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Improving Institutional Governance:

Establishing a Framework to Manage & Maximize Your Enrollment Technology

Melissa Eller & Kristi Kooyman / Thursday, February 16, 2:45 pm

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Your Presenters

Melissa Eller

CRM Business Analyst

About me: I live in Arlington, WA
Ask me about: CRM Administration, my granddaughters, and raising chickens!

Kristi Kooyman

Client Success Manager

About me: I live in Logan, UT, and spend a lot of time in Europe
Ask me about: CRM Governance…and wine!

Agenda

- What is CRM Governance and Why Do We Need It?
- Basic Governance Framework
- Northwest University's Governance Journey
- Establishing Governance on Your Campus

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What is CRM Governance?

The set of policies and processes that govern how you manage and evolve your CRM

It defines:

- Roles and responsibilities
- Systems for institutional decision-making
- How users and stakeholders provide input and feedback
- How you track, organize, consider, prioritize, and execute on these requests

Why is CRM Governance Important?

- Governance ensures:
  - the system meets the **needs of your users**, even (especially) as they evolve
  - the system is aligned to **support your institutional goals** and priorities
  - you have a system strategy that **minimizes risk**

- Governance encompasses change management:
  - Rolling out **new tools** and features, including staff training
  - Onboarding **new staff**

Governance Framework – *The Basics*

- CRM Steering Committee
- Change Management
- Issue Management
- Documentation

Governance Framework – *Steering Committee*

- Purpose
  - Provides oversight for your CRM initiative
  - Is the ultimate decision-making body for major changes or initiatives
  - Represents all relevant departments within the institution
- Composition
  - **Executive sponsor(s):** from business, IT—or both
  - **Business Process Lead(s):** senior-level manager represents the needs of the relevant department(s)
  - **Technical Lead(s):** senior-level manager represents the technical side of the organization
  - **Project Manager:** liaison between committee and project implementation team

Governance Framework – *Steering Committee*

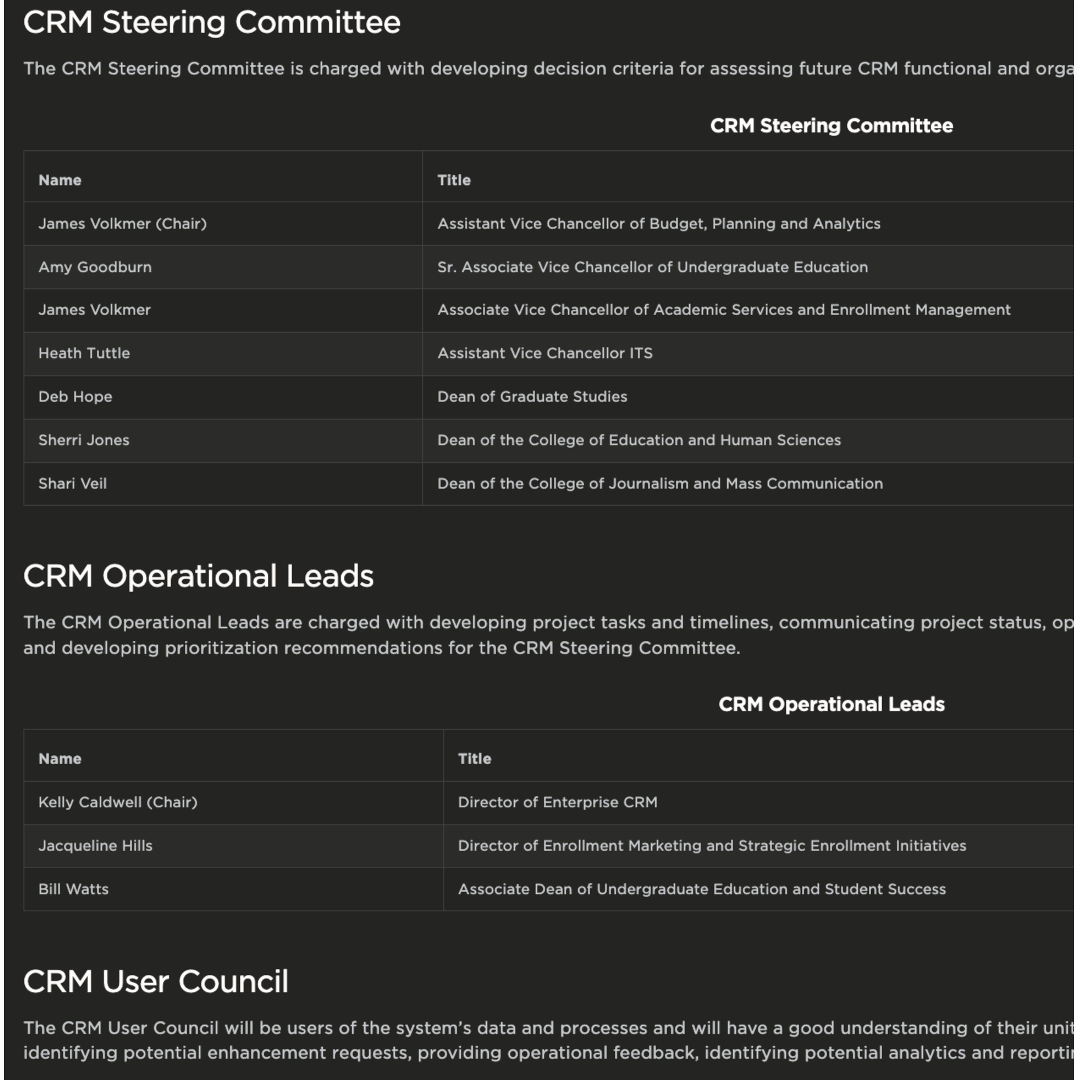
- Responsibilities
  - **Holds regular meetings** to review implementation progress and **assess performance**
  - Understands and represents institutional priorities and business **goals**
  - **Advocates** effective use of the CRM across all departments and users
  - Sets **priorities**, tasks, and timelines for accomplishing business goals

