

Constituent Relationship Management (CRM) Program Status

Weekly Update – 11/02 - 11/06

Ecomm – PHASE ONE

Current Status: Scope – **Green**; Timeline – **Green**

Highlights:

- **PRODUCTION WINDOW IS OPEN!**
- Opt-in/opt-out pages completed by NimbleJack and eComm and tested
- MECS completed preliminary testing in Stage environment
- CoE advises client to pursue test plans from ACF
- Data loads completed this week – deadline 11/6
- Authentication planning for all four campuses, for all short-term community users continues with production-ready authentication for full users complete ahead of schedule
- Provisioning for FULL USERS on-schedule and to be handled by CoE – no change
- Provisioning of Community Users (i.e., Alumni) charter for project in progress
- Team has tabled moving Community into the production train early

Project remains in the Production environment code and data population window. No impediments or roadblocks to that portion of the schedule, so project schedule status remains **green**.

Contractor (Nimblejack) delivered Web pages for email opt-in/opt-out. eComm personnel (Kim Egan and team) created and tested remaining 25% of opt-in/opt-out pages. Results of that testing are documented in the project archive on GoogleDrive. This work was considered in jeopardy for completion by deadline, but due to exemplary heavy-lifting by eComm, project will maintain its original delivery date to Managers of Electronic Communication (MECs) of 11/11.

eComm MEC team completed tests in Stage environment based on the CoE-provided test plan. MECS did experience some challenges with the plans, but we are mitigating those challenges by asking the designer of the solution (ACF) to create separate test plans for completion in Prod beginning 11/11. Plan is to leverage original UAT scripts and compare those to any outstanding requirements not tested during UAT to create a complete catalog of tests for delivered requirements.

Data loads completed 11/5 & 11/6. Error percentages are low (+/- 1%). No issues with moving testers to Prod next week.

CoE refined security settings in the production train and have them in place for MEC Prod testing window (11/11). Two outstanding settings (HR & Forms) are associated with P2 and will go in on a later timeframe.

Team has authentication pages in place for testing by MECS. Provided authentication through Shib/Ping passes muster during test, solution should work for larger and larger audiences of eCommunicators. Delivered nearly a month ahead of schedule.

No change to Provisioning plan. Provisioning of FULL USERS to be completed manually by CoE. MECS are fully provisioned in the Prod system already. For the next batch of SuperUsers (30-40 personnel), CoE is looking to automate the process (by 12/12). Planning session to do so next week. SuperUser provisioning will be the “test” for automating the provisioning of the remaining 200+ eCommunicators by 1/11.

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No change to provisioning of COMMUNITY USERS. We have the Enterprise solution proposal for brokering provisioning and claiming of accounts as well as the “black box” brokering system. CRM team is creating a charter to map this out as a project as it is now larger than just a “Salesforce” project.

Due to a change in direction resource-wise, team has tabled moving Community configuration/code into the Production train early.

High-level milestones below. Additional line items highlighted:

Data Load Complete	11/06/15 – ON TARGET
Issues Logging & Reconciliation – Code & Data	11/09/15 – SCHEDULED
Prod Done (& Tested)	11/11/15 – ON TARGET
MEC Rollout – P1	11/11/15 – ON TARGET
MEC Rollout – P2	11/20/15 – ON TARGET
Provisioning of SuperUsers	12/11/15
Super User Rollout – P1 & P2	12/12/15
Training *	01/18/16
Provisioning of Full Users (Remaining eComm Personnel)	01/21/16
Full User Set Complete *	01/25/16

Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

Development team continues progress on Iteration 2 while MEC team completes testing against iteration 1. Week completed with an additional review of functionality in CVENT with MEC team. Iteration 3 (Data Migration and Membership) proceeds apace with no roadblocks or issues identified.

Iteration completion readout:

Iteration 1 initial development COMPLETE. Testing 85% complete.

