



# Strategic Program & Digital Engagement Kickoff!

March 2nd, 2023

**Elle McKay, Senior Engagement Manager**

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She/Her

**Stephanie Rau, Engagement Delivery Manager**

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She/Her







# Thank you



# Values



The Salesforce Professional Services Team will be driven by our core company values. You will see this through:

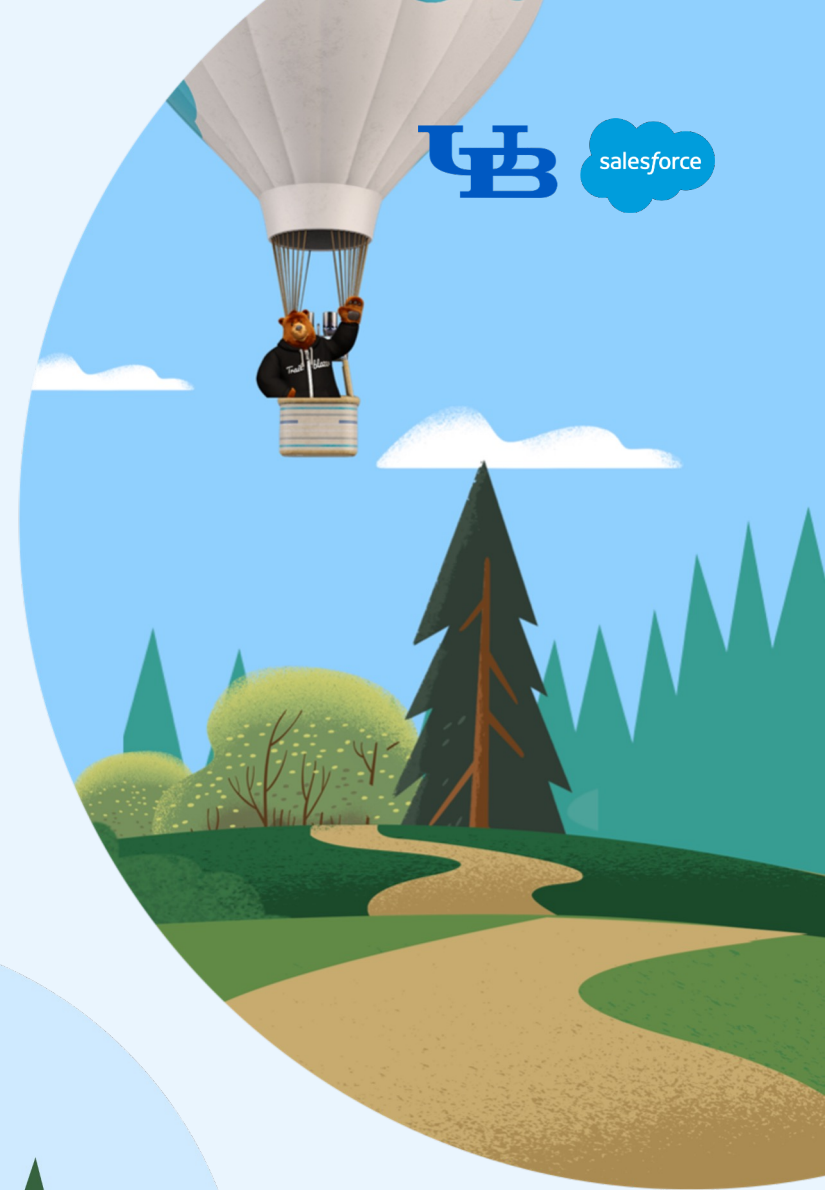
- Bold, honest, and transparent communication
- Advocating for best practices
- Creativity
- Inclusivity
- Partnership





