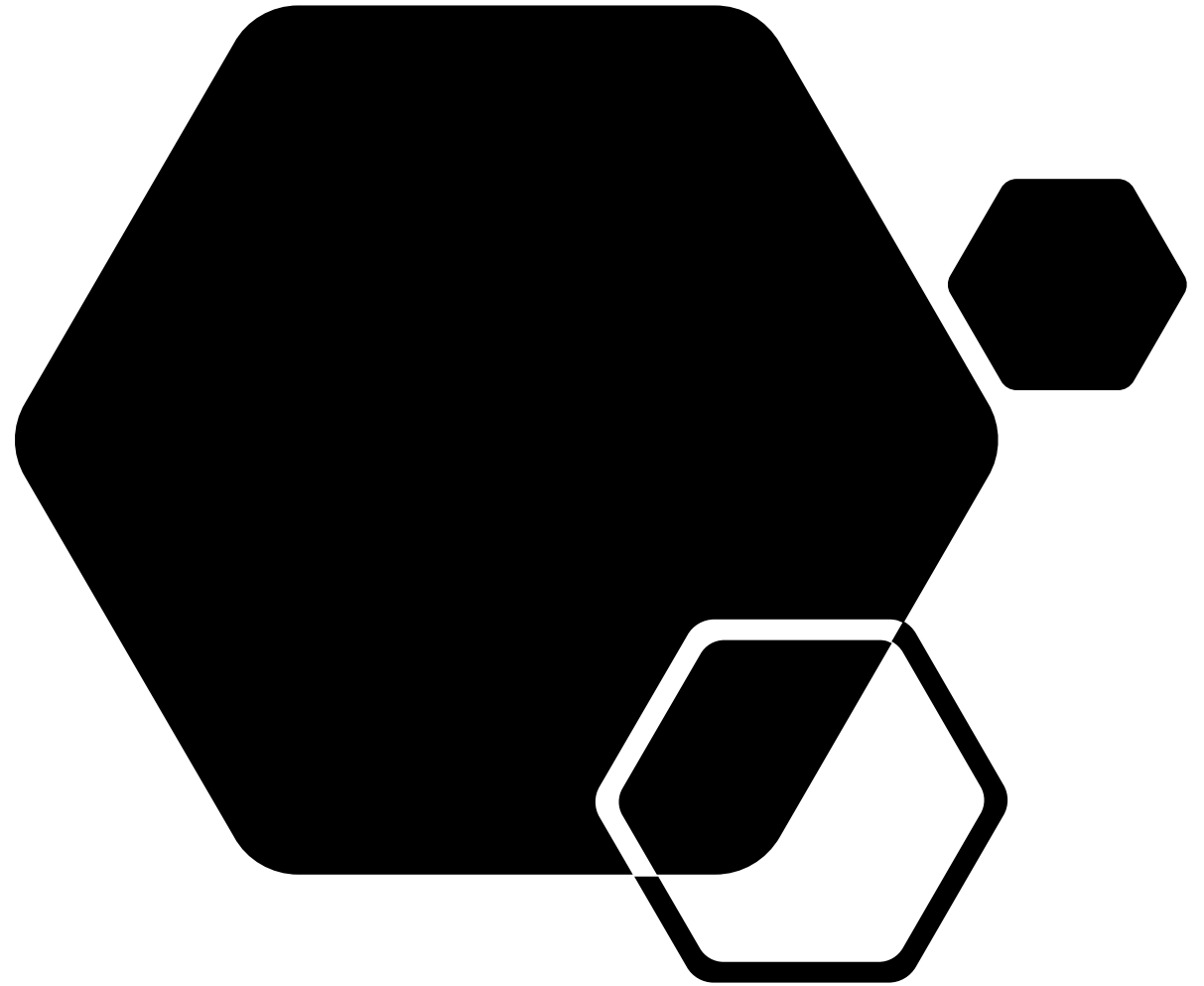


Just Getting Started? Let's Chat!

Enterprise CRM, an Educause Community Group

Hosts: Carrie Shumaker, University of Michigan-
Dearborn & Rebecca Joffrey, Cornell University

June 15, 2022



Agenda

Different models for “getting started” – GROUP BRAINSTORM

What not to do (such as buying licenses too early)

How to manage expectations

Questions and discussion throughout!

The unique nature of CRM

Rapid speed of an evolving landscape

Technology vs. business: which is the cart and where's the horse?

