

Constituent Relationship Management (CRM) Program Status

Weekly Update – 08/13 - 08/19

Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Yellow

Highlights:

- Stage environment data validation and reconciliation is underway
- Leadership and team is adopting a Stage refresh activity to make sure all fields are present and populated correctly and that code is deployed per process
- Revised project schedule in development – to be delivered August 25th
- Provisioning for FULL USERS on-schedule and to be handled by CoE
- Provisioning of Community Users (i.e., Alumni) will have refined plan by Friday August 28th

Getting the Stage environment right – in terms of code deployment, data, and process – remains a big focus of the collective team. Because Stage mirrors prod, it is of the highest priority to make sure that we are confident that everything is Stage is constructed and deployed correctly. To that end, the CoE and UIS, with the agreement of executive leadership and the client have decided to pursue a Stage refresh, which is essentially a rebuild or dry run of the Stage build process. At the end of that refresh we should be highly confident that we have good code, data, and process (read: documentation and deployment checklists) to begin the Prod build process.

CoE and PMO are revisiting the project schedule to incorporate the notion of the Stage refresh but also prepare timelines that are comfortable to the client. Specifically, the client has wisely requested that the MECs rollout in advance of the other Prod users in order to identify any bugs or issues prior to wider launch. Also, the client has expressed strong interest in making sure that training happens as close to Prod rollout for the wider audience in order to prevent cold shelf storage/knowledge loss between training and rollout. The CoE will take this into account when creating and baselining the project schedule. Baselined project schedule to be delivered by August 25th.

As noted last week, provisioning for FULL USERS is on track, handled by CoE, and up to 200 eComm Users, plus additional eComm users as licenses are purchased, can be configured manually on current timeline. No roadblocks or issues.

Provisioning for community users (i.e., Alumni) discussions are underway. Team is exploring the notions of a.) Enterprise Identity Management, b.) the “black box” or Salesforce specific solution, c.) a Plan C where Boulder OIT delivers first wave of community users for all campuses. Or a combination/fusion of some or all three. Detailed design session happens this coming week (August 27th) with firm recommendations expected as an outcome.

Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

Highlights:

- Vendor identification and selection process complete – CVENT and Cvent Express – funding and requirements pending
- Charter Draft delivered to Executive Team 07/21
- MEC/Special Forces Team forming this week – communications in process
- Project Management documentation and formal inception underway

The eComm leadership team has selected CVENT as the events vendor for eComm Phase Two. Client has assumed a certain amount of risk in choosing CVENT prior to full user stories analysis. Team is engaged in project planning processes at this point, including user stories creation and staffing planning. Project will officially kick off September 3rd even while initial planning and scheduling happens in the interim.

As noted last week, MEC/Special Forces team currently working up User Story and Requirements generation. This task should complete by COB August 21st. Goal will be requirements with acceptance criteria and conditions of satisfaction and testability, as well as priority. No roadblocks to this activity.

Project management documentation and formal kickoff is currently in process, funding pending.