# Agenda

- Introductions
- Background
- Scope/ Objectives
- Execution
- Conclusion
- Q&A

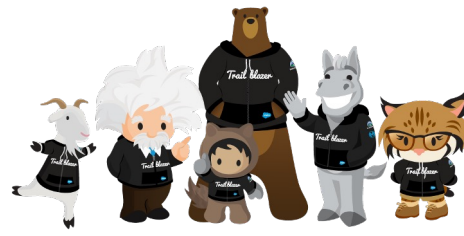




# Introduction



# Meet your Salesforce Team!



**83** Salesforce  
Certifications

**1661** Trailhead  
Badges

**8** Trailhead  
Rangers



**Elle McKay**

Sr. Engagement Manager  
*Engagement Management*



**Stephanie Rau**

Engagement Delivery Manager  
*Project Management*



**Kelly Lafferty**

Solution Architect  
*SPE Lead*



**Raghuveer Mukkamalla**

Technical Architect  
*SPE*



**Luke Ifland**

Solution Architect  
*SPE*



**Justin Piehowski**

Sr. Solution Architect  
*Marketing Cloud Lead*



**Josh Zimmerman**

Implementation Consultant  
*Marketing Cloud*



**Jerome Lodovisi**

Technical Architect, Developer  
*Marketing Cloud*



**Raj Bhatnagar**

Human Centered Change Manager  
*Change Management*

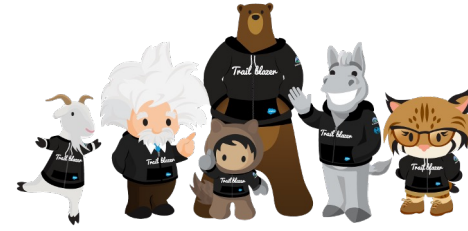


**Kelly Walsh**

Business Strategy Manager  
*Strategy*



# Meet your Salesforce Team!



**5** Trailhead Rangers



**Megan Heppner**  
Sr. Account Partner



**Parijat Sharma**  
RVP, Education Portfolio Lead



**Jonathan Zhe**  
Account Executive



**Brad Hill**  
Account Executive



**Jessica Malek**  
RVP, Sales



**Brent Wege**  
RVP, Sales



**Kelly Kitchen**  
AVP, Sales

# UB Core Team Introductions



**Vice President  
Chief Information Officer**

**Brice Bible**  
VPCIO - Executive Lead, Enterprise

**Vice President for Communications**

**John Della Contrada**  
University Communications  
Executive Lead, Marketing Cloud

**Interim Vice President for University  
Advancement**

**Jason Diffenderfer**  
UADV Administration AVP  
Executive Lead, Advancement

**Vice Provost for Institutional Analysis and  
Planning**

**Craig Abbey**  
Institutional Analysis  
Initiative Co-Lead

**Assistant Vice President**

**Kelly Kenline**  
VPCIO/ IT Portfolio Management  
Initiative Co-Lead

**Assistant Vice President**

**Kathleen Heckman**  
UADV Administration AVP  
Advancement Lead/ Product Owner

**Director of Digital Communication  
Strategy**

**Rebecca Bernstein**  
University Communications  
Marketing Cloud Lead/ Product Owner

**Assistant Director, Application  
Development**

**Rob Wright**  
Enterprise Application Services  
Data Architecture Lead

**IT Portfolio Management**

**Kathleen Murphy**  
IT Portfolio Management  
Project Co-Lead/ SPE Product Lead Backup

**IT Portfolio Management**

**Bethany Gladkowski**  
IT Portfolio Management  
Project Co-Lead/ SPE Product Lead



## Strategic Program Engagement | SPE

- The University at Buffalo and Salesforce Professional Services have committed to partnering together to leverage Salesforce technology and best practices to achieve UB's desired business outcomes.
- This Strategic Program Engagement is dedicated to **assessing current state, aligning on vision** and understanding the **desired business future state at UB.**
- **Salesforce will be developing a multi-year prioritized roadmap and a charter for future work.**



## Marketing Cloud Implementation

- The University at Buffalo and Salesforce Professional Services have committed to partnering to develop world class Marketing capabilities at UB.
- The Marketing Cloud portion of the engagement is dedicated to **assessing current state**, and **understanding the university's visions, strategy, and design** so that we can **build for a future that embraces transformative change** and which creates opportunities to **strengthen relationships with constituents**.
- **Salesforce will be standing up UB's Marketing Cloud.**

