Phase one of the Transformation & Innovation Program (TIP) assessed CU’s enterprise-wide technology landscape. The assessment included a review of CU’s major applications, data, infrastructure, processes, supporting governance, finance, and talent management practices. The result? While CU has invested in CRM across the campuses, the university does not have a coordinated CRM strategy. In fact, CU’s current CRM landscape consists of about 20 separate CRM instances on about ten different platforms. The current CRM architecture hinders data sharing across CU that would allow the university to more holistically understand and serve constituents. There are significant opportunities to not only improve data sharing but also optimize cross-campus coordination, decrease system administration tasks, and eliminate duplicate spend.

CU will leverage Salesforce for its CRM platform. Based on the current level of investment and the number of teams using it, Salesforce was already a “center of mass” at CU and is also considered to be the leader in higher education CRM. CU’s CRM team is working to develop a timeline for moving CRM functions currently performed in other tools (Slate, FireEngine Red, etc.) to the Salesforce CRM platform.
The primary objective of the CRM is to provide personalized service, communication, and engagement for all constituents (current and prospective students, faculty, staff, alumni, donors, and others) to guide them on their journey with CU. This goal will be achieved by developing a **CU-wide strategy and architecture** and implementing an **end-to-end CRM solution** that supports recruitment, admissions, student experience, advancement, and alumni engagement, and more.

Expected benefits of the project include **improving student success**, **standardizing student data**, **utilizing technology effectively**, **improving university communications**, and **realizing cost savings**. A key deliverable of the CU-wide CRM project will be the **governance process**, roles, responsibilities and members that will be used to support this function into the future.

Building on centralized CRM efforts that have occurred in the past, the CRM initiative will create a **common vision** and foster **collective movement** towards a shared goal. With a **CU-wide CRM architectural and governance strategy** in place to facilitate everything from planning and prioritization to data sharing, **collaboration across campuses will be enabled** and **outcomes will be improved**. A holistic CRM solution will not only support other initiatives
such as CU Online but also **increase IT effectiveness** by using common platforms, reducing risk, increasing constituent focus, and encouraging collaboration on projects and maintenance.

**Groups audience:**
CU CRM

**Source URL:** https://www.cu.edu/crm/about/background-objectives

**Links**
[1] https://www.cu.edu/crm/about/background-objectives
[2] https://www.cu.edu/tip