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| **Tertiary ICT Excellence Awards Submission Form** | |
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| **Submitter Name:** | Ezra Holder |
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| **Abstract Title:** | **Cross-Functional, Cross-Roads: Lessons from the UC Online Marketing Automation Project (UCOMAP) and our Journey to Enterprise Systems** |
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| **Describe the technology or process that is core to your submission. Please be precise in describing exactly why this should be considered for the awards (max 500 words).** | |
| The UC Online Marketing Automation Project (UCOMAP) aligned Tuihono UC | UC Online marketing systems with the strategic UC systems, laying the foundations to ensure UC Online continues to attract new learners and meet ambitious revenue targets.  The project enabled more personalised, targeted, and timely interactions with prospective learners by empowering the UC Online marketing and enrolment support teams with better tools.  Project Deliverables:   * New website designed and developed using Adobe Experience Manager and Funnelback search * Content migration and refinement from existing to new website * Significant D365 enhancements   + Introduction of lead and application entities in data model   + Workflow / plugin logic to represent lead and student management application data in D365 * Migration of marketing data from Hubspot to D365 * Forms migration from Hubspot to Click Dimensions * Enabling marketing capabilities in Click Dimensions – campaign automation, lead scoring * Dedicated Azure Landing Zone implementation and connectivity to support integration & associated logic * Established a new event based integration pattern from UC Student Management System to D365 via our Data Integration Hub (DIH).   As a project team, the achievement that we’re most proud of is extending our project scope to cover the entire prospect funnel; from lead generation through to finalised enrolment. By strongly advocating for the inclusion of enrolment application data in D365 and a dedicated application entity to represent this data, we were able to deliver significant value beyond what was available to our business stakeholders in their existing systems.  This project delivered a fully integrated digital marketing and enrolment support ecosystem that enables proactive engagement which was not previously possible at UC. This includes:   * Representing prospective learner data from the Student Management System in Dynamics 365 (D365) in near real time via our Data Integration Hub (DIH) * Supporting lead generation and enrolment support within a single CRM environment * Enabling automated, personalised, and compliant marketing communications   The operating context for this project was shaped by multiple layers of overlapping change. The tertiary sector itself is under pressure, with evolving funding models and a shifting role in modern society. At the University of Canterbury, investment priorities pivoted from physical infrastructure following the Christchurch earthquakes to a long-term digital transformation strategy launched in 2020. Within this, UC Online has been evolving from a fresh-faced start-up to an established contributor to UC’s offerings – bringing with it new expectations and inevitable growing pains.  Delivering this project partway through UC’s 10-year digital transformation meant that many of the systems, processes, and teams we depended on were in varying states of maturity. The combination of sector volatility, institutional change, and evolving internal capabilities presented significant challenges that had to be carefully navigated to achieve success.  UCOMAP was delivered by a small cross-functional project team, achieving an enterprise-scale implementation that not only supports ambitious growth targets for UC Online, but also establishes a connected, scalable CRM and marketing platform. This lays the groundwork for future UC-wide adoption of modern, compliant engagement practices. | |
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| **Briefly summarise how your submission supports and is valued by your organisation. Describe the customer or business benefits of the technology or process. For example, which key strategies did the enhancement meet, what business problem needed to be solved, or perhaps how does a key customer group benefit from a new or improved delivery process. (max 500 words).** | |
| The project addressed key challenges of unintegrated systems, manual processes, and limited visibility across the marketing and enrolment support funnel, all of which restricted Tuihono UC | UC Online's ability to scale marketing and enrolment support efficiently.  This project directly supports Te Whare Wānanga o Waitaha | the University of Canterbury’s Digital Vision strategy through the establishment of a scalable, compliant, and integrated marketing and enrolment support ecosystem. This project also strongly aligns with **Tuihono UC’s mission and vision**: to make education more **relevant, accessible, and flexible**—and to deliver **new revenue, reach different learners, and achieve greater impact through innovation**.  **Strategic value:**   * Advances UC’s Digital Vision by contributing to:   + **A Data Driven Digital Ecosystem:** through near real-time, consistent data across marketing and enrolment support channels   + **A Digitally Empowered Organisation:** by equipping UCO marketing and enrolment support teams to streamline campaign delivery, reduce manual workload, and gain timely insight into prospective learner activity   + **Experience-led Designs:** via personalised communications informed by behavioural signals, consent status, and stated preferences * Supports key goals within UC Online's vision statement including: * **new revenue** * **different learners** * **greater impact through innovation**. * Provides a foundational model that can be applied to the wider UC context and extended to additional requirements   **Business and operational benefits:**   * Enables UC Online to meet recruitment and revenue goals through near real-time, data-driven marketing