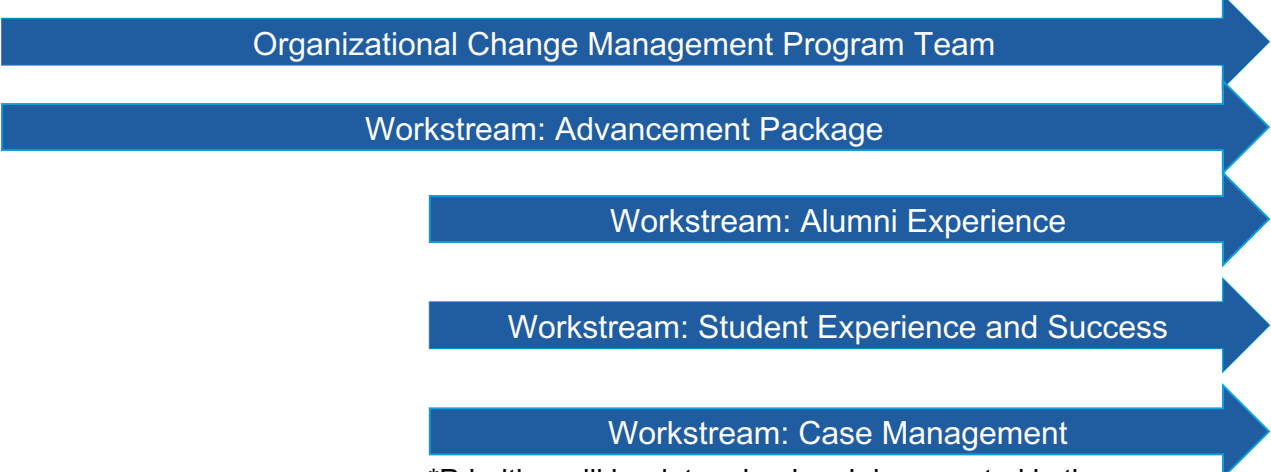


# Overall Timeline



### Enterprise Program Strategy

- Enterprise V2MOM
- Business Capabilities Map
- Current/Future State Architecture
- Enterprise ORG Strategy
- Enterprise Data and Integration Strategy
- Enterprise Phased Roadmap
- Implementation SOW (Epic Level)
- Organization Change Roadmap & Strategy



\*Priorities will be determined and documented in the Enterprise Phased Roadmap from the Enterprise Program Strategy Engagement.





# Background





# Salesforce Professional Services

## Impact and Partnerships in Higher Education

Recruiting and Admissions	Student Success	Advancement	Institutional Operations	Digital Engagement
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**Recruiting and Admissions:** NAU, Northern Arizona University, NE, WGU, UCSS, University of Colorado Colorado Springs, University of Maryland Global Campus, The University of Wisconsin Madison, Boston University.

**Student Success:** George Mason University, Western Michigan University, University of Toronto, Brigham Young University, Case Western Reserve University, Georgia Tech, Boise State, St. Edward's University, University System of Georgia, Batten, Babson, SFU, Simon Fraser University.

**Advancement:** The University of Wisconsin Madison, Stanford University, Georgetown University, CU, Penn, University of Pennsylvania, Emory University, UF, University of Florida, USC Annenberg, Indiana University Foundation, UMMA, Vanderbilt.

**Institutional Operations:** Rutgers, The State University of New Jersey, MIT, TLO, Penn State, UK, CU, Ohio State, Netec, National Emerging Special Pathogens Training and Education Center, The George Washington University, Washington, DC, University of Dayton.

**Digital Engagement:** NC State University, UN, University of North Dakota, Wharton, University of Pennsylvania, Aresty Institute of Executive Education, AU, Auburn University, USC Annenberg, WGU, NAIT, The University of Arizona, University of Maryland Global Campus, Yale.

