

# Constituent Relationship Management (CRM) Program Status

Weekly Update – 10/26 - 10/30

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## Ecomm – PHASE ONE

Current Status: Scope – **Green**; Timeline – **Green**

### Highlights:

- **PRODUCTION WINDOW IS OPEN!**
- eComm working with ACF/Nimblejack to complete opt-in/opt-out pages – deadline 11/4
- MECS testing in Stage environment – end date 11/4
- CoE advises client to pursue test plans from ACF
- Data loads progressed this week – deadline 11/6 (but aiming for earlier)
- CoE implementing security model in production train – no issues or roadblocks
- Authentication planning for all four campuses, for all short-term community users continues – straw models created for review by team – deadline 12/12
- Provisioning for FULL USERS on-schedule and to be handled by CoE – no change
- Provisioning of Community Users (i.e., Alumni) charter for project in progress
- Team is exploring moving Community into the production train early

As stated last week, the project has entered the Production environment code and data population window. No impediments or roadblocks to that portion of the schedule, so project schedule status remains **green**.

Contractor (Nimblejack) has delivered first bundle of Web pages for email opt-in/opt-out. Testing continues, and remaining work is underway. Due date for delivery is 11/4 for all remaining pages. Tests must complete in Stage by 11/6. Any delay to this delivery will cause delay in moving Marketing Connector to Prod, but no issues have surfaced. Still on target for Manager of Electronic Communication (MEC) team production test window opening 11/11.

eComm MEC team conducting tests in Stage environment, due 11/4. The CoE provided a test plan to the MECs from its own testing, but MECS have experienced some difficulties with it. Advising client to pursue separate test plan with designers/developers of the actual system (ACF). CoE will also need these plans for regression test plans in the future.

Data loads are going well. No impediments or roadblocks to 11/11 date.

CoE is refining security settings in the production train and will have them in place by or before MEC Prod testing window (11/11).

Team has modified its authentication model to concentrate on services offered. Plan is to design for the services Web pages over the next few weeks and deliver to MECS and SuperUsers by mid-December. This is not a risk or “showstopper” for 11/11 rollout to MECS if not available.

No change to Provisioning plan. Provisioning of FULL USERS to be completed manually by CoE. No barriers or risks to completing this activity on timelines.

No change to provisioning of COMMUNITY USERS. We have the Enterprise solution proposal for brokering provisioning and claiming of accounts as well as the “black box” brokering system. CRM team is creating a charter to map this out as a project as it is now larger than just a “Salesforce” project.

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Team will begin moving Community configuration/code into the Production train early, and move to DevInt environment as early as next week.

High-level milestones below. No change in dates from last week:

Data Load Complete	11/06/15 – ON TARGET
Issues Logging & Reconciliation – Code & Data	11/09/15 – SCHEDULED
Prod Done (& Tested)	11/11/15 – ON TARGET
MEC Rollout – P1	11/11/15 – ON TARGET
MEC Rollout – P2	11/17/15
Super User Rollout – P1 & P2	12/12/15
Training *	01/18/16
Full User Set Complete *	01/25/16

### Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

This week we completed the first configuration iteration and a comprehensive walkthrough with the team. The iteration was well received and the enthusiasm will be contagious to the rest of the users. The team continues to collaborate very well, coordinating configuration, preparation and training activities.

CRM team member Kalman Sweetwine will continue to drive the bulk of the configuration and architecture solution. Once configuration is complete, team will create Acceptance Criteria for use during testing by the MECS. Kyle Kirves will remain the single point of contact for most issues surfaced by the MEC team so that development against iteration 2 (Memberships and etc.) can continue apace.

**Iteration completion readout:** Iteration 1 initial development COMPLETE.

Iteration 2: 148 hours of configuration (estimate is high). 0% complete, but on schedule.

### Student Success 1.75

Current Status: Scope – Green; Timeline – Green

Two business process sessions completed this week. Team will turn these into user stories for iteration planning early next week for quick execution and delivery. Project will turnaround enhancements to the system quickly and project should close by no later than 12/30. Iterations will concentrate on Calendaring 2.0 and enhanced meeting creation, management functionality.