Governance Framework – *Steering Committee (cont.)*

- Responsibilities
  - Identifies and approves **standards, practices, and changes** that will be applied to the CRM
  - Plans for **product updates** and leveraging new features
  - Resolves **issues** escalated by users and/or system administrators
  - **Measures results** against established metrics

EXAMPLE

University of Nebraska Lincoln Committee Structure



CRM Steering Committee

The CRM Steering Committee is charged with developing decision criteria for assessing future CRM functional and orga

CRM Steering Committee

Name	Title
James Volkmer (Chair)	Assistant Vice Chancellor of Budget, Planning and Analytics
Amy Goodburn	Sr. Associate Vice Chancellor of Undergraduate Education
James Volkmer	Associate Vice Chancellor of Academic Services and Enrollment Management
Heath Tuttle	Assistant Vice Chancellor ITS
Deb Hope	Dean of Graduate Studies
Sherri Jones	Dean of the College of Education and Human Sciences
Shari Veil	Dean of the College of Journalism and Mass Communication

CRM Operational Leads

The CRM Operational Leads are charged with developing project tasks and timelines, communicating project status, op and developing prioritization recommendations for the CRM Steering Committee.

CRM Operational Leads

Name	Title
Kelly Caldwell (Chair)	Director of Enterprise CRM
Jacqueline Hills	Director of Enrollment Marketing and Strategic Enrollment Initiatives
Bill Watts	Associate Dean of Undergraduate Education and Student Success

CRM User Council

The CRM User Council will be users of the system's data and processes and will have a good understanding of their unit identifying potential enhancement requests, providing operational feedback, identifying potential analytics and reporti

Governance Framework – *Change Management*

- Goal
  - Ensure changes are introduced seamlessly with minimal risk or disruption to stakeholders and users

- Changes Subject to Review
  - Data structure: tables/objects, fields, pick list values
  - Student-facing forms and applications
  - Institution-wide reports and dashboards
  - Roll out of new features and tools (including user training!)

Governance Framework – *Change Management*

- Questions the Committee Should Consider
  - What **business goal** does the change address?
  - What **value** will it add to internal business process(es), external constituencies, collected metrics, or key performance indicators?
  - What else will be **affected**: objects and/or fields, reports, dashboards, automations, workflows, templates, campaigns, and/or data integration tasks?
  - Will it require **ongoing maintenance** and affect other departments?
  - Should it be implemented in the **current cycle** or deferred to a new cycle?
  - What **training** needs to happen for this change to be successful?

