



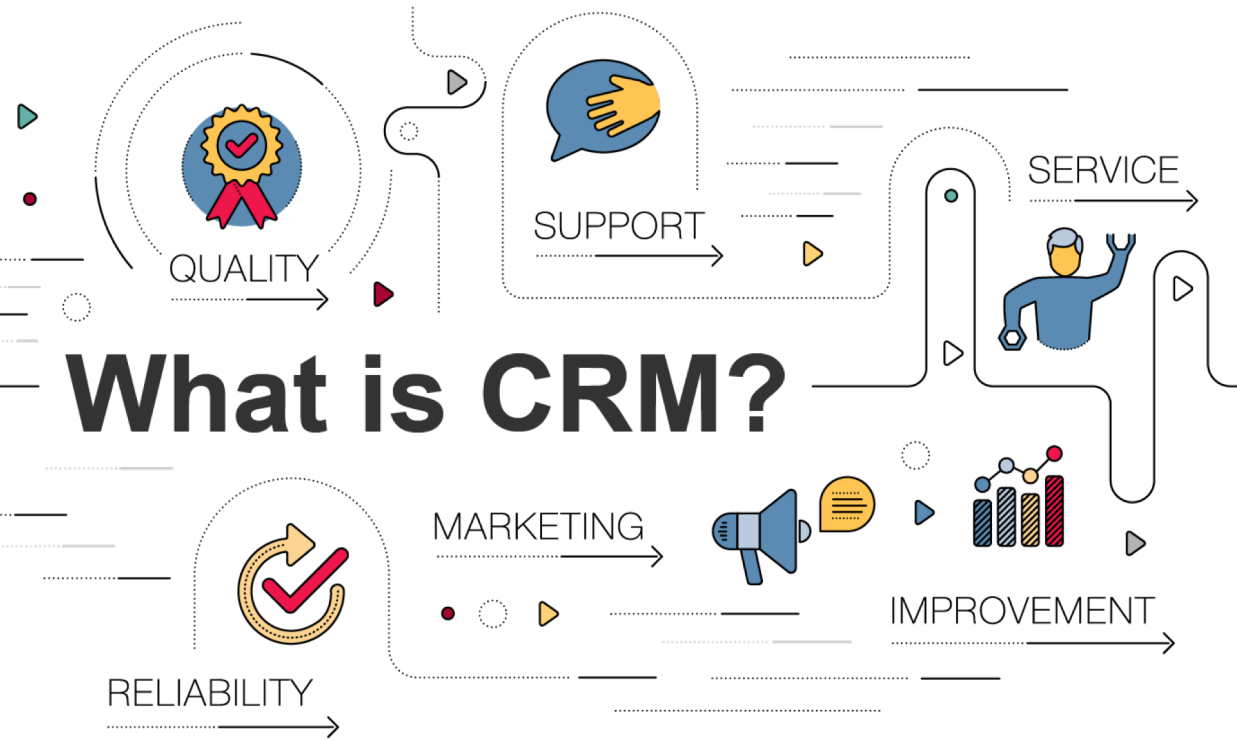
# About the IU CRM Initiative

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SECTION 1

# The basics

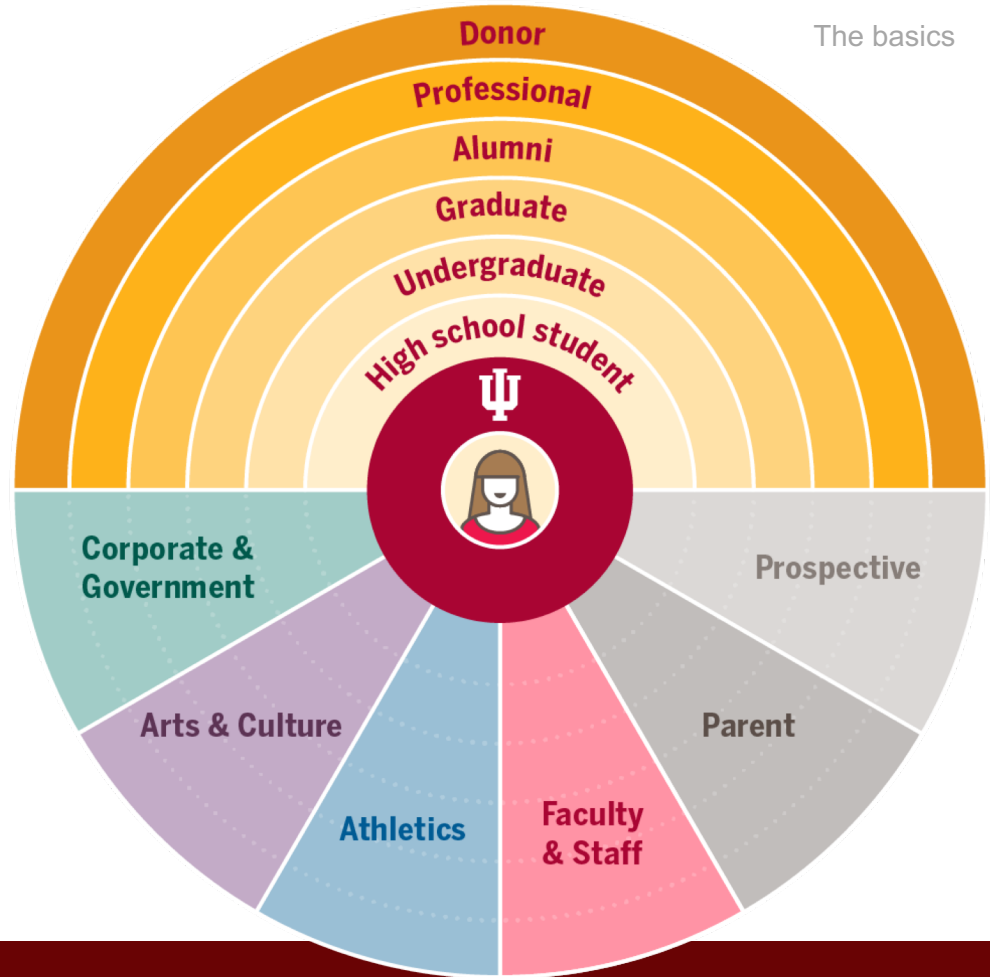


# What is CRM?

- Customer relationship management (business world)
  - Think: Amazon, Google, customer service, etc.
- “C” = Constituent in higher ed.
- Components:
  - People
  - Relationships
  - Interaction



