Welcome to Today's Infoshare

Please sign in at the following URL:
http://bit.do/ITCP

ITCP will post the slides presented today
and the recording at http://go.iu.edu/ITproVideo.

We'll get started at 1:30 p.m.

INDIANA UNIVERSITY

First Look: IU CRM Initiative

Chris Tompkins
Director, IU CRM Initiative

Hosted by IT Community Partnerships

March 30, 2018

UNIVERSITY INFORMATION TECHNOLOGY SERVICES

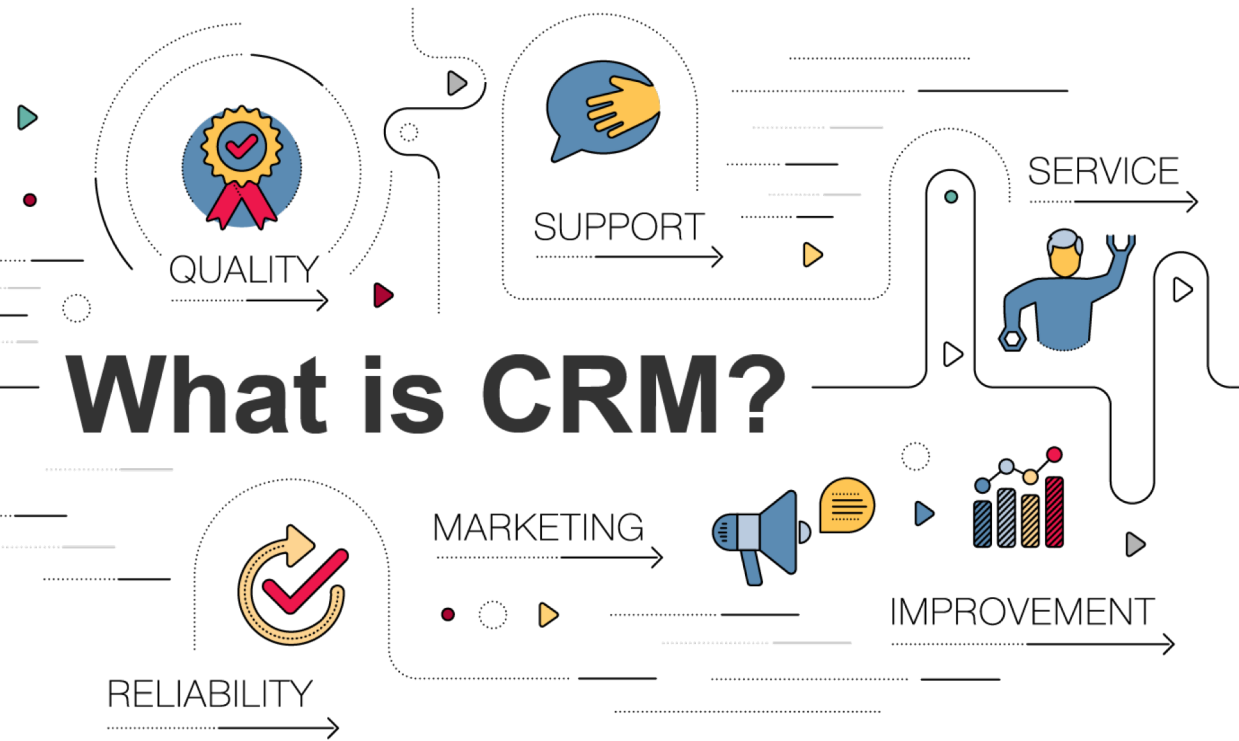FIRST LOOK:

The IU CRM Initiative

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The basics

What is CRM?

