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
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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

IU CRM Executive Leadership (IU CFO & CIO)

Data Stewards / Managers

IU CRM Steering Committees

- **IU Human Resources**
  - Management of IU employee HR service requests

- **Undergraduate Admissions/Recruiting**
  - Recruiting of undergraduate students at campus and departmental levels

- **IU Communications**
  - Mass emailing from IU to internal and external audiences

- **Graduate Admissions/Recruiting**
  - Recruiting of graduate students at school and program levels

- **External Organization Relations**
  - Management of relationships between IU and external organizations

PILLARS of ADOPTION

- **IU CRM Team**

- **IU CRM User**
- **IU CRM User**
- **IU CRM User**

New Pillars
- New implementations, enhancements based on adopter needs
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
How does my unit:

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

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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