Data Governance, Sharing, & Compliance

salesforce

TBSR Atlanta
February 2020

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Leeds At-a-Glance

3,600 Undergraduates

400 M.S., MBA, and PhD. Candidates

1,100 Business Minors

5 Areas of Emphasis
9 Certificate Programs

6 Centers of Excellence

7 Cities traveled to for career treks
10 Countries visited on global initiatives

2019
Best Public University Undergraduate Business Program
#22
U.S. News & World Report

among all U.S. undergraduate business programs, US News & World Report (2019)

#32 Best Business School among Public Universities
#65 Best Graduate Business School

over **1,500** undergraduates and MBAs are engaged in mentoring with

over **1,100** professional and alumni mentors

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What did we need? BUY IN!

What were we asking of the Dean's Cabinet?

- Approve and support strategic vision and project charter

- CRM as a business strategy (not an IT initiative)

- Assistance with Leeds-wide adoption (culture)

- Staffing model to support the Salesforce federated model
  - Writing Salesforce goals related to unit KPIs in performance plans
  - Hiring with CRM exposure in mind

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How Did We Develop our Governance Structure?

- Salesforce Governance Accelerator

- Time

- Evolution

- Shifting goals

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Charter Development: Stakeholders

Advancement
- Assistant Dean
- Events Coordinator
- Director of Alumni Engagement

Diversity and Inclusion
- Assistant Dean, Diversity/Inclusion

Marketing/Communications
- Executive Director
- Content Lead

Centers
- Five Center Directors

Graduate Programs
- Associate Dean
- Director or Operations
- MS Program Director

Undergraduate Affairs
- Associate Dean
- Executive Director, Career Services
- Director, Advising
- Director, Global
- Director, RAP
- Director, Leeds Scholars

Corporate Relations
- Executive Director
- MBA
- Associate Director Employer Partnerships
- Assistant Director Corporate/External

HR
- Associate Dean of Administration
- Manager HR
- Manager Account and Procurement

Faculty Affairs
- Manager, Faculty Support

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Charter Development: KPIs

Undergraduate Affairs
Advising
• Improve retention rates of Leeds students by 2%
• 80% yield (as sophomores) of the students that start in first year as pre-Business majors
• Increase student satisfaction score on EBI to 6.0
• Increase 4-year graduation rates of Leeds students to 65%
• Define 'student success' model and implement early alert system to monitor

Business Minor
• Increase number of BUSM students enrolling in 2 or more Tracks by 25%
• Increase Business Minor retention by 10%

Career Development
• Understand student placement outcomes as reflected by a knowledge rate of 80%+ of all seniors
• Maintain high engagement of Leeds students (80% or more) with the Leeds Career Development

Leeds Scholars Program
• Achieve 100% retention for students in the LSP/LHP within the CU system
• Increase applicant pool of talented students who apply to the LSP by 10%
• Achieve an average ACT score of 32 for the LSP

Residential Academic Program (RAP)
• Attend at least 3 Signature Events by the end of their freshman year
• Recruit high-achieving (measured by SAT/ACT/high school GPA) and diverse (measured by % female and % students of color) students
• Achieve 95% retention to CU of Leeds RAP students from their freshman to sophomore year

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Charter Development: Metrics

Value Driver	Business Objective	Behavior Changes that Lead to Outcome	How to Measure the Behavior Changes – Metric	Definition
Increase Revenue	Acquire New Profitable Students	Increase # of prospects converted to applicants	% change of new applicants	Percent change prospects who apply and pay the application fee
		Increase number of new registrants (yield)	% change of new registrants	Percent change of new student enrollment
	Retain Students	Increase retention	% change in retained students	Percent change of current students who enroll in current term
		Increase placement	% change in placement rate	Percentage of sales associated with repeat customers
		Increase graduation rate	% change in graduation rate	Measure repeat purchase deals against all deals
Cost Reduction	Reduce departmental operations costs	Increase number of qualified prospects for each recruiter	Increase in new student enrollment	Average number of active opportunities managed by an AM
		Pivot to pro-active engagement	Average Number of interventions	Average number of calls made per closed opportunity
		Reduce data entry/manual work (administrative time)	Average time to enter information in salesforce.com	Average number of clicks to enter information into salesforce.com
		Improve productivity	Revenue/# of employees	

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Salesforce Draft Charter Template

PURPOSE

The Center of Excellence will provide a framework to plan, execute, and align the implementation of Salesforce to business goals and strategies. The Center of Excellence will deploy governance processes to provide transparency into the Salesforce program and support the deployment of applications and services.

