University of California
Online Education
The Blackboard Team and Project Kickoff and Discussion
January 23, 2012
The Blackboard Team and Our Project

The Team
The Project
The Timeline
## Introductions – University of California

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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</thead>
<tbody>
<tr>
<td>Larry Pitts</td>
<td>Provost and Executive Vice President, Academic Affairs</td>
</tr>
<tr>
<td>Dan Greenstein</td>
<td>Vice Provost, Academic Planning, Programs, and Coordination – UCOP</td>
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<tr>
<td>Keith Williams</td>
<td>Faculty Associate, Academic Planning, Programs, and Coordination – UCOP</td>
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<tr>
<td>DoQuyen Tran-Taylor</td>
<td>Planning Analyst, Academic Planning, Programs, and Coordination – UCOP</td>
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<tr>
<td>Mara Hancock</td>
<td>Director of Educational Technologies – UC Berkeley</td>
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<tr>
<td>Kathy Zellers</td>
<td>Lead Instructional Designer – UC Berkeley</td>
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<tr>
<td>Kirk Alexander</td>
<td>Technology Lead – UC Davis</td>
</tr>
<tr>
<td>J. Michael Thompson</td>
<td>Assistant Vice Chancellor, Enrollment Management – UC Merced</td>
</tr>
<tr>
<td>Laurie Herbrand</td>
<td>University Registrar – UC Merced</td>
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<tr>
<td>Mariette Araya</td>
<td>Information Technology – SIS Manager – UC Merced</td>
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<tr>
<td>Kathy Jefferds</td>
<td>Budget Director – UC Merced</td>
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<tr>
<td>Jason Simon</td>
<td>Director of Marketing and Communication Services – UCOP</td>
</tr>
<tr>
<td>Lisa Baird</td>
<td>Associate Director of Strategic Initiatives, CFO Division – UCOP</td>
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<tr>
<td>Shawn Boom</td>
<td>Vice President, Sales, Blackboard</td>
</tr>
<tr>
<td>Tom Clarke</td>
<td>Vice President, Consulting Services, Blackboard</td>
</tr>
<tr>
<td>Jim Echsner</td>
<td>Regional Sales Manager, Blackboard</td>
</tr>
<tr>
<td>Andrew King</td>
<td>Senior Director, Strategic Accounts, Blackboard</td>
</tr>
<tr>
<td>Chad Kainz</td>
<td>Solution Director, Blackboard</td>
</tr>
<tr>
<td>Elizabeth Prior</td>
<td>Senior Director, Online Programs, Blackboard</td>
</tr>
<tr>
<td>Jessica Sheehan</td>
<td>Senior Global Campaigns Manager, Blackboard</td>
</tr>
<tr>
<td>Matt Seeberg</td>
<td>Senior Program Manager, Blackboard</td>
</tr>
</tbody>
</table>
The UCOE Partnership

Marketing
- Market Research
- Opportunity Analysis
- Strategy/Positioning/Planning
- Value Proposition
- Branding/Messaging
- Media Buys
- Sub-Contractor Management

Enrollment
- Market Segment Analysis
- Lead Generation
- Qualification
- Direct Response
- Wholesale Relationships
- Retention / Continuous Improvement Analytics
- Application Website

Student Services
- “Shield” Registration
- Financial Transacting
- Student Orientation
- Remediation Referral
- Advising/Mentorship/Coaching
- 24/7 Tech Support
- TA/Faculty Onboarding
- Course Scheduling
- Course Development
- UCOE Courses
- CoLE
- Instruction

Registrar

Transcripting
## Simplified Pro Forma

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<th>FY11-12</th>
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<tr>
<td><strong>Dollars Out:</strong></td>
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<td>UCOE Net Income:</td>
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</table>

= “Academic Income”
UCOE Expenses

- Academic Income: 21%
- Student Services: 18%
- Marketing: 18%
- Instructional Designers: 15%
- Course Development: 9%
- Technology: 8%
- Loan Repayment: 6%
- Central OIPP Personnel: 4%
- Course Author Royalty: 1%
Contract Value and Scope

Contract Value: $4.29 million, covering 18 months of services

**Marketing**
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**Enrollment**
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- Lead Generation
- Qualification
- Direct Response
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**Student Services**
- “Shield” Registration
- Financial Transaction
- Student Orientation
- Remediation Referral
- Advising/Mentorship/Coaching
- 24/7 Tech Support

Project Management
- Day-to-day management of all Blackboard obligations
- Oversight and quality assurance of work
- Central point of contact and accountability

Solution Design and Operational Strategy
- Assist UCOP with design of student gateway
- Business process and technical architecture design
- System integration and strategy for scaling

Marketing and Enrollment Services
- Marketing plan development, branding and messaging
- Focus on the non-matriculated students
- Direct marketing campaign and targeted follow-ups

Student Services
- Managing all contacts with students
- 24/7 LMS support
- Support via phone, self-help knowledgebase, live chat
The Value of Our Partnership

Team support to achieve UCOE’s mission

• Course development and new revenue for faculty and departments
• Expanded choice and more flexibility for UC students
• Broadened access to UC quality for non-matriculated students
The Value of Our Partnership