# Enterprise Program Strategy: Strategic Planning by Professional Services



Set the right foundation to achieve long-term success with Salesforce, fast

## Align on business outcomes

Gain executive alignment early to expedite decision making

## Build a path to business value

Develop a prioritized roadmap designed to accelerate value realization

## Prepare for immediate delivery

Optimize the delivery cadence for long-term success on Salesforce & identifying areas for quick wins



Prioritized business outcomes

Actionable multi-year roadmap

Defined value metrics

Enterprise capabilities blueprint

Transformational leadership structure

# UB Guiding Principles: Work in Progress

## Transform Relationships and Management

EXAMPLE

Leverage UB constituent engagement data as a strategic community asset to create personalized, lasting relationships with constituents, peers and UB units

## Constituent Needs are

EXAMPLE

Design, decide, and act in the best interest of all UB constituents. Create useful intuitive, personalized systems. Enable processes that foster trust among data providers

## Guide Ethically with Governance

EXAMPLE

Build a resilient framework for sharing data securely, effectively and appropriately; foster interconnected systems with less duplication

## Achieve Institutional Alignment

EXAMPLE

Embrace unified data sharing. Leverage the new system to reinvent processes rather than just improve them. Prioritize standardization. Agree on **one** authoritative source for engagement data and arrive at one record of truth for each individual (Single Source of Truth)

## Deliver Impactful Insights

EXAMPLE

Empower data-based decision-making through 360\* data visibility, data analysis, and intuitive reporting methods that benefit UB as a whole

## Support UB Strategic Goals

EXAMPLE

Through people, process and technology, UB will: achieve greater societal impact locally and globally; provide students with transformative, innovative, and research-grounded educational experiences; promote a university-wide culture of equity and inclusion and deepen engagement in the regional community



# UB Operational Drivers: Work in Progress



## Make Thoughtful Progress

EXAMPLE

Plan the development roadmap inclusively and consultatively with the needs of our users balanced with evaluating ROI. Resource adequately; manage responsibility using continuous improvement

## Focus on Improvement Over Perfection

EXAMPLE

Use agile methodologies to deliver value in management pieces. Iteratively improve results as we learn from experience

## Crawl, Walk, Run

EXAMPLE

This initiative will grow in stages. Expect modest results early. Later stages will be more refined and with greater capabilities and maturity

## Training and Support

EXAMPLE

We will equip the campus with the tools, training, and help they need to use this platform at their level whether it's once a year, once a month, or every day. Enable autonomy and self-service whenever possible.

## Inclusivity

EXAMPLE

We will use technology to empower and make accessible communication at all levels of the organization

## Start Change Management from Day One

EXAMPLE

We will be uninhibited by past practices. Strive to re-imagine new business models and modes of thinking



# Project Scope & Objectives



# Project Scope/ Objectives

## Strategic Planning Engagement (SPE)

- Discovery Sessions
- Current State Definition
- Future State Architectural Vision
- Enterprise Data Integration Strategy
- Business Capabilities Map
- Strategic Roadmap
- Change Management
- V2MOM