Gaps between defined business needs and the solution space (transformative)

Iterative nature of bringing people along

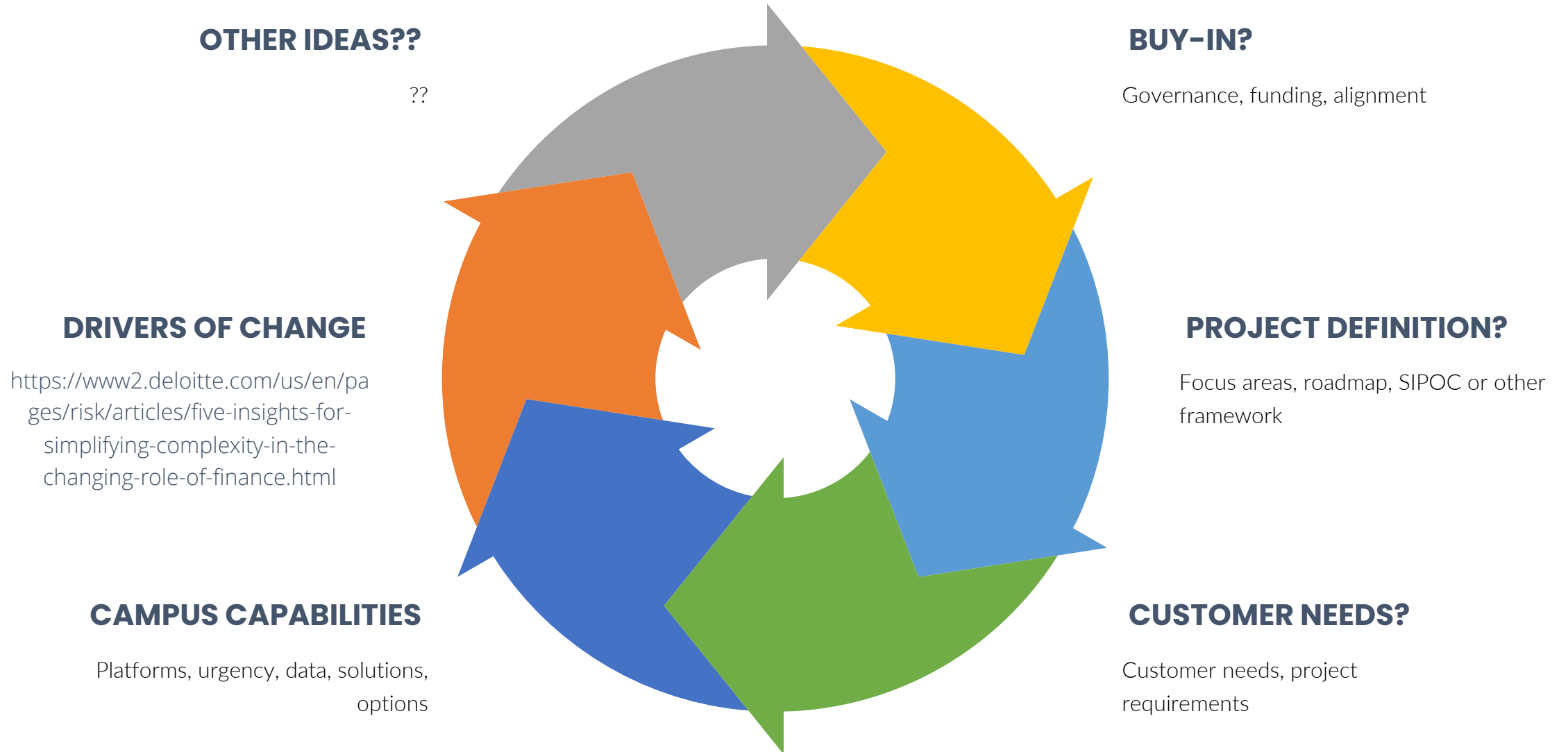
Mix of possibilities for a full solution

“It can do anything”