True partnership – a symbiotic relationship

• Jointly designing solution in unknown territory
• Blackboard provides specialists to chart business functions that wrap around course offerings – achieves a more complete goal for UCOE
• Blackboard works at the direction of the UCOE team – UCOE team will train Blackboard Team to represent UC as if part of the University
• Open communication planned throughout
The Blackboard Team and Project

The Team
The Project
The Timeline
About Blackboard

• Educational technology and services provider for over 5,000 institutions worldwide
  SUNY (statewide), UMass Online, Princeton University, University of Chicago, University of Southern California, Carnegie Mellon University, UIUC

• Blackboard Consulting provides services for over 1,000 clients, ranging from technical to strategic

• Maturing Strategy Consulting practice

• Unique Relationship with UCOP – services only
Teammates – Who We Are

- **Tom Clarke**
  Vice President
  Blackboard

- **Jessica Sheehan**
  Sr Global Campaigns Mgr
  Blackboard

- **Matt Seeberg**
  Sr Program Manager
  Blackboard

- **Andrew King**
  Senior Director
  Blackboard

- **Chad Kainz**
  Solution Director
  Blackboard

- **Carol Gersten**
  Vice President
  Hobsons

- **Elizabeth Prior**
  Program Director
  Blackboard
Project Delivery – Who Does What?

Project Management Office (PMO)
UCOP
Blackboard

Hobsons
Market Execution Plan
Lead Generation
Media Buys
Prospect Management
CRM Implementation

Blackboard
Project Management
Brand Strategy
Solution Design and Architecture
Technical Specifications
Key Business Processes
Assessment Framework
Recommendations for Scale-Up
Service Desk Infrastructure
Student and Faculty Support
Student Registration and Processing

160over90
Website Designs
Promotional Creative Dev
The Project – How Do We Achieve?

Project Management

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Marketing and Enrollment Services

Solution Design and Operational Strategy

Student Services
Project Management

**Plan**
- Account for dependencies
- Sequence
- Schedule

**Define**
- Activities
- Tasks
- Milestones

**Execute & Monitor**
- Track progress
- Resolve issues
- Mitigate risks
- Account for changes
Organize
Corral the willing
Remind the forgetful
Fill the calendars

Communicate
Executive briefings
Status reports
Team meetings

Encourage Change
Identify changes
Determine messages
Inform, entice, cajole

Project Management

Define

Plan

Execute & Monitor
Solution Design and Operational Strategy

- Identify gaps
- Design an approach
- Articulate specifications
- Connect processes together
- Coordinate development
- Create an assessment framework
- Provide recommendations
Marketing and Enrollment Services

Planning

Conduct review of current presence to drive segmentation & audience analysis

Assess competition and opportunities for UCOE

Evaluate current communication tactics and messaging

Deliver a Strategic Marketing plan to drive the effort
Design

Develop a “Hero” UCOE website

Develop Lead Generation and Search Engine Optimization Strategy

Create targeted micro-sites

Generate creative style-guide for UCOE marketing

Design Client Relationship Management (CRM) to capture prospect data based on marketing efforts
Implementation

**Execute** a Lead Generation strategy and action plan

**Conduct** Search Engine Optimization (SEO) for UCOE sites

**Deploy** CRM system to:

- **Manage** and track all prospective UCOE students through enrollment
- **Automate** all marketing communications
- **Track** Key Performance Indicators (KPIs) and monitor progress
Enrollment and Retention Services
• Recruit prospective students
• Bring students “on-board” effectively through direct communication
• Engage students early and proactively to advise and support

Payment Processing
• Process student registrations through “gateway”
• Ensure secure payment processing

Technical Support
• Install 24/7 technical safety net to support learning
• Provide prompt resolution of recurring issues
• Service to students and faculty
• Keep users connected – with their technology

LMS Support
• Yes, we will support other learning management systems
• Provide direct support for level 1 issues
• Determine escalation process with UC
Student Services

Enrollment and Retention Services

Payment Processing

Technical Support

LMS Support

Service Desk Approach
- Comprehensive
- User-focused
- Responsive

Technology-Enabled
- Ticket tracking system
- Knowledge base for direct access to solutions
- Interactive Voice Response (IVR) for inbound calls
- Access to support data – for UC research and analysis
- Interactive chat sessions
Project Timeline – 18 Months

Project Management
- Project Kickoff
- Defining and Planning
- Executing and Monitoring

Solution Design & Operational Strategy
- Requirements & Gap Analysis
- Project: Design
- Project: Implementation
- Project: Assessment
- Recommendations for Growth

Marketing & Enrollment
- Market Analysis & Brand Strategy
- Website Development
- Promo Creative Development
- Lead Generation Design & Execution
- Prospect Management & CRM

Student Services
- Service Operations Design & Implementation
- Service Operations Implementation
- Service Desk Infrastructure
- Service Desk Operations
Upcoming Activities and Milestones

Week of January 23
- Stakeholder Kickoff
- Operational Discovery Meetings in Oakland and Berkeley

Week of January 30
- Marketing-focused discovery sessions in Reston, VA

February-March
- Develop marketing plan and web presence
- Develop operating model

Milestones:
- Solution Design Complete – mid-April
- Website and awareness campaign live – late April
- Live prospect calls begin – early June
QUESTIONS?