In order to realize CU’s vision of enterprise (or “CU-wide”) Constituent Relationship Management (CRM), a number of work efforts are involved. In some cases, the efforts are foundational in nature and will inform key decisions; others are large enough that they will be structured into projects having formal charters and governance processes for decision making. See below for more information on projects that are currently underway.

**Governance and Architecture Strategy Recommendation**

- **CRM Strategy and Architecture Recommendation (otherwise known as the “Salesforce org strategy”):**
  - A number of assessments are underway in order to chart the best path forward for the technical architecture and support the future needs of CRM at CU holistically. The assessments include the following:
    - CRM Capability Assessment: the results of this assessment will capture the CRM functionality and business processes that are currently part of the CRM landscape across CU’s four campuses and the system office.
    - Salesforce Compass Assessment: the results of this assessment will evaluate the institution in terms of people, process, and technology and the maturity of CRM at CU. We know we can’t mature in every area simultaneously. The key findings of this assessment will help us understand where we need to grow and how to prioritize our growth areas.
    - Based on the results of the assessments, we expect to announce the recommendation for our future state CRM architecture in November.

- **CRM Center of Excellence (CoE) Structure Recommendation**
  - The CRM CoE will serve as the governance body for CRM across CU. There are a number of ways we could structure the CoE, and this recommendation from
Salesforce will help ensure we are positioning the CoE for success. This group will include people from across CU who are invested in CRM as an enabler of CU’s success with the responsibility of making decisions regarding the platform, how it is used, keeping it current, and how to enhance it.

- An announcement for the CoE structure is also expected in November and coincides with the technical architecture recommendation announcement.

- **Marketing Cloud Architecture Recommendation**
  - CU currently uses Marketing Cloud to deliver relevant communications to our constituents. Salesforce is helping us to understand how we could make even better use of the this tool to engage with people who interact with CU, whether they are staff, students, donors, or community members. The goal is to be constituent-centric and to present an opportunity to bond and connect with individuals during every interaction.

**Groups audience:**
CU CRM

**Source URL:** https://www.cu.edu/crm/projects/recommendations-progress

**Links**