

Constituent Relationship Management (CRM) Program Status

Weekly Update – 11/16 - 11/20

Ecomm – PHASE ONE

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

Highlights:

- **SERVICE IS IN PRODUCTION**
- MECS finishing data validation, affiliation validation, and email preferences testing this week
- Deployment checklist is complete
- eComm, ACF, and CoE creating test plans for deltas between UAT and requirements
- Provisioning for FULL USERS on-schedule and to be handled by CoE with assistance from OIT
- Provisioning of Community Users (i.e., Alumni) charter for project in progress

Project is in production. We are in soft launch for testing and bug identification. We are in discussion as to how to support the service post-full go-live (1/25/16). Task remain around testing, training, and support, but are planned and manageable. Project schedule status remains **green**.

The deployment checklist to prod is complete as of 11/16/15.

eComm MEC team currently working through data validation exercises/tests for data within the system, among other testing (completion date 11/20/15). As they work through those tests, eComm, ACF, and CoE continue to create additional test scripts for deltas between UAT and requirements and will deliver those piecemeal.

There has been a change to the provisioning plan for FULL USERS. MECS are fully provisioned in the Prod system already. CoE is looking to automate the process (by 12/12). Planning session this week. There are some requirements deliverables that need to be provided by eComm that are underway around users (EMPLID, profile, permission sets, etc.). Small group of users will be provisioned to “test” automated provisioning of the remaining 200+ eCommunicators by 1/11.

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.

Due to a change in direction resource-wise, team has tabled moving Community configuration/code into the Production train early.

High-level milestones below. Additional line items highlighted:

MEC Rollout – P1	11/11/15 – COMPLETE
MEC Rollout – P2	12/01/15 – DEV COMP, TESTING
Training *	01/18/16
Provisioning of Full Users (Remaining eComm Personnel)	01/21/16
Full User Set Complete *	01/25/16

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Ecomm – PHASE TWO

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

MEC team completed testing against Iteration 1 and worked with CRM CoE to analyze results. Iteration 1 closed as ACCEPTED by the client 11/18/15.

Development team finished work on Iterations 2-4 this week, provided an orientation to the MECs, and kicked off testing of Iterations 2 - 4. MECS expected to finish testing of those iterations by 11/30 (note: test plan is approximately 66% smaller than iteration 1 test plan).

Iteration 3 (Data Migration and Membership) has surfaced an issue in terms of Interests mapping and how we will account for memberships. Approval from CRM CoE to pursue integrations work to solve for this issue.

Team will meet to discuss Geolocation/Geocoding requirements (11/20) and we will continue to work to define training & documentation requirements (11/30).

Iteration completion readout:

Iteration 1 initial development COMPLETE AND ACCEPTED.

Iteration 2 - 4: DEV COMPLETE; TESTING 5%.

Next production impact date is 12/18/15.

Student Success 1.75

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

Last week the team completed the remaining security definitions, continued developing the Calendar 2.0 interface updates, started shifting the messaging and logging functions into the community, developed an initial version of the data dictionary solution, documented expected results for the Calendar 2.0 effort, and prototyped an approach for retrieving large numbers of records in support of the data dictionary solution.

Looking ahead to this week the team is focused on developing Calendar 2.0 updates, system testing, and preparing for the UAT week following the Thanksgiving holiday.

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CRM CoE Build Out

Current Status: Scope – Green; Timeline – Green

Highlights:

- Progress continues on Best Practices, Repeatable Processes, and Planning documentation efforts – Iteration 1 documents in review, Iteration 2 documents in development – due 12/30/15
- Provisioning/Deprovisioning planning for Enterprise is underway (larger in scope than just CRM)
- De-duping processes design and definition requirements in development; CoE collaborating with UIS and other invested parties to define Account and Contact management duplication mitigation
- CRM CoE Operating Plan in progress – due January 2016
- Student Success 2.0 (New Student Welcome and more) project planning underway
- PhET project request currently in intake – CoE to deliver charter by 11/20
- UCB College of Engineering and Applied Science Graduate Advising and Student Management project currently in intake – CoE to deliver charter in December 2015

CRM CoE Build Out Best Practices, Repeatable Processes, and Planning:

Team continues to work on standardized repeatable process and procedure definition. Please contact Kyle Kirves for a complete list of deliverables. CRM CoE team is in process of reviewing Iteration 1 documentation and providing comments. Iteration 2 document development proceeds apace. Project wraps December 2015.

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 CoE working on Enterprise solution that is broader than CRM. **This item is now considered a standalone project and will be chartered accordingly.**

CRM Advisory Group met 11/12/15 and agrees to continue to meet monthly ongoing. Team discussed governance and CoE build, agreed to intake processes for CoE for prioritization of requests, and establishment of working groups for lead management and data management. **Meeting minutes were distributed to the advisory group and are available to others upon request.**

SFDC Enterprise Model and Security work and approval from Data Management Groups continues through January 2016.

In partnership with Jason Armbruster, Nalini Indorf Kaplan is creating use cases for Contact and Account Data Management and de-duping processes. Scope includes MDM, SFDC Platform, SFDC MarketingCloud, cVent, Campus Solutions, HRMS. Initial requirements are complete. **Jason and Amar Doshi (Lumendata) demonstrated a working deduping process for MDM to SFDC and vice versa on 11/19/15.**

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

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.

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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.

Hiring Update

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

- Lead Developer, Andrew Kohlhepp started 11/16/15 – **WELCOME, ANDREW!**
- We have extended an offer on 10/29/15 for the Applications Administrator position
- We are interviewing for a SFDEC Senior Developer