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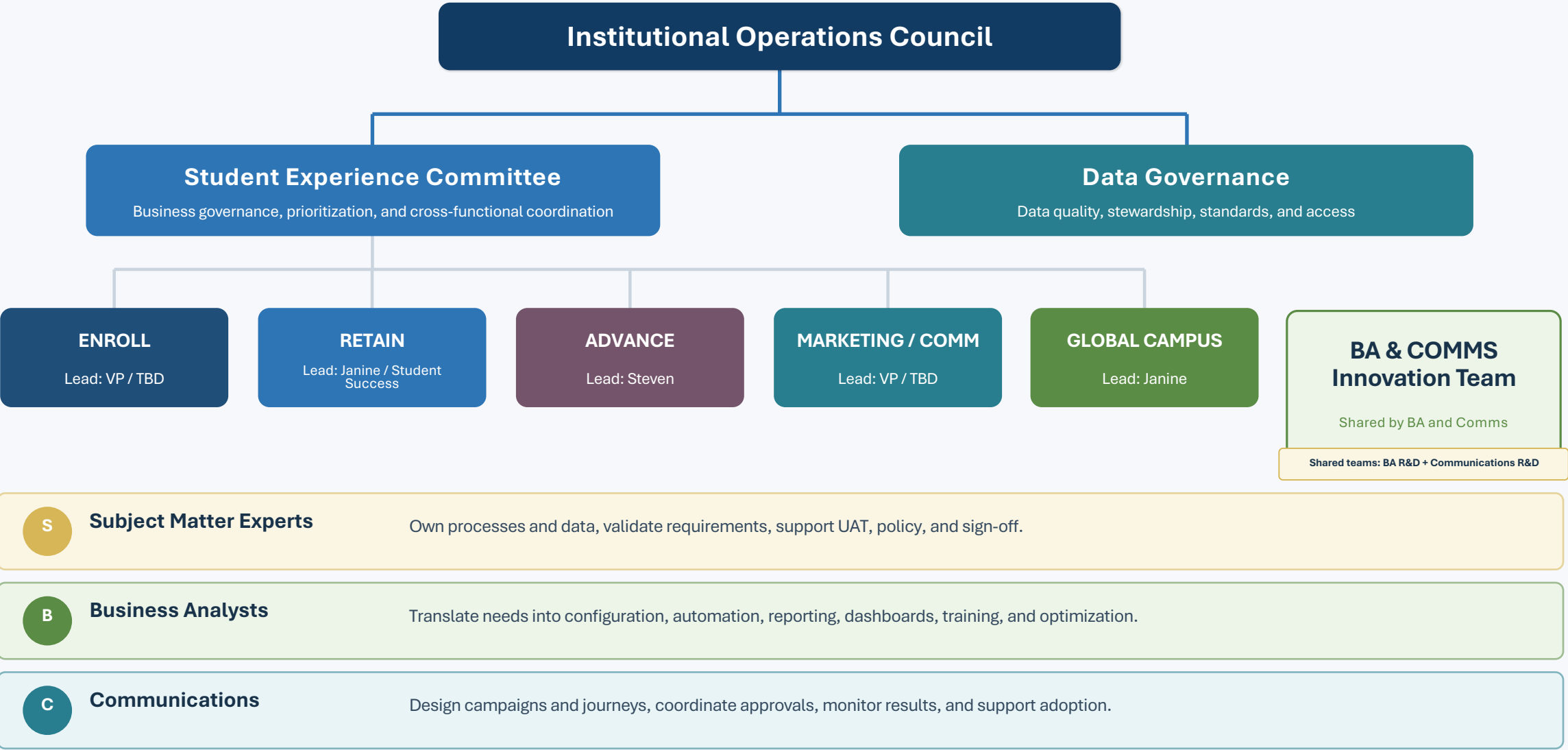
CRM Governance

Governance, Responsibilities, Tasks,
Support & Training



CRM Governance Structure

A simplified view of strategic oversight, operational ownership, and shared enabling teams



Operational Alignment by Workgroup

Named resources and functional coverage from the current governance draft

ENROLL	RETAIN	ADVANCE	MARKETING / COMM	GLOBAL CAMPUS
Lead: VP / TBD	Lead: Janine / Student Success	Lead: Steven	Lead: VP / TBD	Lead: Janine
SUBJECT MATTER EXPERTS	SUBJECT MATTER EXPERTS	SUBJECT MATTER EXPERTS	SUBJECT MATTER EXPERTS	SUBJECT MATTER EXPERTS
GR	Student Success	Alumni	UC & Web Services	DLIT
UG	Precollege	Development		Online Student Services
Colleges: CHHS & CoP	Records	Planned Giving		Promote
Global Campus	Student Onboarding	Events		ISS
Student Onboarding (First Stop)	Global Campus	HPAC		
BUSINESS ANALYST	BUSINESS ANALYST	BUSINESS ANALYST	BUSINESS ANALYST	BUSINESS ANALYST
Abel	Sam V.	Hayden	Pablo	Amy S. (LMS integration)
COMMUNICATIONS	COMMUNICATIONS	COMMUNICATIONS	COMMUNICATIONS	COMMUNICATIONS
Enroll: Regina, Abel & Linette SFS: Fares CoP: Marlana CHHS: Abel Global Campus: Lileen & Glynis ISS: Lileen	Retain: Aimee SFS: Fares CoP: Marlana CHHS: Abel Global Campus: Lileen & Glynis ISS: Lileen	Maxine	UC: University Communications Enroll: Regina / Linette / Abel	Global Campus: Lileen & Glynis

