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?

**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-focusued communications throughout**
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 the Transformation & Innovation Program Steering Committee.
- CRM R&A Steering Committee

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 Office of Digital Education (ODE) will also participate in R&A work with their go-live expected in Winter 2021-22.
- Students success will be the next area of focus, but the deployment date has not been established yet.
- The Advancement NextGen project is scheduled to go live in 2022.

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

- Salesforce is the platform that will enable CU-wide CRM.
- 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.

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.  

President Mark Kennedy is our primary business sponsor for the CU-wide CRM initiative, and the work is supported by the Chancellors.

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.

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

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

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
[3] https://www.cu.edu/crm/about/meet-team
[5] mailto:joanna.iturbe@cu.edu