Enterprise Salesforce at UK

Introduction, Overview, and Exploration

Our deployment of Salesforce is a Constituent Relationship Management (CRM) platform that brings together the many aspects of the University and its constituents together.

Through multiple integrations and data coverage, it informs and supports the student lifecycle from application to graduation and beyond, as well as applications in marketing, health and well-being, and constituent support.

These goals are accomplished across three clouds, five product verticals and multiple support groups.

Verticals

Education Cloud

Marketing Cloud

Health Cloud

Social Studio

Alumni & Philanthropy

Vertical Supports

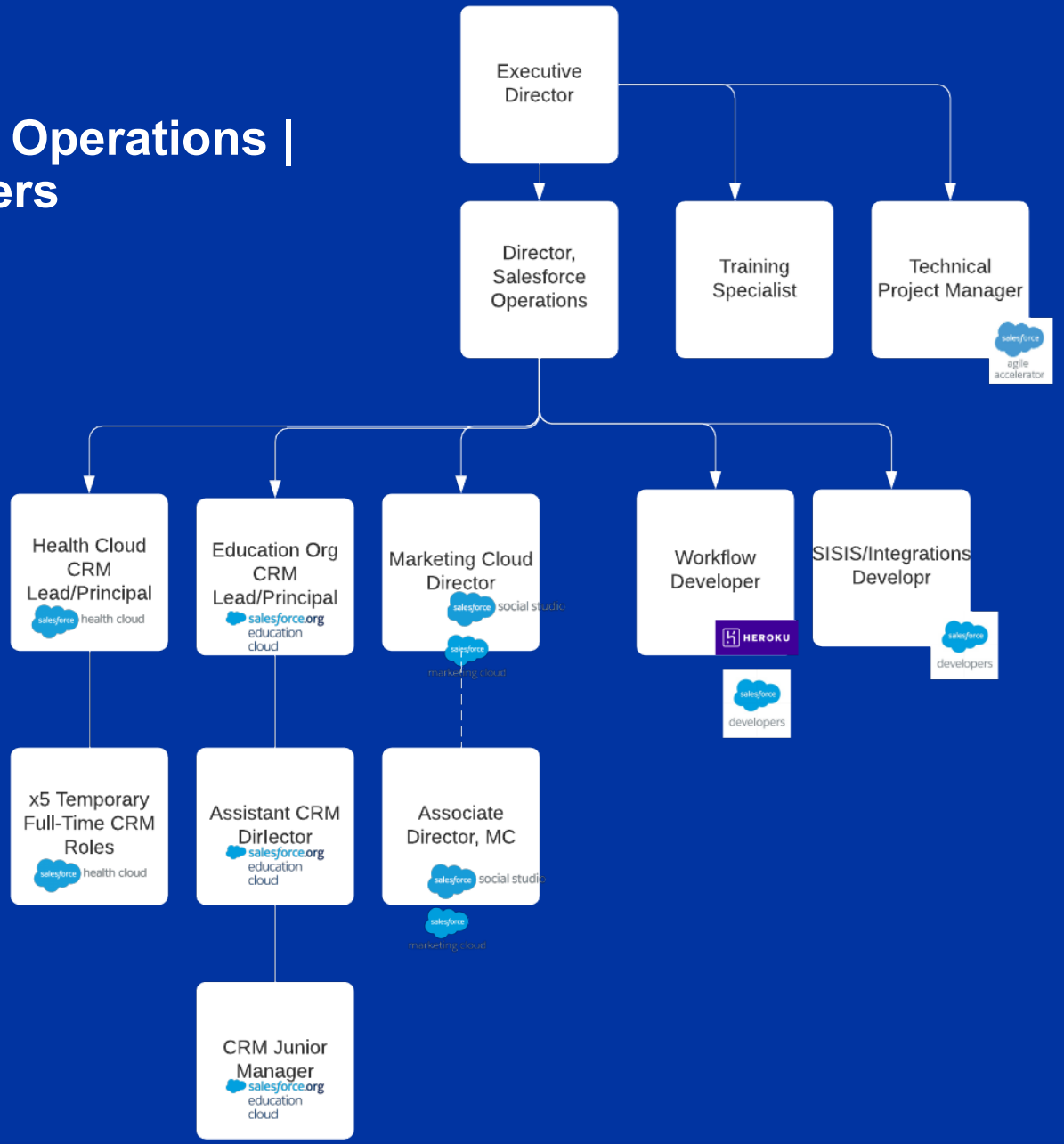
Integrations

Training

Ops Team

Enterprise Salesforce Operations | Product/Service Owners

January 2022

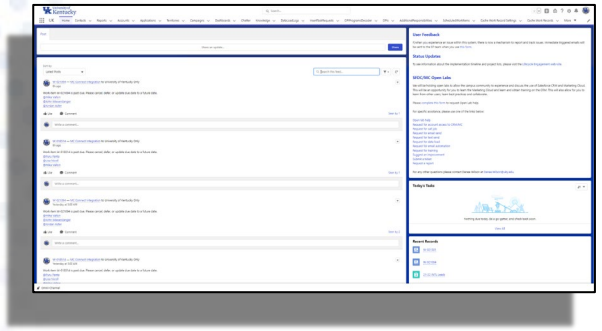


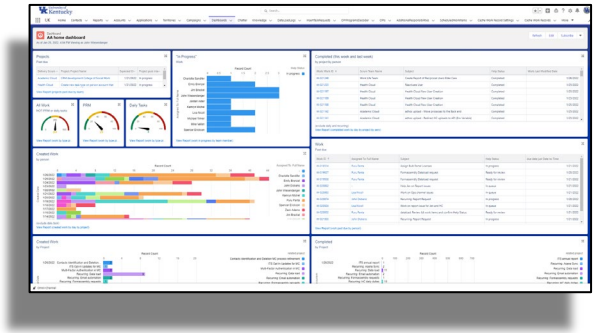
Education Cloud

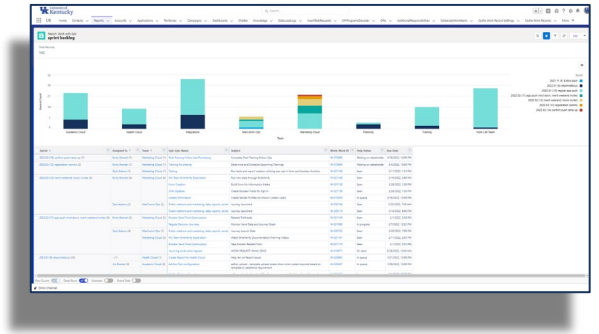
The Enterprise Salesforce Operations team is tasked with creating an end-to-end solution for managing constituents across the student's lifecycle, from recruitment of prospective undergraduate students, to retention of currently enrolled students, to recruitment of graduate and professional programs – both online and in-person.

Through email, text/SMS campaigns, call campaigns, chat and chat bot functionality, customized reports, individual appointment scheduling, email analytics and more, University constituents are enabled to communicate and engage with students in a more targeted, personalized manner within a single Salesforce ecosystem.

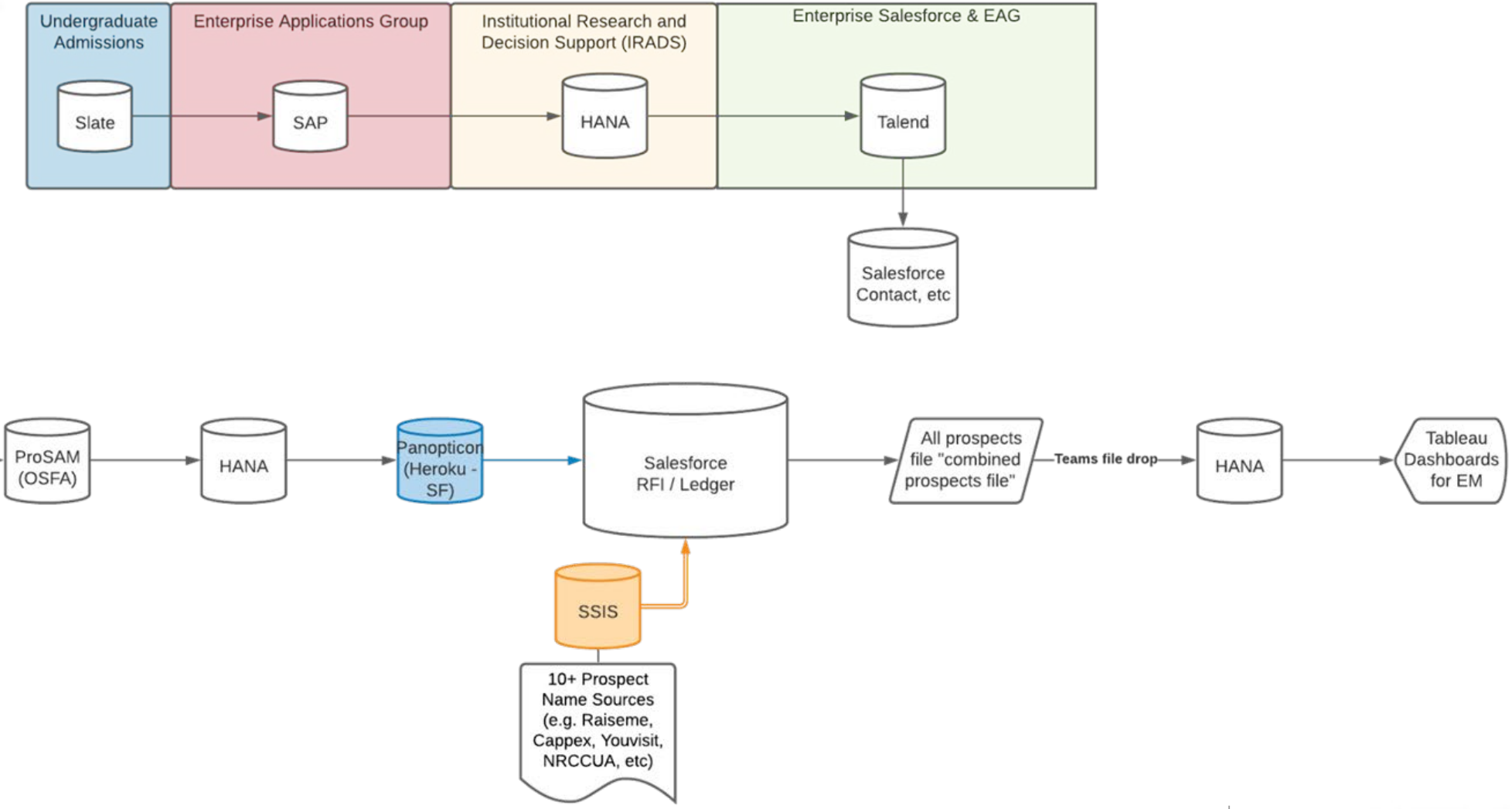
The CRM allows UK to become better stewards, communicators, administrators, and partners while supporting our processes and students.

