



INDIANA UNIVERSITY

Indiana University: Unification with a Cohesive CRM Strategy

Speakers



Brad Schleicher

Senior Manager
Product Marketing
Salesforce.org



Cathy O'Bryan

Associate Vice President
Client Services and Support
University Information Technology Services
Indiana University



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educational and philanthropic
organizations



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

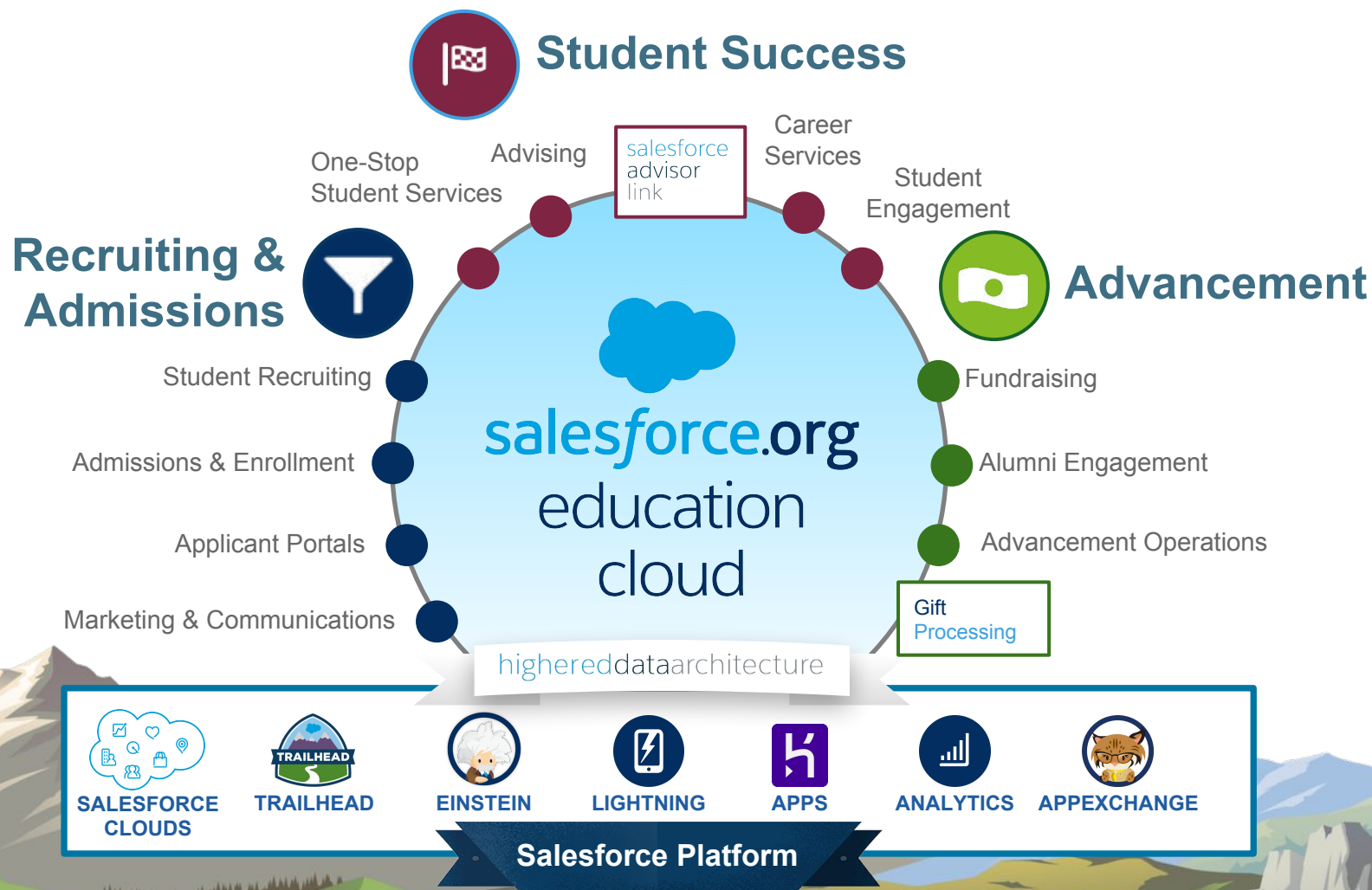


Empowering an army of citizen
philanthropists and driving
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Salesforce.org Education Cloud for Higher Ed

