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

- General
- UCCS R&A

**Why is CU investing in a system-wide constituent relationship management (CRM) solution?**

- Currently, we have approximately 20 separate instances of CRM solutions across CU and while we are seeing that many groups across the system see value in CRM and want to invest in it, **we lack a coordinated CRM strategy**. This means that **we are not efficient in our approach** nor are we readily able to produce a 360-degree view of the constituents we serve.
- Higher education is seeing significant changes to our market that were further
compounded by the COVID-19 pandemic. We must be thoughtful in our investments and think holistically about the relationships we foster. By investing in a CRM solution at the system level, we will **enable our ability to serve the full constituent lifecycle from recruiting and admissions, to ensuring student success, to best supporting advancement, donor management, and alumni engagement while providing constituent-focused communications throughout**. A system-wide CRM solution can also be leveraged in terms of institutional operations for faculty and staff engagement.

**What are the expected benefits?**

- We expect to see productivity gains by **automating and streamlining current processes** that are using a variety of tools and manual steps, as well as **increases to IT and communication effectiveness** through the use of common platforms, shared data that is consistent and trusted, and increased collaboration across CU.
- Another benefit is **reduced risk due to limiting technology platform variation**, and we will **simplify administrative support**.

**How are decisions being made?**

- The projects within our CRM initiative use a **business and technology partnership** to ensure that the recommendations and decisions made will work for CU from both perspectives; **our technology-based solution must enable and further the mission of CU, as well as be reliable, maintainable, secure, performant, and cost-effective**.
- Within our CRM initiative are distinct work efforts that include campus and system resources; they work to define process and technology solution recommendations to address current gaps and requirements in how we serve our constituents.
- The recommendations are reviewed and approved formally by project steering committees that include leaders of the functional process areas and technical teams.
- Final approval and oversight from a strategic perspective is provided by IT Governance.

**When will the solution be deployed?**

- The first area of focus is on Recruiting & Admissions (R&A) with CU Colorado Springs scheduled to go-live in Fall 2021.
- The Advancement NextGen project is scheduled to go live in 2022.

**What platform is being used to enable CU-wide CRM?**

- Salesforce is a platform we are exploring to enable CU-wide CRM. CU is an early adopter of the new Admissions Connect module which is being implemented at CU Colorado Springs (UCCS) to support their recruiting and admissions processes. UCCS is also charting a path to leverage Salesforce’s Advisor Link module to enable student success in the near future.
- Many instances of Salesforce are currently in use at CU, so aspects of the solution are known to us. However, we aren’t making full use of the product suite and know there is value to unlock by leveraging Salesforce more fully. Salesforce is considered a market
leader in the space.

- The Advancement NextGen project will also use Salesforce to engage with donors and modernize advancement processes. The Advancement function will go live on Salesforce in the summer of 2022.
- CU is a complex organization and Slate is a platform currently used at CU Boulder and CU Denver for recruiting and admissions processes. Our efforts for building a “CU-wide CRM” strategy includes this important platform.

**Who is currently participating in the project?**

- The initial work effort has focused on the strategy and architecture to support the vision of a CU-wide CRM solution – this effort included people from across CU [3] who currently support our existing CRM solutions.
- As additional projects are stood-up, campus representatives for recruiting and admissions and student success will be engaged. Their participation is an imperative for success as we dig into business process analysis, requirements and user stories, and what success means from their perspective.

**How will we ensure the CRM solution is accessible?**

- Accessibility is a very important topic and Salesforce is committed to ensuring their product is accessible to all. Information can be found here: https://www.salesforce.com/company/legal/508_accessibility/ [4]
- Further, large-scale, multi-campus initiatives at CU also typically leverage the Accessibility labs at CU Denver and CU Boulder for their expertise when new/changed software is going to be released for use.

I/my team would benefit from using a CRM solution; how do you request access?

- Please contact Joanna Iturbe [5] regarding the use of Salesforce.

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

Salesforce for R&A will go live on September 20th, 2021 and 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[^6], Enterprise CRM Director, Lara Ackerman[^7], Organizational Change Manager, or Alexandria Fleming[^8], Organizational Change Manager.

**Groups audience:**
CU CRM

**Source URL:** https://www.cu.edu/crm/resources/faq

**Links**
[1] https://www.cu.edu/crm/resources/faq
[2] https://www.cu.edu/crm/forms/contact-us
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