Governance Framework – *Issue Management*

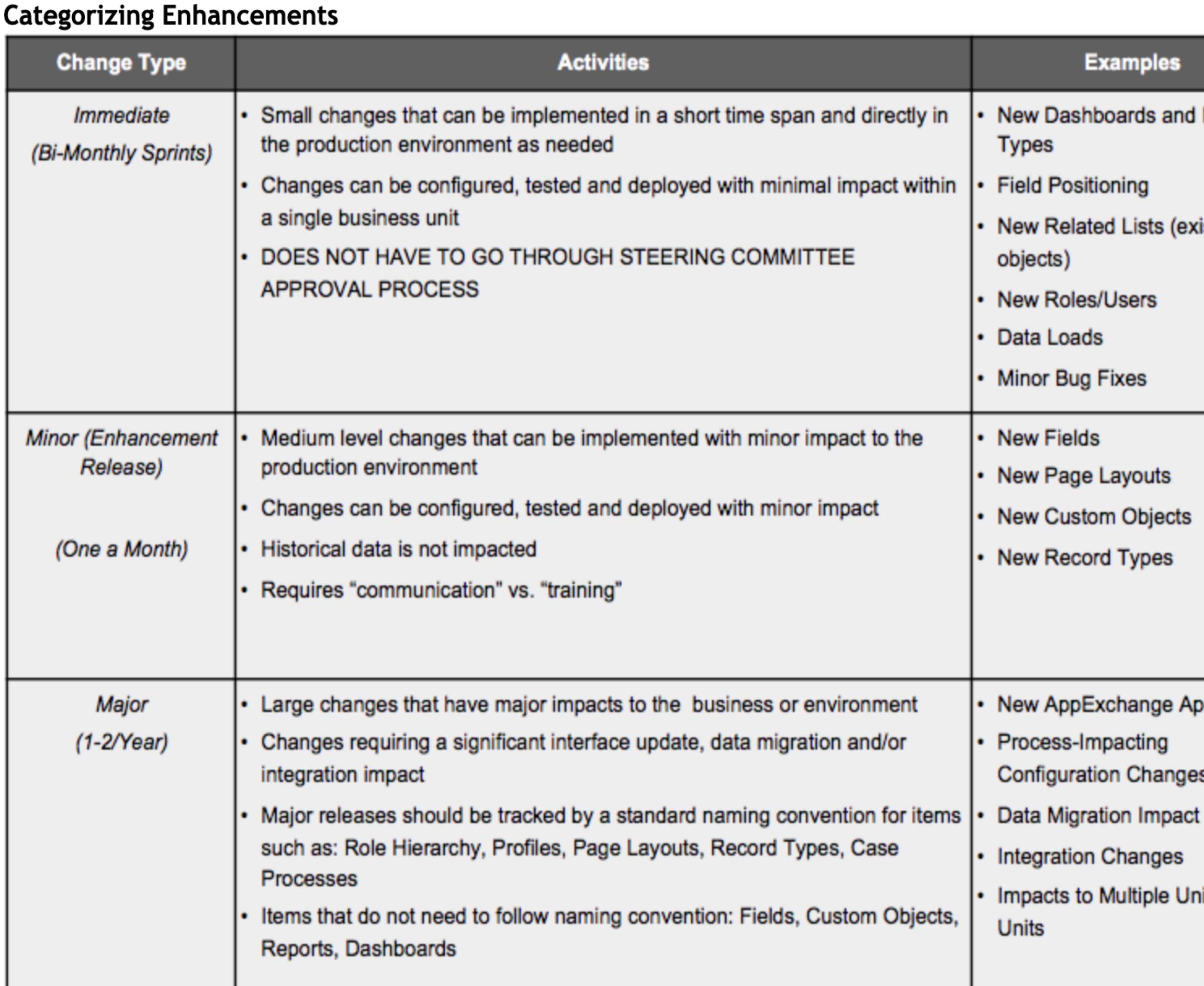
- What?
  - Mechanism for receiving input and feedback from users and stakeholders
    - E.g., Intake form, dedicated email address, case system
  - Tool that facilitates sharing, searching, aggregating, preserving, reporting, and tracking progress in an organized way

Governance Framework – *Issue Management (cont.)*

- How do you use it?
  - Categorize and Prioritize
    - Break fix
    - Wish list
    - New feature
    - General support - add new users, help with login
    - Task vs. project
  - Plan/process for executing

