

Constituent Relationship Management (CRM) Program Status

Weekly Update – 11/30 - 12/04

Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Green

Highlights:

- **SERVICE IS IN PRODUCTION**
- Process for supporting service is in draft; design for support underway (4 campus ITHD)
- Ongoing MEC testing is underway – next cycle is reports and campaigns; marketing cloud
- eComm, ACF, and CoE finalizing test plans for deltas between UAT and requirements
- Changes created in the devEcomm environment need to be reviewed by CoE for applicability, importability, and impacts.
- 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
- Training schedule established – Feb 2, 3, 4 – and training development underway

Project is in production. We are in soft launch for testing and bug identification. Task remain around testing, training, and support, but are planned and manageable. Project schedule status remains green.

Support of the service will be handled through each campus ITHD for initial inquiries. Summarized, Tier 1 requests will be directed to MECs; Tier 3 will be directed to CoE via ServiceNow from MECs.

eComm MEC team completed data validation exercises/tests for data within the system, among other testing in the Phase 2 space. Next cycle is refinement and testing of reports / campaigns and marketing cloud. 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. This allows us to do just in time testing while at the same time not overwhelming the MECS with a full-blown test catalog.

eComm has requested some changes to fields, field names, email preferences categories, and API specs. Many of these requests are in the devEcomm environment and can be promoted without delay. However, others will have to be reviewed for potential impacts to established in-prod users, specifically, the API ones. This will occur over the next few weeks, possibly up to and beyond production.

CoE is looking to automate the process of full users. Small group of users will be provisioned to “test” automated provisioning of the remaining 200+ eCommunicators by 1/11. No roadblocks to this exercise, though some open questions remain.

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.

High-level milestones below. Additional line items highlighted:

Provisioning of Full Users (Remaining eComm Personnel)	01/21/16
Full User Set Complete *	01/25/16
Training *	02/02/16

Constituent Relationship Management (CRM) Program Status

Weekly Update – 11/30 - 12/04

Ecomm – PHASE TWO

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

MECs completing testing of P2 Iterations 2, 3, 4 this week. Early returns suggest that virtually 100% of issues identified are either 1.) training based or 2.) permissions controls problems. Team works to reconcile these issues. Looking to close out most activities in the P2 space on 12/11 with the exception of training and the known issue with Interest objects (see below).

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, however, some discussion and viability options need to be discussed.

Iteration completion readout:

Iteration 1 initial development COMPLETE AND ACCEPTED.

Iteration 2 - 4: DEV COMPLETE; TESTING COMPLETE. ACCEPTANCE GATEWAY REMAINS.

Next production impact date is 12/18/15.

Student Success 1.75

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

Virtually all work complete from a design and development standpoint by COB 12/4.

Deployments through the production train (i.e., from environment to environment and test) commences next week. We will be demoing the new functionality and providing release notes on 12/10, 12/11.

CRM CoE Build Out

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

Highlights:

- 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 – due 1/15
- CRM CoE Operating Plan in progress and fiscal year 2017 budget due January 2016
- 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
- Student Success 2.0 (New Student Welcome and more) project planning underway
- PhET project request currently in intake – charter in review
- UCB College of Engineering and Applied Science Graduate Advising and Student Management project currently in intake – CoE to deliver charter in December 2015
- Disability services expressing interest in exploring CRM as possible appointment scheduling and communications solution

Constituent Relationship Management (CRM) Program Status

Weekly Update – 11/30 - 12/04

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.**

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. **Next step is to schedule a Stage environment refresh and synch between MDM and SFDC. Tentatively scheduled for 12/10.**

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. Fiscal Year 2017 budget also work in progress.

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

Team continues to work on standardized repeatable process and procedure definition. Full suite of documents complete and in review. Opportunities to combine and streamline components exist, and the ultimate results should be both documentation for use by CRM CoE and also customer orientation documentation.

Please contact Kyle Kirves for a complete list of deliverables.

New CRM Project Requests

Student Success 2.0 for the Boulder campus is development. 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. Disability services engaged CRM CoE for discovery session 12/3.

Hiring Update

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

- Jeff Been joins the CRM team as a System Administrator