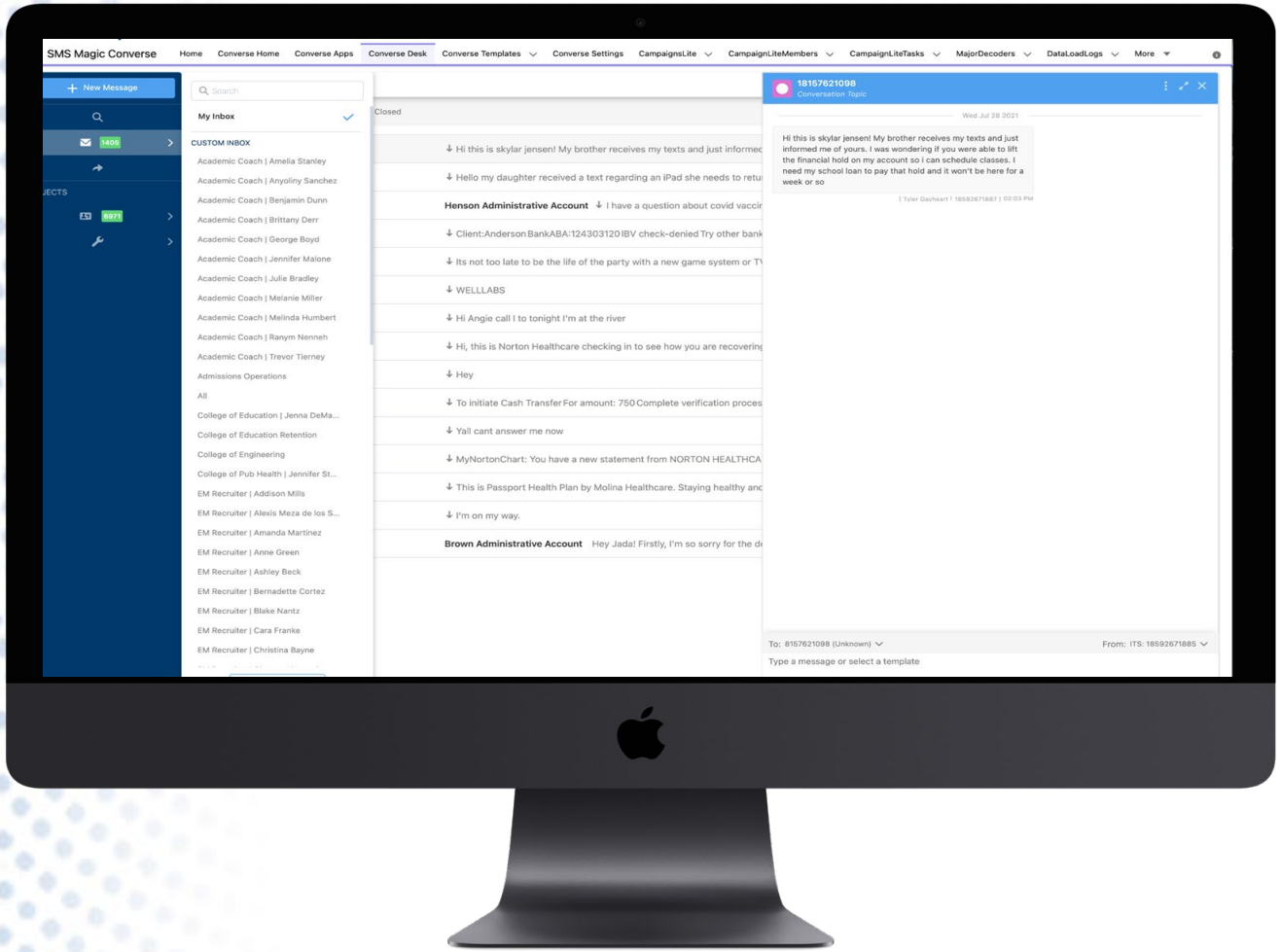




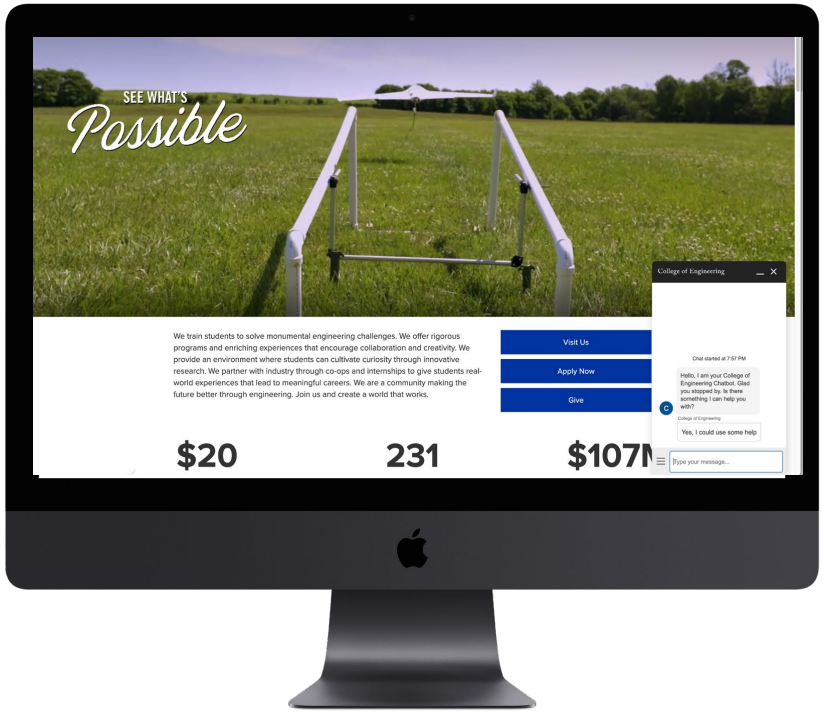


Education Cloud Data Flow & Integrations





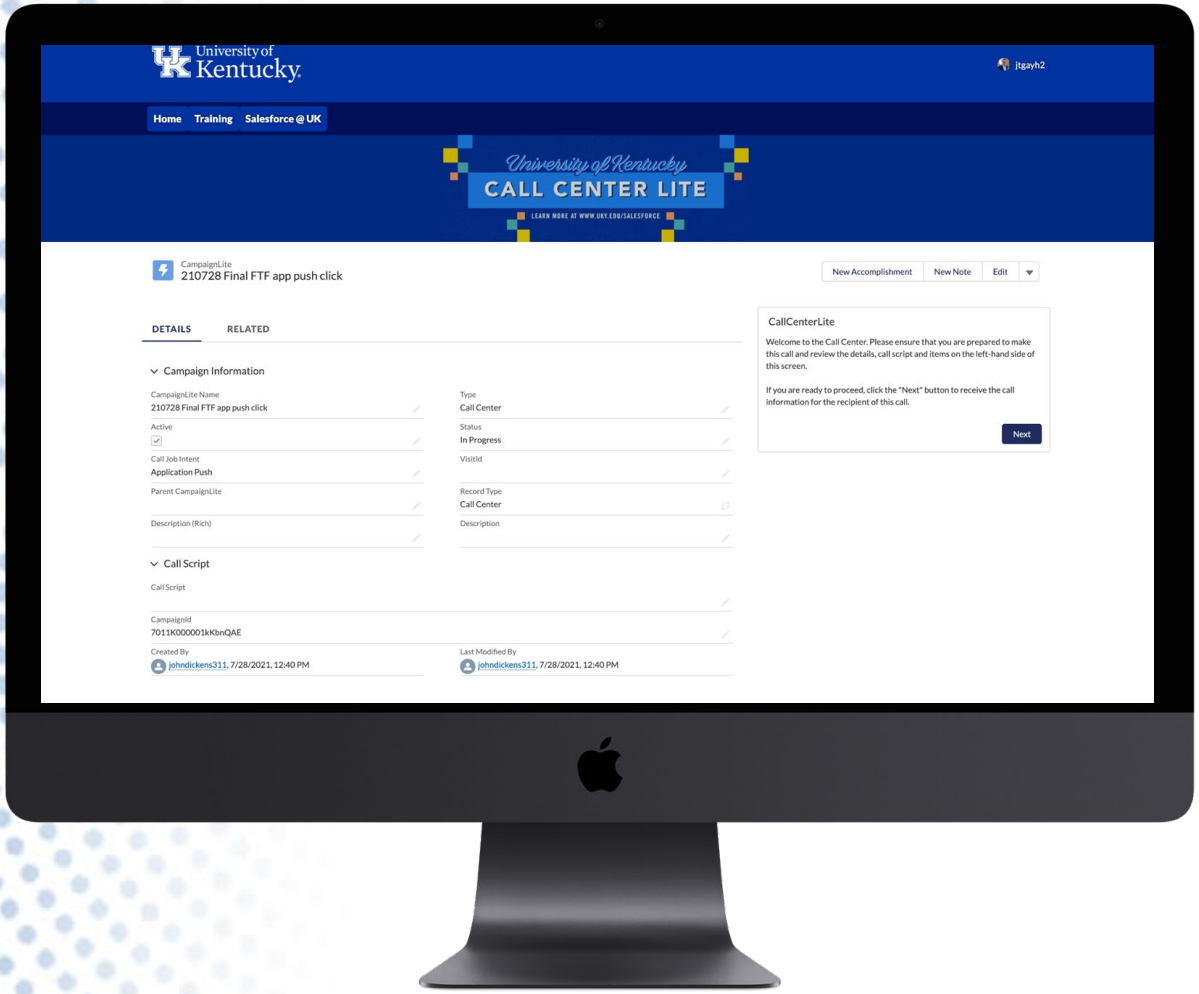
Mass Text Campaign Management



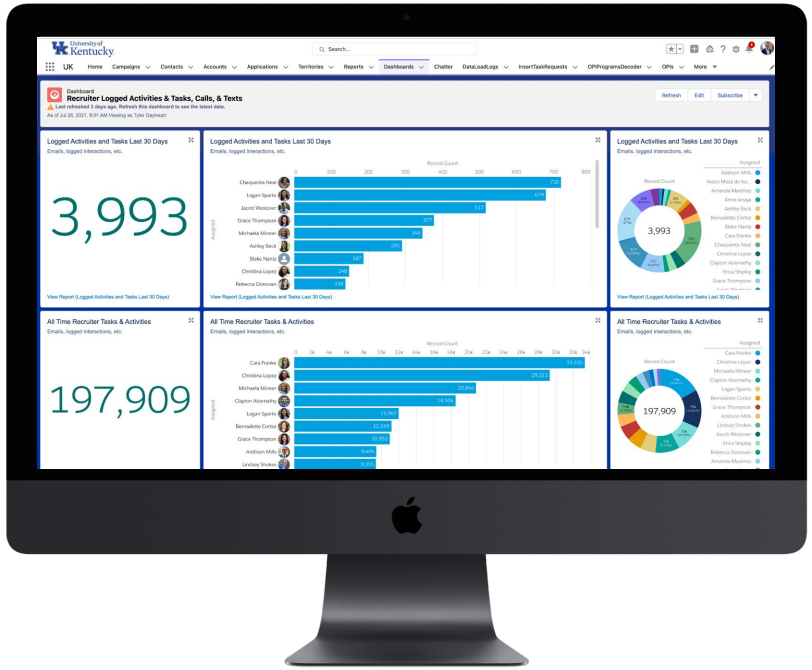
Conversation Layer (Chatbot, LiveChat

University of Kentucky

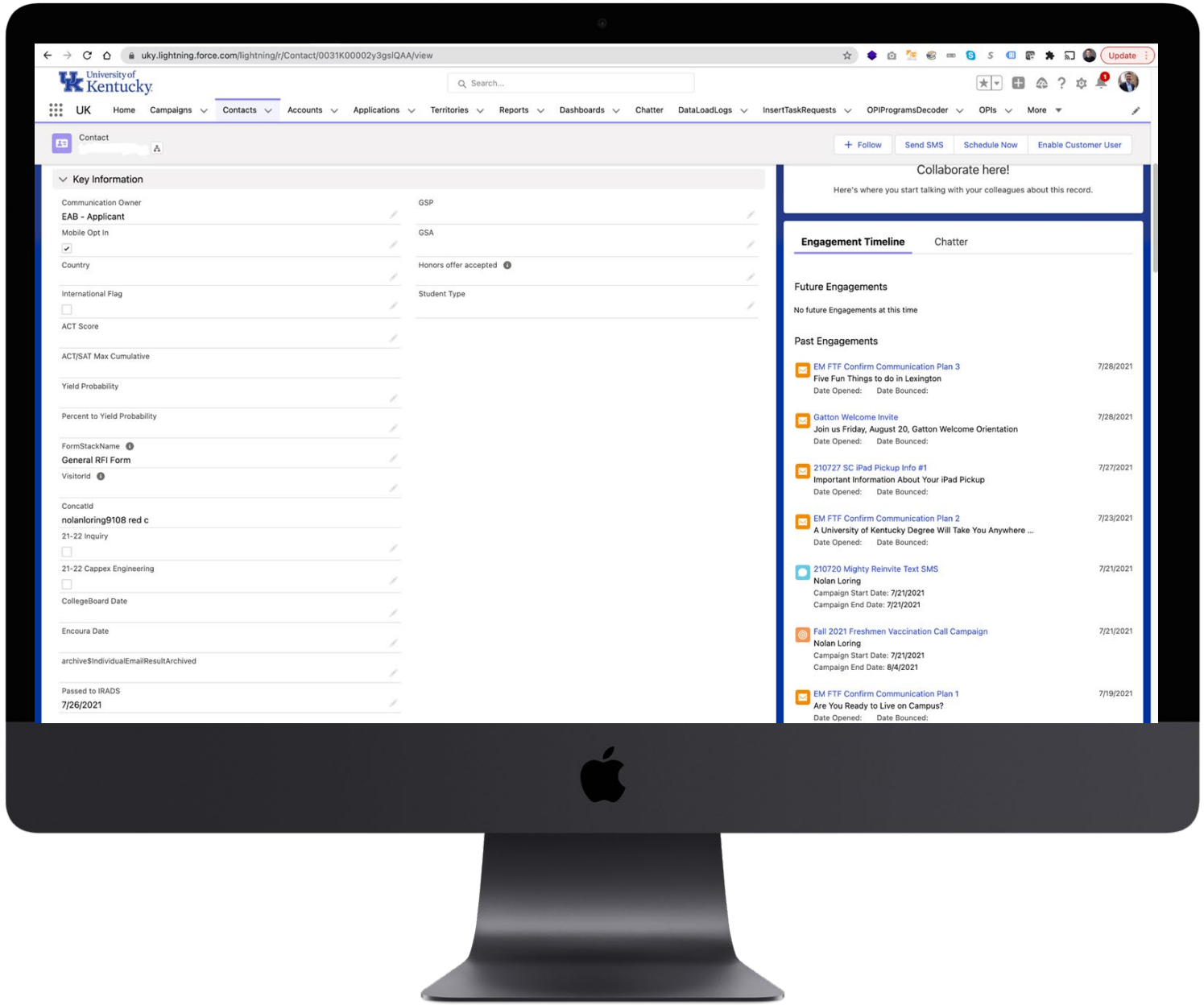
Clo



Call Center Campaign Management



Task & Activity Tracking

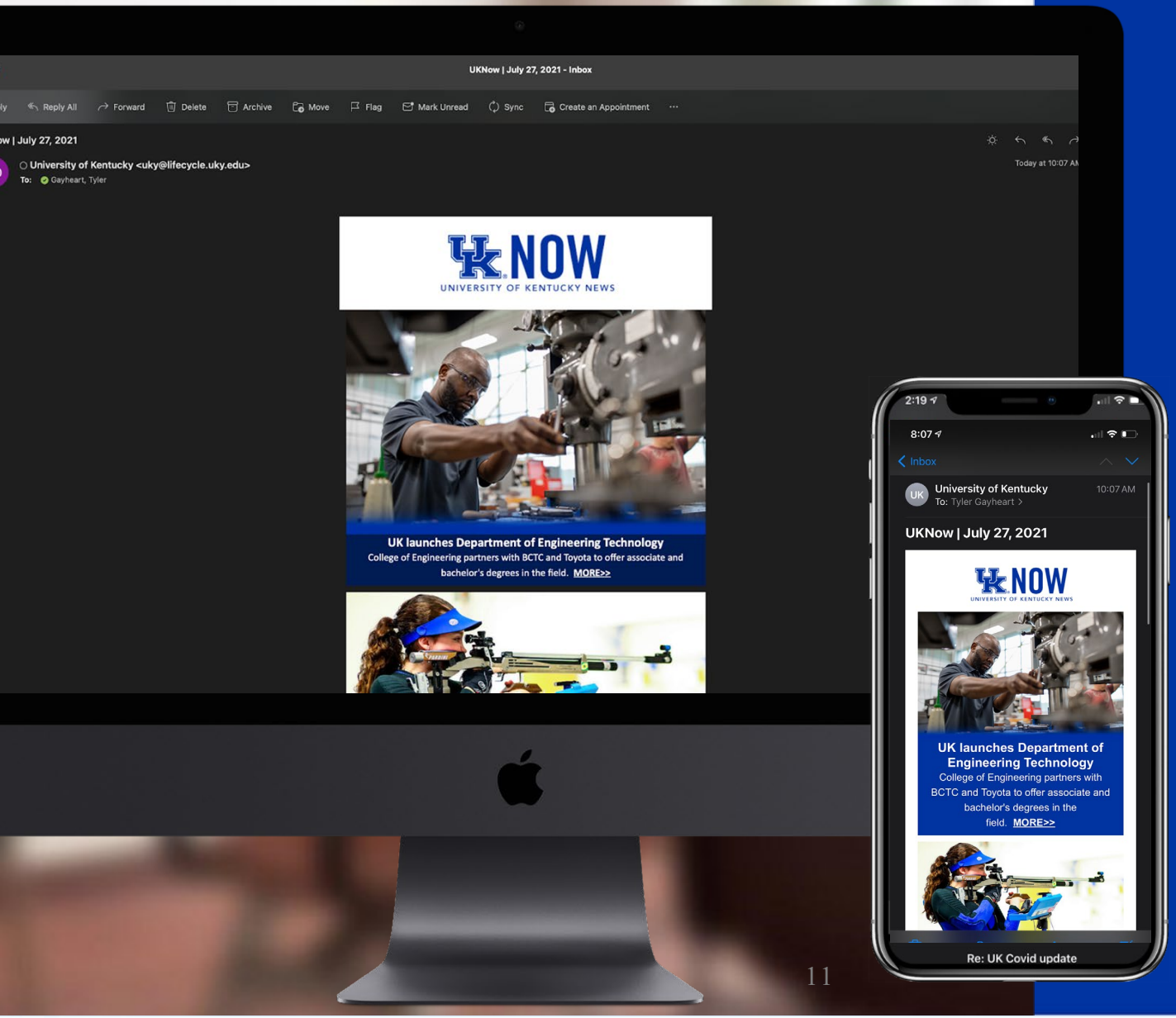


Constituency Management

