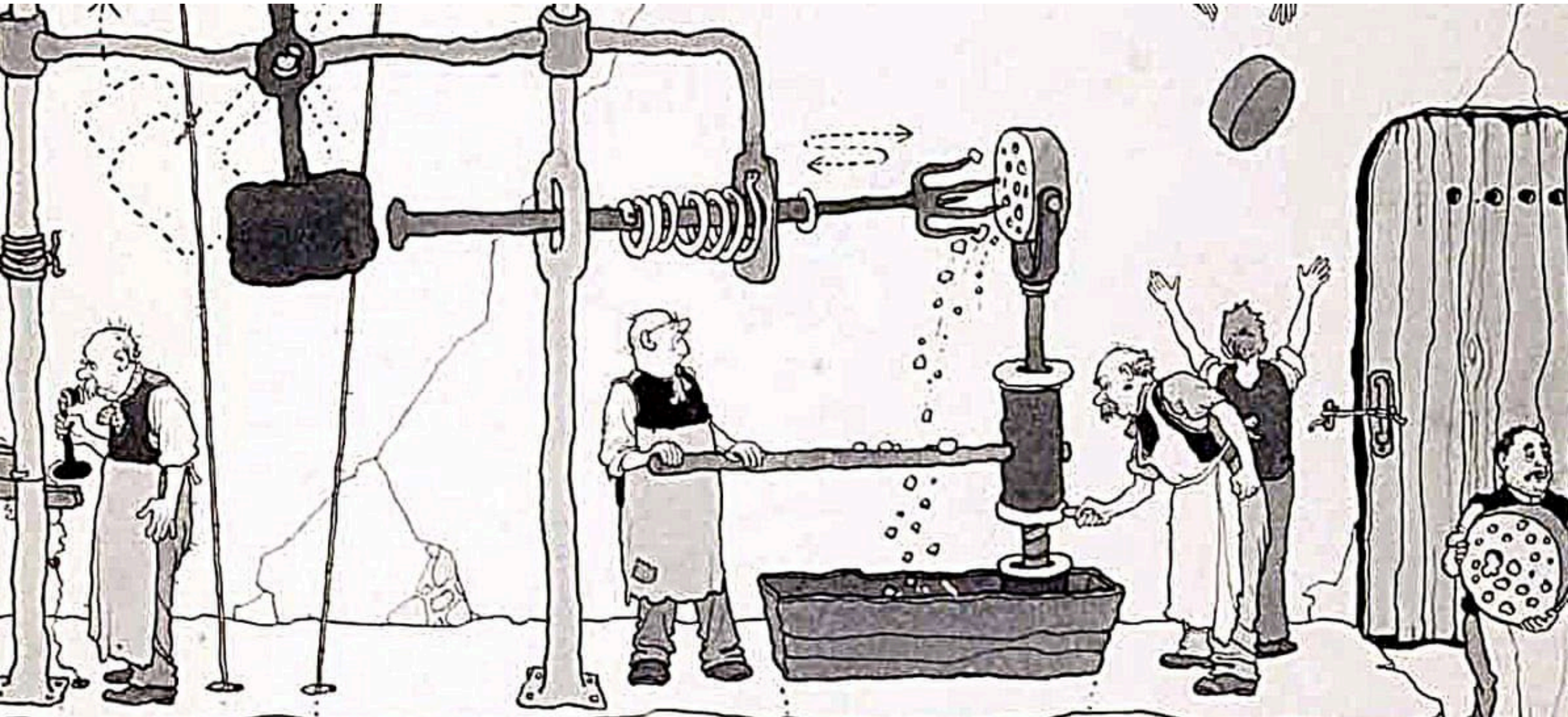
Focus: Managing the University's CRM system

Paul

Digital Marketing Manager

Focus: Using CRM for student recruitment

02 // WHERE WE WERE



2018

Microsoft Dynamics 2013

- Only held data on prospective students
- Lots of 'custom programming' // requests always bespoke
- No third-party integration
- No automation
- Horrific amount of legacy data
- Unfriendly interface
- Poor reporting
- Understandable lack of enthusiasm from business users
- A disconnected system creating business silos

2018

Microsoft Dynamics 2013

- **Operational risk of on-premises Windows Server 2008 end-of-life**
- **Redundant data added time to daily data import routines**
- **Potential for a breach of GDPR legislation by holding outdated data**
- **Data analysis via SQL reporting server**

