Building Relationships with Enterprise CRM

UAccess Symposium
April 16, 2019

Derek Masseth, Chief Technology Officer
# UA’s Strategic Outcomes Are About Relationships & Partnerships

BY 2025...

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Persistence &amp; Completion</strong></td>
<td>Achieve significant increases in FTFT retention, four-year, and 6-year graduation rates.</td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td>Double alumni engagement and increase alumni giving to 14%.</td>
</tr>
<tr>
<td><strong>Impact</strong></td>
<td>10 signature partnerships with the public and private sector.</td>
</tr>
<tr>
<td><strong>Destination Arizona</strong></td>
<td>250K+ attending an annual UA grand challenge themed event.</td>
</tr>
<tr>
<td><strong>Innovation &amp; Partnerships</strong></td>
<td>Become the premier innovation center in the Southwest.</td>
</tr>
</tbody>
</table>
Our Current State Overwhelms Students
Optimize digital experiences and empower human interactions

Enterprise Collaboration
Information Sharing
Technology Enablement
System of Engagement

UA Campus Relationships
- Faculty & Staff
- Parents
- Students
- Alumni
- Corporations
- Donors

System of Engagement
- Marketing
- Community
- Recruitment
- Student Success
- Advancement
- Analytics

System of Intelligence

System of Record

Data System
- UAccess Student
- UAccess Employee
- D2L
- UAccess Finance
- Blackbaud
CRM Platform Capabilities

- 360° View
- Marketing
- Communications
- Interaction tracking
- Collaboration
- Workflows
- Embedded Analytics
- Development platform!
“We’re starting to meet students’ needs and deliver service in the way they’re telling us they want it.”

Leah Lommel, Assistant Vice President and Chief Operating Office of EdPlus, ASU

ASU Drives Innovation Across Campus with Salesforce

32 colleges, departments, and offices using Salesforce to serve students in Service Center

Have solved over 1 million cases in Salesforce and published over 1,000 knowledge articles

Migrated 13 mass email systems to the Marketing Cloud for targeted, authentic outreach

Migrated 14 college and school recruiting departments to Salesforce, where 1.1 million leads are managed
CRM in Higher Edu - Cornell

"CRM gives us a 360-degree view of the student. Communities give students a 360-degree view of our university."
Rebecca Joffrey, Director of Interactive Services

Cornell Uses Communities to Enhance the Student Experience

Moved from file-based to feed-based onboarding experience

New students now directed to community of peers, faculty & staff for onboarding

Online libraries make it easy for students to access resources

Increased student interaction: 2,700 posts & comments in a 10-week period

Student service staff reported 48% decrease in call volume over same period
Trellis Enterprise Relationship Management

Constituents

Trellis Modules

Campus values

Prospective Students

Student Experience

Student Success

Marketing & Communications

Volunteer Management

Government

Campus Values

Trellis Modules

Constituents

Enterprise Relationship Management
Welcome back, John! You have 11 immediate alerts.

**TODAY**

**SCHEDULE**
- 8:00 am  MATH 112  Mathematics 241
- 10:00 am  CHEM 151  Koffler 381
- 1:00 pm  ECON 101  Social Sciences 213

**ASSIGNMENTS DUE**
- "Take Home Quiz 2" due for CSC 337
- "Worksheet 4" due for MATH 124

**APPOINTMENTS**
No Appointments Today

**ALERTS**
Priority Registration opens 4/23
Add courses to your shopping cart
ADD NOW

49% on Midterm 1 in MATH 124, try tutoring?
CatCash balance is $20
Engineers Without Borders has an event tomorrow
You’ve received a grant! Accept your reward now.
VIEW 6 MORE ALERTS

**Grades**
- MATH 112
- CSC 110
- CHEM 151
- ECON 101

**Up next: Class/Event, Time, Location**

**CatBot**
Hi, I’m CatBot. Ask me something!
Things you can ask me:
- Where is my next class?
- What classes do I have today?
- What events are going on?
- Where are some coffee shops?

Send a message to CatBot...
Student Life-Cycle Architecture

multi-channel student experience with targeted interaction modalities

Integration broker

Enterprise Platforms
- Slate
- PeopleSoft
- Salesforce
- Blackbaud

Applications
- Libraries
- Housing
- Others
CRM Governance

- **Executive Sponsors**: Executive leaders from each domain area and representative academic colleges
- **Operational leaders**: Operational leaders from each domain area and representative academic colleges
- **Collaboratives**: Collaboratives led by domain thought leaders
- **Data stewards**: Data stewards for each domain/data type (decision making authority)
- **Data subject matter experts**: Data subject matter experts. Dynamic participation based on need

**Program Strategy Team**

**Enterprise CRM Team**

Data Governance, model, definitions, security, permissions

Priorities, Roadmap, Execution, Assessment

Needs, Best Practices, Adoption Advocacy
Product Management Methodology

User Centered Design + Lean + Agile = Better Products
2019 Roadmap

Build Streams
- Academic Advising Appointments
- Advising Notes & Comms
- Early Progress Reports

Governance & Roadmap
- Marketing – Discovery
- Marketing – Phased Implementation
- Student – User Research
- Listening Tour

Data
- Data Quality Technology & Process

Timeline:
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec
Tackling Big Issues

• Change management – culture and business processes
• Communication governance
• Data sharing
• Privacy
Collaborative Ideation
Early Progress Reports: Empathy Mapping
In the Works

• Program name and website – trellis.arizona.edu
• Listening tours across campus
• Student-faculty design studios
• Fall 2019 – two products ready for launch
  • Early Progress Report
  • Academic Advising Appointments
Questions?

trellis.arizona.edu

or

trellis@list.arizona.edu