QUALITY

SUPPORT

SERVICE

MARKETING

IMPROVEMENT

RELIABILITY
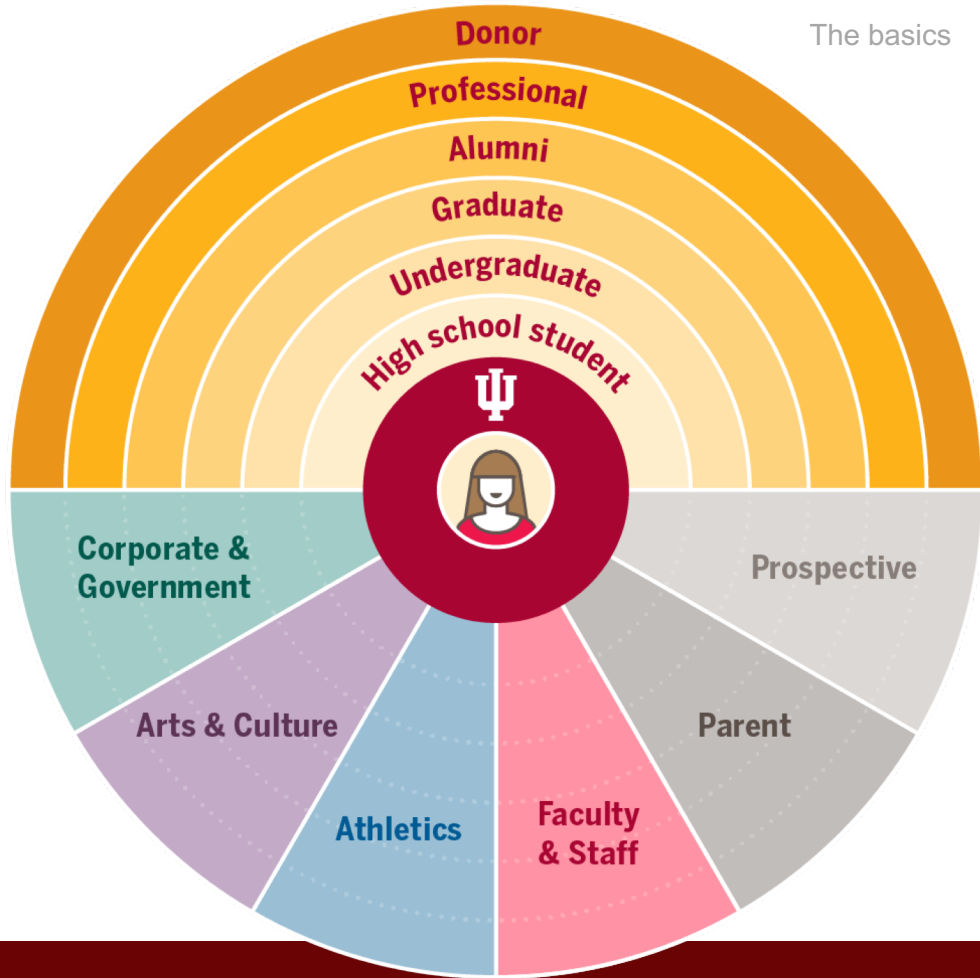
- Customer relationship management (business world)
  - Think: Amazon, Google, customer service, etc.

- "C" = Constituent in higher ed.

- Components:
  - People
 - Relationships
  - Interaction

Why CRM in higher education?

Donor
Professional
Alumni
Graduate
Undergraduate
High school student

Corporate & Government
Arts & Culture
Athletics
Faculty & Staff
Prospective
Parent

