IU CRM:

Communications Adoption

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IU CRM: Pillars of Adoption

**IU Communications**
Used for mass communication, contact management, and email campaigns.

**Admissions / Recruiting**
(Undergraduate)
Used for campaigns, individual interactions, and admissions event management.

**IU Human Resources**
Used to manage employee case records and associated service requests.
Communications
A pillar of adoption

- Primary stakeholder:
  - IU Communications

- Current Adoption:
  - 210 units and growing
  - All campuses

- Scalable & flexible
  - From single communications shop to full campus
  - Units self-defined by adopter interest, business practices

- Intended for anyone wanting to send mass email
SECTION 1

Top features
Marketing Cloud overview

- CRM Platform Communication Module
- Marketing Cloud Business Units
- Email Studio and Content Builder
List management

- CRM Contacts and Campaigns
- Marketing Cloud All Subscribers
- Marketing Cloud Data Extensions
- Distribution List Uploads
Building emails

- Asset management and folders
- Create template-based and HTML emails
- Content development
Lorem ipsum dolor sit amet

Features

Templates

*User friendly!*

- Create email based on templates
- Save locally and edit templates
- Create templates
- IU branded assets (e.g. IU Trusted footer)
Lorem ipsum dolor sit amet


Button Text

Free Form (Click to edit)
Email sends

- User-initiated
- Scheduled
- Advanced automation
Subscription management

- My Lists
- Data extensions and publication lists
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Subscriber Count</th>
<th>Associated Campaigns</th>
<th>Welcome Email Assigned</th>
<th>Created</th>
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Send analytics

- My Reports
- Email Send Reports
SECTION 2
Other features
Send Management

- Reply mail management
- Sender profiles
- Delivery profiles
- Sender classifications
Security & IP Reputation

- Digital signatures
- Whitelisted IP
- Throttling
Demonstration
SECTION 3
How to adopt
Adopting the IU Communications Pillar

IU Communications is already in the Salesforce.org ELA

- Simple to adopt: New adopter inquiry
- No change requests, scoping, prioritizing, cost, etc.
Step 1 is always the same!

crm.iu.edu

Ask about adopting IU CRM

Adoption inquiry form
Onboarding process

- Acceptable Use Agreement
- FERPA compliance form
- S/MIME Certificates
- Migrate lists / contacts

- Submit MOU forms to IU Communications
- Obtain licensing
- Attend training sessions by IU Communications