

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.



IU CRM: Pillars of Adoption

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Cathy O'Bryan, AVP UITS

Hosted by IT Community Partnerships

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**UNIVERSITY INFORMATION
TECHNOLOGY SERVICES**



IU CRM:

Pillars of Adoption

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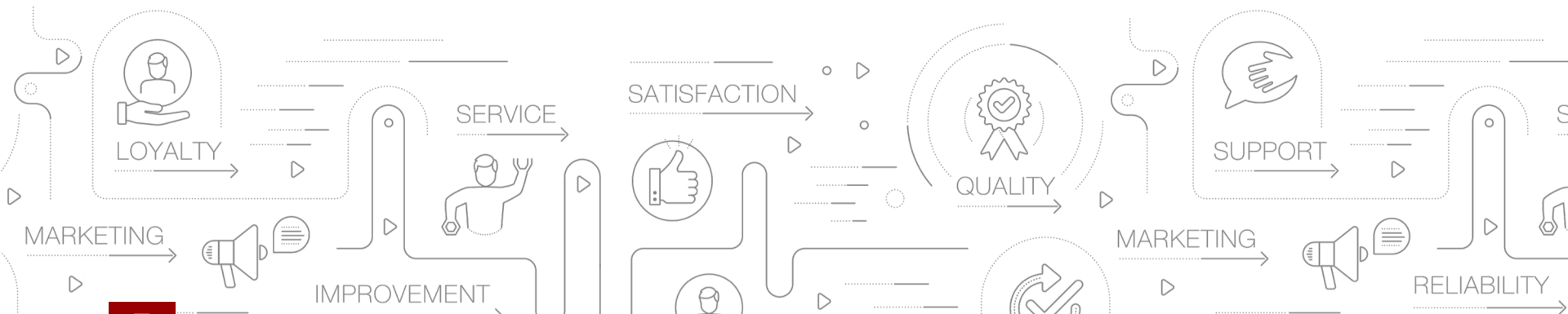
SECTION 1

Background

IU CRM Initiative background

Where did the Pillars come from?

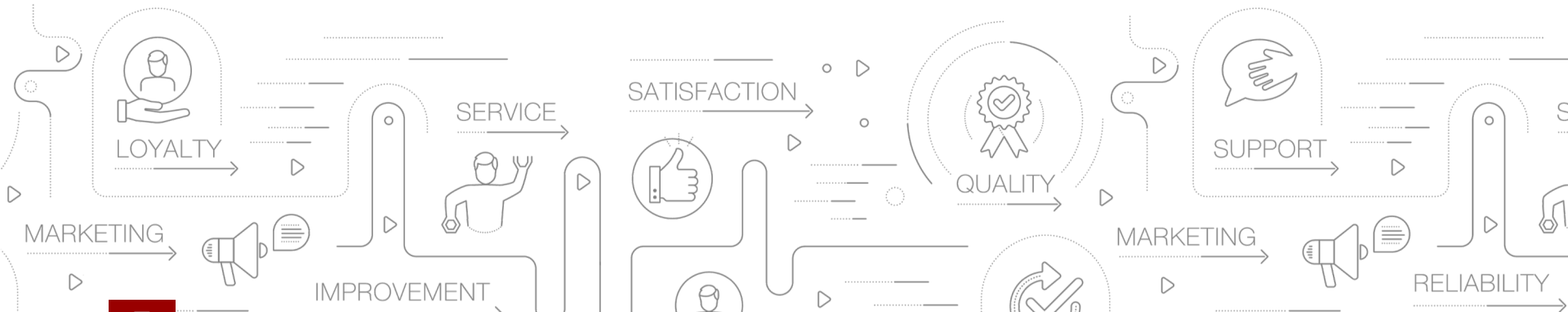
- Departments or groups collaborated
 - Compatible area of adoption
 - Each pillar for distinct core needs



IU CRM Initiative background

Where did the Pillars come from?

