CIO vision for Salesforce

• Customer Relationship Management (CRM) is a...
  – Business strategy for improving value to constituents
  – Solution for managing interactions (prospects, students, alumni, parents, faculty/staff, and corporations)

• CRM can enable...
  – Constituents to interact with UMass Lowell as a single entity and not numerous discrete departments
  – A 360 degree view of student

• Single Salesforce Instance managed by IT in partnership with business offices
Our Journey

Customer Relationship Management

- Hospitality
- Student Affairs
- Solution Center
- Registrar
- Student Financial Services
- Corporate Partnerships
- Retention
- Career Services
- Financial Aid
- Recruiting and Admissions

Learning with Purpose
# Of Salesforce Users to Support

>100% Growth in last 12 months
Getting Started

Solution Center
– Contacts
– Cases
  • Email
  • Phone
  • Drop-In

New IT Skills and Tools
– SF Admin 101 (class)
– Implementation Partner – ApexIT and working with them to absorb knowledge.
– Writing of Reports and Dashboards
– Adding Users
Learning to Support

2015

Solution Center Improvements
- Console
- Queue Line Management
- Email Templates
- Case Management Changes

New IT Skills and Tools
- Salesforce
  - Profiles and Roles
  - Sharing Rules
  - Case Record Types and Case Assignment Rules
  - Case Queues and List views
  - Console Layouts
  - Sites and Visualforce
  - Workflow Rules
- Call Center (Five9)
- Signed Forms (Docusign)

Marc Pellegrini
Learning to Grow and Expand

2016

Admissions and TargetX
- Recruitment
- Marketing

NEW HIRE:
Salesforce Administrator
Neha Madhia

New IT Skills and Tools
- Salesforce
  - Flows
  - Process Flows
- TargetX Suite
  - Managed Package Objects and Fields
  - Web Forms (Form Assembly)
  - Email Campaigns (Tx)
  - De-Duplication (Demand Tools)
  - Events (Tx)
  - Text Messaging (SMS Magic)
Learning to Grow and Expand

Also in 2016

Career Services
• Appointment Scheduling
• Contact notes

Student Retention
• Cases and Surveys

Public Affairs
• Mobile listening

New IT Skills and Tools
• Salesforce
  – Process Builder
  – Salesforce for Outlook
• Appointments (TimeTrade & Sumo)
• Surveys (Qualtrics)
• Data Backup (backupify)
• Social Studio (radian6)
Learning to Support Many

2017

New in 2017
• Hospitality and Events
• Student Affairs
• Continuing Education

Evolving Needs
• Admissions
• Career Services
• Solution Center
• Retention

New IT Skills and Tools
• Salesforce
  – Higher Education Data Architecture (HEDA)
  – Lightning for Outlook

• Improved Operations
  – Sandbox Refresh Process
  – Modification Dev and Test
Building Our Team

IT Enterprise Applications

UML Salesforce Team
• IT Professional Staff– reallocation of duties (3) & new hire (1)
• Co-Op Student Employees (2)
• Solutions Architect/Consultant Services (1)

Training and Development:
• Salesforce Training (videos; webinars; Trailheads)
• Salesforce on-site visits
• UMass Salesforce Day
• Salesforce World Tour Boston
• Salesforce Higher Education Summit ($$)
• TargetX Higher Education Summit ($$)
• Salesforce Certification Exams ($)
Meet Our Team

IT Enterprise Applications

**Services:** Project Management, System Administration, Solution Architecture, Data Integration, Security Administration, Operations Support, Reporting

Richard Conley – Director
Doreen Bray – Sr. Project Manager
Dan Bedard – Project Manager
Neha Madhia – Salesforce Administrator
Julio Hernandez – Salesforce Administrator / Developer
Pranav Nagrecha – Analyst / Co-op
Marc Pellegrini – Architect/Consultant
VINU Vijayan (0.1 FTE Consultant) – TargetX Virtual System Admin.
Questions

Or Contact Later at...

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