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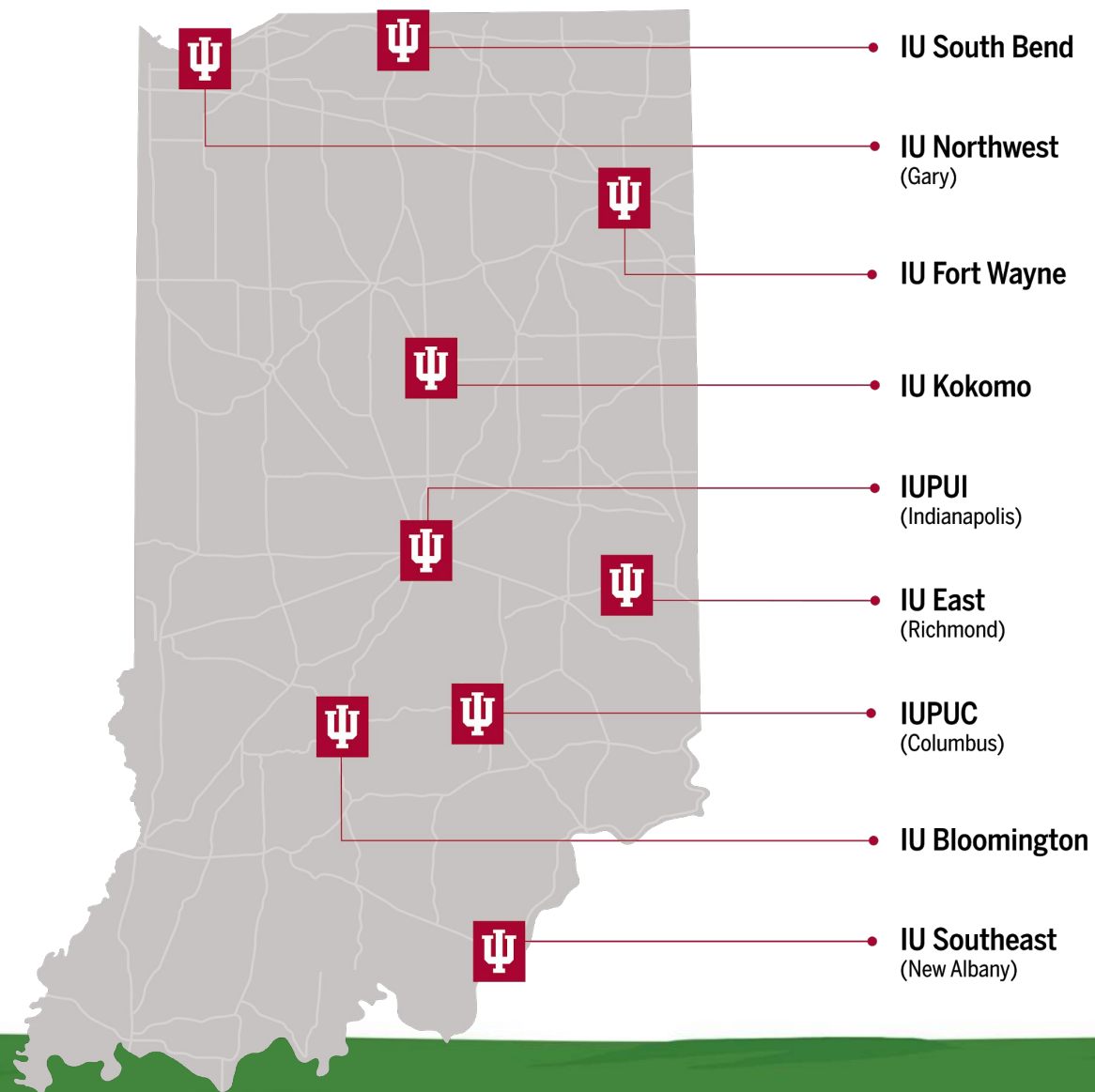


INDIANA UNIVERSITY

Strategically Building an Enterprise CRM Initiative at IU

Cathy O'Bryan
Associate Vice President UITS
caobryan@iu.edu
crm.iu.edu





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

IU CRM Strategic Plan Alignment

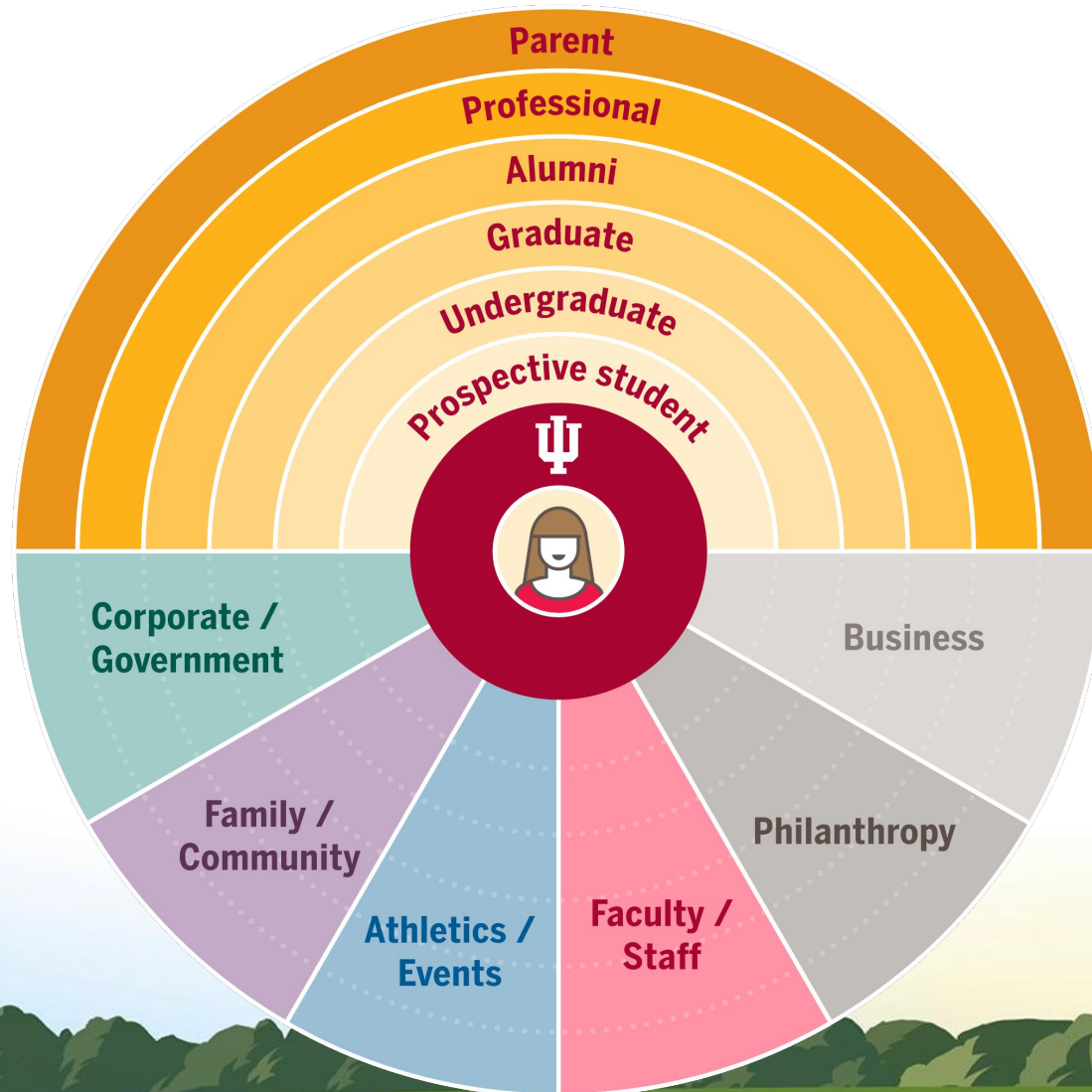
In support of the Bicentennial Strategic Plan, this initiative proposes a major shift in IU's approach to create a more holistic view of information for **students, prospective students, faculty, staff, alumni, companies, and the many friends of IU – collectively, “constituents.”**

