Indiana University: Unification with a Cohesive CRM Strategy
Speakers

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Delivering technology to nonprofit, educational and philanthropic organizations

INVESTMENT
Building a future-ready, diverse, talented and skilled workforce through technology & financial grants

COMMUNITY
Empowering an army of citizen philanthropists and driving community innovation

IMPACT
Salesforce.org Education Cloud for Higher Ed
Become a Connected Campus

Student Success
- One-Stop Student Services
- Advising
- Career Services
- Student Engagement

Recruiting & Admissions
- Student Recruiting
- Admissions & Enrollment
- Applicant Portals
- Marketing & Communications

Advancement
- Fundraising
- Alumni Engagement
- Advancement Operations

Salesforce.org Education Cloud for Higher Ed
Become a Connected Campus

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Strategically Building an Enterprise CRM Initiative at IU

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Indiana University

- Big 10 university with nine campuses across the state
- Core campuses are Bloomington (46k students) and IUPUI (31k students), about 110k students total
- More than 19k faculty and staff across all campuses
- 650K Living Alumni
In support of the Bicentennial Strategic Plan, this initiative proposes a major shift in IU’s approach to create a more holistic view of information for students, prospective students, faculty, staff, alumni, companies, and the many friends of IU – collectively, “constituents.”

It will align existing CRM momentum with a Salesforce Enterprise License Agreement to enable smarter and informed constituent engagement across IU.
Evolving CRM at IU
2015 -2017
Why CRM in higher education?

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
<table>
<thead>
<tr>
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<th>Pre-IU / Recruitment</th>
<th>At IU: Students, Faculty, &amp; Staff</th>
<th>Alumni/External Audiences</th>
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<td><strong>Target Audience:</strong></td>
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<td><strong>Target Audience:</strong></td>
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<td><strong>Corporate Relations</strong></td>
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<td>&amp; Engagement</td>
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**Marketing & Communication / Miscellaneous**
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<tbody>
<tr>
<td>Undergraduate</td>
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<td></td>
<td>• Blackbaud software used by IU Foundation</td>
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<tr>
<td>Graduate</td>
<td></td>
<td></td>
<td>• 800 users</td>
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<td>• 1.5M records</td>
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Corporate Relations & Engagement

Marketing & Communication / Miscellaneous
50+ Unconnected Customer Relationship Management (CRM) Services Used at IU

Target Audience:
- Undergraduate
  - IUB CRM’s Hobsons is transitioning to Slate
- Graduate
  - JIIB Kelley School of Business
  - 50 users
  - 135K contacts
  - 100K leads
  - 23M campaigns
- IU Kelley School of Business
  - 20 users
  - 60 contacts
  - 2 leads
  - 1 campaign
- IUPUI Multidisciplinary School of Law
  - 7 users
  - 5000 leads
  - 0 campaigns
- IUB School of Public and Environmental Affairs
  - 8.9K leads
  - 27M campaigns
- IUPUI Multidisciplinary School of Law
  - 7 users
  - 5000 leads
  - 0 campaigns

Pre-IU / Recruitment

At IU: Students, Faculty, & Staff

Admissions Coalition (IUPUI, Regionals, Online)

Emerging Lifetime Engagement

330 users
- 956K contact records
- 131K leads
- 27M campaigns
- 10M total email sends
- 150K service case interactions
- 133M email recipients
- and/or event participants

Waiting to adopt:
- 4 schools

Exploring:
- Alumni Association

In process of adoption:
- School of Philanthropy
- IU School of Science
- IUPUI Kelley School of Business - Undergraduate

Adopted:
- IUPUI School of Health
- 3 grad schools at IU

No instances connect with each other
Constituents are replicated

> $2M identifiable Salesforce expenditures from IU

Alumni/External Audiences

Marketing & Communication / Miscellaneous

MailChimp
- 23 instances

Constant Contact and other communication tools
- 0 instances remaining
- Down from 250 in 2016

Agility PR (used by IU Communications for some email sends)

IUPUI Department of Family Medicine
- 20 users
- 116K contact records
- 11K leads
- 3 campaigns

IU Physical Activity
- Setup with Pivotal for Ticket sales
- 4 licenses
- 4 leads
- 53.4K records
- 4 campaigns

CRMs in use

Salesforce Platform

Constant Contact, MailChimp, and other CRMs

Crimson

Slate

Hobsons
Dec 2015 – Jan 2018
Salesforce Begins @ IU
Key Current Paths of Adoption

**IU Communications**
Used for mass communication, contact management, and email campaigns. 229 units, 400+ users; all IU campuses

**Admissions / Recruiting**
(Undergraduate)
Used for campaigns, individual interactions, and admissions event management. Tracking >470,000 leads/applicants; 8/9 campuses

**IU Human Resources**
Used to manage employee case records and associated service requests. 10 HR Service Centers of Expertise
Communications Path
Primary stakeholder: IU Communications