Education Cloud Metrics | 2021

49 Departments utilizing CRM	**1.2M** Fall 2022 Prospect Records	**14** Prospect Data Source Types	**75** Call Campaigns Completed
302 Active Users in CRM	**519** Tracked and logged data loads	**545k** Text messages sent/received	**1,576** Communication reports created

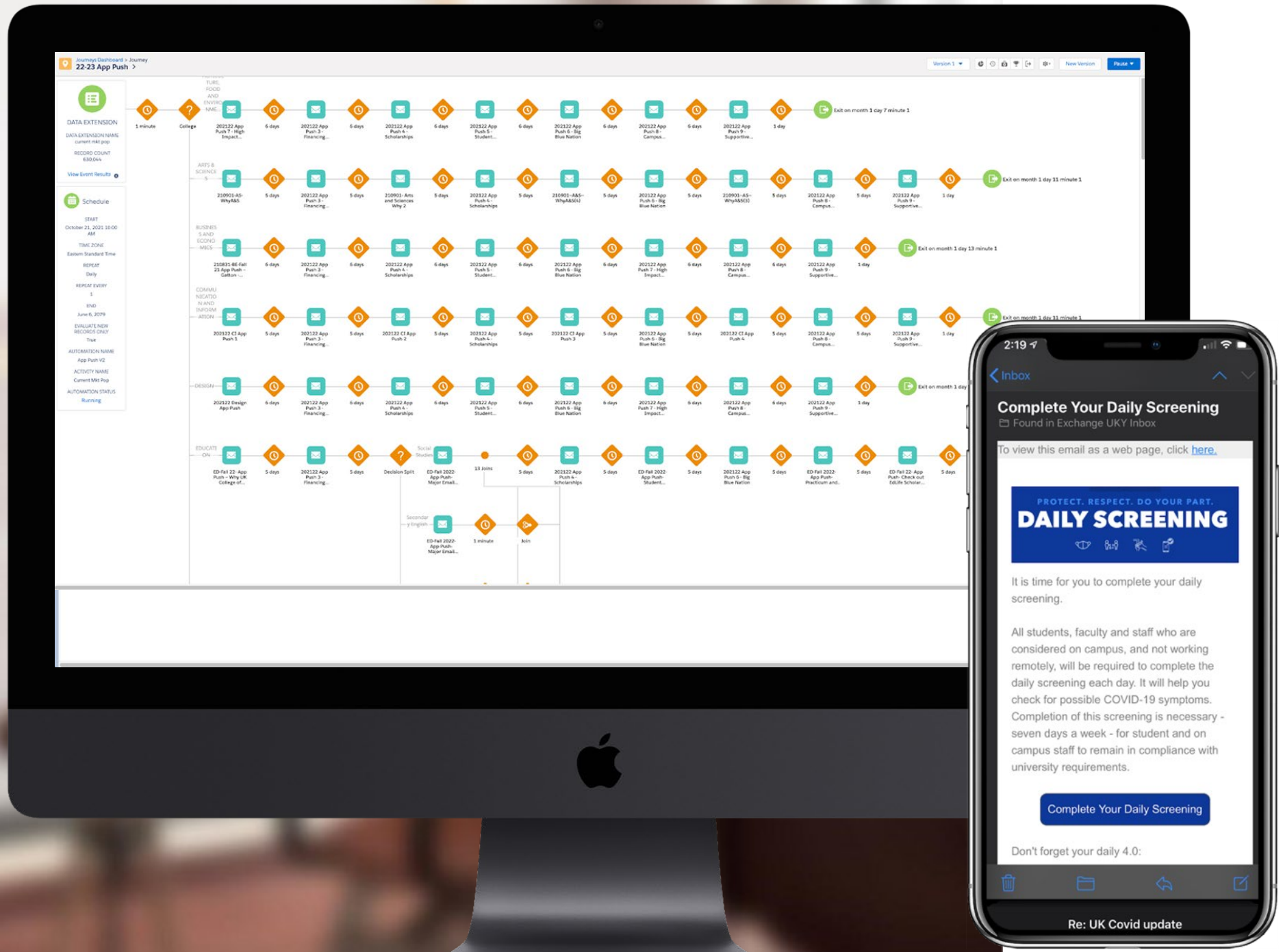
Marketing Cloud



Marketing Cloud is the enterprise-level digital marketing engine for campus, including features such as mass email broadcast