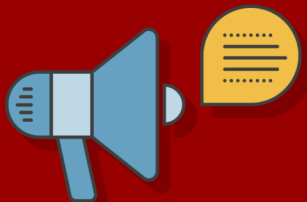
- Funded a project to implement Salesforce
 - Covers core functions for a well-defined area of business
 - Scalable, flexible, & extensible
 - Ex: Admissions event management => Event management



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

Ask about adopting IU CRM

Adoption inquiry form

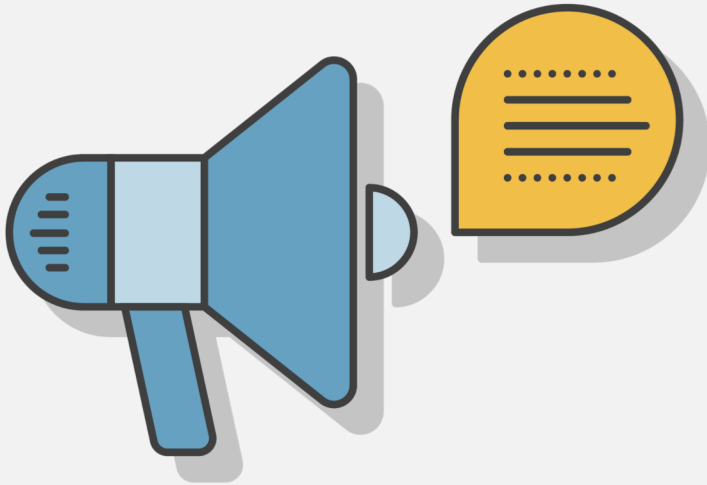


SECTION 2

The Pillars

Communications

Background

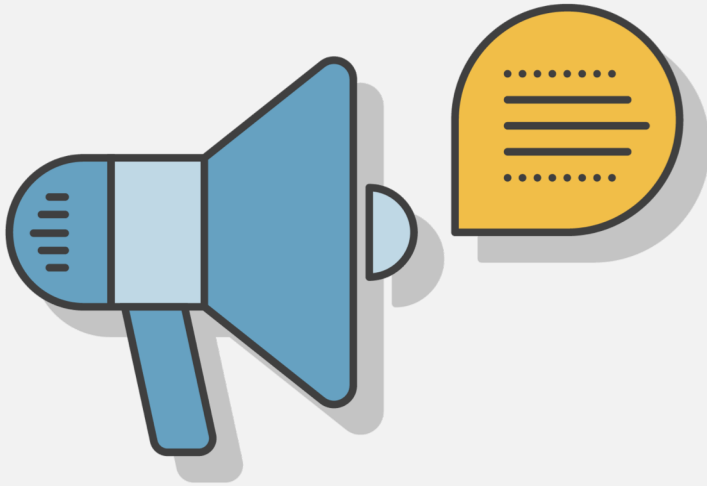


- Primary stakeholder:
 - IU Communications
- Current Adoption:
 - 210 units and growing
 - All campuses
- Scalable & flexible
 - From single communications shop to full campus
 - Units self-defined by adopter interest, business practices
- Intended for anyone wanting to send mass email



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

Admissions/ Recruiting (Undergrad)

Background



- 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)

Background



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



- 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

University Human Resources

Background



- Foundational data model: employees
- Employee service request management (SF Cases)
- Salesforce case console
- Reports and dashboard
- Analytics

University Human Resources

Features



Demonstration

SATISFACTION



QUALITY



SUPPORT



SERVICE



LOYALTY



RELIABILITY



MARKETING



IMPROVEMENT



SECTION 3

Next steps

Is that it?



Possible new pillars

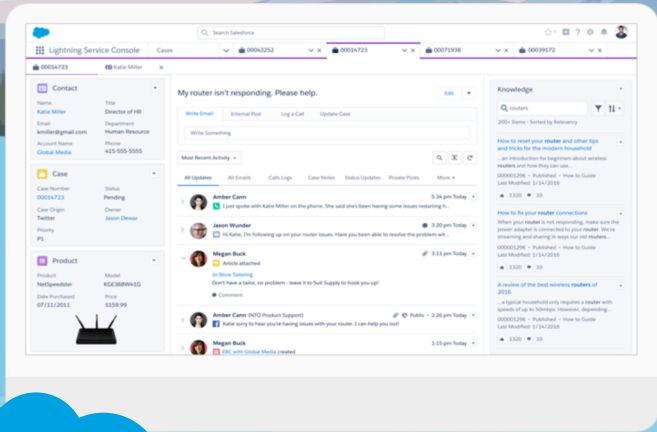
- Corporate relations
- Core CRM
- President's office
- Grad recruiting (as a full pillar)