- Coalition of the willing
  - 60 units

- Value add
  - E-mail Templates
  - Enterprise data
  - Deliverability

- Limited Scope:
  - replacement functionality for
    - MailChimp,
    - Constant Contact
    - WhatCounts

2015
Communications Path
Primary stakeholder: IU Communications

- Enterprise Communications Platform: scales to institutional solution
- Flexible: Allows self-defined toolset based on business practices*
- Wide selection of templates and brand assets
- Robust Documentation
- Training
- Marketing & Recruitment funnel

Foundational CRM data model (Employee & Enrolled)
Security & IP Reputation

- Digital signatures
- IU Trusted Footer
- Whitelisted IP
- Throttling
Undergraduate Recruitment Path

Primary Stakeholders

- IUPUI Admissions
- USSS (Representing All Regional Campuses)
- Office of Online Education
- Collectively funded and scoped an undergraduate recruiting project

Intended Users

- Campus central admissions offices
- Office of Online Education (key partner)
- Departmental recruiters
Undergraduate Recruitment Path

- 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
Graduate Schools Same Path?

- Organic demand but no sponsorship
- Basic extensible tools from Undergrad
- Web inquiry form
- ‘Cohorting ‘via SF Campaign
- 1:1 interaction management vs. SF Cases
- Reporting and analytics
Graduate Schools Same Path?

**Adopted**

1. School of Public and Environmental Affairs
2. School of Public Health Online
3. IU Northwest - School of Business & Economics (SOBE)
4. IU Northwest - School of Education (SOE)
5. IU Northwest - School of Public and Environmental Affairs (SPEA)
6. IUPUI - School of Philanthropy
7. IUPUI School of Nursing

**Waiting:**

1. IU Northwest – School of Nursing
2. IU Northwest – College of Arts & Sciences
3. IUPUI – School of Optometry
Connect with Us

We’re Here for You
The IU Human Resources Customer Care Team is here to assist you in all matters related to your employment at Indiana University. Starting from when you begin your career, continuing through your service, and providing a seamless transition as you complete your employment journey – we are here for you.

Phone: 812-856-1234
Fax: 812-855-3409
Email: askHR@iu.edu
Human Resources Service Path

Unified Toolset and Employee Service Request Tracking

- Tier 1 Customer Care Center
- 10 Centers of Expertise
- 80+ Users

Features

- Email Templates
- Service Desk Consoles & Dashboards
- Reporting and Analytics
Small staff, temporary and limited budget.
330+ Users, 325 Units, 9 Campuses, 3+Functional Projects
Celebrate Survival!
What is CRM in Higher Education?

Presidential Enterprise CRM Initiative

February 15, 2018

Rethinking and modernizing decades of habits and processes from a mostly functional point of view to a constituent point of view
Careful ELA Selection

- Salesforce Lightning CRM (core)
  - Form Assembly
  - Communities Cloud
  - Conga
  - Jitterbit
  - Demand Tools

- Marketing Cloud (formerly ExactTarget)
  - Heroku
  - SMS

- Integration
  - Products licensed/used by IU
  - Other Salesforce products

- Salesforce is 800+ product SKUs; each licensed and each with a per-use fee
- + An ecosystem of 6,000+ add-ons from Salesforce and third parties
IU CRM Initiative Includes:

- Enterprise charge for CRM across IU
- Larger IU CRM team
- Foundational resources for IU’s CRM
- Governance
- Enterprise Licensing Agreement
- ‘Train the Trainer’ for initial adoption
Accelerating Progress

- Marketing Cloud Content Builder: Complete

- Undergrad Admissions/Recruitment Phase II: 30% complete, ETA Fall 2018

- SMS/Text Phase I: Charter and consulting agreements complete, ETA Fall 2018

- Core CRM Package: Complete

- CRM Team Expansion: 14 of 15 positions filled, interviews for remaining 3 in progress
Fulfill 30+ Unit Requests

- Core configuration of the IU CRM ready to onboard more IU departments (~30 new units)

- Early Adopters: Precision Health Initiative Grand Challenge, Provost’s Center for Rural Engagement…
What’s Next?

- Graduate Recruitment Real Phase I
- Corporate Relations
- Alumni/Advancement Exploration: Data Sharing?
- Executive Offices’ CRM package
- Single Institutional OU
  
  (1 unit just transitioned to enterprise IU CRM, 12 to go!)
- Foundational projects: archival strategy, improved integration, de-duplication, 2 factor security and more.
Lessons Learned…..

- Seek the right problems to build momentum…….. that broaden constituencies/data in CRM, find partners along the way.
- Document existing CRM spend, opportunity losses……a picture is worth M’s/year.
- Governance….is essential but keep it simple.
- Build extensible solutions for the 80%….customized perfection is overrated by far.
- Configure… don’t code.. (only in extreme cases, PaaS)
- Think, plan and manage change to use tool strategically.
- Communicate…… can’t have too much.
- Staffing….. build your own & keep hot spares around; student talent!
- Enjoy the Journey……..celebrate along the way!
Thank You

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