BUSINESS GOALS & STRATEGIES

Goals
- Create a multi channel platform to improve the user and customer (student, corporate, prospect & alumni) experience.
- Establish common language (e.g. normalized account naming), standardized business processes and established best practices across all users
- Leverage Salesforce data to determine student, faculty and staff success indicators (KPIs) to elevate the school's profile, internally and externally
- Implement business process automation via Salesforce and other integrated applications (e.g. travel reimbursement, procurement, new hire) – add business value mapping here

Strategies
- Optimize user adoption
- Maintain user satisfaction
- Achieve Executive sponsorship
- Define budget and organizational structure

BUSINESS KPIs

Centers
- X acceptance rate
- Add metrics from business value map exercise

Ugrad
- X acceptance rate
- Add metrics from business value map exercise

Grad
- X acceptance rate
- Add metrics from business value map exercise

Corporate Relations
- X acceptance rate
- Add metrics from business value map exercise

KEY STAKEHOLDERS

Centers
- Add stakeholders here
- Include Product Owners here

Ugrad
- Add stakeholders here

Grad
- Add stakeholders here

Corporate Relations
- Add stakeholders here

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Leeds' Salesforce Project Charter

Approved by Dean's Cabinet November 2017

Purpose
The Leeds Salesforce Success Committee (LSSC) will create an ongoing and transparent framework and processes to plan, execute, and align the implementation of Salesforce with business goals and strategies.

Goals
- Create a multi-channel platform to improve the constituent experience (e.g. student, corporate, prospect & alumni)
- Establish common language (e.g. normalized account naming), standardized business processes and best practices across all users
- Attain accurate data to develop and track student, faculty, staff, and school success indicators (KPIs) to elevate the college's profile, internally and externally
- Implement and share business process automation to improve efficiency and standardize processes across units
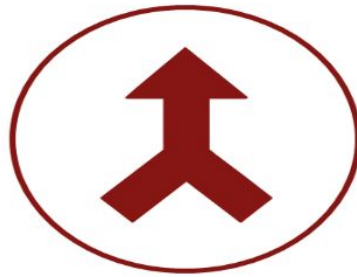
Strategies
- Optimize user adoption
- Maintain user satisfaction
- Achieve and maintain executive sponsorship
- Define budget and organizational structure
- School-wide collaboration and communication with respect to inputs/outputs and business processes

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What are the Major Governance Models and How Do They Differ?

Consolidated

Federated

Confederated

- Formal command and control
- Stakeholders can be dispersed
- Ideal for developing school-wide processes
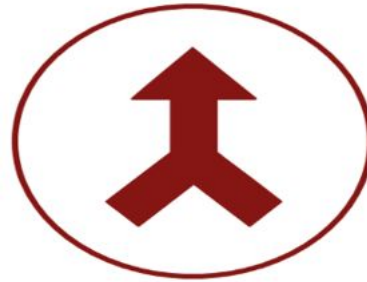
- Moderate command and control
- Used for some school-wide processes and some unit-based processes
- More flexible

- Each unit works independently
- Allows for greater agility
- Used for sharing best practices

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Federated Model: Benefits and Challenges

Federated

Benefits

- Moderate level of command and control governance and support.
- Mix of independent / dependent Business Units, subsidiaries, or companies.
- Salesforce Center of Excellence specify what baseline apps will be used.
- Business Units build their own apps on their own orgs.