EXAMPLE

University of Minnesota



Categorizing Enhancements

Change Type	Activities	Examples
Immediate *(Bi-Monthly Sprints)*	Small changes that can be implemented in a short time span and directly in the production environment as needed Changes can be configured, tested and deployed with minimal impact within a single business unit DOES NOT HAVE TO GO THROUGH STEERING COMMITTEE APPROVAL PROCESS	New Dashboards and Types Field Positioning New Related Lists (exi objects) New Roles/Users Data Loads Minor Bug Fixes
Minor (Enhancement Release) *(One a Month)*	Medium level changes that can be implemented with minor impact to the production environment Changes can be configured, tested and deployed with minor impact Historical data is not impacted Requires "communication" vs. "training"	New Fields New Page Layouts New Custom Objects New Record Types
Major *(1-2/Year)*	Large changes that have major impacts to the business or environment Changes requiring a significant interface update, data migration and/or integration impact Major releases should be tracked by a standard naming convention for items such as: Role Hierarchy, Profiles, Page Layouts, Record Types, Case Processes Items that do not need to follow naming convention: Fields, Custom Objects, Reports, Dashboards	New AppExchange Ap Process-Impacting Configuration Change Data Migration Impact Integration Changes Impacts to Multiple Uni Units

Governance Framework – *Documentation*

- CRM Governance documentation
  - Decisions *AND* rationale
  - Auditable and documented timeline—inception to implementation

- Reference
  - Business process documentation
    - Augment - don't recreate - vendor documentation
    - Unique to accomplishing *your* business processes in the system
  - Shared environment to avoid out-of-date copies

- Readily available and accessible to stakeholders and users.

Northwest University

Our Governance Journey

Northwest
UNIVERSITY

- Northwest University in Kirkland, Washington
- 1,237 total undergraduate and graduate enrollment
- 265 graduate students
- 15 specialized Master programs

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Northwest University CRM Governance

BEFORE

- Siloed processes
- Spreadsheet-based
- Manual
- Messy handoffs

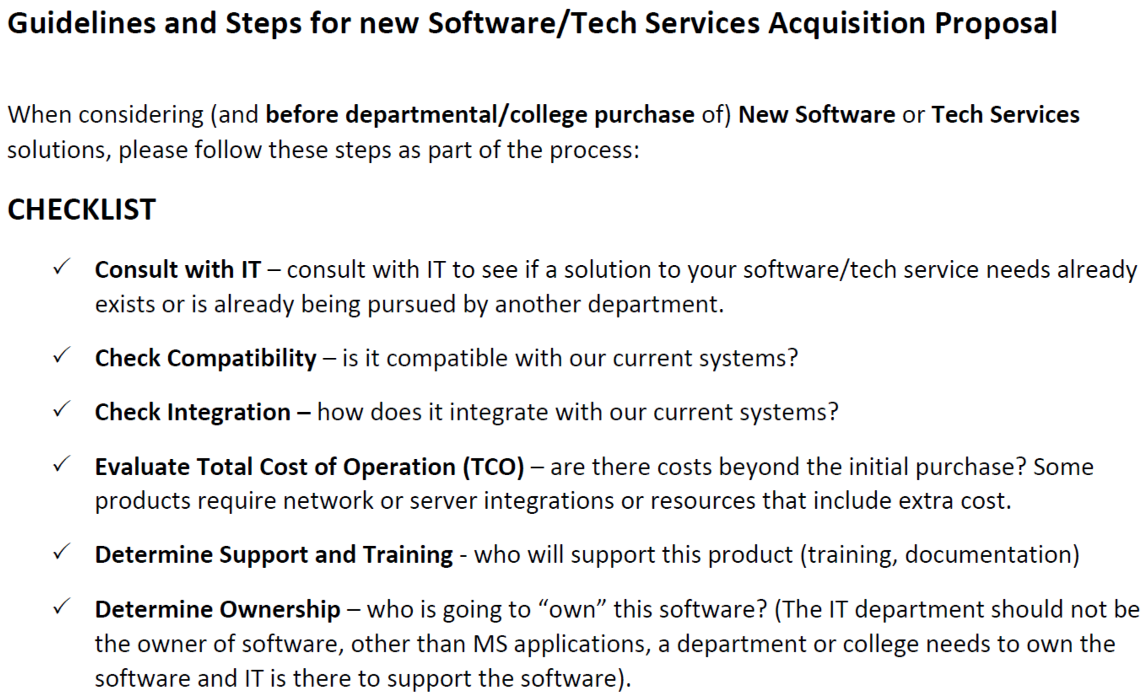
- Leadership not involved
- No one owned the 'whole process'
- Lack of authority to coordinate peer-level changes between departments

