

IU CRM Initiative—UITS

CRM enhancement request form

Requester name		Email	
Requirement name		Priority	

User access

Specify all user roles that need access to this functionality and what they should be able to do.

User role/profile/etc.	Create/edit/view/delete

Adoption impact

Identify the scope of impact that this change will have by listing each area of university business and the number of anticipated users to whom the enhancement will provide value.

Area of impact	Number of users
<i>Example: Central admissions offices for all campuses</i>	<i>Example: 250</i>
<i>Example: All departmental communications and marketing offices</i>	<i>Example: 500</i>

Projected ROI

Describe the anticipated return on investment this enhancement will provide by listing the value that the university will receive.

Return on investment
<i>Example: Change will significantly improve response times for providing employee services and reduce administrative processing effort.</i>
<i>Example: Change will expand existing event management solutions, so all adopters can utilize.</i>

Description

Provide a summary description of the requested functionality to include the **business objectives** it will achieve, how it will be applied/utilized, and all other pertinent information.

Summary description
<i>Description should identify business cases/outcomes and NOT specify products, solution designs, or features.</i>

Requirements and acceptance criteria

Specify all functional requirements stated as individual business outcomes. Identify all criteria that must be satisfied for this to be a usable feature/enhancement. Also, indicate the prioritization of each requirement.

Priority	Requirements description
	<i>Example: Need ability to create new prospective student and recruiting funnel records with data populated appropriately from a submitted web form.</i>
	<i>Example: Users need ability to easily generate new emails from a prebuilt template, so they do not have to re-create layouts for each send.</i>

Submission instructions

Please submit completed CRM enhancement request forms to crmhelp@iu.edu. Requests will be assessed and initially refined. The IU CRM team may contact the requester for additional clarification so that requests can be appropriately categorized and effort estimated. Requests that qualify for the CRM Minor Enhancement Process will be tracked in the CRM Enhancement Backlog for approval and prioritization by corresponding pillar Stakeholders and incorporated into future project cycles. Requests that qualify for CRM Major Project objectives will be selected by appropriate CRM Pillar Stakeholders and incorporated into future project scoping.