Terms of Reference

- CRM Enrollment Workgroup
- CRM Communication Workgroup
- CRM BA Workgroup

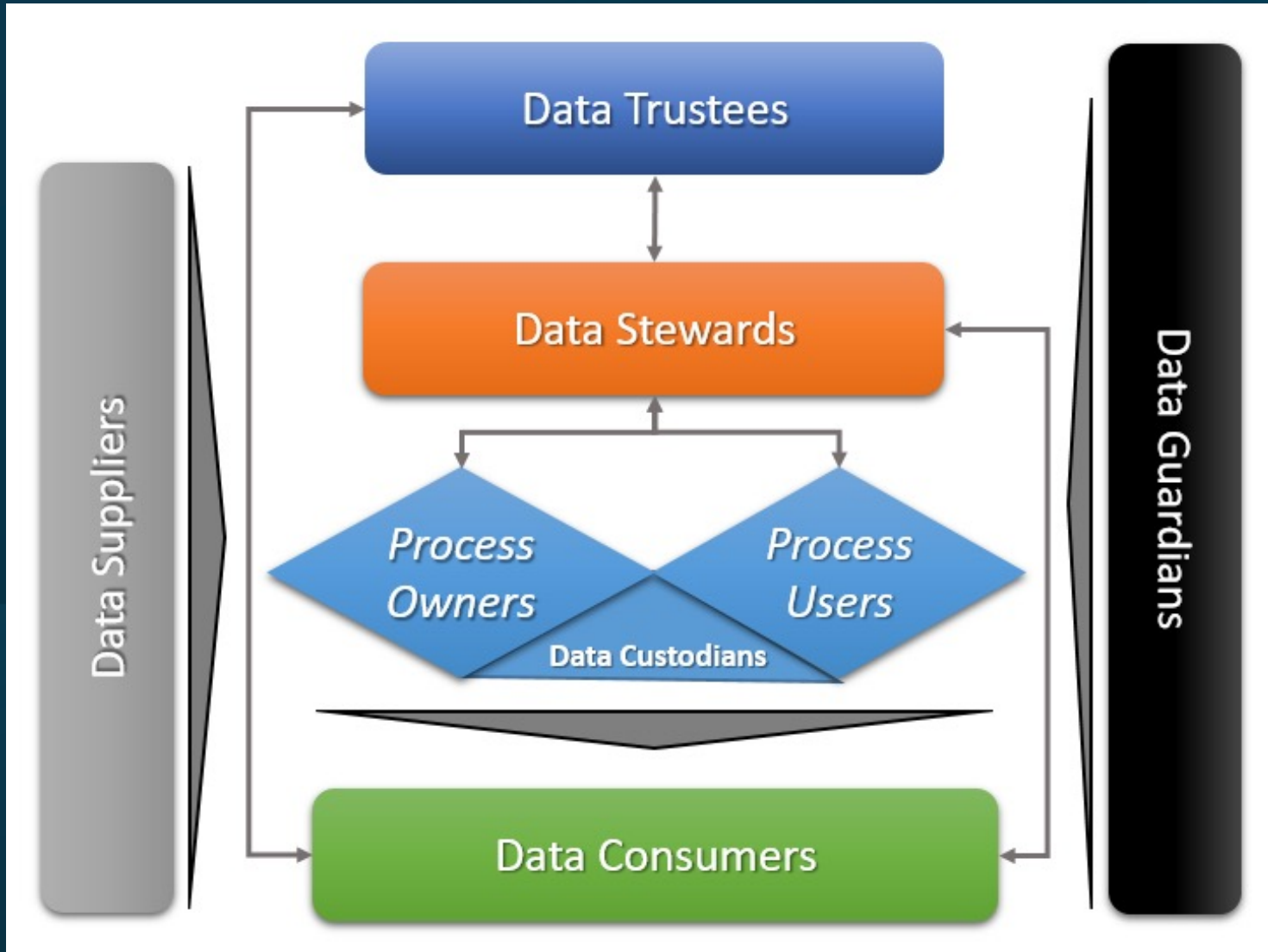


Data Governance

- Agenda Items
- Data Quality



Data Governance Roles



Data Governance Roles at a Glance

Role	Responsibility
Data Trustees	Unit leaders accountable for data
Data Stewards	Content experts over a data domain
Data Custodians	Process Owners & Process Users
Data Suppliers	Systems, customers, processes creating data
Data Consumers	Anyone informed by the data
Data Guardians	ITS, systems & infrastructure