# Why CRM in higher education?

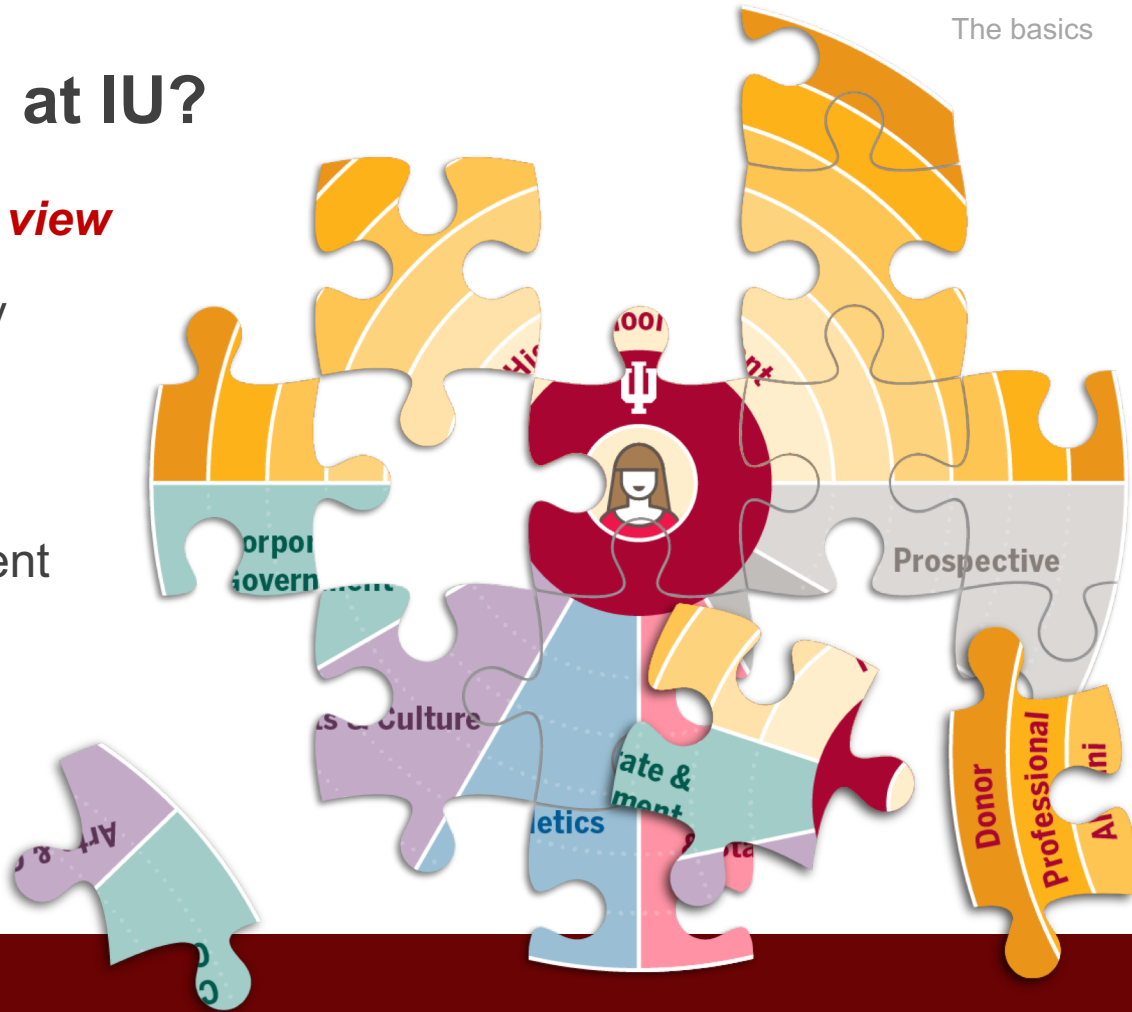




# Why a unified CRM at IU?

## *To form that full-spectrum view*

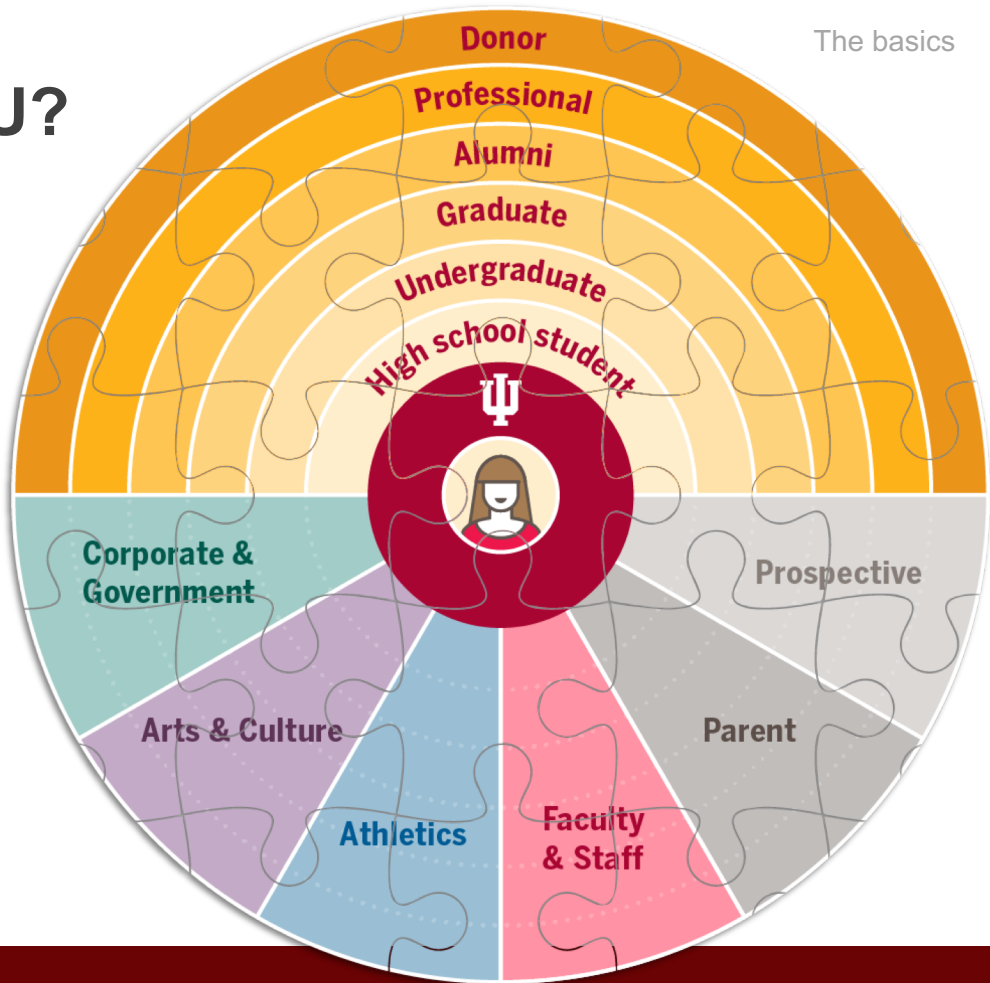
- Reduce staff data reentry
- Mitigate constituents re-explaining
- More effective engagement
- Data security
- Speak to constituents as One IU



