



GEORGE MASON GRADUATE PROGRAMS TARGETX CRM IMPLEMENTATION KICKOFF MEETING

December 15, 2017

DRAFT – for discussion purposes only

WHO ARE WE?



Mickey Baines

Principal, Kennedy & Co.

- Consulting since 2010
- In higher ed since 1998
- Fifth TargetX implementation in two years



Lauren Arimoto

Manager, Kennedy & Co.

- Consulting since 2012
- In higher ed since 2010
- Fourth TargetX implementation in two years



Len Lipkin

Technology Director,
Kennedy & Co.

- Three years with Ellucian
- Began career in higher ed in 1995
- Six years as a TargetX CRM Admin

K&Co. WORKING WITH TARGETX



The Kennedy & Company team will lead the implementation efforts and will be the primary point of contact for all Mason staff throughout the process.



Kennedy & Company will work with the TargetX team on development and configuration items that must occur 'behind the scenes' in order for the CRM to be implemented properly.

TARGETX SOLUTIONS PURCHASED

TargetX offers a number of different services and solutions but the ones that we are focused on implementing during this project include:



PROSPECT

- Prospect Automation
- Events Management
- Territory and Travel Management
- Integrated Campaigns and Reporting

APPLICATION

- Salesforce Native
- Responsive Design
- Formbuilder
- Guided Student Interface
- Self-Service Customization

DECISION

- Web-based Reader
- Academic Scorecard
- Application Annotation

YIELD

- Build Community
- Connect to a College
- Rank Probability
- Targeted Personalized Messaging

PORTAL

- Customize content for students post-application
- Improve onboarding process

IMPLEMENTATION TEAM ROLES PROVIDED BY MASON

Vision/Strategy Group

Charged with making recommendations to Project Sponsors regarding key direction for the CRM design – including which functions should be included and a timeline for adoption.

LEADERSHIP

- Amy Takayama-Perez, Admissions
- Cody Edwards, Provost Office

MEMBERS

- Tom Shiflett, ITS
- Marilyn Smith, ITS
- David Burge, EM
- Matt Boyce, EM
- Caitlin Shear, IEM
- Rob Pegues, Admissions
- Stephen Nash, VSE
- Julie Shedd, SCAR
- Diane Vermaaten, BUS
- Amanda Stokes, CHHS, OGAL
- Melissa Hayes, COS, OGAL

Project Manager

- Derek Kan, ITS

Administrative Support

- Jen Kasse-Wanzer

Internal Communication Team

Responsible for designing communication streams to both inform and engage the university community on the CRM design project.

LEADERSHIP

- Caitlin Sheer, EM
- Crystal Hall Brett, Admissions Operations

MEMBERS

- Shukri Abdi, Admissions Tech
- Laura Powers, CHSS, GRAC
- Stephanie Hinnenkamp CHSS, OGAL
- Suddaf Ismail VSE, OGAL

Project Manager

- Derek Kan, ITS

Administrative Support

- Erika Schaefer

System Execution Team

Responsible for all areas related to the implementation of the CRM and have ultimate accountability for meeting deadlines associated with the launch of the CRM.

LEADERSHIP

- Matt Boyce, EM
- Andrew Bunting, Admissions Operations

MEMBERS

- Rob Pegues, Admissions Tech Director
- Kathy Adcock, ITS
- Tom Shiflett, ITS
- Kathy Zimmerman, EM
- Jade Perez, EM
- Richard Houston, SF Admin, Business
- Shukri Abdi, Admissions Tech
- Purshara Gray, Admissions
- Chris Ummen, Admissions Tech
- Crystal Hall Brett, Admissions Operations
- Nicole Mariam CEHD, OGAL
- Stevie Otto CVPA, OGAL

Project Manager

- Derek Kan, ITS

Administrative Support

- Whitney Sublett/Erika Schaefer

THE IMPLEMENTATION PROCESS

- *What are our roles in the implementation process? What are your roles?*
- *How work is completed; level of weekly communication*
- *The role of open, direct communication*
- *Kumbaya moments*
- *Consensus, compromise, limitations*
- *When does the implementation end?*

HIGH-LEVEL COMPONENTS OF IMPLEMENTATION PROCESS

- **Discussions** about business processes as they relate to specific components of the CRM implementation to prepare for the implementation of each
- **Workbooks/worksheets** to collect and confirm data elements necessary to complete each component of the CRM
- **Working sessions** (both virtual and in-person) with members of the K&Co. team where we will provide a hands-on overview of the functionality of each functional component of the CRM
 - Utilizing *real* Mason examples and building in real time
- **Collaborative builds** (for events, fields, forms, etc.) with members of the Mason and K&Co. teams working together build foundational elements in each module
- **Assignments** to various components of the Mason implementation team to complete remaining elements (forms, events, communications, etc.) required for go-live
 - K&Co. will manage and share a running task list with a Mason 'owner' and K&Co./TargetX 'owner' to provide support and monitor accountability
 - Ongoing assistance from K&Co. as needed to accomplish these tasks
- Customized End-user **training sessions** hosted by K&Co. to ensure successful adoption of the tool

FOUNDATIONAL DISCUSSION
TOPICS & QUESTIONS

ANTICIPATED TIMELINE

	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
System & Project Team Readiness Tasks	■								
Official Project Launch		■							
User Setup & Configuration		■							
CRM Administration Tasks		■	■						
Understanding and Creating Workflows		■	■	■	■	■			
Building Events		■	■	■	■	■			
Building Forms		■	■	■	■	■			
Understanding and Creating Reports & Dashboards			■	■	■	■	■		
Communications (Email, SMS, Snail Mail)			■	■	■	■	■		
Building Group Assignments			■	■	■				
Build and Test Application and Decision Module			■	■	■	■	■	■	
Building Application Requirements & Applicant Dashboard				■	■				
Prospect Scoring					■				
Portal Configuration						■	■	■	
End-user & Administrator Training Sessions								■	
Project Wrap-up and Transition to Support									■

PROJECT MILESTONE DATES

- September 10, 2018: Fall 2019 Applications go live
- August 15, 2018: Spring 2019 Applications go live
- August 1, 2018: CRM ready to turnover to the Mason team.
- July 15, 2018: All application and decision builds complete, application testing underway
- June 30: Communication Plans Complete
- June 15: Portal content finalized
- May 31: Core CRM functionality/modules complete
- Week of February 19: Application & Decision Discovery and Build Process Begins
- January 9 & 10: Discovery kick-off

IMMEDIATE NEXT STEPS

- Mason to complete Business Process Readiness Tasks
- On-site Discovery Meeting Tuesday and Wednesday, January 9th and 10th
- Kennedy & Co., TargetX, and Mason to ensure all installs are ready and users are set up in preparation for On-site Discovery Meeting in January

KENNEDY & COMPANY