Challenges

- Regional business units, subsidiaries, departments may feel their concerns are not addressed.
- Best practices may be lost.
- Possible org explosion
- Companies architectural standards may not be adhered to
- Support costs

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Project Ownership

- **Past State**

  - Consolidated model
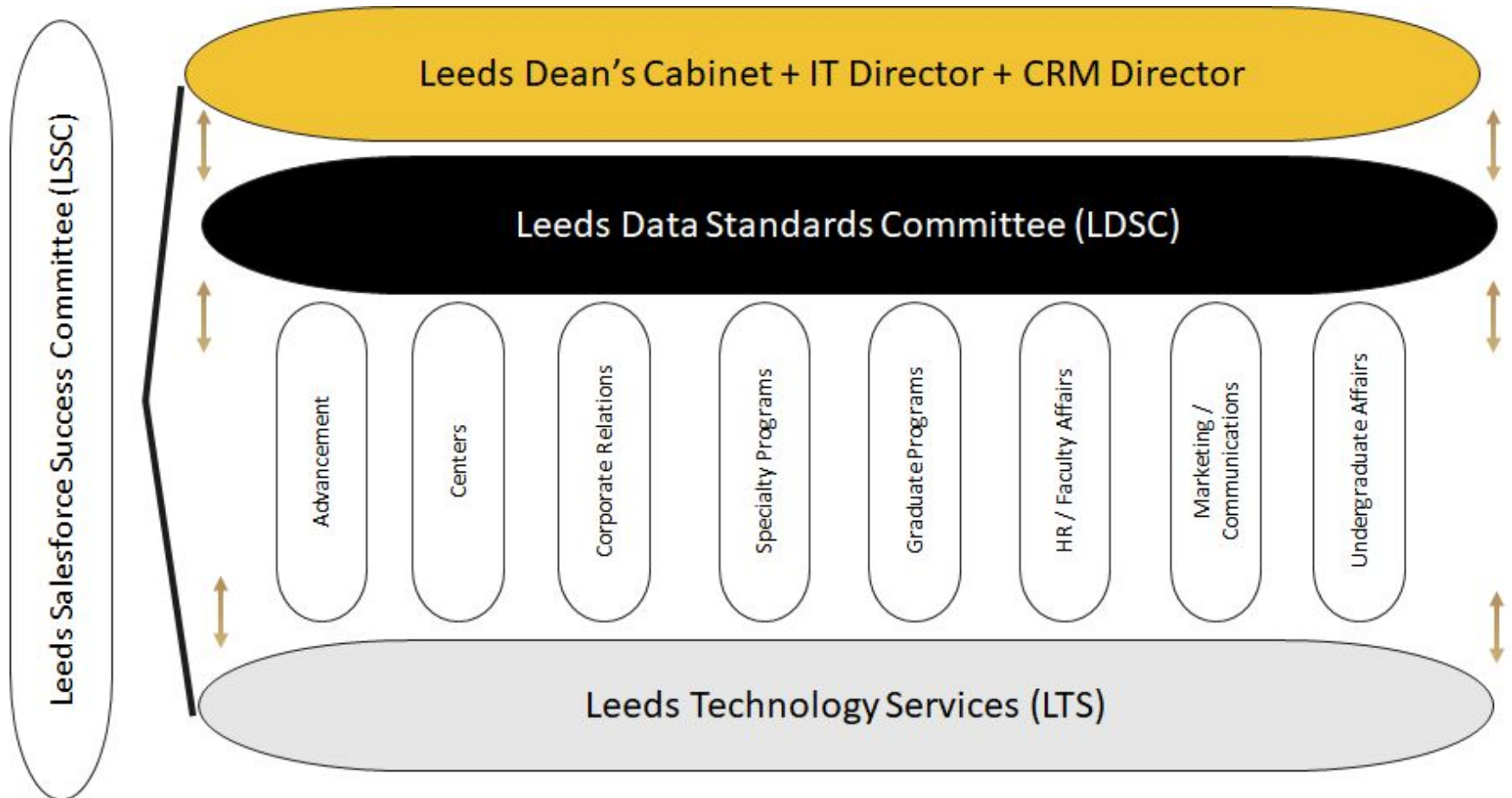
    Formal command and control

- **Developed State**

  - Federated model

    Moderate command and control, more flexibility

  - Not an IT initiative, a school-wide data management effort

  - Leverage student workforce

  - Salesforce power users within the units

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Federated Model Governance Structure