# Why a unified CRM at IU?

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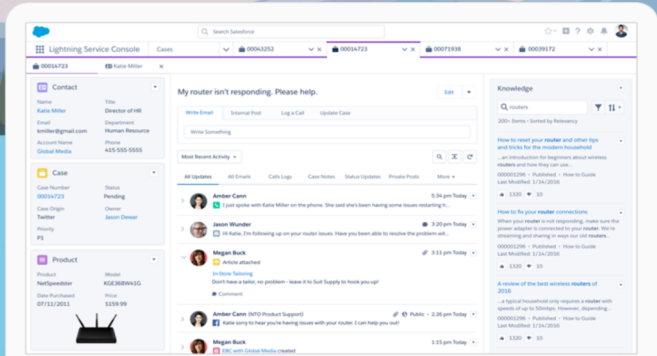
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Make your customers happier using the world's #1 platform for service.

WATCH DEMO

TRY FOR FREE



salesforce

# What is Salesforce?

- A platform
  - Foundational CRM core with flexibility to extensively configure and “bolt-on” additional functional modules.
- Components:
  - Salesforce CRM (Information management)
  - Marketing Cloud (Mass communications)



SECTION 2

# IU CRM Initiative

*Launched 2/15/18*

# IU CRM Initiative

- Enterprise charge for CRM across IU
- Larger IU CRM team
- Foundational resources for IU CRM platform
- Executive Leadership
- Salesforce Enterprise Licensing Agreement (ELA)

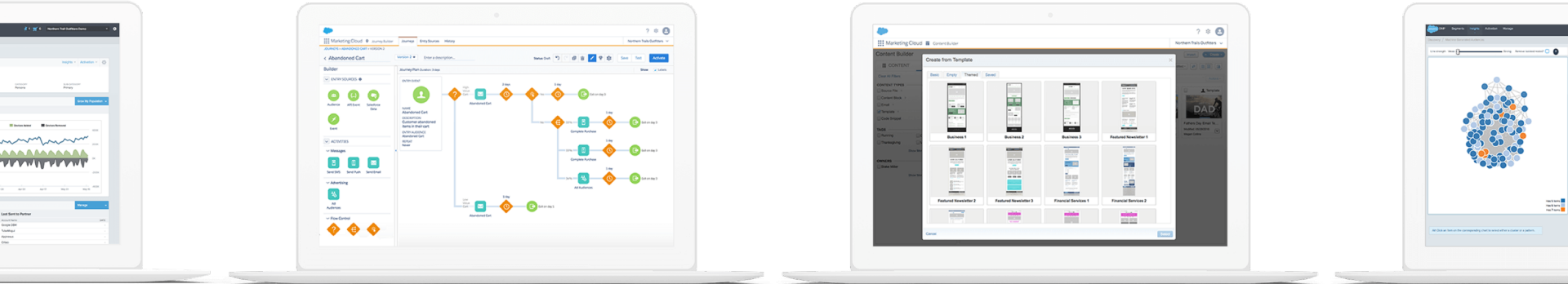
Does not include:

- Unit/functional-specific consulting
- Apps outside of the ELA

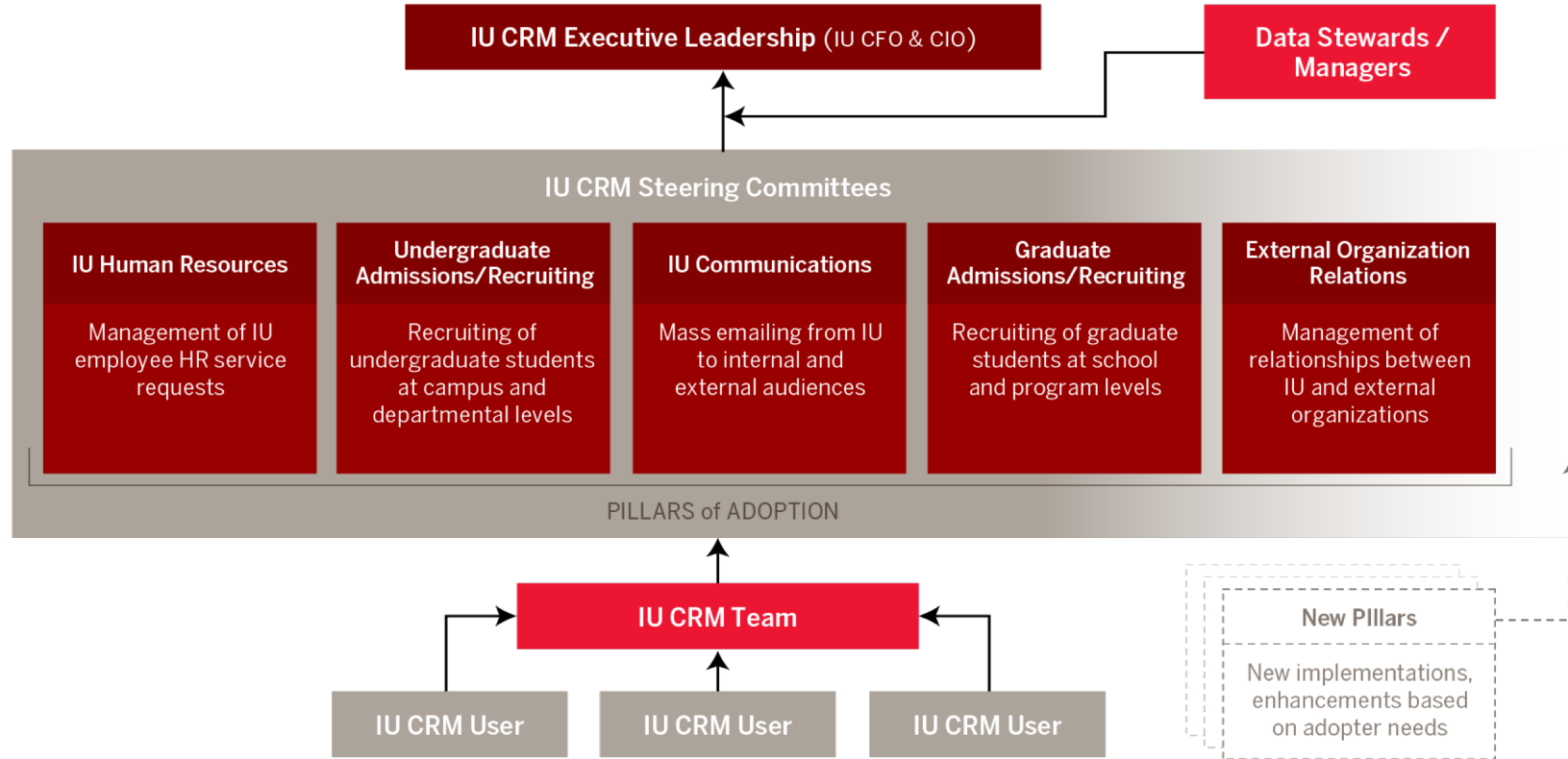


# What products are included in the Salesforce ELA?

- CRM
- Marketing Cloud
- Salesforce Communities
- Platform foundational products



