

Constituent Relationship Management (CRM) Program Status

Weekly Update – 12/13 - 12/18

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
- 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
- Training schedule established – Feb 2, 3, 4 – and training development underway

Project schedule status remains green.

Soft launch tests continue with the Managers of Electronic Communications (MECS) in production and we are analyzing issues as they come in. Approximately 50 issues recorded, with 80% of these considered low-LOE fixes. CoE will work to put into production quickly. Tasks remain around testing, training, and support, but are planned and manageable.

eComm has requested some changes to fields, field names, email preferences categories, and API specs. Virtually all of these requests are in the devEcomm environment will be planned and promoted. Going forward, CoE will intake these concerns as issues for proper analysis and work.

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. Team will work to engage ITHDs for four campuses in the next few weeks, though training and documentation needs should be minimal (virtually all issues should be channeled to the campus MEC).

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. eComm tasked with providing Marketing Cloud Role and Marketing Cloud Business Unit to make this provisioning flow happen.

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

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Ecomm – PHASE TWO

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

Most team activities are now concentrated on the orbital tasks pertaining to rollout: training and documentation. Virtually all design and development work complete for P2. Testing continues, and training and documentation efforts are underway for eCommference training session in February (February 2, 3, 4).

Some work remains in the configuration space pertaining to treasury and channelling of funds to Accounts, Affiliations, and Speedtypes. This work will not delay rollout in February. Requirements intake should complete first week of January, with configuration activities occurring shortly thereafter.

Team is eager to test CVENT and may use the tool as the scheduling mechanism for training registration in February.

Next production impact date is 12/18/15.

Student Success 1.75

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

Student Success 1.75 is now complete as a project release. All remaining fixes/activities will be handled through support channels.

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 charter review complete. Project kickoff scheduled for January 2016.
- UCB College of Engineering and Applied Science Graduate Advising and Student Management project currently in intake – CoE to deliver charter in February 2016
- Disability services expressing interest in exploring CRM as possible appointment scheduling and communications solution

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Enterprise-wide Initiatives Update

- 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. CoE to review and schedule this activity next week, likely for January.**
- 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.
- The CoE is in the process of negotiating a multi-year Enterprise License Agreement with [Salesforce.org](https://www.salesforce.com)
- The CoE will participate in a [Salesforce.org](https://www.salesforce.com) Beta program of the Higher Education Data Architecture
- The CoE is sponsoring a “Spark” review session with UCB Strategic Relations and [Salesforce.com](https://www.salesforce.com). The focus will be a review of CU’s current and planned use of Social Studio as part of enterprise CRM.

New CRM Project Request Update

Student Success 2.0 (Stu 2)

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. Charter expected 12/11/15.

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. Plan for athletic advisors is to roll out to a few SuperUsers, train them accordingly, and begin soliciting requirements for inclusion in the Student Success 2.0 project/iterations.

Other Project Requests

CRM team scoping out new contact management functionality for PHet. Project Kickoff mid-January 2016.

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.

CRM Advisory Group Update

The CRM Advisory Group has approved the Group’s charter and mapped out their monthly meeting schedule for 2016 (typically on the 2nd Thursday of each month).

Hiring Update

Nalini Indorf Kaplan, Program Director, continues to pursue additional hires for the CRM program.