communications, SMS functionality, social media management tools in Social Studio, and automated marketing "journey" functionality. These functions allow for customized communications that reach the right people at the right time.

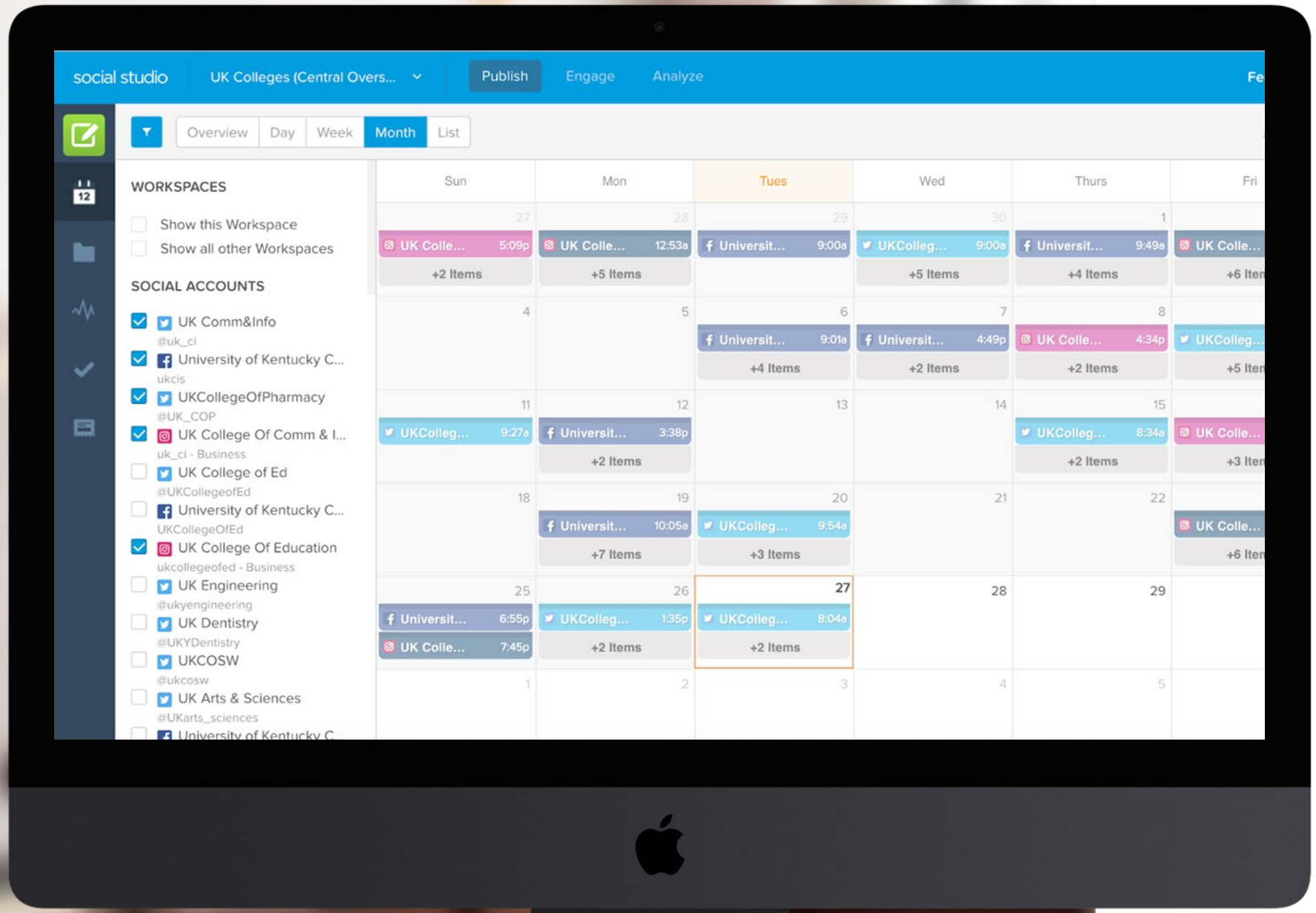
The platform draws from three primary CRMs, housing information on the academic campus, alumni and philanthropy, and health and COVID-19 response within specialized business units that are leveraged by more than 150 users.

