

Our Approach ^[1]

The UIS approach to CRM consists of **four key phases** that operate in a continuous loop of iteration. Ready to take the next step on your CRM and digital engagement journey? We're looking forward to working with you.

GET IN TOUCH ^[2]



Discovery & Assessment

What do you hope to achieve? No single solution solves every problem, so we'll work with you to understand your pain points and goals, collect your business requirements and user stories, and assess possible ways to address them. Every campus and every use case are unique, so we'll get to know you and your business before technical work begins.



Collaborative Build

Once we collaboratively agree on a solution, your technical build will begin. But it won't just focus on an out-of-the-box product; our approach covers multiple aspects of engagement including CRM best practices, quality data, marketing strategy, web design and development, creative services, and more. We understand how these elements work together and directly influence your CRM implementation and success.



Training & Enablement

We know change isn't easy, and we don't expect you to do it alone. We'll create training resources for your users that guide them through the basics, as well as more advanced tasks. You'll play a key role in helping us decide how we can best assist you. From training and user groups to on-demand resources and enablement success stories, you won't be implementing alone.



Support & Continuous Improvement

The CRM ecosystem and its facets are continually evolving, so we know our partnership will, too. And continuous improvement is a two-way street: you'll let us know about how your needs change, and we'll let you know how the resources we offer can change in tandem. Every iteration of your CRM story will run through this four-step cycle so that we're discovering, collaborating, and enabling together based on your campus needs and story.

Groups audience:

CU CRM

Source URL: <https://www.cu.edu/crm/overview/our-approach>

Links

[1] <https://www.cu.edu/crm/overview/our-approach> [2] <https://www.cu.edu/crm/forms/crm-help-ticket>