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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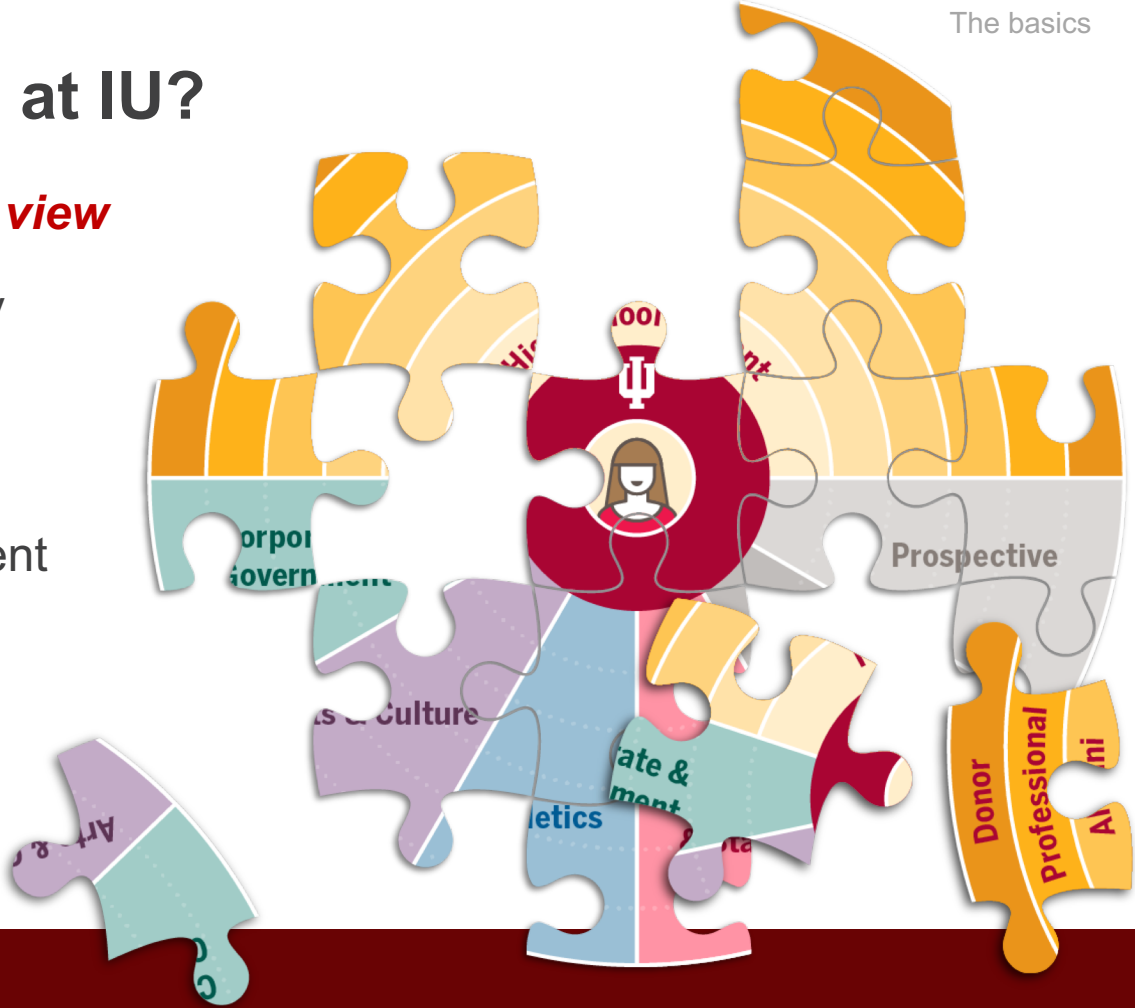
Why a unified CRM at IU?
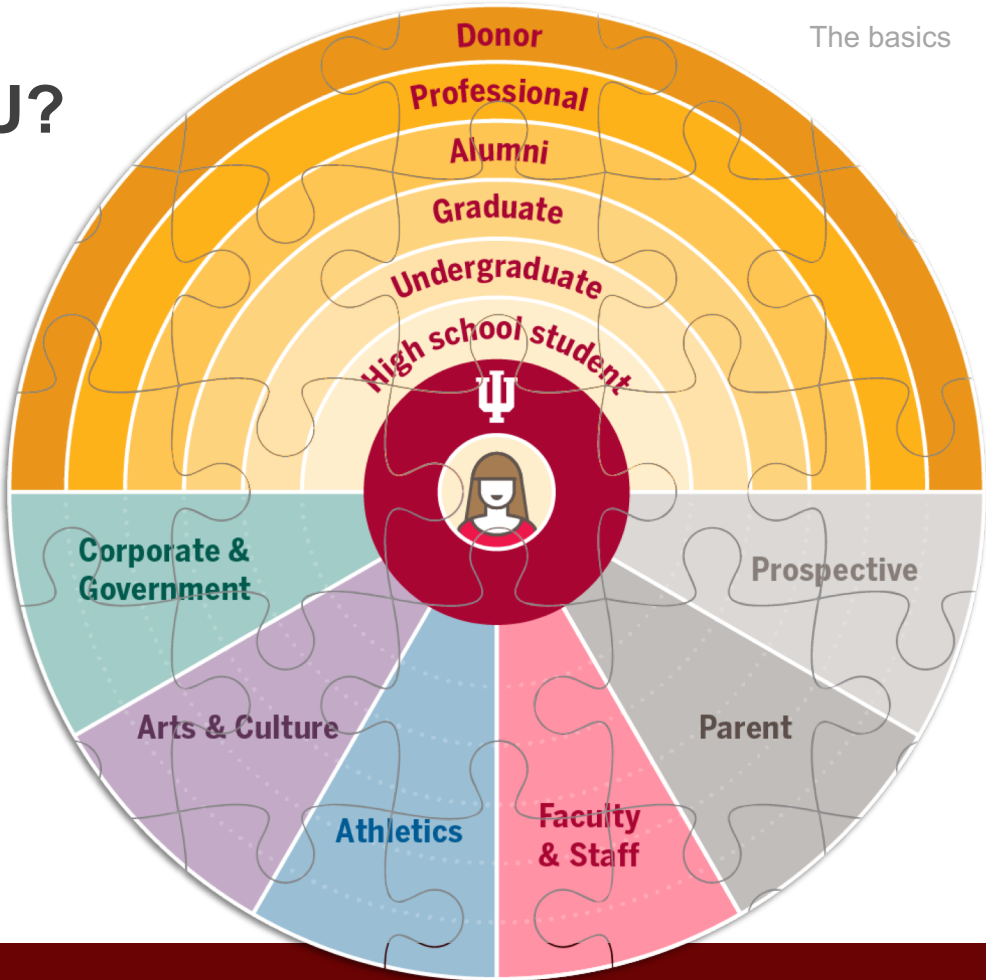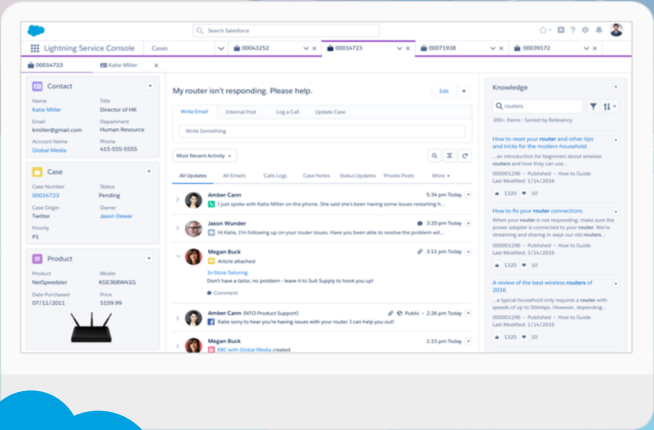
To form that full-spectrum view