and enrolment support * Strengthens data integrity and reporting, supporting informed decision-making for marketing team – for example being able to target marketing activities depending on enrolment numbers or higher value offerings. * Eliminates parallel systems, maximises return on investment and standardises tooling across UC * Reduces risk associated with staff dependency by replacing spreadsheet and email-driven processes with structured, automated workflows driven from an integrated CRM platform   **Learner and staff impact:**   * Prospective learners receive timely, relevant communications tailored to their interests and enrolment stage * UCO marketing and enrolment support teams can execute campaigns, manage leads, and provide support more efficiently due to the connected ecosystem and enrolment application data being available in the CRM * Outbound marketing and enrolment support communications take a prospective learner's current context into account – marketing emails are prioritised, or not sent, based on lead preferences and whether they have started an application to enrol * Teams across UC now have a working model to follow for future marketing and automation initiatives   This submission demonstrates how a focused, strategically-aligned implementation delivered immediate value for UC Online and also laid the foundations for ongoing capability across the wider university. | |
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| |  | | --- | | **Describe the broader applicability of the enhancement across different teams, departments, or institutions and how it might support long-term transformation and adaptability in the IT landscape.** | | The project addressed key challenges of unintegrated systems, manual processes, and limited visibility across the marketing and enrolment support funnel, all of which restricted Tuihono UC | UC Online's ability to scale marketing and enrolment support efficiently.  This project directly supports Te Whare Wānanga o Waitaha | the University of Canterbury’s Digital Vision strategy through the establishment of a scalable, compliant, and integrated marketing and enrolment support ecosystem. This project also strongly aligns with **Tuihono UC’s mission and vision**: to make education more **relevant, accessible, and flexible**—and to deliver **new revenue, reach different learners, and achieve greater impact through innovation**.  **Strategic value:**   * Advances *UC’s Digital Vision* by contributing to:   + **A Data Driven Digital Ecosystem**: by providing near real-time, consistent data across marketing and enrolment support channels   + **A Digitally Empowered Organisation**: by equipping UCO marketing and enrolment support teams to streamline campaign delivery, reduce manual workload, and gain timely insight into prospective learner activity   + **Experience-led Designs**: via personalised communications informed by behavioural signals, consent status, and stated preferences * Supports key goals within UC Online's vision statement including:   + **new revenue**   + **different learners**   + **greater impact through innovation**. * Provides a foundational model that can be applied to the wider UC context and extended to additional requirements   **Business and operational benefits:**   * Enables UC Online to meet recruitment and revenue goals through near real-time, data-driven marketing and enrolment support * Strengthens data integrity and reporting, supporting informed decision-making for marketing team – for example being able to target marketing activities depending on enrolment numbers or higher value offerings. * Eliminates parallel systems, maximises return on investment and standardises tooling across UC * Reduces risk associated with staff dependency by replacing spreadsheet and email-driven processes with structured, automated workflows driven from an integrated CRM platform   **Learner and staff impact:**   * Prospective learners receive timely, relevant communications tailored to their interests and enrolment stage * UCO marketing and enrolment support teams can execute campaigns, manage leads, and provide support more efficiently due to the connected ecosystem and enrolment application data being available in the CRM * Outbound marketing and enrolment support communications take a prospective learner's current context into account – marketing emails are prioritised, or not sent, based on lead preferences and whether they have started an application to enrol * Teams across UC now have a working model to follow for future marketing and automation initiatives   This submission demonstrates how a focused, strategically-aligned implementation delivered immediate value for UC Online and also laid the foundations for ongoing capability across the wider university. |   **Describe how the project was taken from vision/idea to delivery, what challenges were met and how they were handled on the way (max 500 words).** | |
| One of the most significant challenges the project faced early on was a lack of alignment around purpose. Initially, the focus was on technical implementation – moving to enterprise systems – rather than delivering meaningful business outcomes. The initial “lift and shift” approach posed multiple risks: replicating existing practices instead of transforming them, alienating key stakeholders who felt the change was being done to them rather than with them, and failing to meet leadership expectations due to oversimplification and lack of complexity handling.  The turning point came when the team shifted from a technology-led mindset to one grounded in solving real business problems. This was enabled by strong collaboration between our subject matter expert, who could clearly articulate the marketing and enrolment pain points, and our project lead. Together, we reframed the project’s value proposition and amended the scope. The evolved vision focused on enabling scalable, personalised marketing and enrolment support, built on a compliant, integrated ecosystem.  The project was delivered in distinct phases. We began with the website build and migration, while CRM discovery and design progressed in parallel. Keeping these workstreams on track was challenging for our small team, but we overcame this through an agile, iterative approach, open communication, and adaptability as dependencies and constraints emerged.  