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



Not Yet at IU

at IU

Was at IU

	Pre-IU / Recruitment	At IU: Students, Faculty, & Staff
Target Audience: Undergraduate		
Target Audience: Graduate		
Corporate Relations & Engagement		

Marketing &
Communication /
Miscellaneous



Alumni/External Audiences [salesforce.org](https://www.salesforce.org)



INDIANA UNIVERSITY



	Pre-IU / Recruitment	At IU: Students, Faculty, & Staff
Target Audience: Undergraduate		
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Corporate Relations & Engagement		

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Communication /
Miscellaneous



Alumni/External Audiences

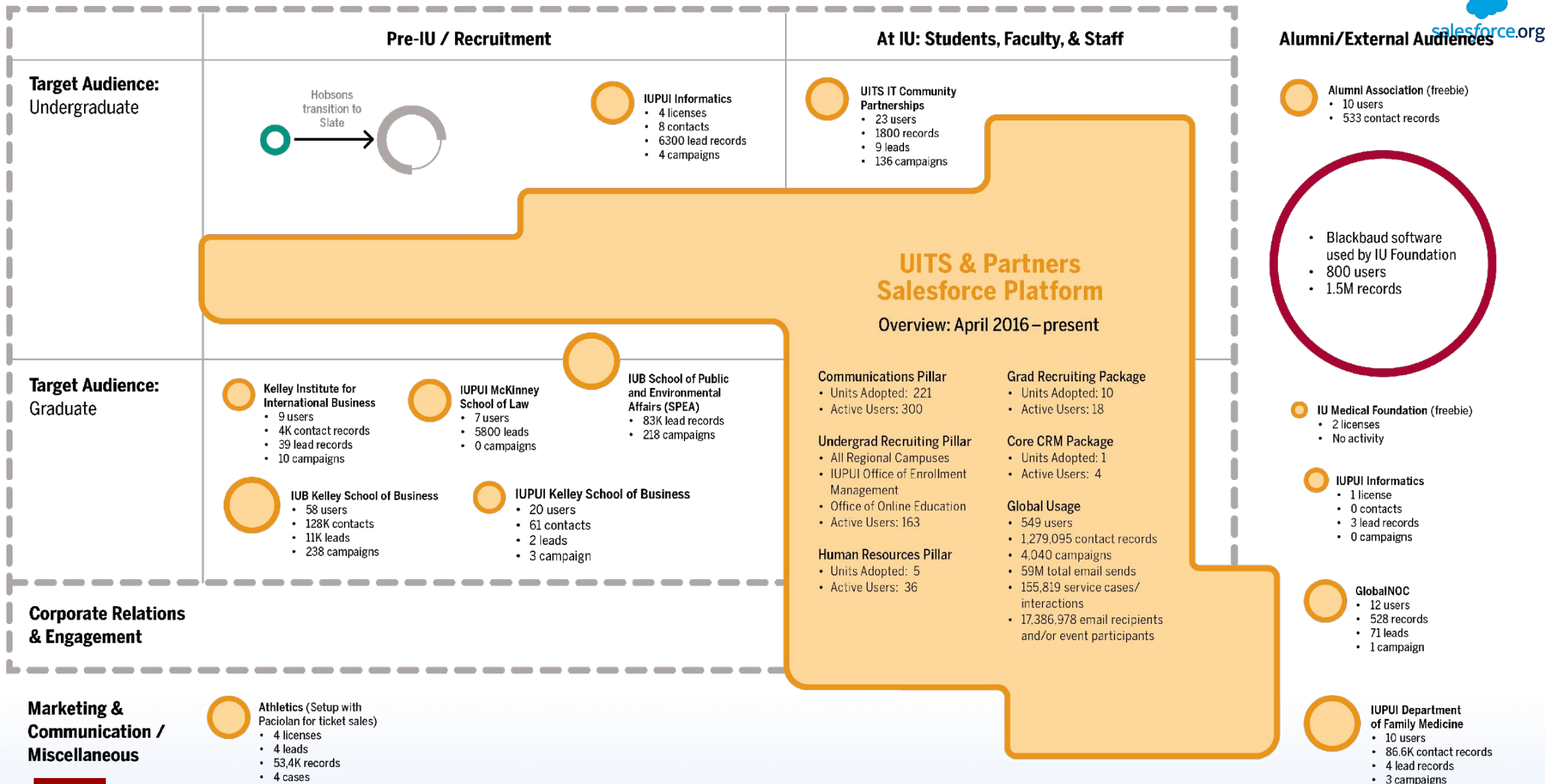
- Blackbaud software used by IU Foundation
- 800 users
- 1.5M records