Journey Based Strategies



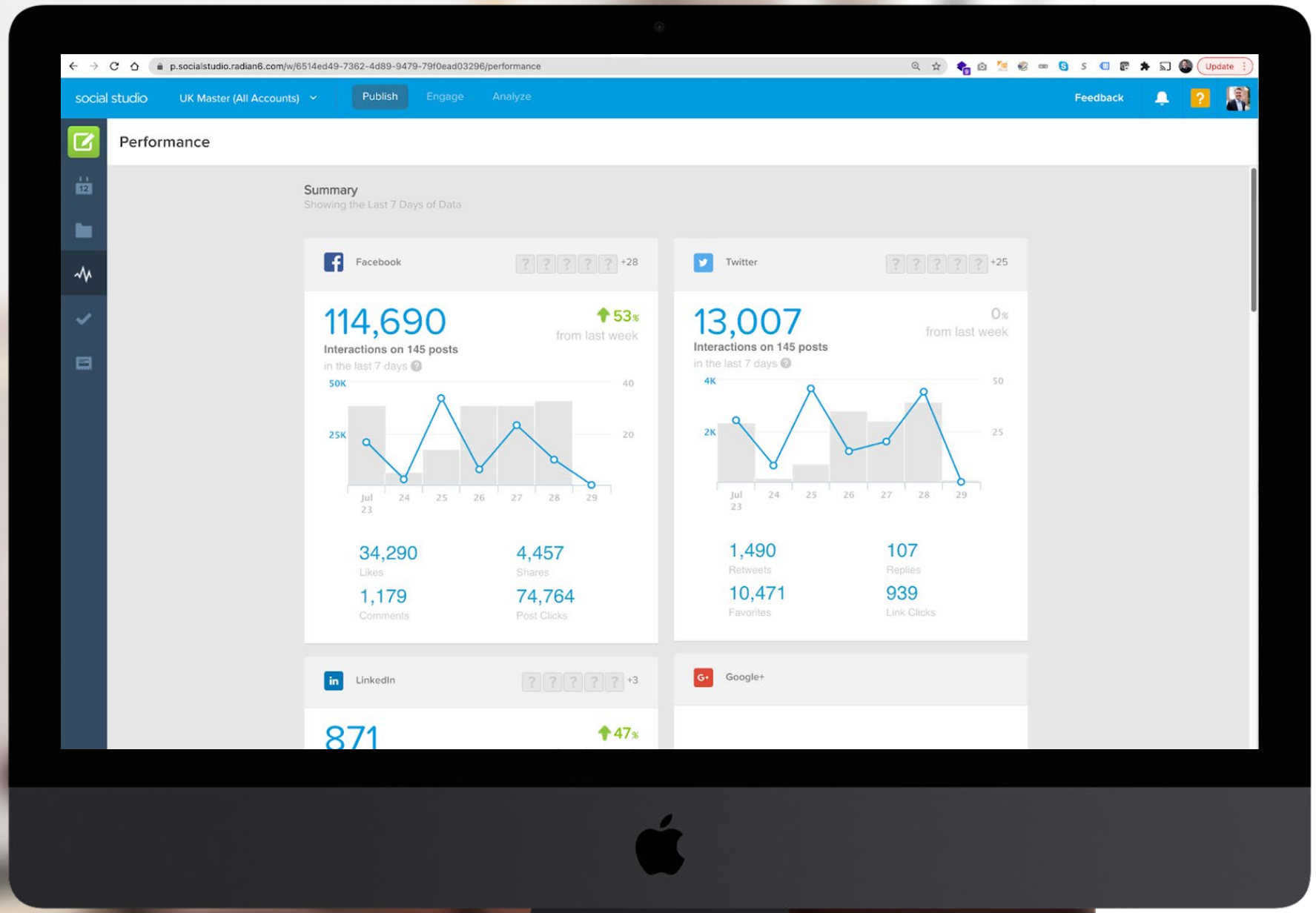
University of Kentucky

UK's Social Media Engine



University of Kentucky

UK's Social Media Engine



MARCOMM SUMMIT 2021

University of Kentucky

Marketing Cloud (cont)

Marketing Cloud automations, decision splits, and engagement data allow UK to tailor communications and target prospective undergraduate and graduate students to maximize applications, confirms, and matriculated students.

Templates and shared content blocks offer quick turnaround of consistent brand standardized content for marketing and communications teams across campus. Teams and departments from both the EVPFA and Provost areas utilize Marketing Cloud for newsletters, announcements, and single send communications to existing students, faculty, and staff.

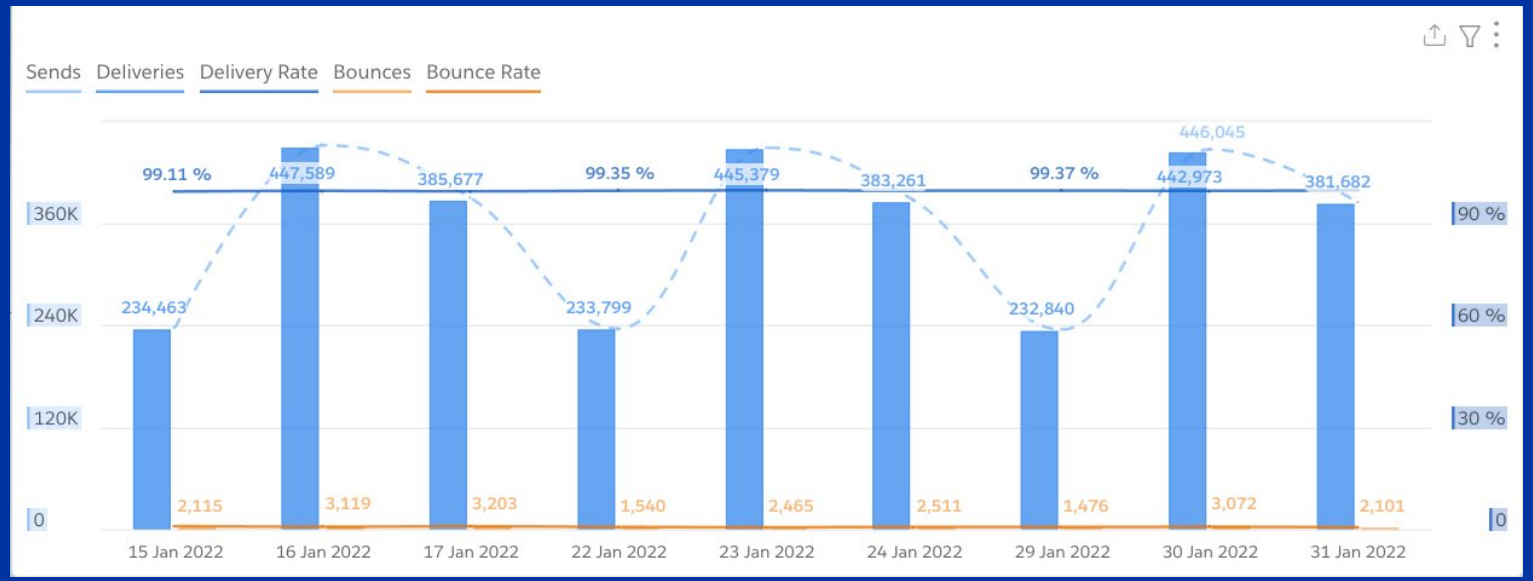
Continued engagement data syncs back to alumni and donor records through the Alumni and Philanthropy CRM, identifying the best prospects and fostering continued relationships