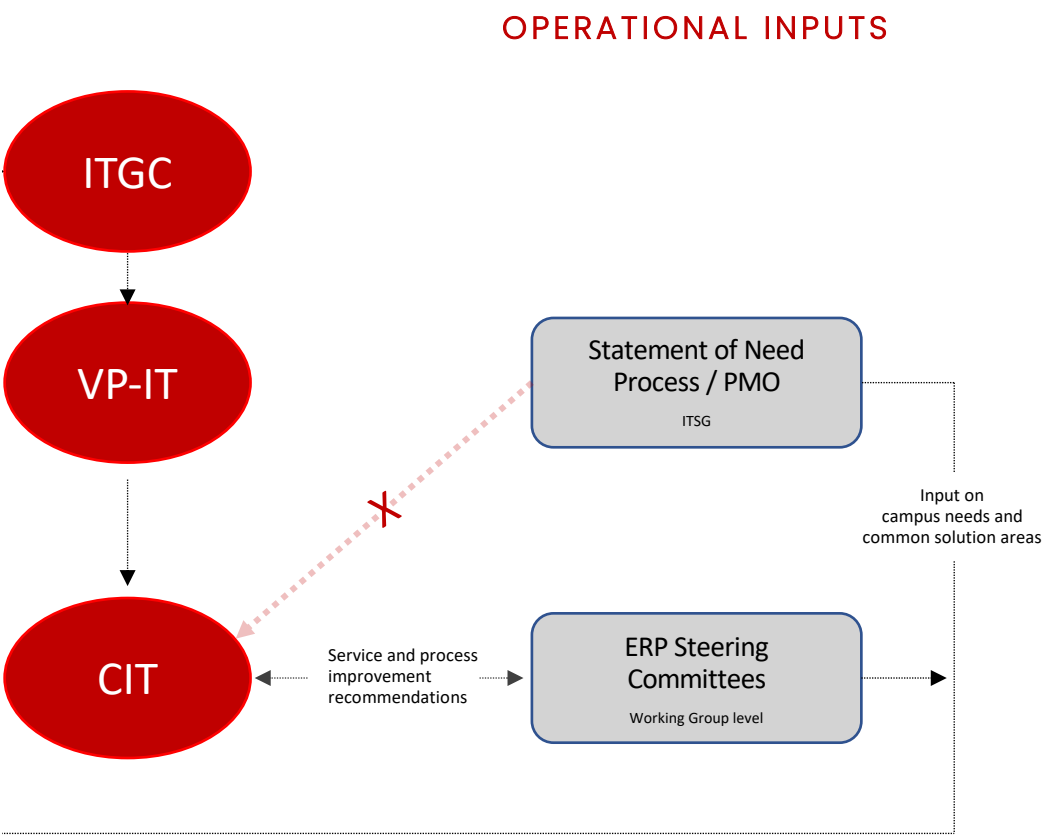
Where does CRM begin and end? (should this be in the CRM?)

Cost (net new over time) – puts pressure on the starting point

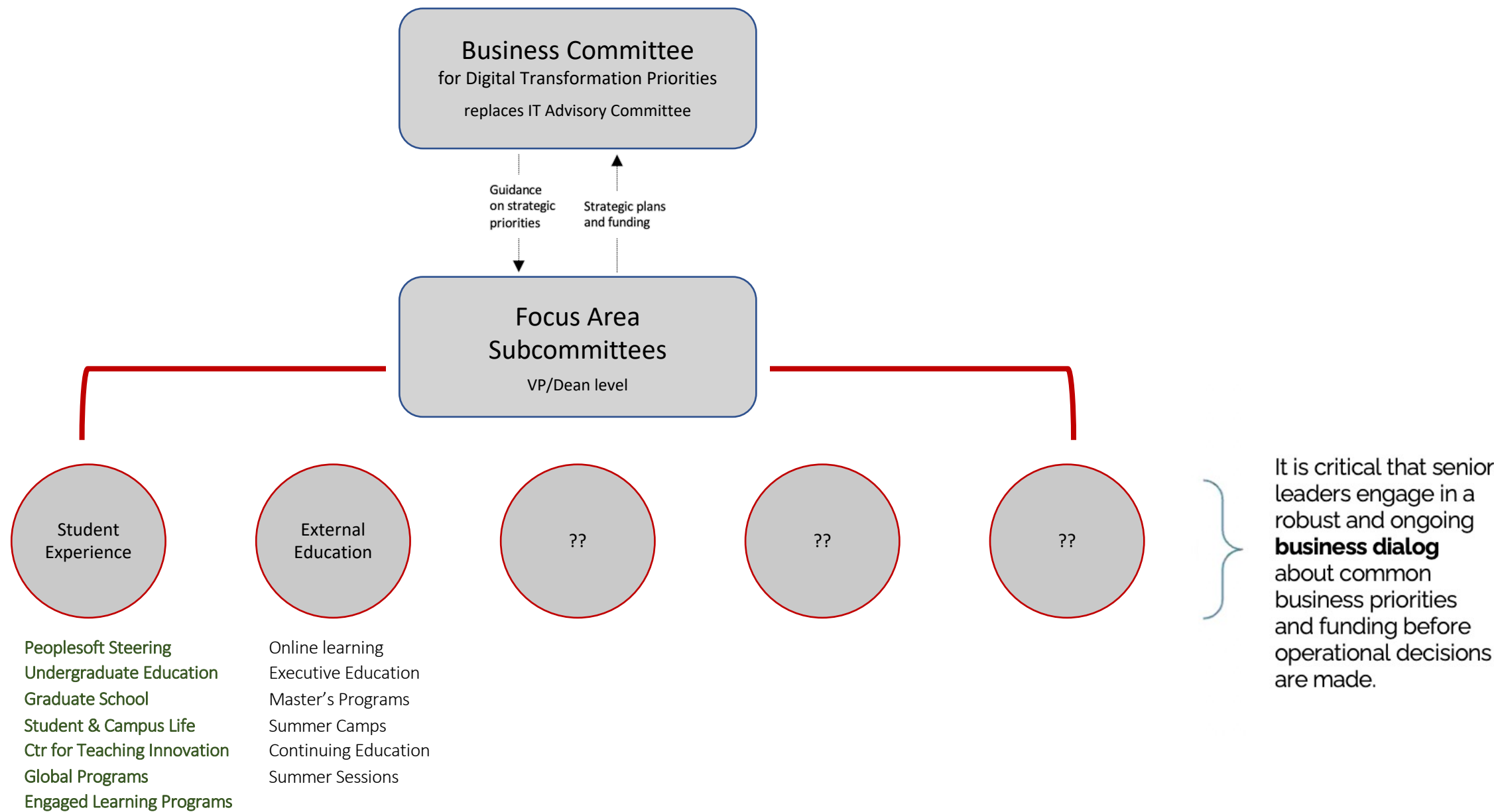
WHAT'S THE RIGHT PLACE TO START?



