Frequently Asked Questions [1]

Don't see an answer to your question below? Please reach out so we can assist.

CONTACT US [2]

Discovery & Assessment

- **Where can I submit a request for CRM-related work?**
  We're currently creating a formal request submission process, but for now, please contact Jennifer Mortensen [3] with all new CRM work requests. Customers requesting support for current implementations should utilize their existing support channels.
- **What if I have a CRM-related request but not a full implementation?**
  Even if your CRM request isn't a full-scale implementation, we'd love to learn more and determine how we can assist you. Please contact Jennifer Mortensen [3] for more information.
- **Is there a cost to obtain UIS CRM services?**
  There may be a cost depending on the type of service being requested or licensing that is supported. We'll work with you during the discovery and assessment phase to determine a cost range for your request.
- **Do all campuses have to be on the same Salesforce org, or can the approach be individualized?**
  Each campus is unique, and we do not require campuses to share the same Salesforce org.
- **How is the timing of projects determined? Is there a queue?**
  Given demand and the current list of projects, there will likely be a queue when you submit your initial request. We'll be transparent with you about how your work falls into the overall timeline and collaborate to establish a project schedule that meets your needs.

Collaborative Build

- **How will I be kept informed about the status of my project?**
  We will share bi-weekly sprint reports that detail the work completed during each two-week period. Additionally, we are developing a broader communication strategy that will inform you and other CU customers and stakeholders about CU and CRM industry trends.
- **What if I have a change to the scope of my project?**
  We try to account for all aspects of your project during the discovery and assessment phase, but we know that changes can sometimes occur. If you have a change of scope,

please contact us immediately so that we can assess the change request and understand how it will impact the overall project and timeline.
- **How is CRM data sourced? What do you do to ensure data quality?**
  Once we understand your needs, we'll work with our integrations team to appropriately source your data, and we'll share the data model with you to understand the flow and timing of data changes. We run standard checks on data quality to ensure accuracy and will respond if and when a broad data issue is identified.

Training & Enablement

- **What kind of training will the CRM team provide to my users?**
  The training and enablement provided will be based on the specific programs needs, enablement goals and available resources. From onboarding new users to continued education, the goal is to ensure CRM users and stakeholders are taking full advantage of the applications and setup to embrace future change. Successful training methods include:
    - On-demand resources (written steps with screenshots, videos/recordings, knowledge checks/quizzes, test scenarios to practice, etc.)
    - Help ticket (with potentially useful resources, ability to submit ticket for help, turn-around time expectations)
    - Standardized new user onboarding (from requesting access to getting fully trained)
    - Regular, targeted communications (new features, session invitations, tips & tricks, etc.)
    - Live sessions (virtual and/or in-person user groups/lunch and learns/training sessions)
    - Virtual communities (network to collaborate with other users)
- **Are there examples of enablement resources for existing programs that I can view as an example of what we might receive?**
  Yes. The eComm program, UIS' most mature CRM-related services, has the most robust training resources. Other programs will prioritize valuable resources to replicate and promote them when available.
    - eComm wiki [4]
    - eComm help ticket [5] with built-in resources based on the type of request
    - New user onboarding [6]
    - Communications
        - Bi-Monthly Digest [7] for super users, specialists and stakeholders
        - Monthly Newsletter [8] for users
- **Will users working in different orgs be following the same processes and procedures? How will they be supported?**
  Depending on your objectives and business needs, you may have users working in multiple CRM orgs. As our programs continue to grow, we'll be working to create opportunities for us to streamline processes and procedures between them to ensure success and a simple user experience. We'll provide more information based on the orgs in which your users are operating.

- **What training and support will be provided for ongoing enhancements?**
  As with the training described above, we'll continue to provide resources for ongoing enhancements, changes, and training gaps you identify. We'll also work with you to ensure that your users continue to build their skills and knowledge over time.

Support & Continuous Improvement

- **How will my campus users be supported?**
  The support model you use may vary depending on the nature of your program. We'll work together to develop a support model that works for you and your users and ensure that it communicated effectively. We'll also endeavor to give you estimated completion times for certain types of support requests so you can plan ahead for success.
- **How will I be kept informed of new technology available in existing CRM products?**
  The CRM team is continually learning about new technology in existing products, as well as technology available outside our existing product line. We'll inform you as enhancements and opportunities become available, but we encourage you to reach out with ideas and suggestions based on what you learn as well.
- **How can I request an enhancement for a project UIS already completed?**
  Requests for enhancements on completed work will run through the existing four-step intake process and will be placed in the work queue. Please contact Jennifer Mortensen [3] to request an enhancement.

Groups audience:
CU CRM

Source URL:https://www.cu.edu/crm/overview/frequently-asked-questions

Links
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