

Subject: Customer Relationship Management (CRM) Project Update

The College has made significant progress implementing the new CRM despite the challenges we faced as the COVID-19 pandemic changed our lives and the way we have operated for the last several weeks. We are very proud of the work the teams have taken on and how multiple campus and systems office representatives continue to focus on implementation while working virtually.

Our first announcement is launching our new branding and logo for the CRM. We are very proud to inform you that IvyConnect will be the name of our CRM and project moving forward. Campus representatives from various functional areas participated in a focus group with our systems office marketing team and from there, the name IvyConnect was developed. The tagline of “One Community, One System” represents our mission and the goal of one system-wide CRM.



The vision statement for IvyConnect is: “Transform the student journey by creating a platform to enable informed decision-making and align business processes to improve student success, lifetime constituent engagement, and facilitate Ivy Tech’s strategic mission and vision.”

The guiding principles for IvyConnect are: innovative, intuitive, efficient, collaborative, trusted.

To help communicate the progress of IvyConnect, we will send monthly emails. As things progress we also plan to provide information on future President’s Updates and the Podcast.

For this month’s update, here is the list of areas with more information, along with links to learn more:

- Readiness Survey
- Release 0 completed – progress and kudos
- Release 1 progress
- Salesforce Change Champions Network

As we move forward with IvyConnect you may be contacted by representatives from our internal change management team, or Appirio, to better understand how you use our current systems, or seek your help in development and implementation. As always, we appreciate the time you are dedicating, or will dedicate, to IvyConnect.

If you have any questions or would like to contact us, please send us an email at: ivyconnect@ivytech.edu. We also keep a running repository of information at

<https://link.ivytech.edu/IConnect> (copy and paste the address in a web browser) that is updated each Friday.

Thank you,
Andy Bowne and Matt Etchison

Readiness Survey

In March, a Readiness Survey was distributed to 116 individuals who were identified because of the role they currently play in the existing CRM and/or their role in its future buildout. The goal was to understand how best to engage users across the College in a manner that will result in a smooth transition. The assessment and analysis of the survey was completed by Appirio, our CRM system integration partner.

The survey had a 65.5% response rate and most notably these stats surfaced quickly:

- 91% of Ivy Tech stakeholders understand how Salesforce will become beneficial to Ivy Tech
- 94% of Ivy Tech stakeholders believe the benefits of the Salesforce implementation will be worth the effort

As an institution, we strive to support our work with data as much as possible. The positive, early perception of IvyConnect was a great way to kick-off the project.

Release 0 completed – progress and kudos

Implementation of IvyConnect is built into five releases. Release 0 commenced in February and completed mid-April. Release 0 was the “Blueprint” stage of the project where we established the project vision, learned the current state (across technology, systems, data, and business processes), listened to the desired future state, and created the roadmap to get there.

The key accomplishments of Release 0 included:

- Journey Mapping/Personas development – spent time with Ivy Tech to gain understanding of current state (33 interviews, 52 hours, 38 Roles, 11 Personas, 357 Pain Points)
- Potential future functionality information gathering
- Technical and Data Architecture development to allow for integrations and data migration to inform a complete view of the student
- Creation of the roadmap to provide direction for the development of IvyConnect

Kudos to our teams who worked for many hours in Release 0 that included:

- The Enrollment Services Core Team - Sarah Cleveland, Jeff Kraft, Shakira Grubbs, Chris Ponsler, Susan Brown, Joseph Binkley, Morgan McClure, Tyiana Thompson, Leah Allman, Kates Brommeland, Kelsey Batten, Jason Penrod, Brad Watts, and Stephanie Richter
- The Branding and Messaging Team - Sydney Ziegler, Meghan O'Connor, Jason Penrod, and Kelsey Batten

Release 1 progress

Release 1 of IvyConnect implementation is underway with the goal of being completed in September/October. The overarching theme to Release 1 is to define our work by identifying and understanding our user personas (marketing, enrollment services, student success, academic affairs, career coaching and employer connections, and foundation) and their Epics. Epics are major activities these user personas will conduct that need to be captured in IvyConnect. For example, the enrollment services user persona group will want to capture "Inquiry to Application" data.

Also, a large part of Release 1 is data integration. As you can imagine, integrating many large and complex systems into IvyConnect will take time, but also provides us with the opportunity to really examine the data we need and the data we do not need. The larger systems that are under review for integration include Banner, SmartView, SignalVine and Outlook. Additional Ivy Tech system integrations will come, but in later releases.

New capabilities will be brought onboard as well. The largest piece is combining multiple ways to apply (dual credit, guest, new first time) into one application that will be more intuitive and easier for the user.

Some upcoming milestones for Release 1 include:

- Scope Checkpoint – completed by May 8
- Begin development of the CRM – week of May 11
- Ivy Tech User Testing – targeted for August
- Go-Live – targeted for week of September 14

Many of you have contributed multiple hours into Release 1 work so far. For that, thank you very much for participating and ensuring your voice was heard in this buildout. We recognize it has been a large commitment of time.

Salesforce Change Champions Network

An organization as large as Ivy Tech requires a true focus on change management, especially with a project of this scope. The Salesforce Change Champions Network was developed, which is a program that leverages a diverse group of early adopters to generate a high-level awareness and engagement to drive adoption and sustainment.

Salesforce Change Champions provide the following:

- Guide the way and inspire others to use the system properly
- Answer questions, demonstrate good use, and provide expertise on benefits and getting the most out of the system
- Provide peer-to-peer support, help socialize the new technology, and increase user buy-in
- Provide opportunities to voice opinions and give feedback
- Engagement link between the stakeholders and project team

Thank you to our Change Champions Network:

- Letha-Joy Crowe Brooks: Anderson
- Nicole Mitchell: Bloomington
- Monica Robinson: Columbus
- Elaine Brewer: Evansville
- Jennifer Simmons: Fort Wayne
- Brittany May: Indianapolis
- Kates Brommeland: Kokomo
- Ivan Hernandez: Lafayette
- Gina Willis: Lake County
- Alyssa Lay: Lawrenceburg
- Courtney Gullion: Madison
- Treva Stith and Olivia Compton: Marion
- Emery Peck: Muncie
- Lauren Starr: Richmond
- Dawn Weaver and Jennifer Bloom: South Bend/Elkhart
- Amy Sears: Terre Haute
- Shelly Kooi: Valparaiso
- Samantha Manire: Sellersburg

The Change Champions Network held its first meeting on Thursday, April 30 and intends to meet monthly. The kick-off was led by Andy Bowne, Kristen Moreland and the Appirio team, and provided an overview of the role of the network and review the roles that each Salesforce Champion member will have.