A V2MOM [2] is a statement highlighting vision, values, methods, obstacles, and measures. It can be implemented by a company, an individual, across a program, or for a specific project. Our cross-functional, cross-campus working group [3] collaborated together and with Salesforce to establish a V2MOM for the CU-wide CRM efforts. Our CRM V2MOM helps keep us aligned, prioritized, and accountable.

More specifically, a V2MOM helps CU answer important questions.

- **Vision**: What do we want to do?
- **Values**: What's important to us?
- **Methods**: How will we do it?
- **Obstacles**: What could get in our way?
- **Measures**: How will we know if we are successful?
Build and strengthen mutually beneficial relationships between the university and its constituents by establishing a shared and ever-evolving sense of knowing while responsibly democratizing CRM by and for all.

The four values that are guiding the CU-wide CRM process are:

1. Constituent-Centered
2. Accountable Partnership
3. User-Focused
4. Insightful Innovation

Our obstacles and measures are currently under development.
We will always place the needs, values and experience of the constituent over those of the university. We will enable and empower our constituents to own their relationships with CU and personalize their related experiences, and we will be worthy of their trust in doing so.

What is a constituent?
At CU, we define a constituent as any person who has a relationship with CU at any point in time. Constituents include but are not limited to prospective students, current students, parents, alumni, donors, friends, and community partners.

Methods:

- Ensure that the CRM model is constituent-centric, resulting in an optimal experience with CU

Our obstacles and measures for value one are currently under development.
Our work will be selflessly collaborative within and throughout the CU System. We will put the needs of the university over our own. We will treat others with respect, recognizing that trust goes both ways and assuming good intent. We will be transparent, honest and hold ourselves accountable.

Methods:

- Increase communication and collaboration to optimize transparency, trust, and self-governance.

Our obstacles and measures for value two are currently under development.

We will empower our users to responsively and responsibly serve constituents, building human-first technology that allows users to excel at what they do best. We will be known for service excellence that enables flexibility and autonomy whenever possible. We will be timely within a pace of change that respects organizational culture.
Methods:

- Establish cross-functional system-wide governance covering multiple layers (operational and executive; data and IT)
  - Focus groups with responsibilities for producing guidelines and best practices on topics to align with roadmaps
  - Ensure buy-in, top down and bottom up across CU
  - Develop common data strategy and architecture
  - Security and risk management

Our obstacles and measures for value three are currently under development.

The value that CU’s engagement efforts generate for its constituents and itself – the Return on Engagement (ROE) – is maximized by gaining greater insight and having the ability to strategically act upon it. We will leverage our collective experience, learn from failure and build on success. We will recognize that innovation is iterative and requires us to think big but start small with scalable, sustainable and extendable solutions in mind (e.g. config-over-code). We will define Prioritized Return on Investment (ROI)/Success Factors.

Methods:

- Define prioritized Return on Engagement (ROE) and Return on Investment (ROI) success factors

Our obstacles and measures for value four are currently under development.

Groups audience:
CU CRM

Source URL: https://www.cu.edu/crm/vision-0

Links
[1] https://www.cu.edu/crm/vision-0
[3] https://www.cu.edu/crm/about/meet-team