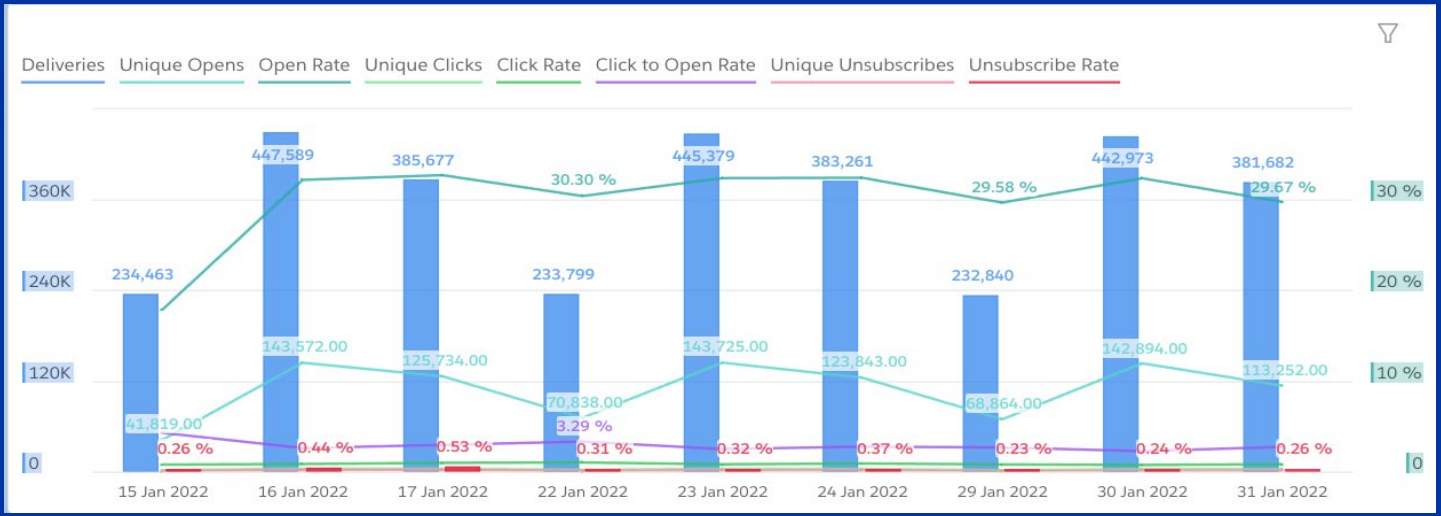
UK's COVID-19 response continues with a partnership with Wild Health and UK Health Corps, utilizing Marketing Cloud to deliver test results as quickly as possible

salesforce marketing cloud

Marketing Cloud Reporting: Campaign Tagged Email Metrics

Delivery metrics include KPIs for email marketing, including sends, deliveries, bounce rates, email domains reached. In addition, send information can be broken down by email domain, day of the week the message was sent, and audience type.





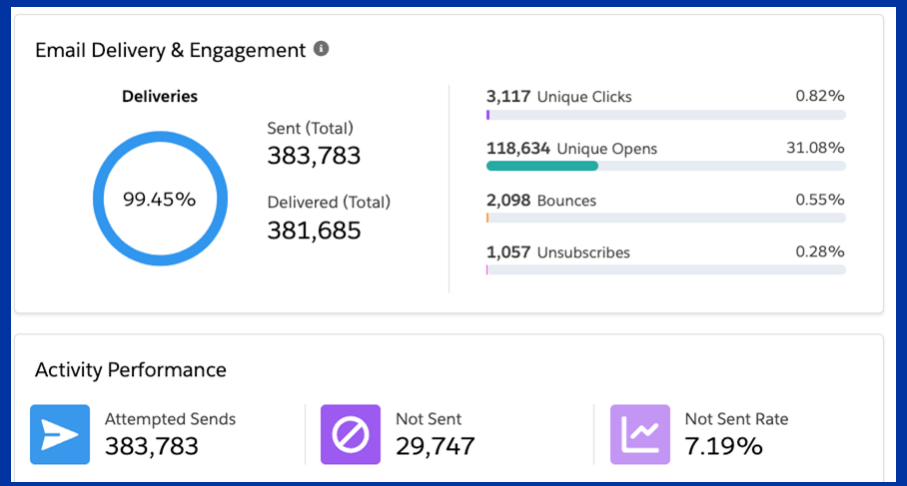
Engagement KPIs in Datorama give visualization to the successes of any individual email send or targeted campaign, showing all touchpoints for a customer receiving a Marketing Cloud communication.

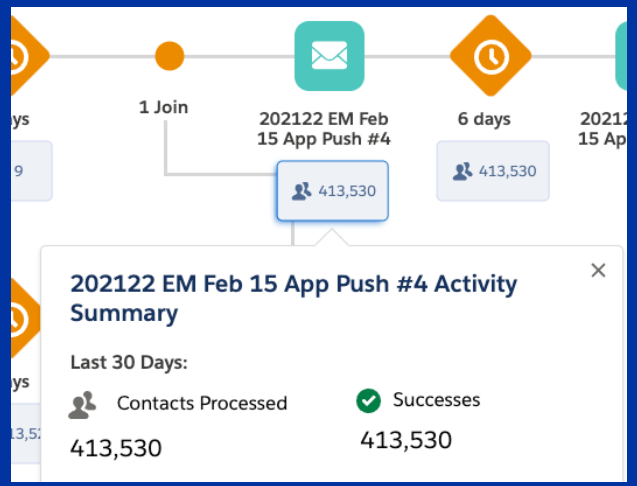
Marketing Cloud Reporting: Journey Metrics

Overall Journey metrics show total performance across all activities inside a Journey, which gives us insight into underperforming activities, "active" prospects vs. those unlikely to apply, and indicates which activities will offer the best yield.

Journey Name	Journey Ve...	Journey Activity	# Sends	# Open Rate	# Unique Clicks
22-23 Regular Decision App Push WEST	All	All	1,158,435	31.53 %	10,150
22-23 Regular Decision App Push KY	All	All	706,233	25.89 %	5,936
22-23 Regular Decision App Push EAST	All	All	1,344,597	32.20 %	10,450

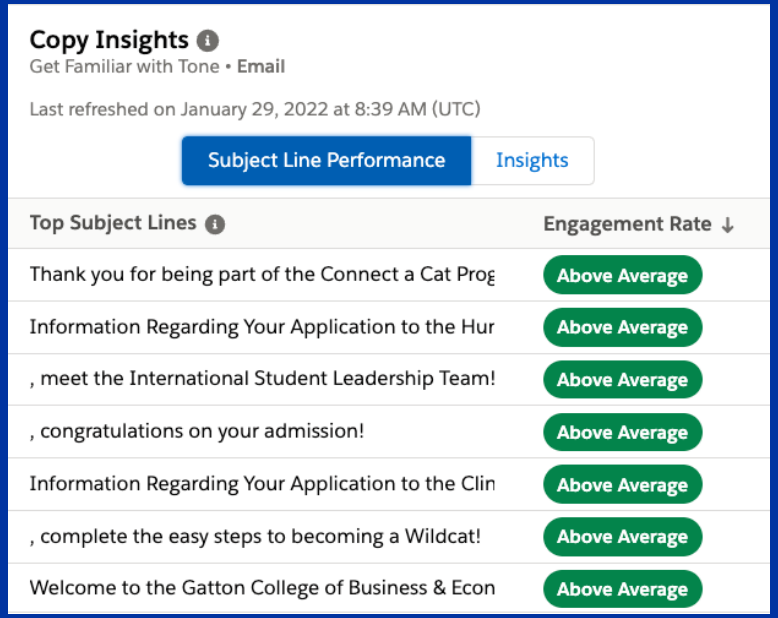
Individual email metrics are available, both within the journey itself and within datorama reports.