Participation: Trustees & Stewards

❖ Trustees

- ❖ route data issues to the responsible entity
- ❖ seek input as policy is crafted so structure supports policy

❖ Stewards

- ❖ serve on relevant committees
- ❖ apply data life cycle best practices (definitions, quality)
- ❖ report issues and drive resolution
- ❖ actively bridging the gap between silos (collaboration)
- ❖ train Custodians and ensure the right data access



Participation: Custodians, Consumers, Suppliers, Guardians

- ❖ Custodians: Process Owners keep day-to-day processes aligned to data goals; Process Users create conforming data; both join workgroups as needed.
- ❖ Consumers: understand definitions; flag and help solve issues.
- ❖ Suppliers: customer data accurate and timely; vendor data standardized and importable.
- ❖ Guardians (IT): identify issues, enforce governance authority, share system knowledge, provide the enterprise view, join workgroups.



Data Steward: Responsibilities & Skills

- ❖ Responsibilities — definitions & policy aligned to industry standards
- ❖ Responsibilities — access roles and awareness of Process Owners
- ❖ Responsibilities — quality of the data set university-wide; Custodian training
- ❖ Responsibilities — collaboration with other Stewards and Guardians
- ❖ Skills — policy implementation; process definition & change management
- ❖ Skills — problem solving; communication; human resource management



Workgroup Agenda Items

- CRM Enrollment Workgroup
- CRM Communication Workgroup
- CRM BA Workgroup



Enrollment Workgroup Agenda Items

- Education History – "Visiting" Terminology
- Academic Interest – "My Ed Objective" Wording
- Grad Type Selection – Logic Refinements
- Application Type Selection – Wording Clarity
- Supplemental Items Matching – Fall 2026 Graduate Admits
- Train Frontline Workers on Application Login/Profile Issues
- Training/Access Gap – Academics Want Visibility into Inquiry-Stage Students



Enrollment Workgroup Agenda Items

- No In-System Way to Ask a Question
- Test Scores – Official vs. Unofficial Display & Workflow
- Transferring Credits – Logic Incomplete
- Academic Interest Search Only Matches First Word
- Supplemental Items Connected to Multiple Applicants
- Investigate UG Online Students Not Receiving Emails
- Final Reviewer Portal – Advisor Name Field



Enrollment Workgroup

Agenda Items

- Admission Decision – Student Type Showing F Instead of G
- Rush Admits – 44 Students with Wrong Decision Code (CO vs. PV)
- Review Journey Stats Together (incl. Contact Us – Stage 1 at 0 completions)
- References – Rating Scale & Required Fields
- Graduate Acceptance Letter Process – New Process from Grad Dean
- Undergraduate Acceptance Letter Process – Needs Definition
- Automate Graduate & Undergraduate Acceptance Letters



Communication Workgroup

Agenda Items

- SMS Tool Is Not Working — **Critical**
- No Personal/Human Touch in the Applicant Journey — **Normal**
- Build/Review Communication for "Under Review" Stage — **High**
- Build Communication Journeys – Acceptance to Enrolled — **High**
- Automate Graduate Acceptance Letters — **High**
- Automate Undergraduate Acceptance Letters — **High**
- Graduate Acceptance Letter Process — New Process Proposal (content approval) — **High**



Communication Workgroup

Agenda Items

- Undergraduate Acceptance Letter Process — Needs Definition (content approval) — **High**
- Review Journey Stats Together — **High**
- False-Positive "Missing Items" Emails — **High**
- Investigate UG Online Students Not Receiving Emails — **High**
- Personalization Not Exactly the Same (Template Editor vs. Test Send) — **High**
- Clone, Share, and Other Commands Not Visible — **High**
- No Academic Advisor Info for Admitted/Applicant Students — **High**



BA Workgroup Agenda Items

- Review Volunteer greymatter Access — **Medium**
- Email + Training to Departments – Reviewer Login & PowerBI Access — **High**



Support Model

- **User Support Tiers**
- **Support Tickets vs Project/Tasks**



User Support Tiers

We are supporting a 3-tiered model

- Issues – open a ticket with Andrews HelpDesk and they will triage as needed (level 1)
- Escalated as needed to BA's or ITS (level 2).
- If Greymatter issue, will be escalated to Frequency Foundry for resolution (level 3).

All tickets in AU FreshWorks will be updated as issues are resolved no matter what the level.



User Support Tiers

Tier 1

ITS Help Desk

- Access requests
- Licensing requests
- Basic navigation and user assistance
- Password and authentication issues
- Initial issue intake and triage
- General user support and routing



Tier 2

ITS Applications Team

Focus: Technical administration and platform support

Business Analyst (BA) Team

Focus: Solution design, optimization, reporting, and business enablement

Subject Matter Experts (SMEs)

Focus: Business ownership and governance



Tier 3

Foundry Support



Support Tickets vs Projects/Tasks

Support Tickets are issues that can be resolved in less than 40 hours (1 week)

Projects/Tasks are issues that require more planning or effort than 40 hours. Will have formal approval/project plan.



Training / Education

- **Data**
- **Product**



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