Northwest University CRM Governance

Enterprise Operations Group

- VP Institutional Effectiveness (Chair)
- VP Advancement
- CFO
- CRM Administrator/System Analyst
- IT Director

Software/Tech Services Request



Guidelines and Steps for new Software/Tech Services Acquisition Proposal

When considering (and **before departmental/college purchase** of) **New Software** or **Tech Services** solutions, please follow these steps as part of the process:

CHECKLIST

- ✓ **Consult with IT** – consult with IT to see if a solution to your software/tech service needs already exists or is already being pursued by another department.
- ✓ **Check Compatibility** – is it compatible with our current systems?
- ✓ **Check Integration –** how does it integrate with our current systems?
- ✓ **Evaluate Total Cost of Operation (TCO)** – are there costs beyond the initial purchase? Some products require network or server integrations or resources that include extra cost.
- ✓ **Determine Support and Training** - who will support this product (training, documentation)
- ✓ **Determine Ownership** – who is going to "own" this software? (The IT department should not be the owner of software, other than MS applications, a department or college needs to own the software and IT is there to support the software).

NU Leadership Database Team

New positions:

- CRM Administrator/System Analyst reports to Advancement VP
- CRM Developer

New operational focus

- Built operational team that supports admissions: Operations Director, Coordinator and Visit Specialist
- Implementation Team led by VP Institutional Effectiveness: reviews Faculty minutes to coordinate implementation of new programs, identifies and prioritizes projects that are high impact across campus
- CRM Database MS Team to keep all users apprised of changes, tips, updates etc.
- IT meeting 2x/week to discuss integration and other cross system issues

Northwest University CRM Governance

- Issue Management
  - Using Mojo help desk to track and assign priority
  - Still working on a way to track more complex projects (no PMO)