## Marketing Cloud (MC)

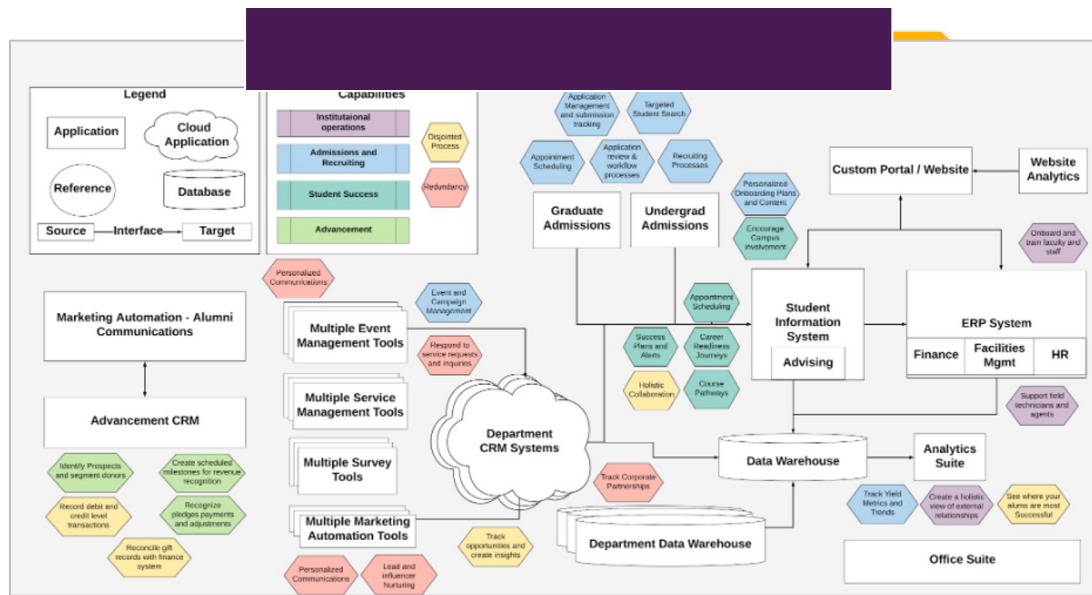
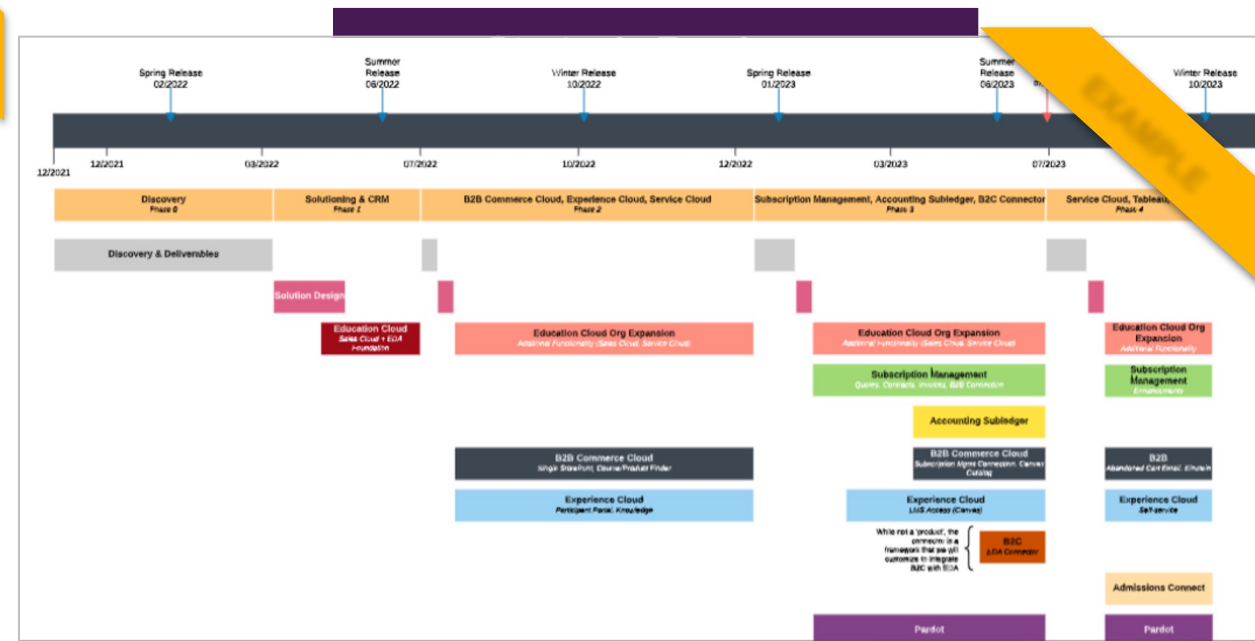
- Design Architecture
- Operating Model
- Stand up Marketing Cloud Instance
- IP Warming
- Email Campaigns
- Integrations
- Go-Live