03 // WHAT WE DID (MIGRATION)



2019-2020

Migration

- The logical step was migration to a cloud-based solution
- The purpose: to unlock integrations with other platforms
- Planning started 2019 with approval and funding secured
- Banana skins included:
 - Migration delayed by long-term absence of team leader
 - Global pandemic and lockdown – new ways of working

2019-2020

Migration prep

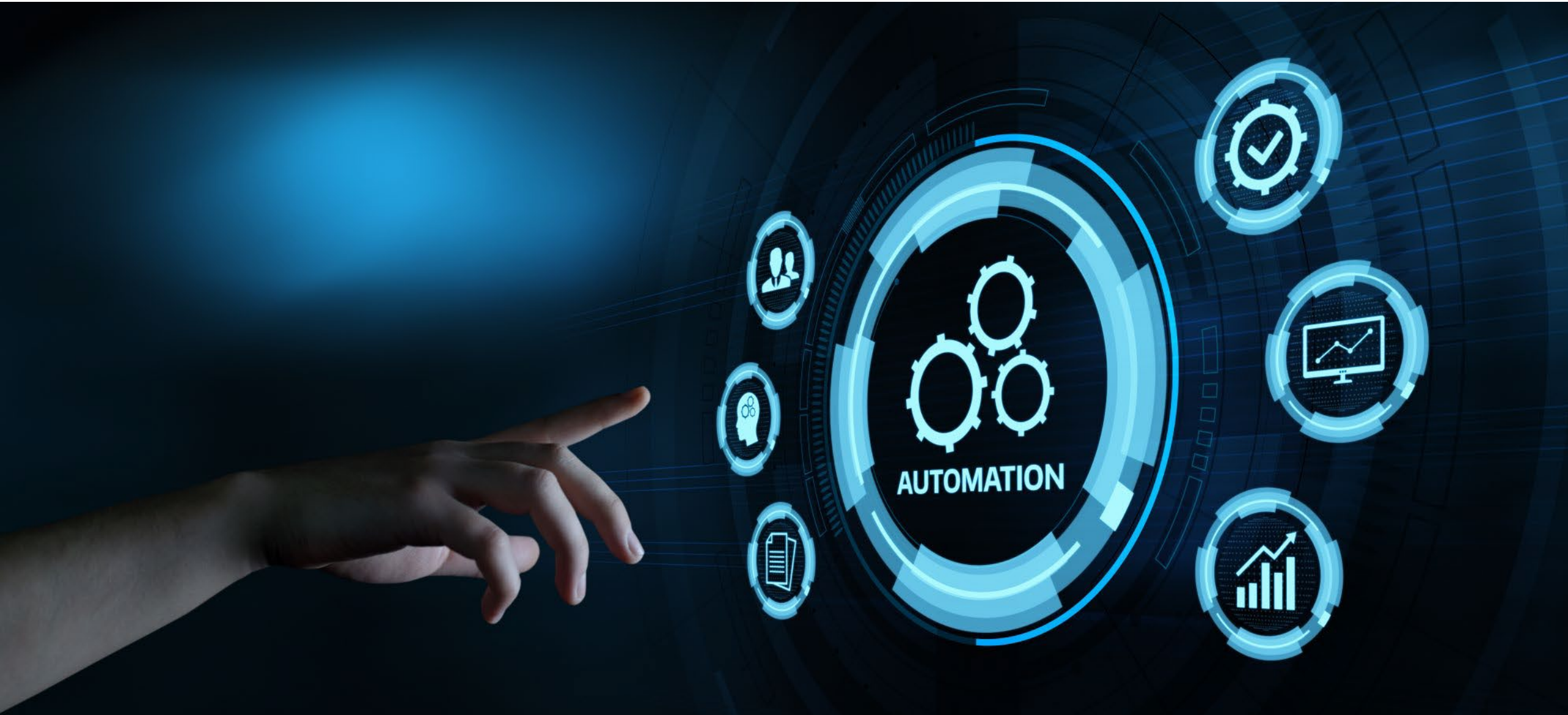
- CRM 2013 development halted, administrators trained on Dynamics 365
- CRM 2013 database upgraded to CRM 2015 then CRM 2016
- Dynamics 365 configured – sandbox, production, web portal
- Core entities customised and custom entities created
- Code review and remediation
- Student recruitment forms recreated in Power Portal and multi-entity web forms transferred from on-premises web server to Azure App Center
- Windows 2012 SQL Server VM set up for CRM data processing

