Welcome to Today’s Infoshare

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We’ll get started at 1:30 p.m.
IU CRM: Pillars of Adoption

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Hosted by IT Community Partnerships
April 20, 2018
IU CRM:

Pillars of Adoption

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SECTION 1

Background
IU CRM Initiative background

Where did the Pillars come from?

- Departments or groups collaborated
  - Compatible area of adoption
  - Each pillar for distinct core needs
**IU CRM Initiative background**

*Where did the Pillars come from?*

- Funded a project to implement Salesforce
  - Covers core functions for a well-defined area of business
  - Scalable, flexible, & extensible
  - Ex: Admissions event management => Event management
What are the Pillars?

**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.
How do I decide which one’s for me?

*Step 1 is always the same!*

New adopter inquiry

[crm.iu.edu](http://crm.iu.edu)

Ask about adopting IU CRM

Adoption inquiry form
SECTION 2

The Pillars
Communications

Background

- 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
Communications

Features

- Sophisticated HTML emails and templates
- Managed distribution lists
- Subscription management
- Digital signatures & IU-whitelisted send IP
- Reporting and analytics
- Foundational CRM data model: employee & enrolled
Primary stakeholders
- IUPUI Admissions
- USSS
- Office of Online Education
- Collectively funded and scoped an undergraduate recruiting project

Intended users
- Campus central admissions offices
- Office of Online Education
- Departmental recruiters
Robust admissions data model

1:1 interaction management via SF Cases

Event management

Webform builder utility

Document generator / print utility

Extensive automated drip communications

Reporting and analytics

Admissions/Recruiting (Undergrad)

Features
Admissions/Recruiting (Graduate)

Honorable mention

- Not technically a “pillar,” but a specialized option
- No stakeholders (IU CRM created subset of undergraduate admissions)
- Intended users: graduate recruiters
Admissions/Recruiting (Graduate)

Background

Honorable mention

- Web inquiry form
- Cohorting via SF Campaign
- 1:1 interaction management vs. SF Cases
- Reporting and analytics
University Human Resources

Background

- Primary stakeholder: IU HR
- Part of HR2020 strategic plan
  - Nimble, adaptable to institutional needs
  - All employee case records and associated service requests
  - Coordinates 10 HR centers of expertise & main HR Customer Care Center
- Intended users: HR Staff
- Foundational data model: employees
- Employee service request management (SF Cases)
- Salesforce case console
- Reports and dashboard
- Analytics
Demonstration
SECTION 3

Next steps
Is that it?

Possible new pillars

- Corporate relations
- Core CRM
- President’s office
- Grad recruiting (as a full pillar)
Which pillar to adopt?

How to adopt?

What about a new pillar?
IU CRM Governance Structure

IU CRM Executive Leadership (IU CFO & CIO)

Data Stewards / Managers

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.

New Pillars
New implementations and enhancements depending on adopter needs.

PILLARS of ADOPTION

IU CRM Team

New Adopter

Next steps
Step 1 is always the same!

crm.iu.edu

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Adoption inquiry form
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Thanks for joining us!

Send questions about the service to:

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Would you like to see an infoshare about a specific topic?
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