Starting point: Governance



Starting point: Governance



Starting point: Surface area of need (“the student experience”)



Starting point: Surface area of need (“the student experience”)



Starting point: Surface area of need (“the student experience”)

Student Activities (co-curricular lens)

Give students the tools to find and participate in university programs. Give program managers the tools they need to run those programs.

Student Advising (curricular lens)

Give advisors the tools they need to strengthen student engagement, understand student needs more deeply, collaborate efficiently, and build stronger paths through graduation.

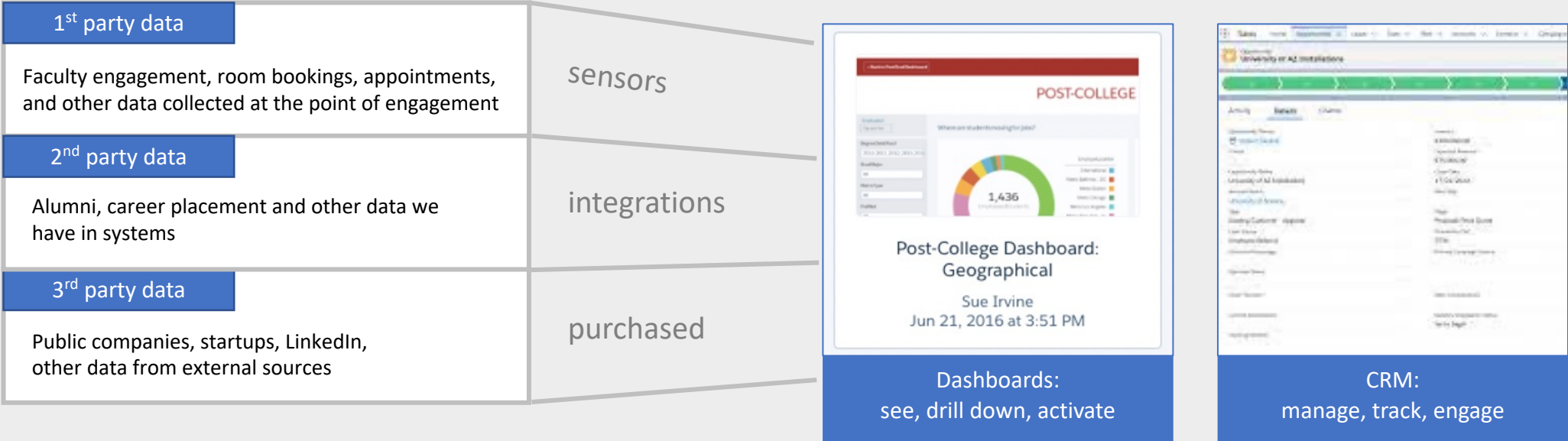
Student Community

Give students the tools they need to feel connected to the institution.

Analytics

Give senior leaders access to important trends and information that can be used for decision-making.

