Indiana University

Expanding Beyond the Student Lifecycle: Salesforce for University HR

Speakers

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Organizational Overview

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 populatations 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

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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

Salesforce Service Cloud for HR

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
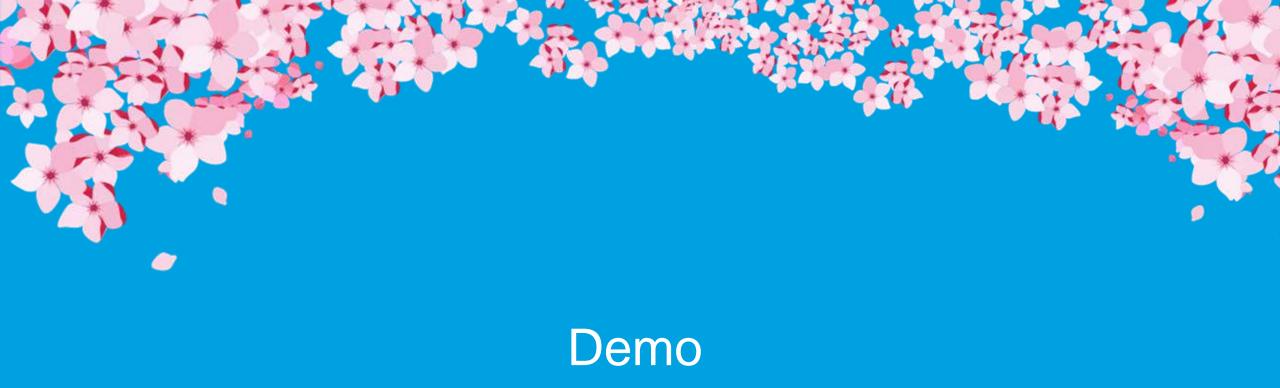- Case List Views
- Consoles
- Security Setting

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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

Indiana University CRM Initiative

Strategic Plan includes developing a rolling yearly roadmap

- 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

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Thank You