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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)

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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

- Governance

- Salesforce Enterprise Licensing Agreement (ELA)

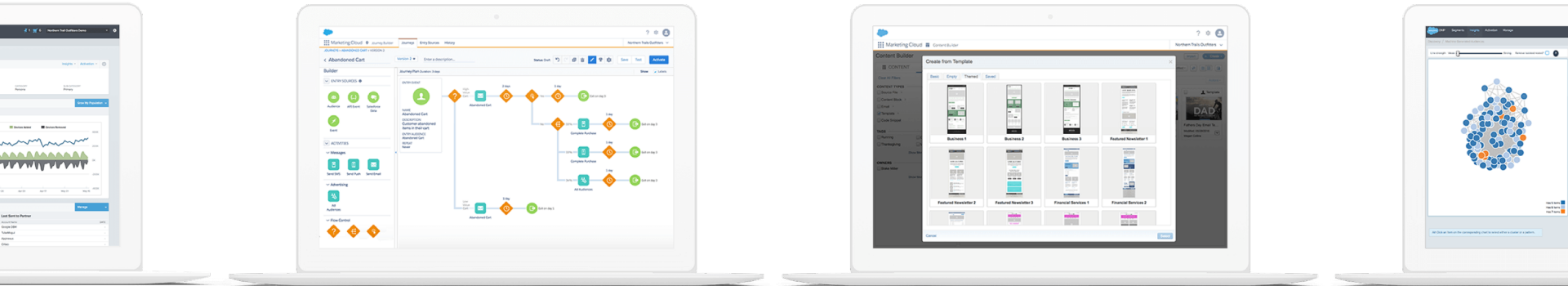Does <u>not</u> include:

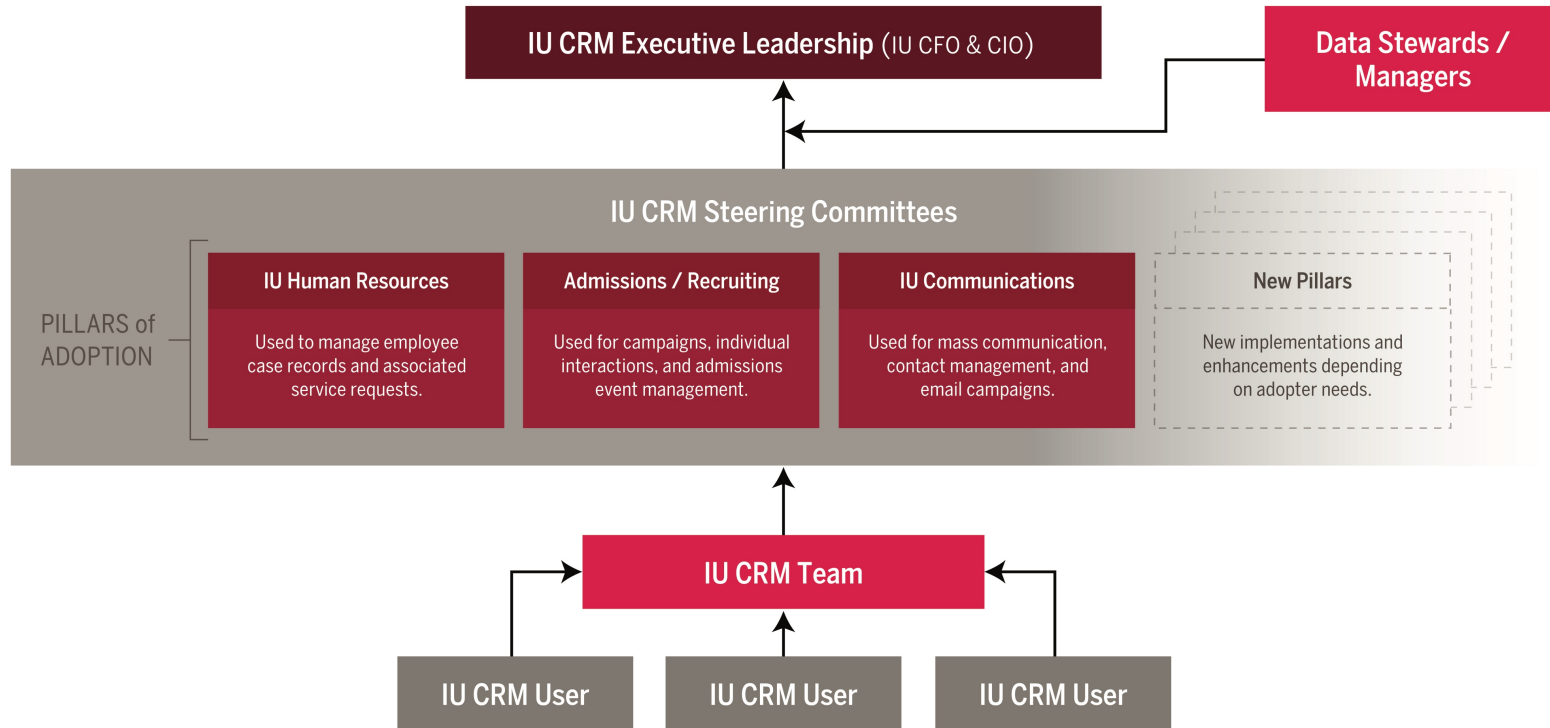- Unit/functional-specific consulting

- Apps outside of the ELA

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What products are included in the Salesforce ELA?

- CRM

- Marketing Cloud

- Salesforce Communities

- Platform infrastructure products

IU CRM Governance Structure

IU CRM Executive Leadership (IU CFO & CIO)

Data Stewards / Managers

IU CRM Steering Committees

PILLARS of ADOPTION

IU Human Resources	**Admissions / Recruiting**	**IU Communications**	**New Pillars**
Used to manage employee case records and associated service requests.	Used for campaigns, individual interactions, and admissions event management.	Used for mass communication, contact management, and email campaigns.	New implementations and enhancements depending on adopter needs.