2017

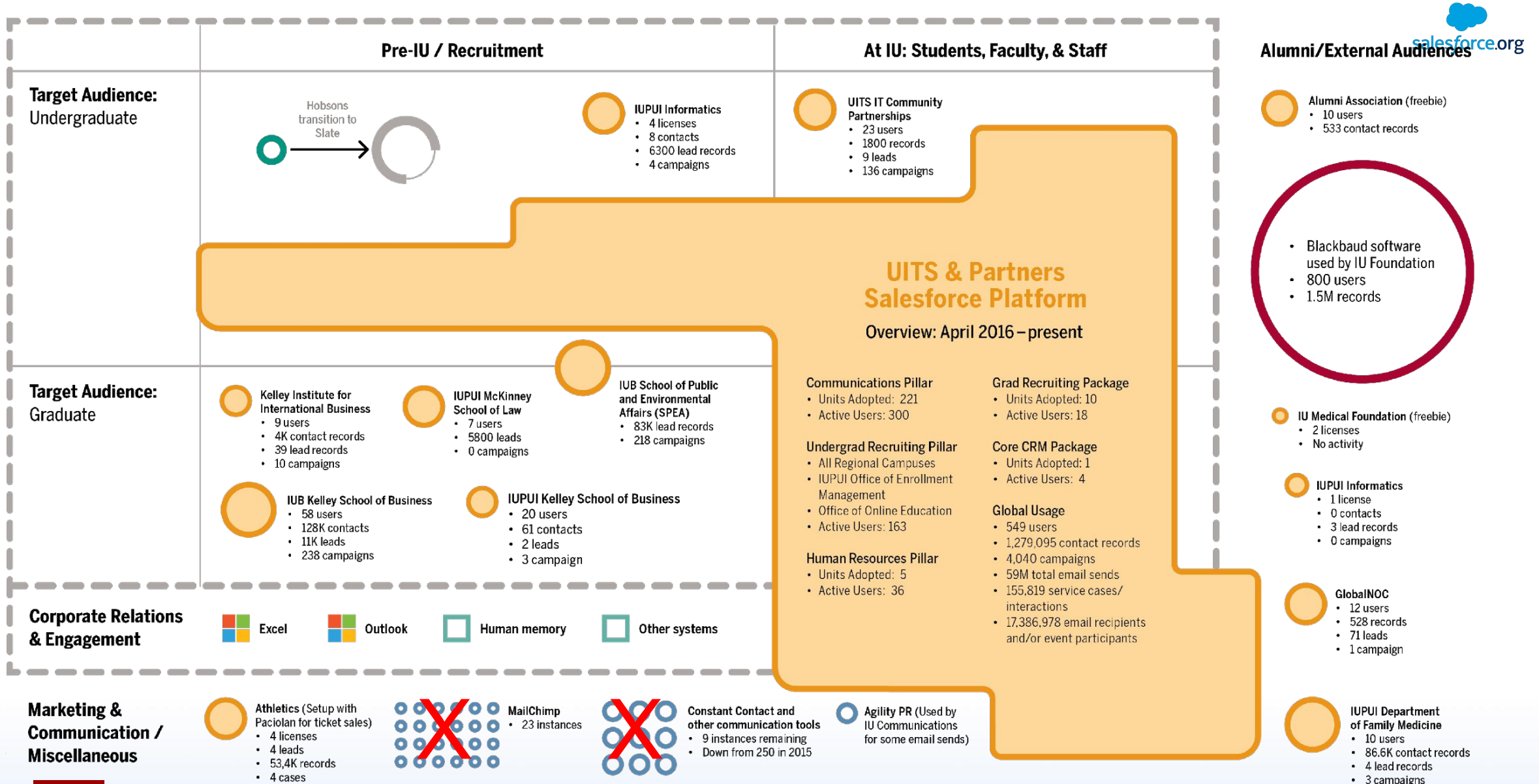
Salesforce Uses



INDIANA UNIVERSITY



50+ Unconnected Customer Relationship Management (CRM) Services Used at IU



CRMs in use

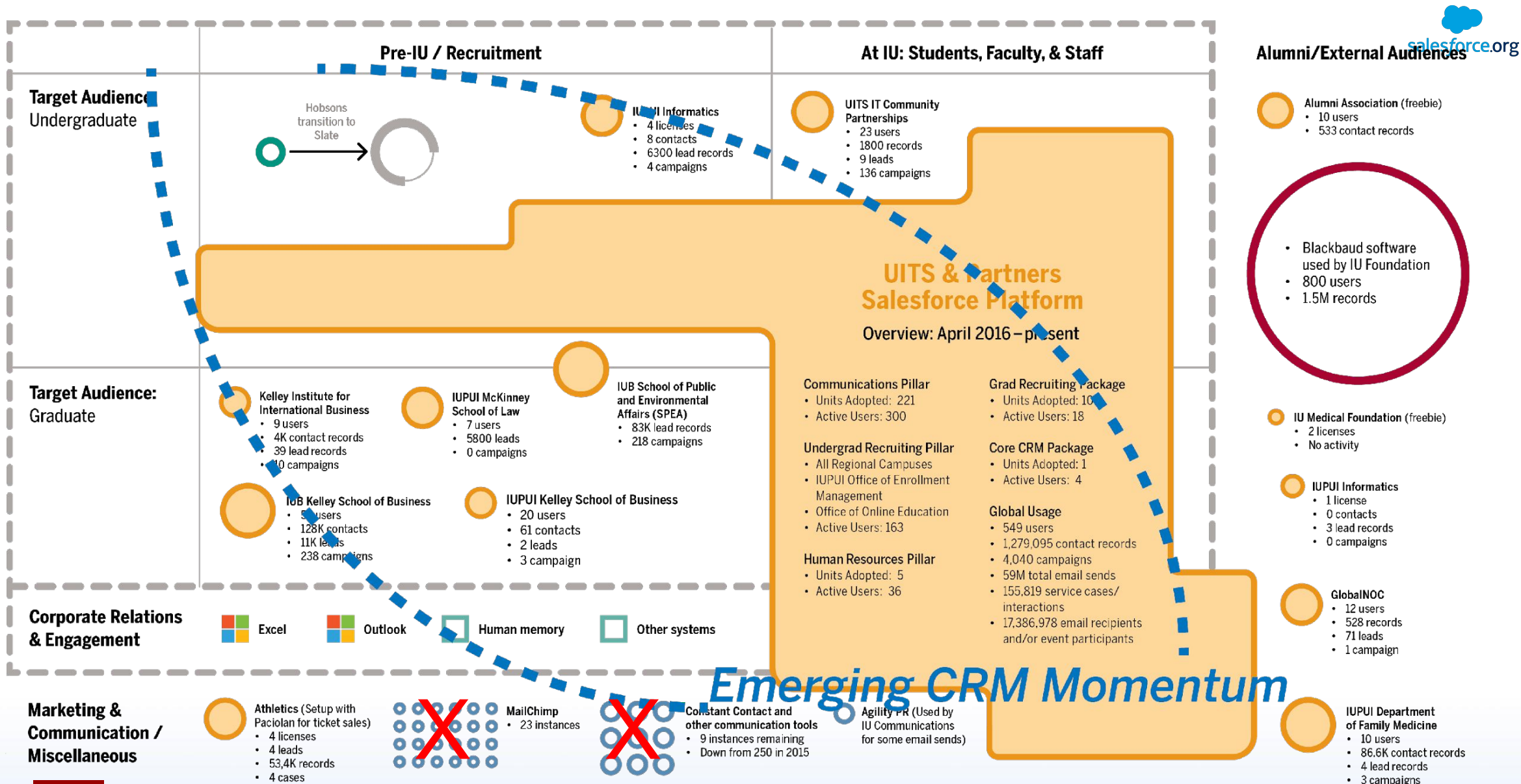


Non-CRMs in use





50+ Unconnected Customer Relationship Management (CRM) Services Used at IU



CRMs in use



Non-CRMs in use

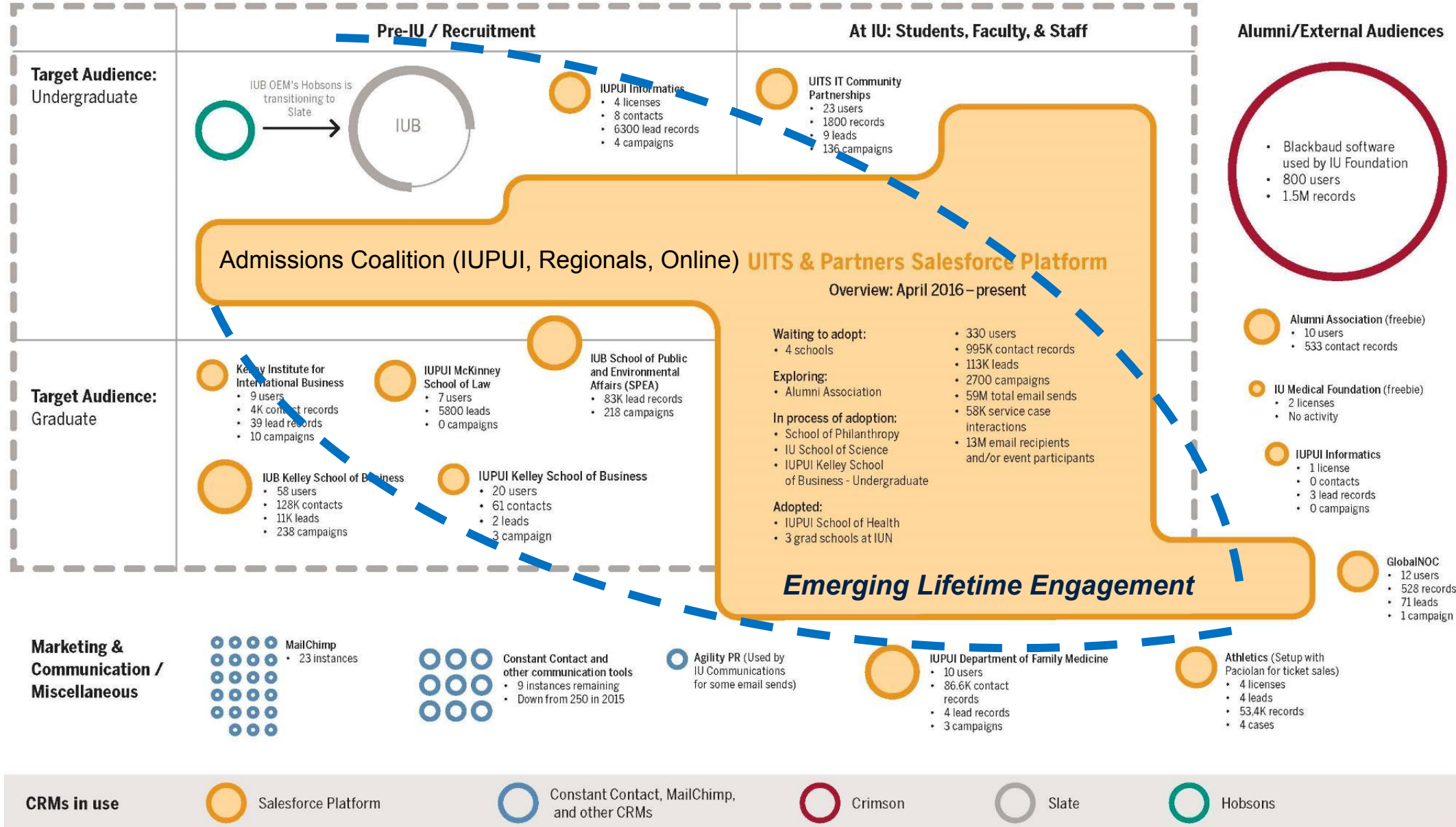





50+ Unconnected Customer Relationship Management (CRM) Services Used at IU

No instances connect with each other
Constituents are replicated
force.org

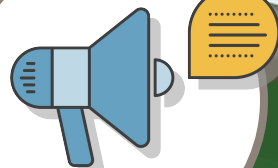
> \$2M identifiable Salesforce expenditures from IU





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



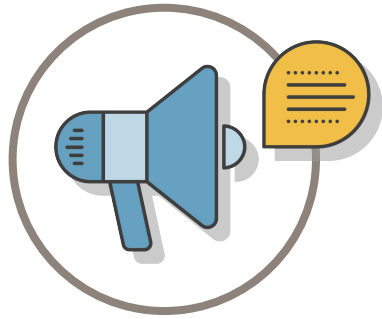
Admissions / Recruiting

(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

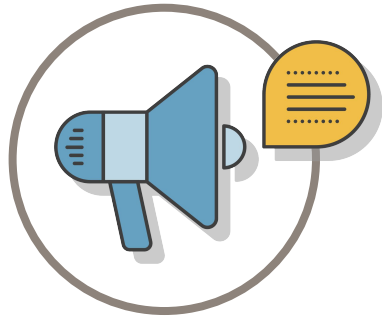


Communications Path

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





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)