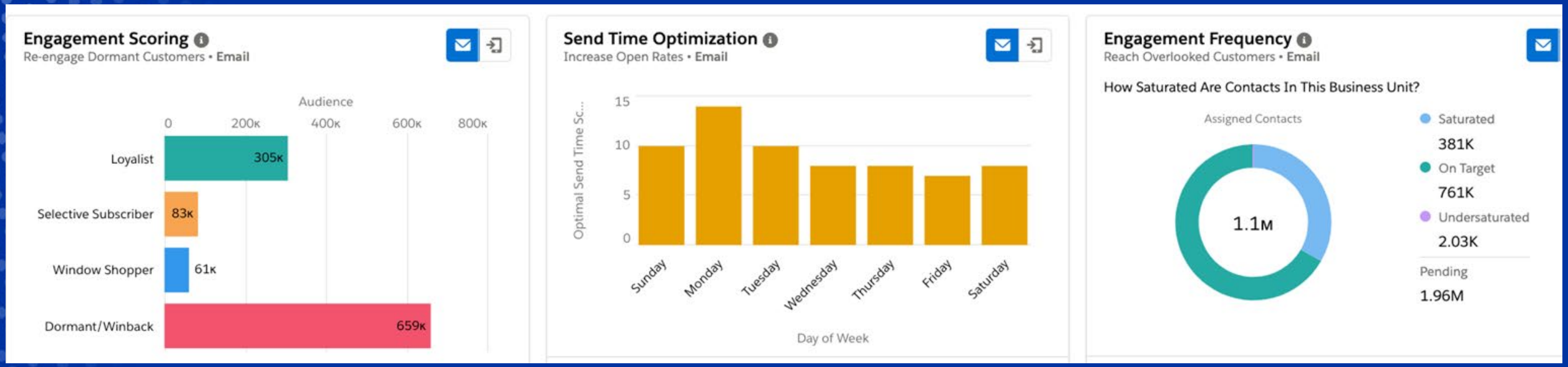




Marketing Cloud Reporting: Einstein AI

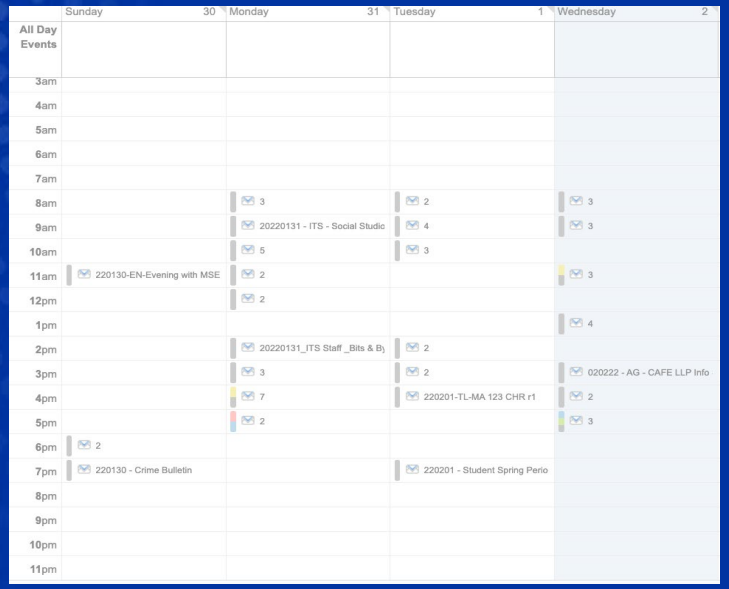
Einstein AI analyzes messages from each Business Unit, offering insight into the customers most likely to apply, the best times of day to send messages, whether customers are receiving sufficient messaging to remain engaged, and even copy insights such as Subject Line based engagement.

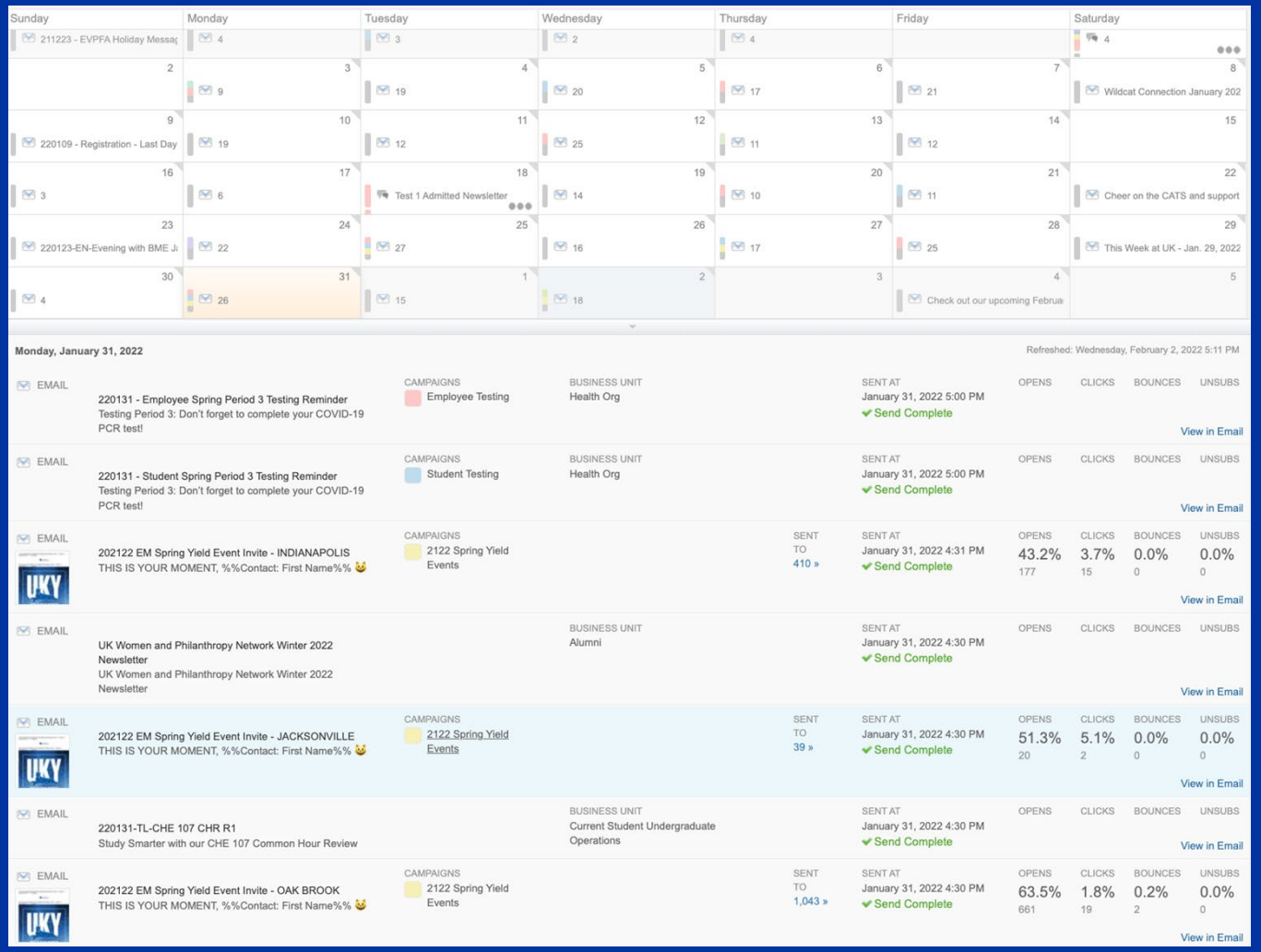




Marketing Cloud Reporting: Send Calendar

Calendar view shows all historical sends from all Business Units, with related campaign tags, and shows details for each email send in your current Business Unit. In daily view, you can see the distribution of non-journey send times from across your entire organization.

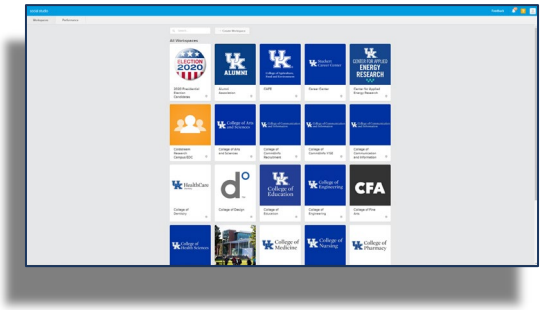


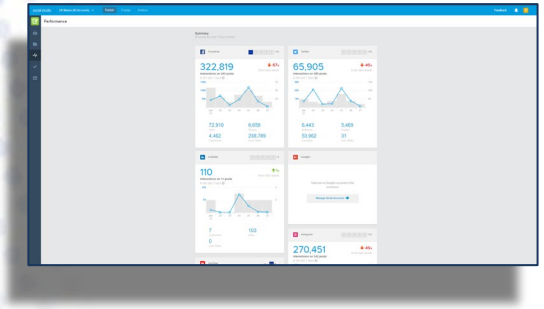


Social Studio

Marketing Cloud's social media management tool, Social Studio, provides a space in which users across campus can manage campus social media needs, engage effectively with constituents, and measure social metrics in a meaningful way. Social Studio also provides in-depth social listening capabilities, allowing the University to better understand the conversation surrounding U.K. at all times. Social Studio hosts more than 130 social accounts with over 140 users.

Workspaces and dashboards allow University Marketing and Communications professionals to monitor multiple social media channels for cross posting and interaction opportunities.





Metrics and engagement data give teams and departments actionable information to plan future marketing endeavors

Social Media posts and canned traditional responses can be queued for constant and continuous interaction with all UK followers.

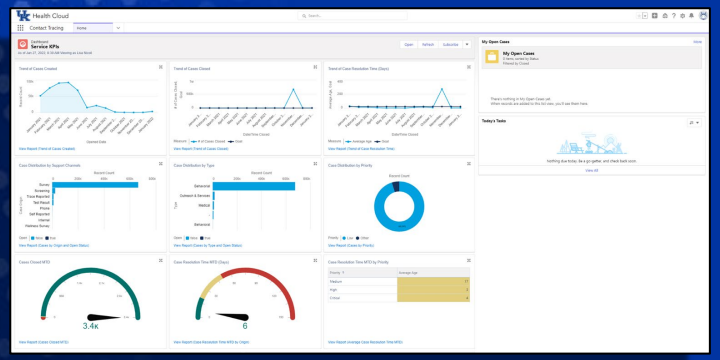
Marketing Cloud Metrics | 2021

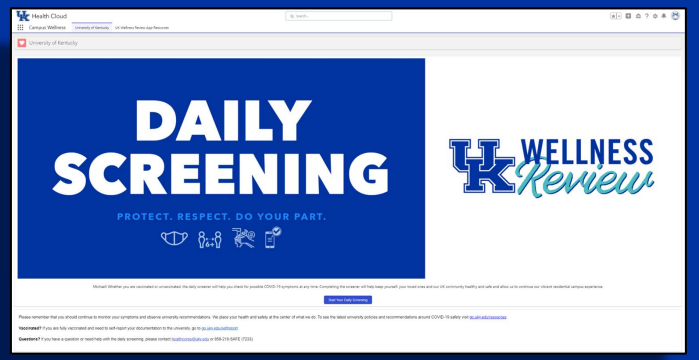
71M Total emails sent from Marketing Cloud	**12.49%** click to open rate (201.73% growth YOY)	**166** Active & enabled users	**139** Social Media Accounts Managed in Social Studio
20 Active automation journeys	**33** Data Extension Automations Running	**13** Contextual Business Units	**2.5M** Unique Email Addresses as Contacts