IU CRM Team

IU CRM User	IU CRM User	IU CRM User

IU CRM now and next

IU CRM now

✓ Marketing/Communications Phase I complete
  – 202 comm. shops across IU

✓ Undergraduate Admissions/Recruitment
  – All campuses but IUB

✓ University HR
  – All employee case records and associated service requests

✓ Graduate School adoption
  – 10 schools, 12 on list, all purely organic adoption

What's next?

- Undergrad Admissions/Recruitment Phase II — ETA Fall 2018

- SMS/Text Phase I

- Graduate Recruitment Phase I

- Corporate relations

- CRM Core Adoption package

- Foundational projects: Improved integration, deduplication, Duo security

Joining IU CRM

How does my unit:

- adopt IU CRM?
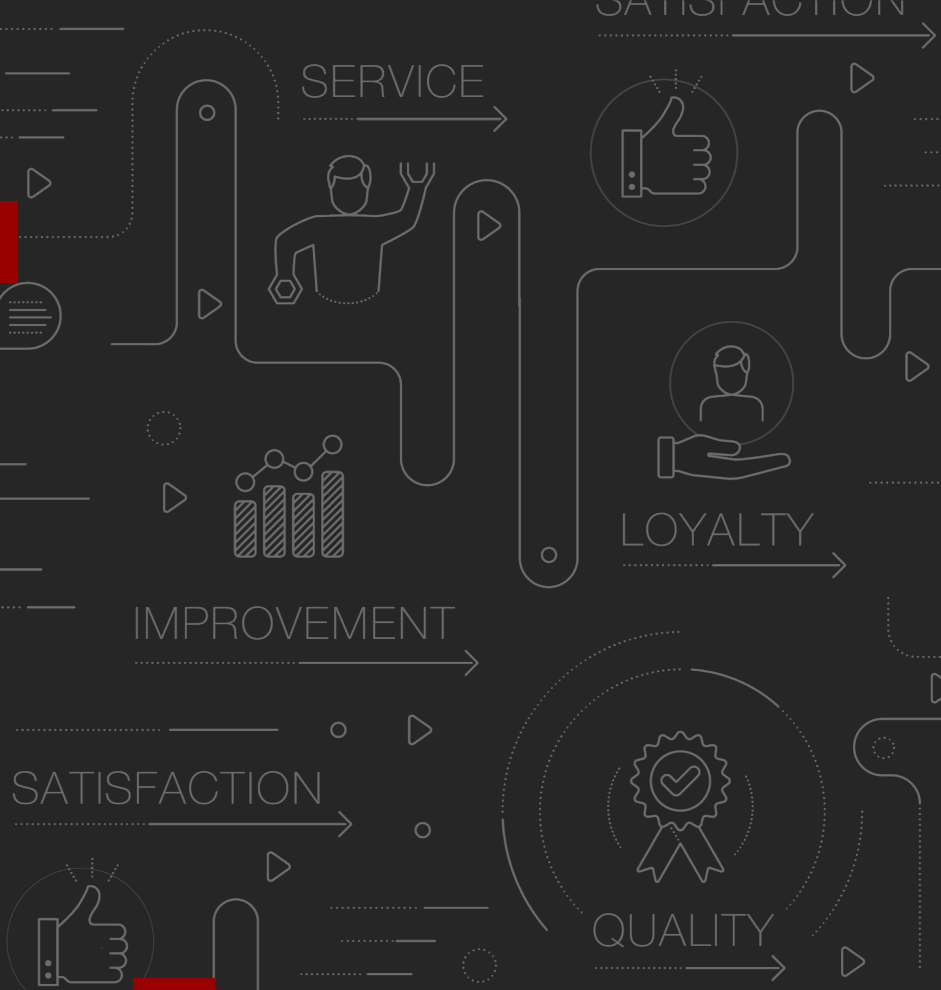
- become a stakeholder?

- join the IU CRM community?

New adopter inquiry
(or change request):

crm.iu.edu

Ask about adopting IU CRM

Adoption inquiry form

IU CRM Initiative

Next 3 to 6 months:

- Ramping up staffing

- IU CRM executive leadership prioritization

- Project planning with stakeholders

crm.iu.edu

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FULFILLING *the* PROMISE

Thanks for joining us!

Send questions about the service to: talk2uits@iu.edu

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Would you like to see an Infoshare about a specific topic?
Send your suggestion to talk2uits@iu.edu
and ITCP will try to arrange it

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