2018



Security & IP Reputation

- Digital signatures
- IU Trusted Footer
- Whitelisted IP
- Throttling





Undergraduate Recruitment Path

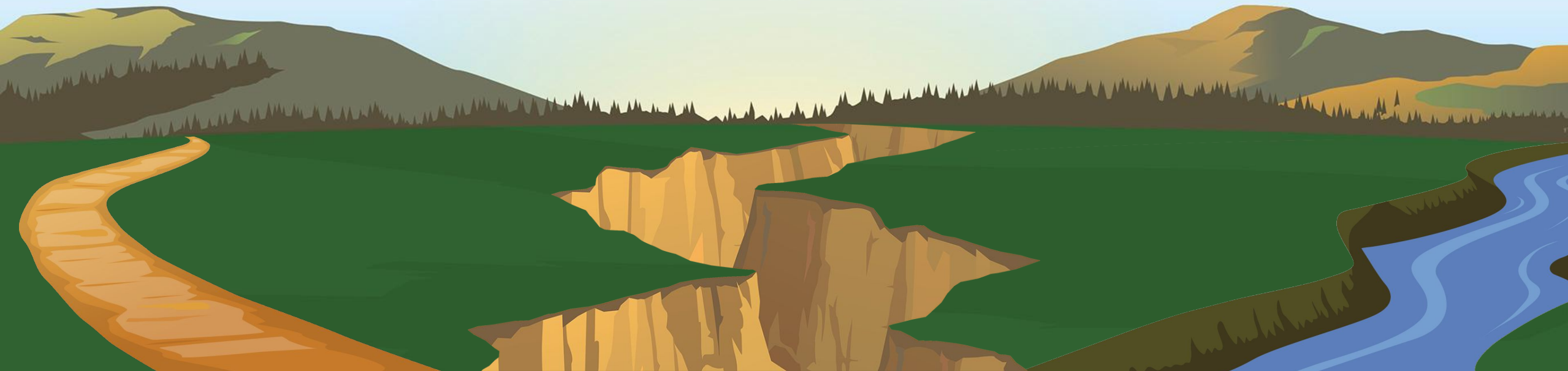


Primary Stakeholders

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

Intended Users

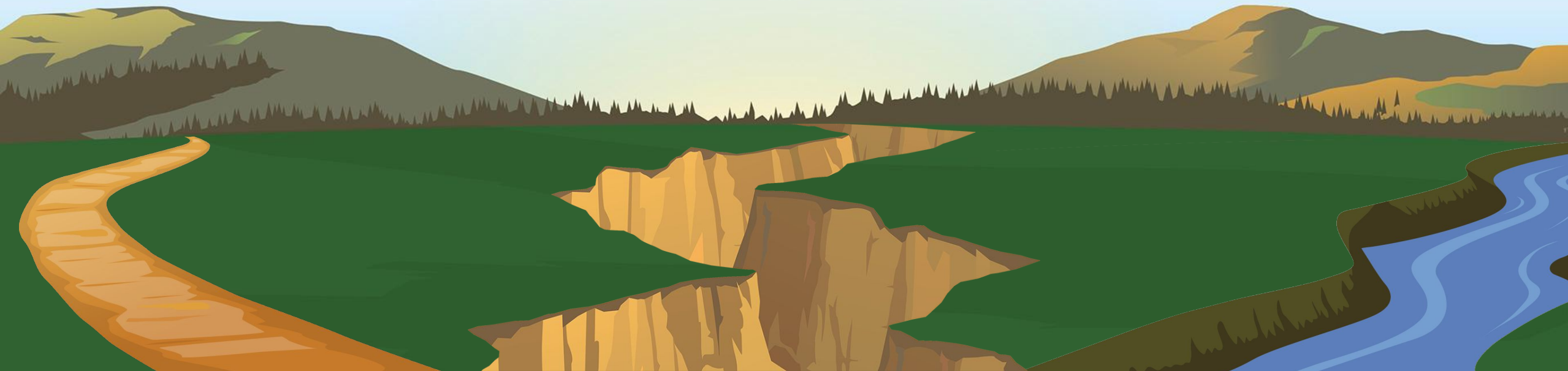
- Campus central admissions offices
- Office of Online Education (key partner)
- Departmental recruiters





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



Human Resources Service Path

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

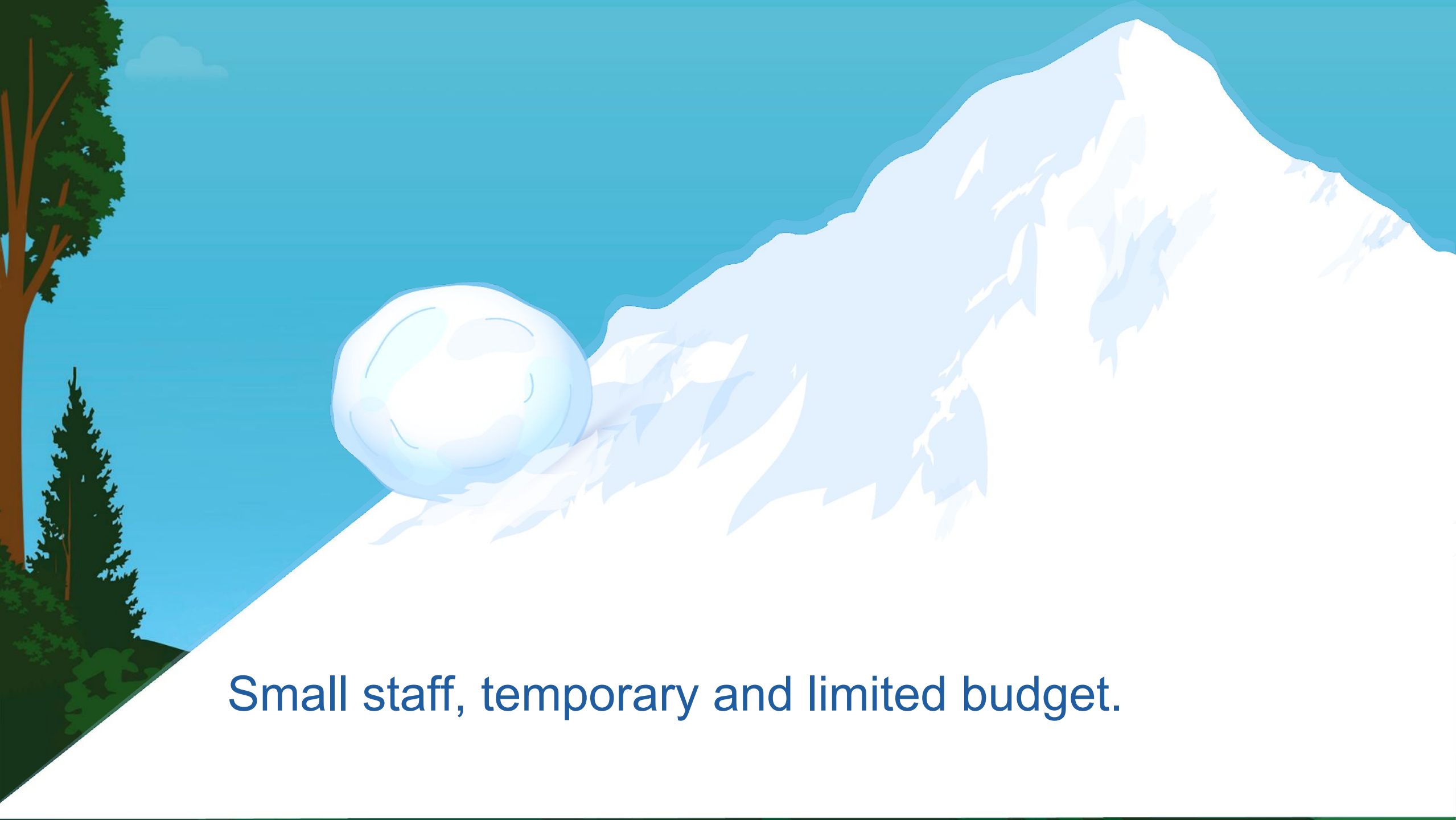
Unified Toolset and Employee Service Request Tracking

- 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!

