Published on *University of Colorado* (https://www.cu.edu)

Our Approach [1]

The UIS approach to CRM consists of **four key phases that operate in a continuous loop** of iteration.

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.
- 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, 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