Health Cloud

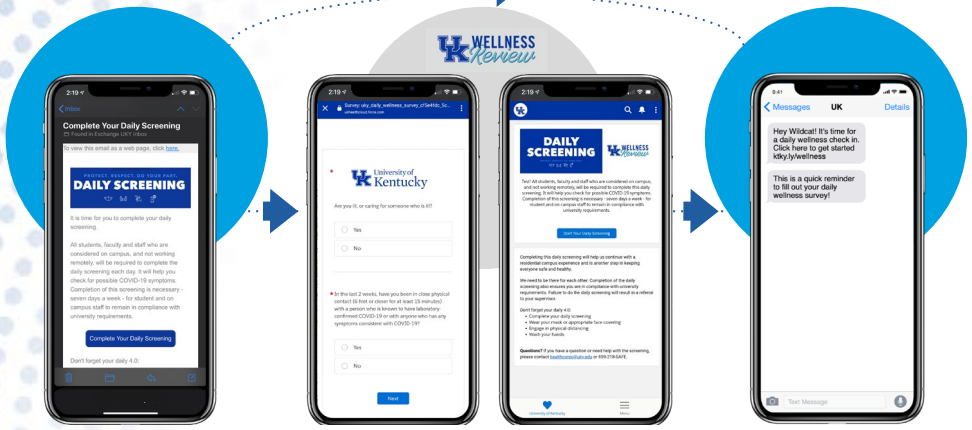
Built as an immediate response to COVID-19 for daily screening, testing and contact tracing. A single source of truth, Health Cloud is the HIPAA-compliant system that the University uses to manage the health and wellbeing of the campus community and has since expanded to include immunizations and case management for the general wellbeing strategies.

Built around a case management model, Health Cloud has and will become an effective tool to triage and engage our community around issues of health and well-being. This system is supported by the Salesforce Health Cloud Operations team, which ensures the deployment lifecycle is meeting the demands of UK's Health Corps staff.





UK Health Corps Operations

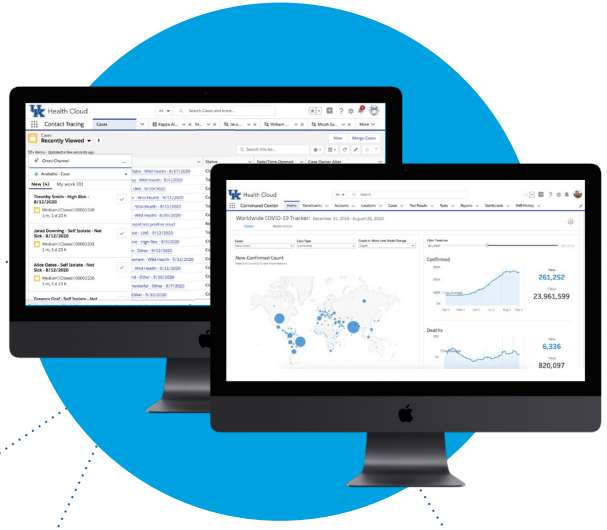


Daily Screening Reminder

Screening Mobile App

Compliance Reminders

Survey Results

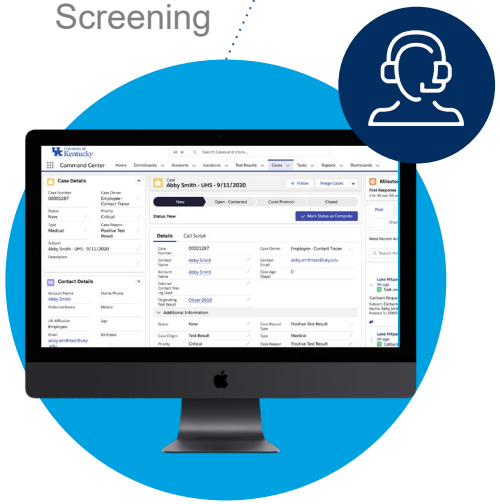


Screening/Test Results and Tracing Operations
(Health Cloud CRM)

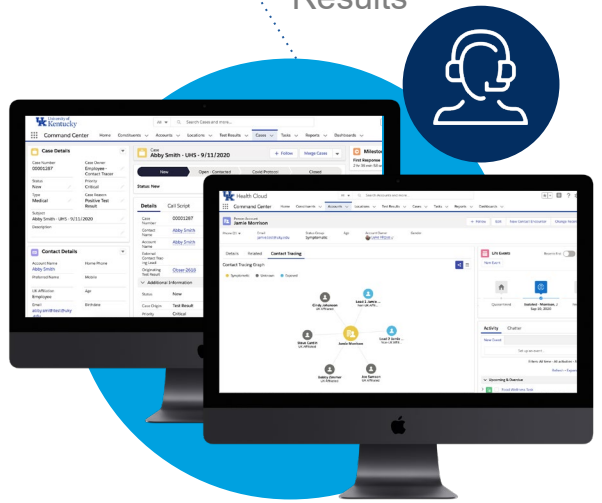
High Symptom Screening

Positive Results

Testing



Automated and UK Staff Driven Support



High Exposure Contact Tracing

Health Cloud Metrics | 2021

11K

Total number of cases

3.2M

# of texts/SMS received and sent

104K

# of tasks/activities from Health Corps (does not include email)

77%

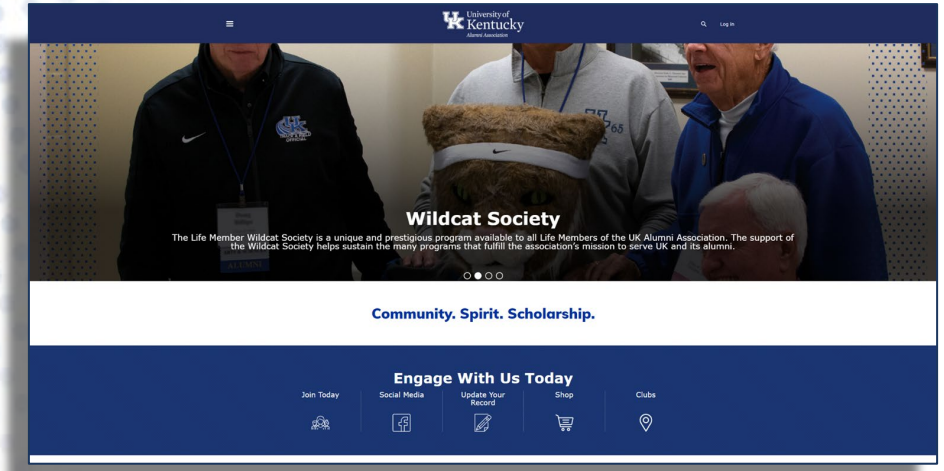
Compliance percentage on daily screener

707k

All Cases created all time

Alumni & Philanthropy Cloud

Supported as an independent project with Alumni and Philanthropy organizations in conjunction with UK's enterprise license agreement, the RADAR system is meant to create a dynamic, integrated Constituent Relationship Management (CRM) platform to empower stakeholders, engage constituents, and to impact not only the University of Kentucky, but possibly Philanthropy and Alumni Relations across all of higher education. This state-of-the-art Constituent Relationship Management (CRM) tool is UK's next alumni/donor system of engagement and platform of record.



Vertical Supports

Ops Team

Supporting such areas as Elder Care, Work Life, Health Corps Ops, the entirety of the product verticals and more, the Ops Team are an integral part of Salesforce at U.K. From building, testing, documenting, and executing across multiple projects, the constant rotation of needs and demands are fulfilled by this highly driven and focused group.

Integrations

The Salesforce Integrations team at U.K. work tirelessly to support the variety of products and verticals offered at the university. From developing systems sync between project management software, creating new and innovative ways for data capture and upload, to building intricate support framework for multiple integrated products and more.

Training

The Training team at U.K. work to support and create new user onboarding into the Salesforce platform at U.K. across a variety of modalities, as well as help to develop policy and procedure documentation and technical writing for the platform and internal processes.

What Salesforce at UK can do for You?

Each vertical offers wide ranges of support depending on the use case of your college, department, or individual need. Some of the most common requests we help fulfill are;

- Generate constituent reports for communications and monitoring data.
- Create mass or single communications through text/SMS, email, and call jobs.
- Utilize scheduling software to allow your constituents to sign up for coaching or academic appointments based on your availability and preferences.
- Create single send and fully fledged email communications tailored to your needs.
- Build automations and journeys to schedule and map out email sends.
- Control your social media presence across multiple platforms from a one stop shop.
- Provide high level details on enrollment and communications to individuals and groups.
- Track vaccinations, boosters, and health metrics at a high stakes level.
- Support infrastructure related to well-being of students, employees, and the university at large.

These are just some of the many services we utilize Salesforce for at the University, and with ever expanding opportunities and needs, you can expect this list to grow.