Following the website launch, we worked through complex data and integration requirements with D365 partners *Fusion 5* to ensure the CRM could deliver. A significant challenge was the effort required to include the application entity in our D365 data model and project scope. This was resolved through a commitment to solving problems properly and sheer perseverance. Including this entity allowed us to support a broader range of marketing and enrolment needs, and to manage lead generation and application engagement within a single platform – enabling automated communications and rich reporting. We are also much better equipped to address future requirements as they arise!  A recurring theme was navigating UC’s broader digital transformation. Many of the systems, teams, and processes we depended on were in flux or less mature than we would have liked. For the natural problem-solvers among us, this meant balancing a desire to improve everything with a pragmatic “done is better than perfect” mindset.  Setting up the integration between the Student Management System and D365 via the Data Integration Hub illustrates this well – from establishing an Azure Landing Zone and required components, managed via Terraform infrastructure-as-code, to ensuring event queues and handling met our requirements, resolving connectivity, and aligning with UC stakeholders and our vendor.  These challenges were addressed through technical depth in our core team and strong collaboration with experts across the digital group. Rather than chasing perfection, we focused on sequencing delivery and laying foundations for continuous improvement.  By embedding transparency, co-design, and structured decision-making – and drawing on a highly collaborative, cross-functional team dynamic – the project delivered an enterprise-grade solution that not only meets UC Online’s immediate needs but also sets the stage for scalable, university-wide adoption of modern CRM and marketing practices. | |
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| **Please detail any technologies that were implemented to deliver your enhancement or supply any other information you think may assist your submission (max 500 words).** | |
| **Technologies leverages / implemented as part of UCOMAP include:**   * **Adobe Experience Manager (AEM):** Content Management System for the UC Online website, with embedded Click Dimensions forms and components designed to support lead nurturing and capture. * **Squiz Funnelback:** Used to power site search and qualification/course indexing for improved discoverability. * **Microsoft Dynamics 365 CRM:** UC’s enterprise platform CRM. UCOMAP significantly extended the data model – modifying existing entities (Contact, Qualification) and introducing new ones (Lead, Application) – while implementing custom plugins and cloud flows to manage status updates and ensure timely, accessible information for marketing and enrolment support. * **Custom D365 Dashboards & Views:** Purpose-built dashboards and filtered views were developed within Dynamics 365 to give UCO marketing and enrolment support teams the information they need to carry out their day-to-day activities. This empowers them to work efficiently and prioritise effectively. * **Custom Consent Model in D365:** Developed to support category-based opt-in tracking and ensure compliance with marketing regulations. * **Click Dimensions:** Marketing automation platform used for building forms, email campaigns, lead scoring, nurturing workflows, and tracking web activity. * **Click Dimensions Tracking Scripts:** Embedded in AEM to monitor prospective learner interactions and pass engagement signals into D365. * **UC Data Integration Hub (DIH):** custom middleware platform built in Microsoft Azure that is used to publish application, enrolment, and consent data into D365 from our  Student Management System in near real time via an event-driven model. * **Azure Landing Zone:** Built following UC’s Cloud Adoption Framework to securely host integration components, including Azure Service Bus and Function App. * **Azure Functions:** Used to process inbound events from the DIH and update records in D365, enabling scalable, real-time integration logic. * **Terraform:** Infrastructure-as-code tooling used to define and manage Azure resources in a repeatable, secure, and supportable way. * **Power BI Dashboards:** Enabled reporting and performance tracking across lead generation and enrolment funnel.   These technologies, working together, formed a secure, scalable, and compliant ecosystem that empowers UC Online’s marketing and enrolment support teams while providing a foundation for future UC-wide CRM and automation initiatives. | |
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| **Please supply the name, title and contact details of two people whom our judges may contact as referees. Ideally the referees should have knowledge of the implementation and its benefits from a customer or Institutional management perspective.** | |
| **Referee 1:** **Name:** Rachel Montejo **Title:** Assistant Director (Growth & Operations) | Future Learning & Development **Email:** rachel.montejo@canterbury.ac.nz  **Referee 2:** **Name:** Dana Burnett **Title:** Director, Digital Channels & Research Experience | UC Digital Services **Email:** dana.burnett@canterbury.ac.nz | |
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| **Please list all technology suppliers involved in the project.** | |
| **Website implementation workstream:**   * UC Digital Web Team (internal): AEM site build and theme development * Funnelback (Squiz): Search infrastructure provider * Adobe: AEM web platform provider   **CRM implementation workstream:**   * Fusion 5: Dynamics 365 implementation and marketing automation integration partner * UC Digital: Cloud, Connectivity, Integration, Cyber Security Teams (internal): Azure infrastructure, and data integration enablement * Click Dimensions: Marketing automation platform integrated into D365 * Microsoft: CRM platform and cloud services | |