We are also actively pursuing implementation/integration of the RIVA solution package (RIVA will allow advisors to drag-n-drop emails/updates into their email application folders and have those updates dispatch directly to MyCUHub, among other functionality).

### CRM CoE Build Out

Current Status: Scope – Green; Timeline – Green

Team continues to work on standardized repeatable process and procedure definition.

Catalog of deliverables delivered or in process highlighted below:

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Deliverable	Description
Campus Stakeholder Assessment	COE Program Establishment: Summary: This document outlines the cross-campus stakeholders that have a need to or interest in being involved in shaping the COE program.
Campus Adoption Plan	COE Program Establishment: Summary: This document outlines everything that a campus needs to know to adopt the COE and begin to benefit from the COE.
CRM Platform Support: Monitoring	CRM Platform Support: Summary: Set up automated monitoring of the CRM system to identify errors
Support: Automated Testing and Test Data Loading	CRM Project Support: Summary: Suite of automated testing capabilities and test data loading capabilities to support full regression and project testing needs.
Onboarding: Rules of the Road - Environment "Get Smart" for Projects	CRM Project Support: Summary: Process for educating inbound projects and firms on the current environment setup, objects, etc.
Onboarding: Onboarding Handbook	CRM Project Support: Summary: Process by which a project comes onboard to the COE program, how to engage the various colleges/departments, how to get access to the University's network, user provisioning for various systems
Project Closure Process	CRM Project Support: Summary: Defines the set of deliverables and processes that a project needs to go through in order to fully close out a project. Includes project closure with college/department, harvesting IP, Recording Basic How-To videos, etc.
Project Budget Governance Approach & Best Practices	CRM Budget: Summary: Process by which project budget is governed, gates for Analysis/Design, estimating accuracy by gate
SFDC Certification Budget Approach & Best Practices	CRM Budget: Summary: Process by which re/certification budget is governed, criteria by which certification budget is granted, qualifications met
SFDC Certification Training Budget Approach & Best Practices	CRM Budget: Summary: Process by which certification training budget is governed, criteria by which certification training budget is granted, qualifications met

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Ongoing Training Budget Approach & Best Practices	CRM Budget: Summary: Process by which training budget is governed, criteria by which certification budget is granted, qualifications met
Technical: Project Management	CRM Implementation Best Practices & Resources: Summary: Project Management standards that resources (both internal and 3rd party project employees) must follow to meet CU project requirements.
Technical: Pre-Approved Software Libraries	CRM Solution Accelerators: Summary: Software libraries (e.g. JQuery, DOJO, etc.) pre-approved for use in development. Also includes the process by which a project can request and gain approval for a new library, as well as an index of existing libraries.
Technical: Integration Libraries & API Documentation	CRM Solution Accelerators: Summary: A resource for projects to identify existing integration documentation, API libraries, contact information, and resources to get development activities started.
Documentation: Deliverable Templates	CRM Solution Accelerators: Summary: Templates for all of the core deliverables required from the COE.
Technical: Solution Accelerators Library	CRM Solution Accelerators: Summary: A resource for projects to identify existing capabilities that they can use to build off of for their solutions. Current examples: Calendaring, Student/Constituent Private Messaging, Text Messaging, eCommunications. Future: Check-In, Engagement Scoring and Treatment Strategies, Early Alert Mechanisms, Reporting
Shared Solution Development (User Provisioning, ANT Deployment)	CRM Project Shared Services: Summary: Development funded by the COE for the greater good of the CRM platform Includes Document, Process, Form
Change Management Approach and Best Practices	CRM Project Shared Services: Summary: Documentation of a set of change management best practices, processes and a documented method by which these processes can be systematically delivered for future projects implemented under the COE. Includes Offerings, Document, Process, Form
One-Time Salesforce User Provisioning:	CU On Demand - Shared Services: Summary: Process by which a project, department or college can request the COE provision a user manually one-time for a Salesforce user. Includes Document, Process, Form,
One-Time App User Provisioning:	CU On Demand - Shared Services: Summary: Process by which a project, department or college can request the COE provision a user manually one-time for a specific application.