# Examples of Deliverables Include & Are Not Limited To....



Find & Engage	Review and Approve	Onboard	Streamline Services	Prep for Post Grad Success	Fundraise and Engage
<b>Recruitment and Admissions</b>		<b>Student Success</b>			<b>Advancement</b>
Targeted Search Strategy (H)	Application Submission (H)	Student Success Team Collaboration (M)	Student Communities (M)	Career Readiness Journeys (M)	Identify Prospects (H)
Personalized Communications (H)	Application Review Processes (H)	Personalized Onboarding Content (H)	Case Management (H)	Track Corporate Partnerships (H)	Segment Donors (H)
Custom Journeys (M)	Social Listening and Engagement (M)	Program Management (H)	Consistent Support Experience (H)	Track Alumni Success (H)	Streamline Solicitations (M)
Event Management (M)	Applicant and Institution Collaboration (H)	Course Management (H)	Appointment Scheduling (H)	Assess Career Focus (M)	Reconcile Gift Records with Finance (H)
Campaign Management (M)	Yield Metrics and Trends Tracking (H)	Contact Management (H)	Alerts and Success Plans (H)		Record debit and credit level transactions (H)
Influencer Nurturing (L)	Appointment Scheduling (H)	Onboarding Journeys (M)	Support Team Collaboration (H)		Online Giving Portals (M)
Predictive Lead Scoring (L)	Data Driven Alerts (M)		Course Pathways (H)		Recognize payments, pledges and adjustments (H)
			Campus Involvement Initiatives (L)		Create Scheduled Milestones for Revenue Recognition (M)
<b>InstitUBional Operations</b>					
Operational Reporting and Dashboards (H)	Central Marketing and Social Media Management (M)	Staff Collaboration (M)	Staff Onboarding (H)	Security (H)	Data Integration (H)
Analytics and Insights (H)	GDPR Compliance (M)	Governance, Data Quality and Change Management (H)	Internal Service Requests and Inquiries (H)	Corporate Relationships (M)	Philanthropy opportunities for employees (L)



# Change Management



Change Management will work with stakeholders to understand the UB Landscape Diagnostic

Landscape Diagnostic will be comprised of the following actions and deliverables:

- **Interviews** to learn about UB
- **Workshops** to understand areas of optimization
- **Readout** with recommendations



