The IU CRM Initiative
Why CRM in higher education?

To form that full-spectrum view

- Reduce staff data reentry
- Mitigate constituents re-explaining
- More effective engagement
- Data security
- Speak to constituents as One IU
What is Salesforce?

- A platform
  - Foundational CRM core with flexibility to extensively configure and “bolt-on” additional functional modules.

- Components:
  - Salesforce CRM (Constituent Relationship Management)
  - Salesforce Products (Marketing Cloud, Communities, etc.)
  - App Exchange Products
IU CRM Initiative  
Launched 2/15/18

- Enterprise charge for CRM across IU
- Larger IU CRM team
- Foundational resources for IU CRM platform
- Governance/Project Prioritization
- Salesforce Enterprise Licensing Agreement (ELA)
- Adoption services and initial training

Does not include:

- Unit/functional-specific consulting
- Apps outside of the ELA
- Ongoing service or functional support
IU CRM Leadership Structure

IU CRM Executive Leadership (IU CFO & CIO)

Data Stewards / Managers

IU CRM Steering Committees

IU Human Resources
- Management of IU employee HR service requests

Undergraduate Admissions/Recruiting
- Recruiting of undergraduate students at campus and departmental levels

IU Communications
- Mass emailing from IU to internal and external audiences

Graduate Admissions/Recruiting
- Recruiting of graduate students at school and program levels

External Organization Relations
- Management of relationships between IU and external organizations

PILLARS of ADOPTION

IU CRM Team

IU CRM User

IU CRM User

IU CRM User

New Pillars
- New implementations, enhancements based on adopter needs
What are the Existing Pillars?

**IU Communications**
Used for mass communication, contact management, and email campaigns.

**Admissions / Recruiting**
(Undergraduate)
Used for campaigns, individual interactions, and admissions event management.

**IU Human Resources**
Used to manage employee case records and associated service requests.

Varying phases of completion - Incremental Implementation and Adoption
Communications - Pillar

Background

- Primary stakeholder: IU Communications
- Current Adoption: All campuses all departments
- Scalable & flexible
  - From single communications shop to full campus
  - Units self-defined by adopter interest, business practices
- Intended for anyone wanting to send mass email
Primary stakeholders
- IUPUI Admissions
- USSS
- Office of Online Education
- Collectively funded and scoped an undergraduate recruiting project

Intended users
- Campus central admissions offices
- Office of Online Education
- Departmental recruiters
Primary stakeholder: IU HR

Part of HR2020 strategic plan

- Nimble, adaptable to institutional needs
- All employee case records and associated service requests
- Coordinates 10 HR centers of expertise & main HR Customer Care Center

Intended users: HR Staff
Graduate Recruiting - Package

Background

- Not technically a “pillar,” but a specialized option
- No stakeholders (IU CRM created subset of undergraduate admissions)
- Intended users: graduate recruiters
Core CRM Package

Background

- Not technically a “pillar,” but a specialized option
- No stakeholders (IU CRM created subset of standard CRM features for general use)
- Intended users: all
- Anticipated 4 week adoption
- No scoped project required
Core CRM Package

Features

- Contact management
- External affiliations
- Unit relationships
- 1:1 interactions (Cases)
- List management
- Reports & Dashboards
- *Event Tracking
- Basic mass communication (Marketing Cloud)
IU CRM now

✓ Marketing/Communications
  Phase I complete
  – 280+ comm. shops across IU
  – Approx 500 users

✓ Undergraduate Recruiting
  – All campuses but IUB
  – Approx 250 users

✓ HR Employee Services
  – All employee case records and associated service requests

✓ Graduate Recruiting Package
  – 10 schools/programs adopted
  – 15 on waiting list
  – Purely organic adoption

✓ Core CRM Package
  – Initial Adopters: Precision Health Initiative & Center for Rural Engagement
  – 36 units progressing through adoption currently
What are the Pillars in Progress?

- **Graduate Recruiting**
  - Phase 1 Project Approved
  - Project Stakeholders Identified
  - Currently developing project scope and charter for approval and prioritization

- **External Organization Relations**
  - Phase 1 Project Approved
  - Project Stakeholders Identified
  - Scoping meetings currently being scheduled
External Relations
What’s been happening?

- CRM Team Staffing and Processes
- Marketing Cloud Content Builder
- Undergraduate Recruiting Phase 2
- Mass SMS/Text Phase 1
- Lightning Interface Conversion
- Single Sign On – CAS/Duo
- Convergence Cloud Phase 1
Joining IU CRM

How does my unit:

- adopt IU CRM?
- create a new pillar?
- join the IU CRM community?

Adopt IU CRM

crm.iu.edu

Adopt

- Adoption Request
- User Access Request
- User Training
Questions? ........crm.iu.edu

Chris Tompkins
Director, IU CRM Initiative
chtompki@iu.edu

Mary Kern
CRM Adoption Coordinator
mbkern@iu.edu