2019-2020

Migration complete

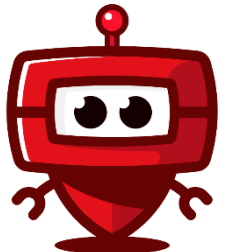
- Kingswaysoft for data transfer from CRM 2016 to Dynamics 365
- Model-driven apps created for business areas
- CRM forms and views rebuilt to improve business processes
- Switch over date set for July 2020!
- Last access to CRM 2016 at close of business day
- 2 hour downtime for final data transfer then Dynamics 365 goes live
- On-premises Windows Server 2008 SQL Server decommissioned

04 // WHERE WE ARE NOW



Automation

- Condition-based email campaign automation via Click Dimensions
- Event automation via Gecko Engage – signup, comms, SMS prompts, QR codes, digital tickets, in-market offline capture, straight from digital ticket to streamed webinar
- Advertising Campaign leads automation – Facebook, TikTok, Keystone
- Engagement automation via Gecko chatbot
- International Scholarship awards
- Selection interview process for Admissions



Good governance

- Devolved email campaign marketing to subject areas
- Devolved form-building
- Improved governance of CRM-related processes via Microsoft stack
- Azure DevOps for project management, code repositories and wikis
- Kingswaysoft for annual routine data archiving ensuring data relevance

New Contact Types

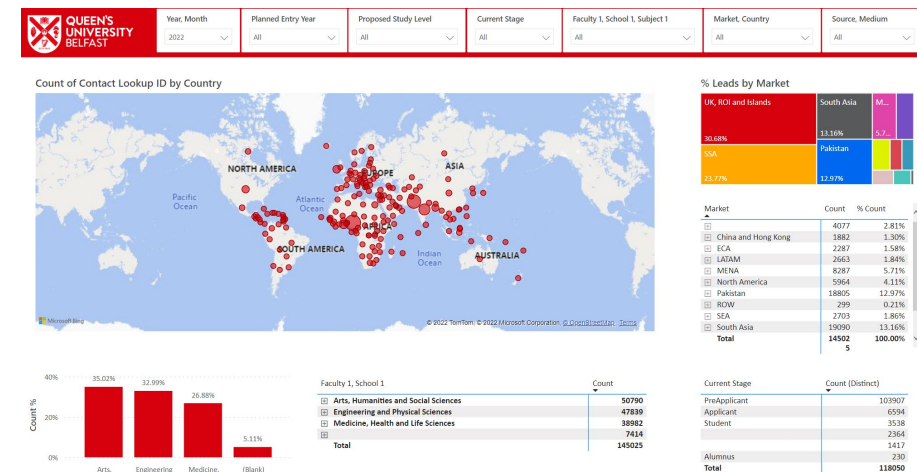
- Parents
- Post-primary school staff – principals, careers teachers, subject heads
- International Education Agents
- INTO progressors and partners
- Global sponsors
- Employers

New stakeholders, processes and remit

- Student placement data
- Campus tour bookings
- Widening participation
- Scholarship applications
- Disability Services and Student Wellbeing

Visual Reporting

- Power BI to demonstrate the most effective marketing activities for generating leads – for live insights, cost per lead, and future spend



- Power BI dashboards embedded within Dynamics model-driven apps
- Using Azure Data Lake for all Power BI data flows

05 // HOW WE WORK TOGETHER



Collaboration

- Agreeing priorities based on the University's corporate strategy
- Joint Teams meeting every week to discuss ongoing or tactical projects
- Two really useful digital governance groups/meetings to decide strategic priorities
- A united front to other stakeholders
- Shared credit
- Mutual respect

06 // WHAT'S NEXT



The road(map) ahead

- Social media integration via Hootsuite
- Student accommodation data
- Lead scoring
- **Power BI for attribution modelling** – what activity leads to a successful application and how much does each activity generate?
- **Integration with Alumni / Graduate CRM**
- **Business engagement?**

Thanks for listening

Any questions?