# The V2MOM Drives Alignment



**What do we want to do?**



**What's important to us?**



**How will we do it?**

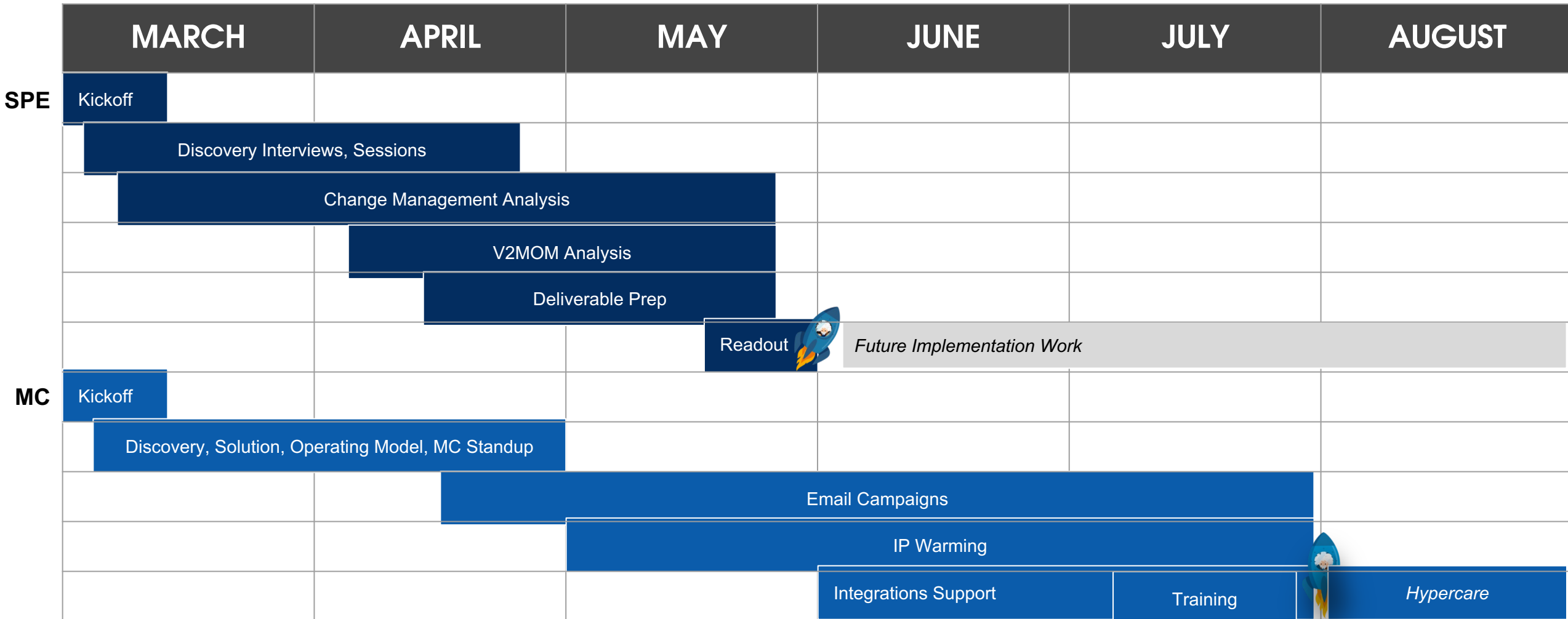


**What could get in our way?**



**How will we know if we are successful?**

# Timeline







# Execution



# Executing Phase 1A (SPE, MC)



1

## PLAN

- Identify & confirm **Buffalo & Salesforce resources**
- Confirm timeline, and roadmap

2

## PARTNER

- Align on long-term **program goals & objectives**

3

## DISCOVER

- Conduct Buffalo **internal interviews**
- Document discovery

4

## ANALYZE

- Complete high level **foundational collateral** in collaboration with UB team

5

## REVIEW

- **Read out** of findings
- **Iterate** on any changes

6

## ACTION

- **Provide** Strategic Planning Engagement deliverables
- Deliver **SOW** for next phase



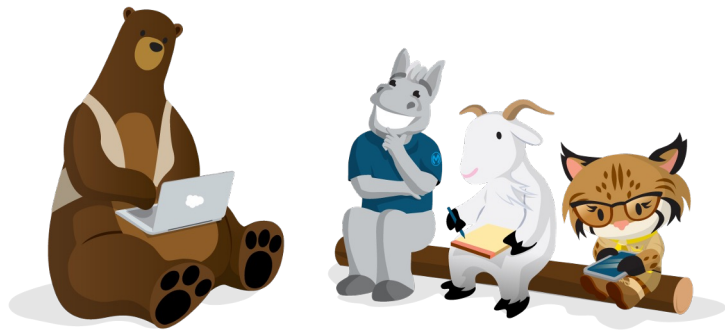
# Discovery Interviews, Sessions



UB & Salesforce will partner in Discovery Interviews, Discovery Sessions and Deep Dives to ascertain UB's current state and desired future state.

## How Sessions Will Start

- Discovery Interviews and Discovery Sessions by design start very broad and become more detailed as we go



## How You Can Help

- **Be engaged:** ask questions, provide feedback, and approve work
- **Connect** us with the right groups (SMEs, Testers, Trainees)
- Help **support** the build (MC only)
- Proactively **communicate** any outages (holidays, personal leave, training) that may impact the project timeline
- Be **available** for clarifications following any discovery sessions



# Product Lead



Product Leads connect the right stakeholders/business units to the project at the right time.

## UB Product Leads

### Marketing Cloud

- Rebecca Bernstein
- Jessica Kane

### Strategic Planning Engagement

- Bethany Gladkowski
- Kathleen Murphy

## Role of Product Lead

- Understand the UB departments & appropriate representatives
- Help create & maintain a clear project vision
- Prioritize effectively
- Collaborate with the Salesforce team and business units as the main point of contact
- Continuously learn & improve project practices



# Conclusion



# Conclusion

UB and Salesforce are partnering to understand the current UB CRM landscape and learn about Salesforce capabilities



## Objectives

*SPE: Develop a multi-year prioritized roadmap*

*MC: Stand up Marketing Cloud*

## Next Steps

*Conduct a series of discovery sessions to understand current landscape & begin designing the desired future state*



Q&A







# Thank you