Iteration 2: 90 hours of development time total with 13 hours remaining = 86% complete.

Student Success 1.75

Current Status: Scope – Green; Timeline – Green

Team has completed initial iteration planning and will present the iterations requirements packages to the SuperUser team next Wednesday. Project will turnaround scoped in enhancements to the system quickly and project should close in December 2015. Iterations will concentrate on Calendaring 2.0 and enhanced meeting creation, management functionality.

The RIVA solution package – an application that will allow advisors to drag-n-drop emails/updates into their email application folders and have those updates dispatch directly to MyCUHub, among other functionality – is currently in design/development. Estimated completion of RIVA work is 12/9.

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CRM CoE Build Out

Current Status: Scope – Green; Timeline – Green

Highlights:

- Progress continues on Best Practices, Repeatable Processes, and Planning documentation efforts – Iteration 1 documents in review, Iteration 2 documents in development – due 12/30/15
- Provisioning/Deprovisioning planning for Enterprise is underway (larger in scope than just CRM)
- De-duping processes in design and definition; CoE collaborating with UIS and other invested parties to define Account and Contact management duplication mitigation
- CRM CoE Operating Plan in progress – due January 2016
- Student Success 2.0 (New Student Welcome and more) project planning underway
- PhET project request currently in intake – CoE to deliver charter by 11/20
- UCB College of Engineering and Applied Science Graduate Advising and Student Management project currently in intake – CoE to deliver charter in December 2015

CRM CoE Build Out Best Practices, Repeatable Processes, and Planning:

Team continues to work on standardized repeatable process and procedure definition. Catalog of items appears in last week's status. Please refer to that document for a complete list (or contact Kyle Kirves). CRM CoE team is in process of reviewing Iteration 1 documentation and providing comments. Iteration 2 document development proceeds apace. Project wraps December 2015.

Enterprise-wide Initiatives:

Multi-campus authentication and SFDC user provisioning/de-provisioning project on-going. In partnership with campus and UIS IT organizations and IdM Center of Excellence and teams, CRM CoE working on Enterprise solution that is broader than CRM. **This item is now considered a standalone project and will be chartered accordingly.**

CRM Advisory Group meets 11/12/15.

SFDC Enterprise Model and Security work and approval from Data Management Groups continues through January 2016.

In partnership with Jason Armbruster, Nalini Indorf Kaplan is creating use cases for Contact and Account Data Management and de-duping processes. Scope includes MDM, SFDC Platform, SFDC MarketingCloud, cVent, Campus Solutions, HRMS.

Nalini Indorf Kaplan is developing the CRM Program CoE Operating Plan which will summarize the components and processes of the CRM Program. This document will be socialized with CRM stakeholders for input in the December/January timeframe.

New CRM Project Requests

Nalini Indorf Kaplan and Daniel Robert scoping Student Success 2.0 for the Boulder campus. High level scope includes: New Student Welcome, Continuing Education Advising, Leeds appointment scheduling for academic advising, Faculty and Resident Advisor early alert and logging, new users to include Student Affairs, Athletics Coordinators and Tutors, Faculty Mentors (pilot), Student Services, e.g. Registrar, Bursar, Financial Aid.

Daniel Robert is performing requirements analysis for Athletics Coordinators and Tutors. Currently Athletics uses GradesFirst and is evaluating when to migrate to the MyCUHub platform.

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CRM team scoping out new contact management functionality for PHet. CRM Team scoping out project UCB College of Engineering and Applied Science Graduate Advising and Student Management.

Hiring Update

Nalini Indorf Kaplan, Program Director, continues to pursue additional hires for the CRM program. CRM Team Hiring and Onboarding:

- Lead Developer, Andrew Kohlhepp starts 11/16/15
- CRM Solution Architect, Shailesh Pokharel, starts 12/1/15
- We have extended an offer on 10/29/15 for the Applications Administrator position
- We are interviewing for a SFDEC Senior Developer