Starting point: Campus capabilities



Unified Data Platform project

MVP
(works for most)

D&B, other TBD

Dashboards project

Harvesting of existing data

Basic CRM project

List of accounts, contacts, alumni;
note taking (basic use case)

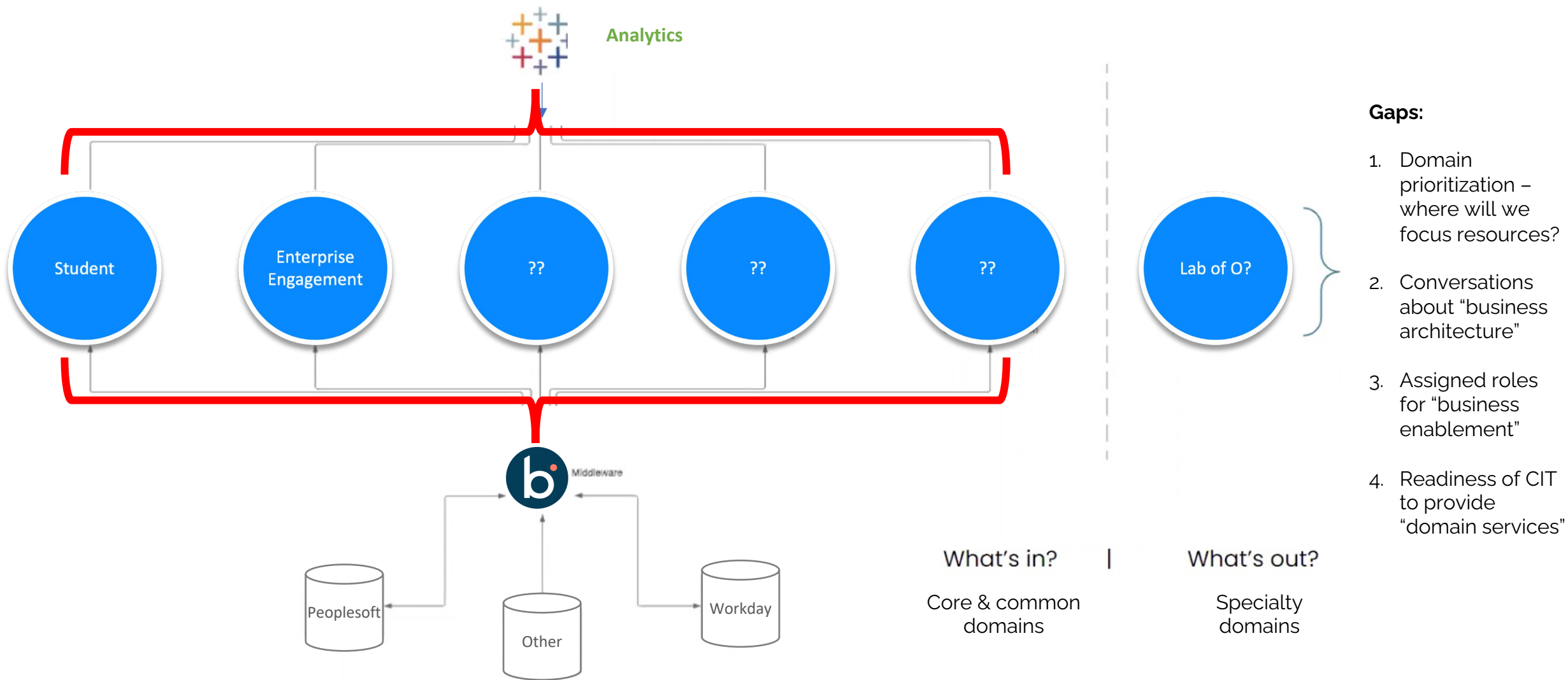
Later
(unique use cases &
capabilities to be prioritized)

More integrations
More sensors
Meta data derived from activity

Enriching data

Marketing Cloud, data feed service,
proposal collaboration, fundraising

Starting point: Campus capabilities



Starting point: Options

Option	Pros	Cons
No solution	No IT cost	Indirect costs; lack of reporting capabilities
Stand-alone solution(s)*	One unit/one purpose	Need multiple systems; data becomes silo'd
Platform solution	Leveraged spend via common “apps” and common data retrieval for multiple units	Takes more time; requires compromise and adoption; added apps can mean added cost

**can be custom app development, 3rd party application or independent implementation of Salesforce*

Starting point: SIPOC

S	I	P	O	C
SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
Who supplies the materials / inputs?	What resources are needed or provided by the supplier? Can be materials or information.	What steps or activities are carried out to create value for the customer?	What products or services are created by (or result from) the process?	Who are the customers?