Adoption

"Culture does not change because we desire to change it. Culture changes when the organization is transformed - the culture reflects the realities of people working together every day." - Frances Hesselbein
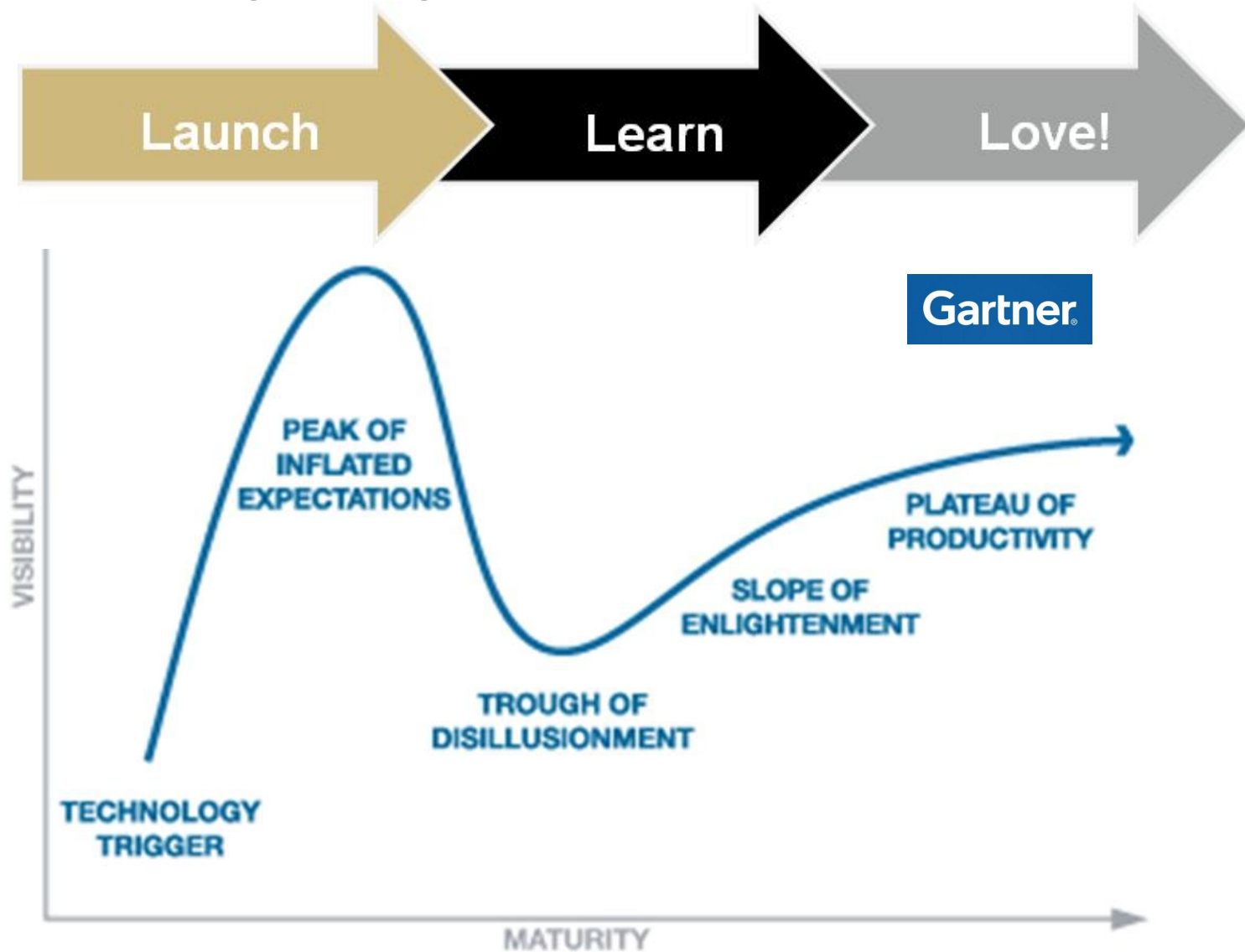
- **Performance Plan Goals**
  - What Salesforce indicators would you like your staff to track? Is there something not currently be tracked that should be?

- **New Positions and Vacancies**
  - Include CRM experience and technology-competency
  - Coordinate with LTS for positions with Salesforce and/or Qualtrics-specific components

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Gartner Hype Cycle

http://www.gartner.com/technology/research/methodologies/hype-cycle.jsp

Thanks!

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