# Constituent Relationship Management (CRM) Program Status
## Weekly Update – 08/05 - 08/12

### Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Green

**Highlights:**

- Execution of iterative plan for Stage has experienced some delay from data load – contingency planning in effect
- Marketing Cloud (MC) is connected to Stage in a collaborative effort between CoE and ACF
- Provisioning for FULL USERS on-schedule and to be handled by CoE
- Provisioning of Community Users (i.e., Alumni) will need to be revisited weekly
- Security discussions are complete – open model will be preserved and custom reports used to support eComm MC BRs

We continue to work the schedule for Stage environment build, but have experienced some delays due to data load. We are mitigating the delay by doing soft launch in Stage environment with MECs – on existing schedule – instead of Prod. Prod will rollout to MECS and SuperUsers at same time (September timeframe). Snapshot schedule for Prod remains and outstanding task.

Marketing Cloud (MC) is bolted on to Stage. We have a higher degree of confidence that MC will be in good shape for Prod – but a dependency is collaborative "co-piloting" of Prod buildout between ACF contractors and ACF. Also, we will need to have comprehensive testing conducted by eComm to ensure everything is AOK in Stage. Test scripts for this work are available. Expect that with the delays to Stage, this testing can be conducted by MECs in Stage as part of Stage softlaunch.

Provisioning for FULL USERS is on track, handled by CoE, and up to 600 users can be configured manually on current timeline. No roadblocks or issues.

Provisioning for community users (i.e., Alumni) needs to be revisited as both a larger Enterprise-Identity-Management dependency – that is, part of a larger Enterprise program. Deadline for decision is September 3rd. Otherwise, an alternate approach will have to be adopted, or Alumni provisioning delayed. Negotiations underway.

Previous issues around competing BRs for security, permission sets, and etc. have been reconciled. Plan is to keep CRM open data model and account for eComm BRs using reporting. Details to follow.

Current schedule for environments, code, data load appears below. Prod snapshot coming sometime after 8/21:

| Activity | Who Accountable? | Start Date | End Date | Complete? |
|---|---|---|---|---|
| **Stage ENVIRONMENT** | | | | |
| Deploy & Load - Stage | Kim/ACF/Lisa | 7/13/2015 | 7/20/2015 | Yes |
| Unit Test - Stage | Kim/ACF | 7/20/2015 | 7/21/2015 | Yes |
| Sign off on Unit Test Results - Stage | Kim | 7/21/2015 | 7/22/2015 | Yes |
| COE Regression Testing - Stage | Rebecca/Lynn | 7/22/2015 | 7/24/2015 | Yes |
| Data Load2015 | Lisa/UIS | 7/22/2015 | 07/31/2015 | No |

| | | | | |
|---|---|---|---|---|
| COE Regression Testing #2 – Stage | Rebecca/Lynn | 8/03/2015 | 8/05/2015 | No |
| Functional Testing - Stage | eComm | 8/03/2015 | 8/10/2015 | No |

Changes to future Plans noted below:

- Production complete in September (all software and data reconciled in Prod)
- Allow MEC usage and bug reporting in September
- SuperUsers (UAT) deploy sometime in September
- Provision Community users in September – in negotiation
- Conduct training to September/October
- Rollout to all Production users in October

## Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

**Highlights:**

- Vendor identification and selection process complete – CVENT – funding and requirements pending
- Charter Draft delivered to Executive Team 07/21
- MEC/Special Forces Team forming this week – communications in process
- Project Management documentation and formal inception underway

The eComm leadership team has selected CVENT as the events vendor for eComm Phase Two. **Funding pending** and barring anything unforeseen that makes them uncompliant with CU security or accessibility guidelines, CVENT is the selected tool. **This also presumes that the tool will be able to meet requirements of the users.** Team is engaged in project planning processes at this point.

MEC/Special Forces team currently working up User Story and Requirements generation. This task is underway and will be part of an iterative process to review and groom user stories. Goal will be detailed requirements with full acceptance criteria and conditions of satisfaction and testability. No roadblocks to this activity.

Project management documentation and formal kickoff is currently in process, funding pending.