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2021 Launch: Frequently Asked Questions [1]

June 19, 2021 by Melanie Jones [2]



We understand that a project of this scope raises many questions. A few of the most common ones we receive are documented below. Don't see your question listed?

CONTACT US [3]

When is the R&A CRM Salesforce Go-Live?

Salesforce for R&A will go live on September 20th, 2021and replace Fire Engine Red and BombBomb functionalities.

Who is being impacted?

- **Recruiting and Admissions Staff:** Currently, only employees within Enrollment Management with R&A job roles will be using Salesforce for R&A functionalities, but

there is potential to enhance functionalities and incorporate feedback from other departments.
- **Impacted Community**: Other departments may have minor downstream impacts, such as new reports.

How can I benefit from using Salesforce as my new CRM?

- CRM benefits an institute in a variety of ways. While the benefits vary by department or industry, six benefits of CRM platforms that affect every user include:
    - Trustworthy reporting
    - Dashboards that visually showcase data
    - Improved messaging with automation
    - Proactive service
    - Efficiency enhanced by automation
    - Simplified collaboration
- Admissions Connect is admissions CRM software that helps teams meaningfully engage applicants and streamline admissions management — all on one trusted platform. There is less time consumed on manual processes which increases productivity.

Will this implementation affect our ongoing activities, or will there be a blackout period?

The blackout period will start on Sept 3rd, 2021. At this point, the Admission team will stop reviewing applications in CU-SIS. There will be no other changes in ongoing activities, and all processes will continue as is.

What will happen to the applications that are submitted during the implementation period?

They will stay in CU-SIS but will be integrated within Salesforce once go-live.

How will I be trained?

- **Recruiting and Admission**: Salesforce and OCM teams will provide ample training prior to go-live to allow for optimal user adoption. In-person training will take place on the week of September 14th. The purpose of training is to familiarize staff with the use of Salesforce and other supporting applications, guide you through the updated business processes, and ensure you can successfully operate in the new system.
- **Impacted communities**: Will receive communications describing any downstream impacts.

Will I be receiving Quick Reference Guides (QRGs) and/or Job Aids?

Yes, the project team will be delivering detailed QRGs, describing technical functionalities of Salesforce and Job aids, explaining the step-by-step process by functional role.

Where are self-paced training materials stored?

- **Recruiting and Admission**: Once go-live training materials will be stored on Chatter within Salesforce. Salesforce Chatter allows the advantages of social networking to work for your institute. It is the ultimate collaboration software solution that connects people and information at the speed of social. The Chatter social network for business allows everyone to communicate and produce in a secure social environment.
- **Impacted Community**: Training materials will be stored on CRM Community Site.

Whom can I contact for more help?

If you have comments, questions or concerns, please reach out to Joanna Iturbe [4], Enterprise CRM Director, Lara Ackerman [5], Organizational Change Manager, or Alexandria Fleming [6], Organizational Change Manager.

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