Indiana University
Expanding Beyond the Student Lifecycle: Salesforce for University HR
Speakers

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IU Overview and CRM Landscape

University Organization

• 2 Main Campuses and 6 Regional Campuses
• Approximately 115,000 combined Undergraduate and Graduate students
• 17,000+ Employees
• Centralized University IT services and CRM management
• Newly endorsed “enterprise” as Presidential initiative

Constituent & User Populations

• All constituent populations excluding Alumni (student/staff/faculty/external)
• Current user populations:
  • Communications
  • Undergrad Recruiting
  • Graduate Recruiting
  • University HR
• 400+ Users, 200+ Business Units

Platform Products

• Salesforce Service Cloud
• Salesforce Marketing Cloud
• Marketing Cloud Connect
• Jitterbit
• DemandTools
• People Import
• FormAssembly
• Conga
History of CRM at Indiana University
Past

Limited Success with Dramatically Increasing Demand
Cultural Resistance and Evolution
Technical Limitations
Unsatisfied Expectations & Business Demands
Increasing Need For CRM and Related Functionality
Limited Adoption
Lessons Learned – Sometimes the hard way
Present

Grass Roots Approach-Departmentally Sponsored Projects
Critical Mass Achieved – Fall 2017
Presidential IU CRM Initiative
Salesforce Scoped Enterprise License Agreement
Three Initial Pillars of Adoption, Multiple More Being Planned
Initiative Governance & Strategic Roadmap
The Need
In Need of Unified HR Services

- Indiana University (IU) was limited by disparate Human Resources services spread across campus locations and divisions - they lacked consistent HR processes and a common knowledge base
  - The HR team was unable to track metrics on resolution time or types of questions/cases that were trending
- During a strategic initiative launch - 'HR 2020' - the need for a unified HR Help Desk was discovered
Appirio partnered with IU to roll out the following Salesforce Service Cloud components as part of the HR 2020 initiative:

- Case Management
- Collaboration, Security & Reporting
- Accounts, Contacts, Activities

Additional system functionality configured included:
- New HR case fields
- Queues
- Email to case
- Case List Views
- Consoles
- Security Setting
Solution
Indiana University’s HR Employee Services Solution

“One and Done” Resolutions

- With Service Cloud for HR, IU now has an employee services model in place, and have experienced process efficiencies and improved response times
- In terms of next steps, IU HR will deepen interactions within the HR Centers of Expertise (COEs) and will work through enhancements for a comprehensive knowledge base
Demo
Next Steps for IU
Strategic Plan includes developing a rolling yearly roadmap

Indiana University CRM Initiative

- Establish Initiative Framework (Governance, processes, staffing, new adopters)
- Admissions Recruiting Phase 2
- SMS/Text Mass Sends
- Corporate Relations
- Graduate Recruiting Phase 1
- Core CRM Adoption Package
- Cloud Convergence Integration Architecture
Thank You