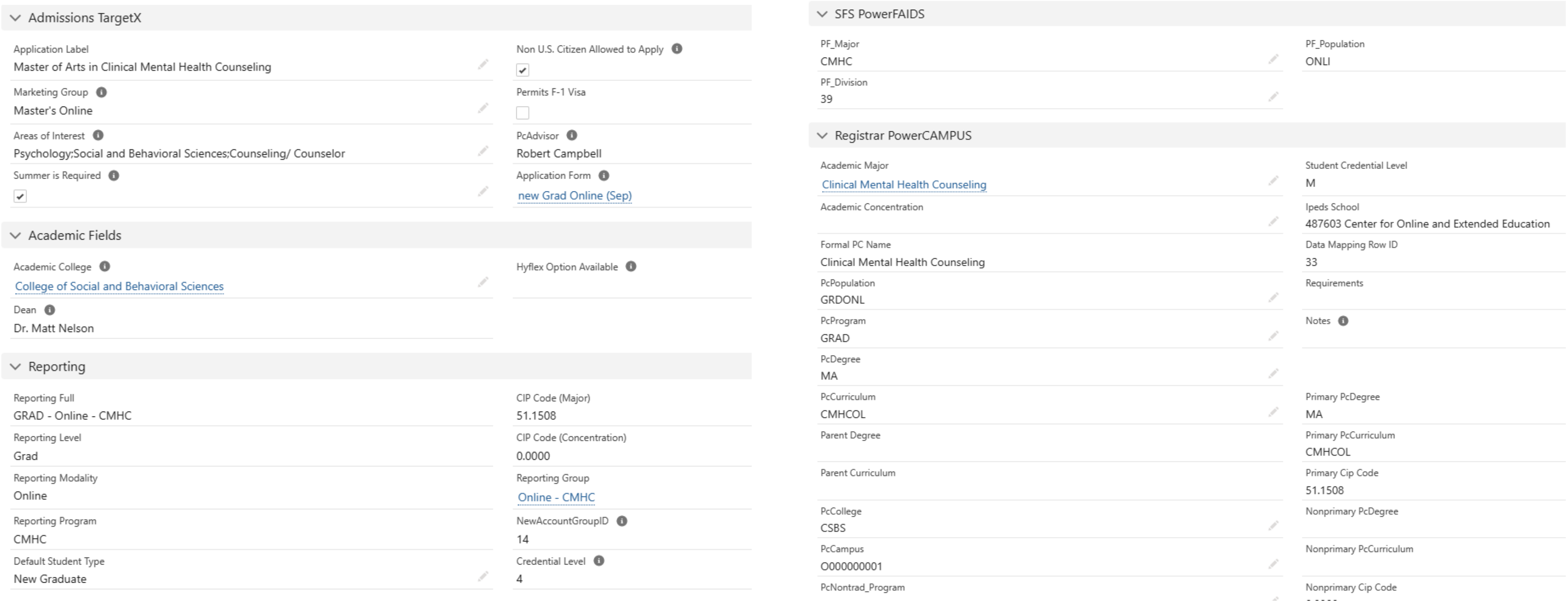
Northwest University CRM Governance

- Input Management
  - GOE for new software needs
  - Implementation team for new programs
  - Identified Salesforce power users to gather information and needs from their areas of expertise

Northwest University CRM Governance

- Documentation
  - Document in Teams
  - Keep it simple and relevant
  - Refer to TargetX and other vendor documentation
  - Same set available to everyone

Shared Data Structure Program Mapping



Admissions TargetX

Application Label	Master of Arts in Clinical Mental Health Counseling	Non U.S. Citizen Allowed to Apply	☑
Marketing Group	Master's Online	Permits F-1 Visa	☐
Areas of Interest	Psychology;Social and Behavioral Sciences;Counseling/ Counselor	PcAdvisor	Robert Campbell
Summer is Required	☑	Application Form	new Grad Online (Sep)

Academic Fields

Academic College	College of Social and Behavioral Sciences	Hyflex Option Available	
Dean	Dr. Matt Nelson		

Reporting

Reporting Full	GRAD - Online - CMHC	CIP Code (Major)	51.1508
Reporting Level	Grad	CIP Code (Concentration)	0.0000
Reporting Modality	Online	Reporting Group	Online - CMHC
Reporting Program	CMHC	NewAccountGroupID	14
Default Student Type	New Graduate	Credential Level	4

SFS PowerFAIDS

PF_Major	CMHC	PF_Population	ONLI
PF_Division	39		

Registrar PowerCAMPUS

Academic Major	Clinical Mental Health Counseling	Student Credential Level	M
Academic Concentration		Ipeds School	487603 Center for Online and Extended Education
Formal PC Name	Clinical Mental Health Counseling	Data Mapping Row ID	33
PcPopulation	GRDONL	Requirements	
PcProgram	GRAD	Notes	
PcDegree	MA		
PcCurriculum	CMHCOL	Primary PcDegree	MA
Parent Degree		Primary PcCurriculum	CMHCOL
Parent Curriculum		Primary Cip Code	51.1508
PcCollege	CSBS	Nonprimary PcDegree	
PcCampus	O000000001	Nonprimary PcCurriculum	
PcNontrad_Program		Nonprimary Cip Code	

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Establishing CRM Governance on Your Campus

Tips, Principles, & Good Practices

Establishing Governance – *Guiding Principles*

- **Collaboration** is the best way to ensure successful CRM implementation, usage, and adoption
- Clear, open lines of **communication** are critical to success
  - Establish a systematic approach to sharing information, developing champions, and encouraging feedback
- Teams and individuals must be held **accountable** for completing their tasks in a thorough and timely manner
- Predictable, reproducible, transparent **processes** ensure nothing is overlooked and provide structure for stakeholders and users
- Processes do not guarantee success
  - people need to be **flexible and adaptable** as change happens

Establishing Governance – *Good Practices*

- Develop your governance structure over the course of your implementation so it’s in place when you go live
- Take advantage of training, documentation, and consultation offered by your vendor; don't reinvent the wheel!
- Take advantage of your Client Success Manager
  - hold regular strategic planning meetings to ensure:
    - your technology is aligned optimally to support your goals
    - you don’t miss out on new features/tools that could bring value!

Establishing Governance – *Other Resources*

- **Who else is doing this well?**
  - College of Saint Scholastica: 2020 conference presentation
  - Pepperdine University Governance Charter
  - University of Minnesota CRM Governance
  - University of Nebraska Lincoln CRM Governance & Support

- **Vendor Resources:**
  - Forum One – The Secret to CRM Success: Training & Governance
  - Collegis Education – Why IT Governance in Higher Education Is So Essential

Thank You

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