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.
First Look: IU CRM Initiative

Chris Tompkins
Director, IU CRM Initiative

Hosted by IT Community Partnerships

March 30, 2018
FIRST LOOK:
The IU CRM Initiative

Chris Tompkins
IU CRM Initiative Director
chtompki@iu.edu

Cathy O'Bryan
AVP UITS
caobryan@iu.edu
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
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
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
- Governance
- 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 infrastructure products
IU CRM Governance Structure

IU CRM Executive Leadership (IU CFO & CIO)

IU CRM Steering Committees
- IU Human Resources: Used to manage employee case records and associated service requests.
- Admissions / Recruiting: Used for campaigns, individual interactions, and admissions event management.
- IU Communications: Used for mass communication, contact management, and email campaigns.

Data Stewards / Managers

PILLARS of ADOPTION

IU CRM Team
- IU CRM User
- IU CRM User
- IU CRM User

New Pillars
- New implementations and enhancements depending on adopter needs.
SECTION 3

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](https://crm.iu.edu)

[Ask about adopting IU CRM](#)
IU CRM Initiative

Next 3 to 6 months:

- Ramping up staffing
- IU CRM executive leadership prioritization
- Project planning with stakeholders
Thanks for joining us!

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

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