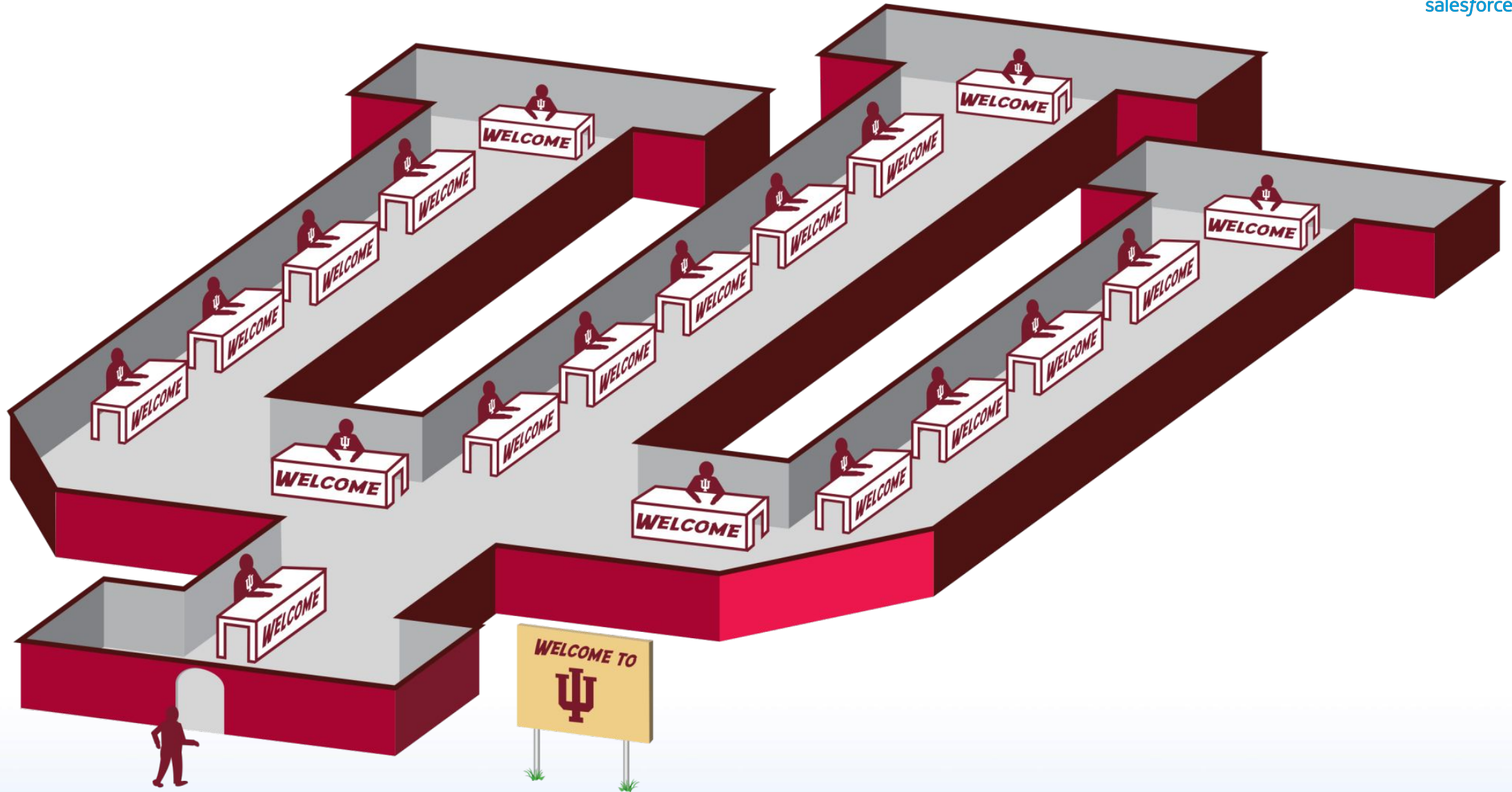




Presidential Enterprise CRM Initiative

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



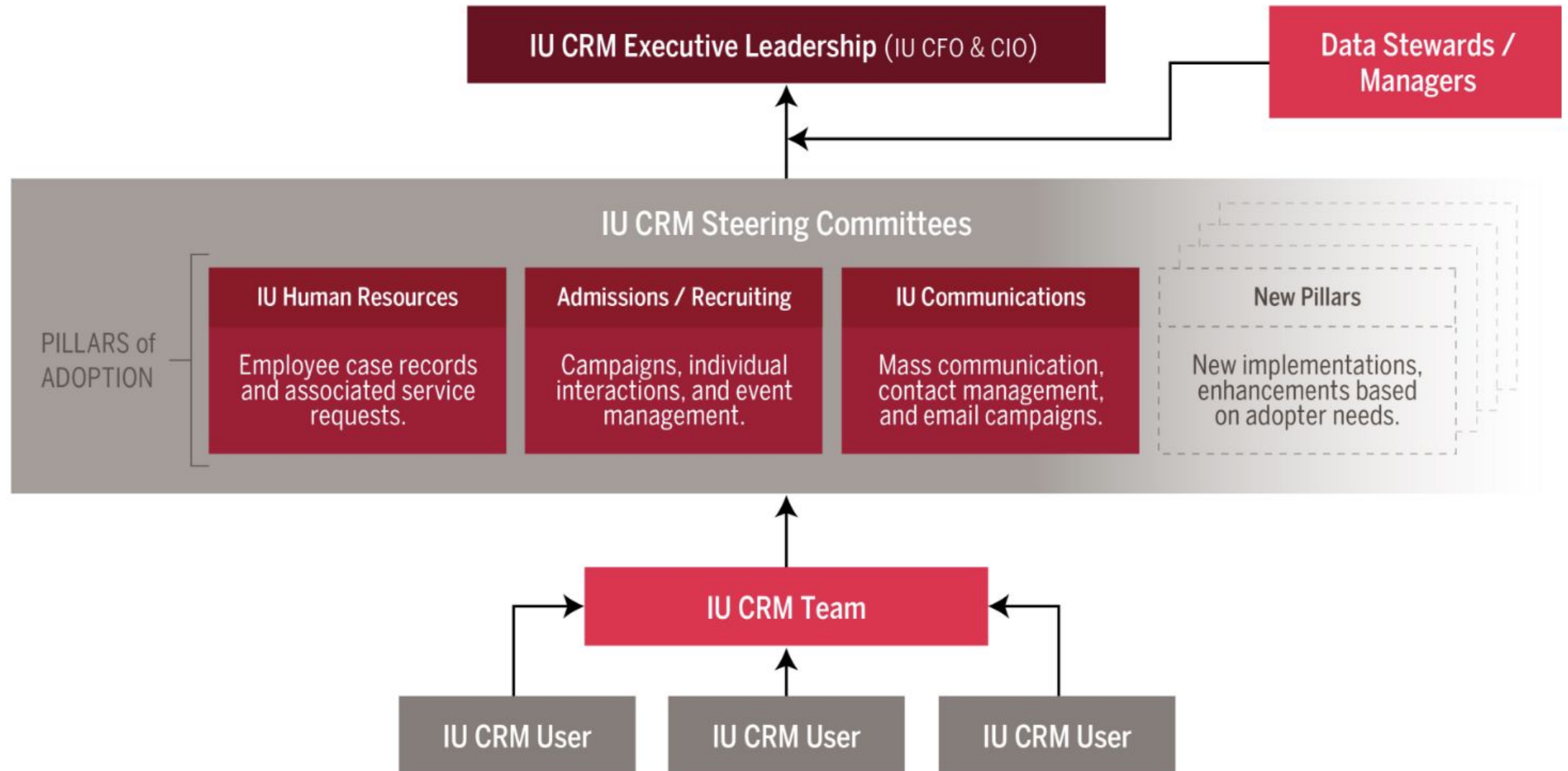
IU CRM Initiative Includes:

- 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





IU CRM Governance Structure



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?

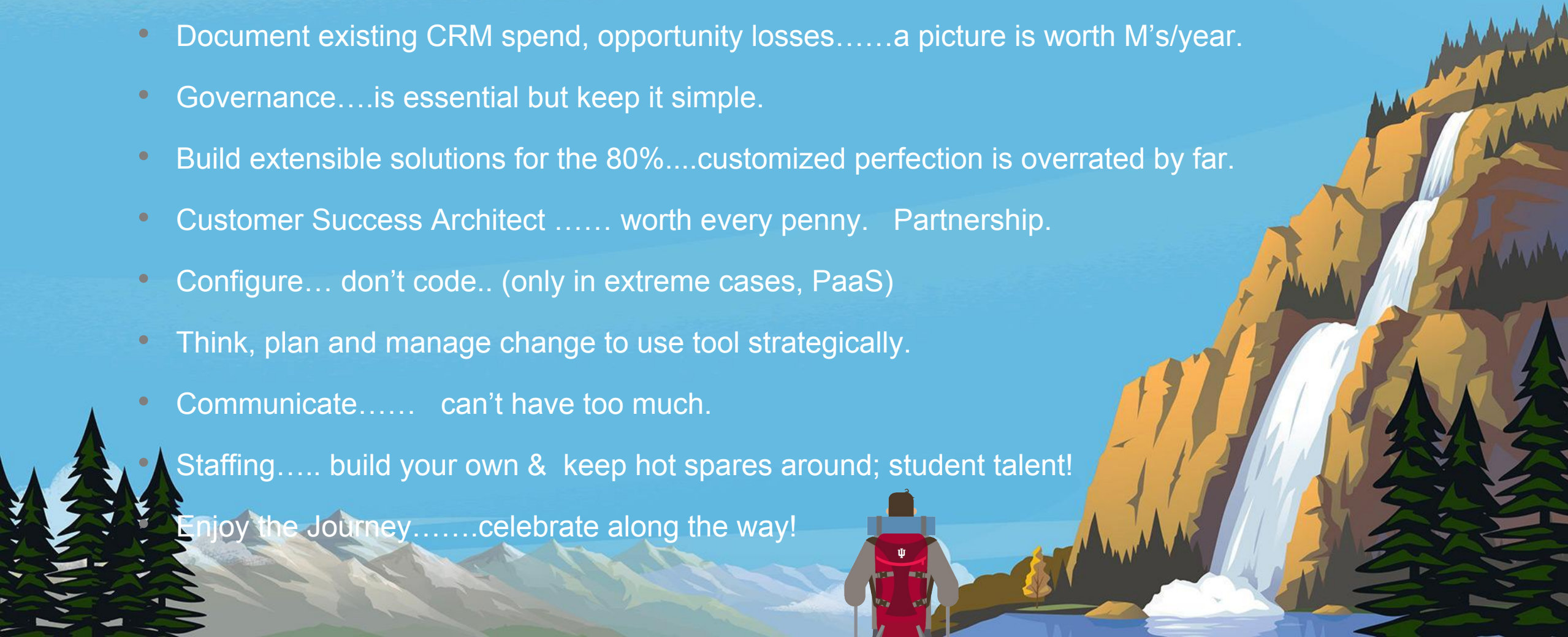
- Graduate Recruitment Real Phase I
- Corporate Relations
- Alumni/Advancement Exploration: Data Sharing?
- Executive Offices' CRM package
- Single Institutional OU
 - (1 unit just transitioned to enterprise IU CRM, 12 to go!)
- Foundational projects: archival strategy, improved integration, *de-duplication*, 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.
- Customer Success Architect worth every penny. Partnership.
- 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



Cathy O'Bryan

*Associate Vice President,
Client Services and Support*

Office of the Vice President for IT and CIO

caobryan@iu.edu

crm.iu.edu