Not Just for Sales!

Relationship Management with Salesforce at Harvard

We found out 3 weeks ago that this wasn’t a poster session -- April Fool on us!
**Introductions**

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*In absentia: Aimee Hague*
Senior Project Manager, Academic Technology Services

Who are we? Academic Technology for the Faculty of Arts & Sciences.

Aimee wasn’t able to be here -- she has a broader, University-wide perspective; we can mostly talk about the instructional support use case and are happy to follow up and connect you to others at Harvard.
Agenda

- What are we up to?
- What are you up to?
- What can we learn from each other?
Who’s here?

Take 5 minutes to:
- Introduce yourself to someone you don’t know
- Describe your clients or customers
- Report out to the group

Question: Who else is here?
- student recruitment?
- alumni affairs?
- academic technologists?
- other IT staff?
- instructional support folks (library, teaching & learning, etc.)?

Question: who are your clients/customers? How many of them are there?
Customer relationship management metaphors: wheel & spokes or lifecycle -- hold these metaphors in your head as we discuss different models in University context.

With whom are we managing relationships? Who’s at the center of the wheel/cycle?

- For DCE and exec ed programs, it’s students, from prospective to alumni (?)  
- Alumni Affairs & development: alumni, development prospects  
- For ATG/ISST, it’s courses and faculty.  
- For HWP, it’s administrative customers (e.g. departments, centers)  
- For SIS, it’s stakeholders across the University
Harvard Web Publishing uses Salesforce to manage prospective “clients” -- other departments at the University who might need their fee-for-service web design & development services.

Perhaps most like the typical sales model for Salesforce.
Student Recruitment & Retention (Funnel/Lifecycle) -- Extension School, Exec Ed

Student enrollment “funnel” courtesy of our colleagues in the Harvard Extension school
- Managing student lifecycle from prospect to enrollment

Alumni & development: flip the funnel to start with graduates
- donor prospects
- event management for reunions, etc. (next slide)
Anecdote: shouldn’t have been at all surprised to see this URL pop up when I registered for my own reunion this year!

But let’s bring this back home to what we needed to figure out for our team at Harvard: faculty & course support.
Brandon
Faculty and Course Support (this is the part we know best)

- We’re good at tracking support tickets and have tools to do it:
  - break/fix
  - how do I…
  - quick turnaround, service metrics, etc.
  - transactional
  - and we had just moved to ServiceNow when we started working on this, maybe our approach would be different now

- We’re good at project management and have tools for it, and project managers to help

- But much of our work is somewhere in between:
  - semester-long consulting engagement -- we don’t want to see tickets sitting open for 3 months
  - the “client” or “customer” is really the course itself, and can involve multiple people (faculty, teaching fellows, staff) -- needed a way to connect all those activities together
  - course support is collaborative by nature -- need to be able to see what else is going on with a course
  - first metaphor was Electronic Health Records -- so all your specialists can see your test results, etc.
- How else have we tried to do this?
  - Email: massive email threads with long cc lists -- unmanageable, people get dropped
  - Collaborative tools like Google spreadsheets -- can't get a whole picture, can't see the story over time
  - Neither have ways to assign tasks and follow up action items
  - Project management tools are all about tasks and to-do lists, but assume a linear process and don't coordinate a bunch of synchronous activities around the same course/subject
How about you?

Take 5 minutes to talk to your neighbor about the tools you use to manage your clients or customers. What works? What doesn't?

Report back to the group!
Brandon

- Salesforce instance customized to incorporate course data & faculty/course relationships
- As you add people to the team, you can give them the case history more efficiently and not make the faculty member tell the story over and over

Cycle: course proposal, course development, course delivery, course evaluation
For a particular course, we can see all the activities ("cases") associated with it -- and across groups (library, academic technology, teaching & learning, writing program, etc.)
Reports -- we can report on courses or faculty we’ve been working with. Can help us target our outreach, and can help in answering the inevitable “what have you for Department X lately?” or “Which faculty have you been working with?” questions.
Coordinated course support across instructional support areas for new(ish) program in General Education -- library, academic technology, teaching & learning center, writing program, museums

attempted to “instrument” an existing process -- had been coordinated in monthly working group with a spreadsheet for tracking

What are we trying to do across groups?
- Coordinate and organize our work
  - Documentation & follow-up
  - Reporting
- Collaborate more effectively
  - one location for information, accessible to all
  - transparency
  - Shift onus of collaboration from just the “project leader” to all members of the ISST (Accountability)
- Make it [obtaining coordinated course support?] easier for faculty!
Lessons learned:

- tried to sell it as instrumenting an existing process and improving on our old Google spreadsheet -- but that didn’t really come naturally.
- As IT staff, we’re used to tracking stuff -- our colleagues in other instructional support areas, not so much
  - it’s more a cultural change than a technical one
- Not just about tracking, but also a sense of protectiveness about their work and faculty relationships
- Need complete buy-in. Going forward, the platform will only be as good as the data we put into it
What’s next?

- Focus on Academic Technology
- Events
- Reporting
- Outreach

- Return focus to supporting our own work in Academic Technology
  - and Improve our own practices for getting data in and using reports
- Event management for workshops and other stuff
- Use reporting in upward/outward communication to leadership
- Guiding our outreach to departments

Explore other areas:
- extend use as “social network” for campus-wide teaching & learning community
Questions?
Thank you!