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	Includes Document, Process, Form
Recurring Salesforce User Provisioning:	<p>CU On Demand - Shared Services:                      Summary: Process by which a project, department or college can request the COE provision a set of users manually on a recurring basis based on a specified set of criteria for a specific application.                      Includes Document, Process, Form</p>
Recurring App User Provisioning:	<p>CU On Demand - Shared Services:                      Summary: Process by which a project, department or college can request the COE provision a set of users manually on a recurring basis based on a specified set of criteria for a specific application.                      Includes Document, Process, Form</p>
CRM Onboarding	<p>CRM Governance and PMO:                      Summary: Overall process by which CRM projects are onboarded, including documents required to be filled out, documents to be reviewed and acknowledged, forms to be filled out, etc.</p>
Project Governance:	<p>CRM Governance and PMO:                      Summary: Overall process by which CRM projects are governed from intake, prioritization, funding, status updates and integration with the existing CU OIT processes.                      Funding Gates                      Budget Review Gates                      Project Status Reporting Process                      Change Request Process</p>
Application Review Board:	<p>CRM Governance and PMO:                      Summary: Overall process by which CRM application review board reviews projects, criteria established for determining which project should proceed, communications re: approvals and rejections.                      Project Intake Process:                      Project Prioritization Process:                      Project Funding Process:                        Includes a set of templates and processes.</p>
Technical Review Board:	<p>CRM Governance and PMO:                      Summary: Overall process by which CRM application review board reviews projects, criteria established for determining which project should proceed, communications re: approvals and rejections.                      Project Intake Process:                      Project Categorization Process: Full Review or Abbreviated Review</p>

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	Includes a set of templates and processes.
Integration Governance:	CRM Governance and PMO: Summary: Overall process by which integrations are vetted to determine security requirements, whether existing integrations will meet requirements, introduction to other needs within the organization for similar capabilities, etc.  Includes a set of templates and processes.
Cross-Campus Data Exchange & Definition Standards:	CRM Governance and PMO: Summary: Overall process by which the COE facilitates cross-campus data requests from projects, communications with constituents across campuses, and standardization of the process by which COE communicates information to the various campuses.  Includes a set of templates and processes.

Project wraps December 2015.

Nalini Indorf Kaplan, Program Director, continues to pursue additional hires for the CRM program. CRM Team Hiring and Onboarding:

- Welcome Daniel Robert as our new Senior Business Analyst as of 10/19/15
- We have hired a Lead Developer, Andrew Kohlhepp, who will begin on 11/16/15
- We have hired a CRM Solution Architect, Shailesh Pokharel, who will start on 12/1/15
- We have extended an offer on 10/29/15 for the Applications Administrator position
- We are interviewing for a SFDEC Senior Developer

## Enterprise-wide Initiatives

- Multi-campus authentication and SFDC user provisioning/de-provisioning project on-going – in partnership with campus and UIS IT organizations and IdM Center of Excellence and teams
- CRM Advisory Group meets 11/12/15
- SFDC Enterprise Model and Security work and approval from Data Management Groups on-going through January 2016
- Contact and Account Data Management and De-duping processes, In partnership with Jason Armbruster, Nalini Indorf Kaplan is creating use cases; scenarios' scope includes MDM, SFDC Platform, SFDC MarketingCloud, cVent, Campus Solutions, HRMS. Next action: Flesh out requirements and begin process design
- Nalini Indorf Kaplan is developing the CRM Program CoE Operating Plan which will summarize the components and processes of the CRM Program. This document will be socialized with CRM stakeholders for input in the December/January timeframe.

## New CRM Project Requests

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- Nalini Indorf Kaplan and Daniel Robert scoping Student Success 2.0 for the Boulder campus. High level scope includes: New Student Welcome, Continuing Education Advising, Leeds appointment scheduling for academic advising, Faculty and Resident Advisor early alert and logging, new users to include Student Affairs, Athletics Coordinators and Tutors, Faculty Mentors (pilot), Student Services, e.g. Registrar, Bursar, Financial Aid.
- Daniel Robert is performing requirements analysis for Athletics Coordinators and Tutors. Currently Athletics uses GradesFirst and is evaluating when to migrate to the MyCUHub platform.
- CRM team scoping out new contact management functionality for PHet.
- CRM Team scoping out project UCB College of Engineering and Applied Science Graduate Advising and Student Management.