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salesforce

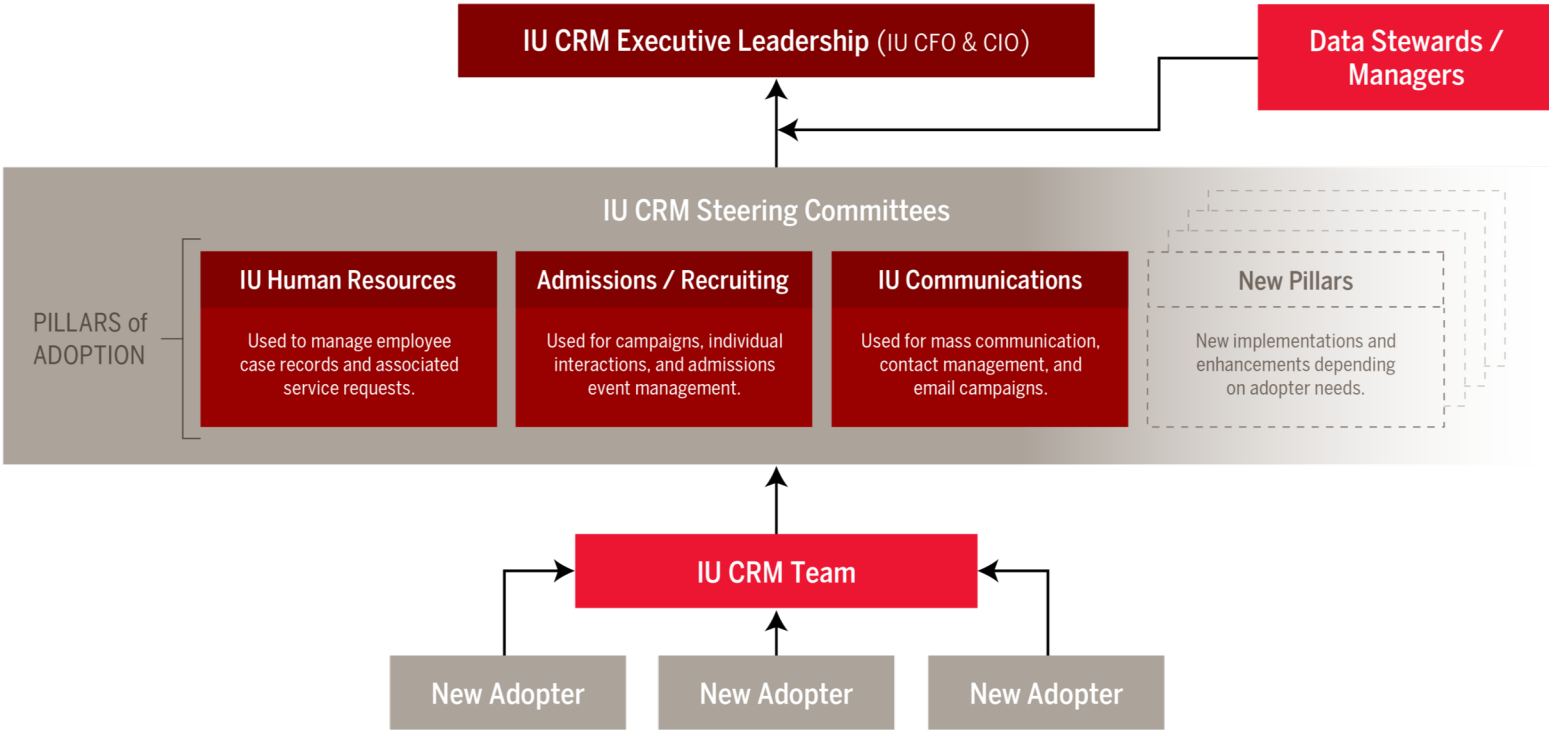
Which pillar to adopt?

How to adopt?

What about a new pillar?



IU CRM Governance Structure



Step 1 is always the same!

crm.iu.edu

Ask about adopting IU CRM

Adoption inquiry form



crm.iu.edu

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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 suggestions to *talk2uits@iu.edu*
and ITCP will try to arrange it.



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