# IU CRM Leadership Structure



SECTION 3

# IU CRM now and next



# IU CRM now

- ✓ Marketing/Communications Phase I complete
  - 250+ comm. shops across IU
- ✓ Undergraduate Admissions/Recruitment
  - All campuses but IUB
  - Phase II feature set complete
- ✓ University HR
  - All employee case records and associated service requests
- ✓ Graduate School Package adoption
  - 10 schools, 12 on waiting list, all purely organic adoption
- ✓ Core Package adoption
  - Precision Health Initiative
  - Center for Rural Engagement underway
  - 15 on waiting list



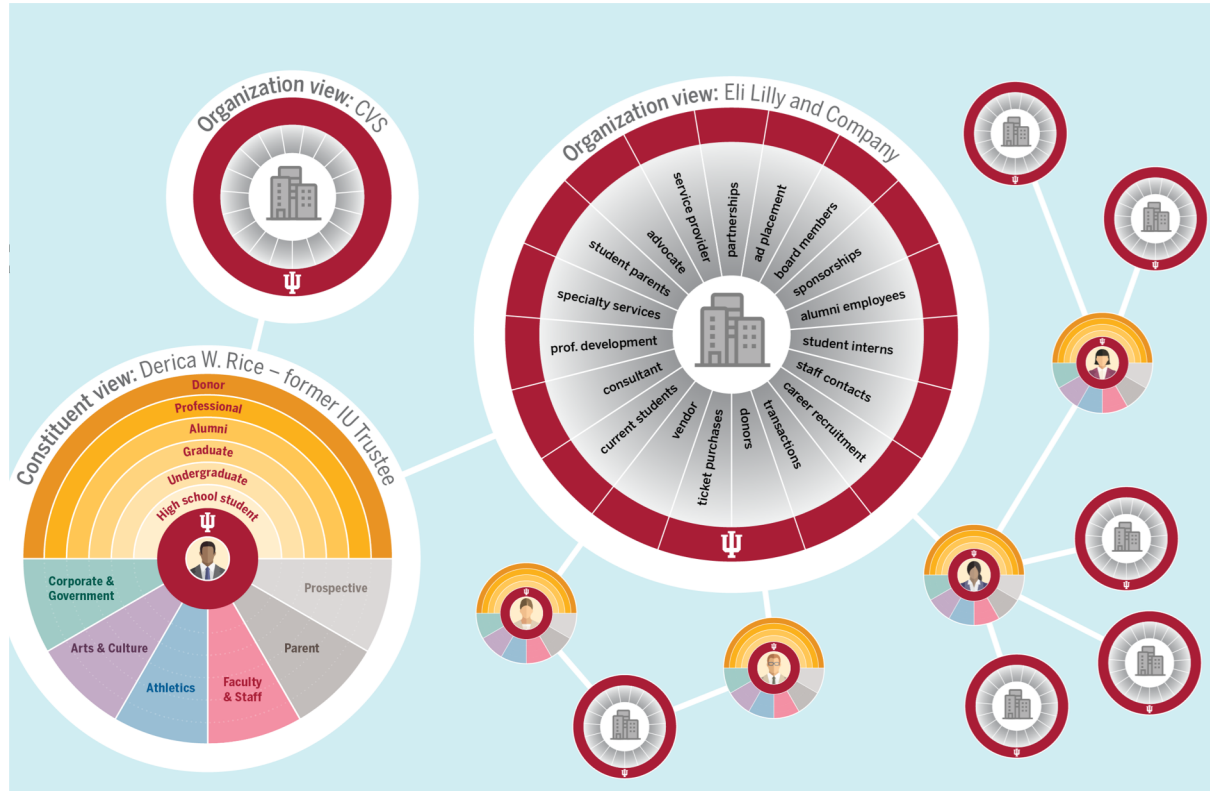
# What's next?

- Graduate Recruitment Phase I
- SMS/Text Phase I
- Foundational projects
  - Improved integration
  - Improve deduplication
  - Duo security
- External Relations Phase I



# External Relations

IU CRM now and next



INDIANA UNIVERSITY

# crm.iu.edu

How does my unit:

- adopt IU CRM?
- become a stakeholder in a project?
- join the IU CRM community?

**Adoption inquiry**

Submit an inquiry.

The IU CRM team will set up a consultation and guide you through the process.



# crm.iu.edu

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