



LRM for Corporate & External Relations (LRM-CER)

LRM Project Portfolio

- History & Governance
- WSB LRM Projects
 - LRM for Leads and Admissions
 - **LRM CER for Corporate and External Relations and Alumni engagements**
- LRM CER team
 - Adoption specialists (Jane, Dean, Steve and Nick)
 - Representatives from centers and programs
 - Developers including DoIT developers

Why LRM-CER?

Objective: To track all external engagement activities in LRM to improve awareness, decision making, and collaboration to harvest those benefits:

- Streamlined communications
- Internal Coordination and efficiency
- Deeper and wider engagement with an external partner
- Better reporting
- Better student placement
- Gauge employer interest in hiring regarding specializations

UW-Madison Data Eco-System



WSB needs to capture WSB's external relationship data entered into the eco-system

LRM-CER: Steering Committee Mandate

Phase 1

GROW CER USERS

October 2017

- SC Members to assist in notifying their constituents of this mandate
- Establish operational protocols to distinguish use of BuckyNet vs LRM
- Validate information sources and types of information.

Phase 2

ROLLOUT TO ALL WSB

October/November 2017

- Train LRM Users
- Add Board of Directors for each Center (identify LTE resource(s) for entry)
- Rollout to Programs as Operational Schedules allow
- Leverage Support Model Levels to identify and develop enhancements
- Train/rollout to new users without changing current CER functionality (grow usage)

Phase 3

INTERFACE TO CAMPUS

- Identify shared processes and data
- Link to BuckyNet
- Link to ABE
- Other new systems providing value

LRM CER: Project Team Activities

- Offered personalized learning for the end users (100 users)
- Expanded the LRM Knowledge Base
- WSB Helpdesk Portal
- Bi-weekly project team meetings to socialize data mapping ideas and solve problems

LRM CER: the Process



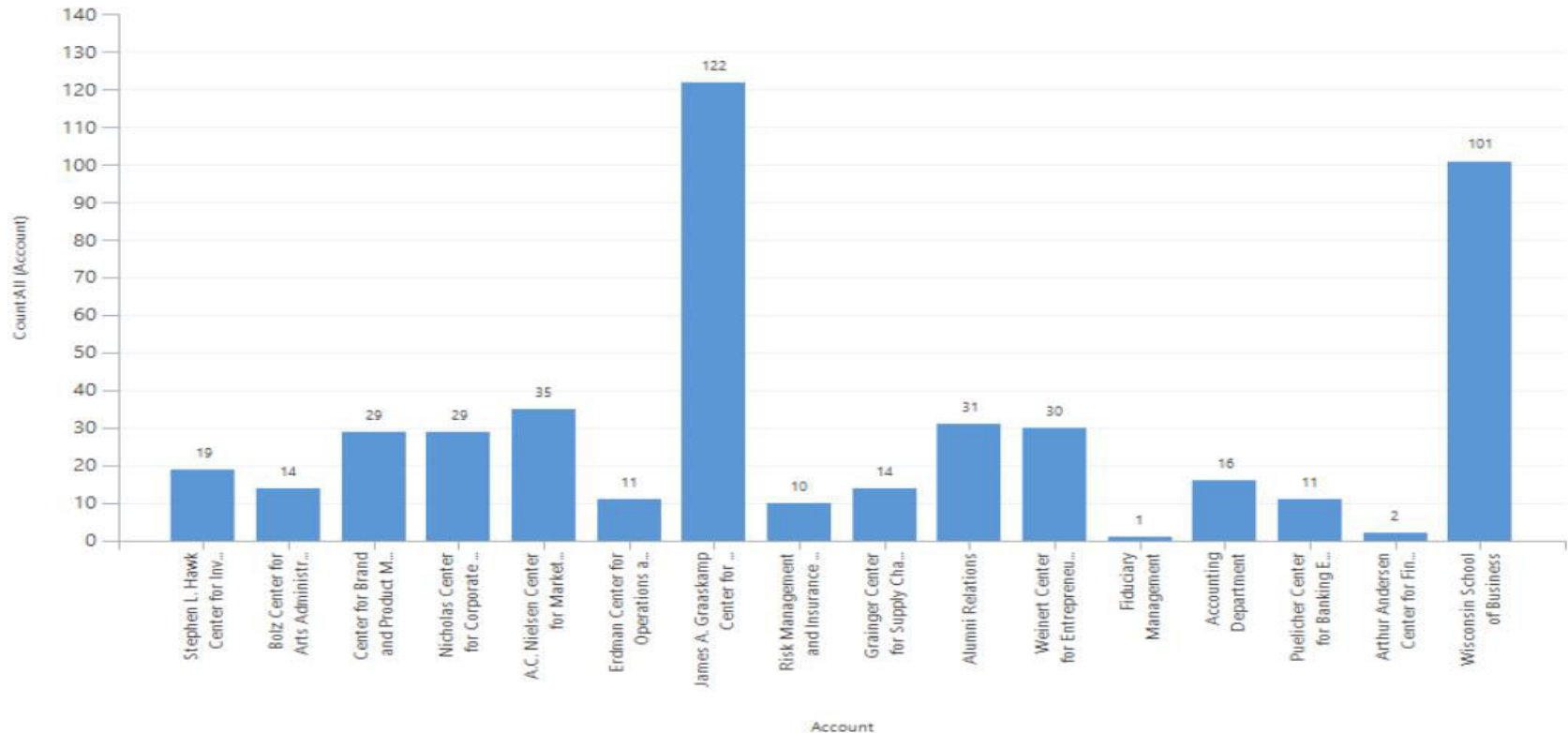
LRM-CER: Relationship Activities

- Regular activities
 - Phone calls
 - Emails
 - Appointments
 - Meetings

- WSB facilitated events
 - Mock interview
 - Case competition
 - Event
 - Mentor program
 - Site visit
 - Speaking engagement or Panel
 - Applied Learning

LRM CER: Reporting

WSB Advisory Board Members



- Native LRM (CRM) Reports with dashboards, queries, and charts
- LRM Customized Reports with SRSS Report

LRM CER: Project Milestones

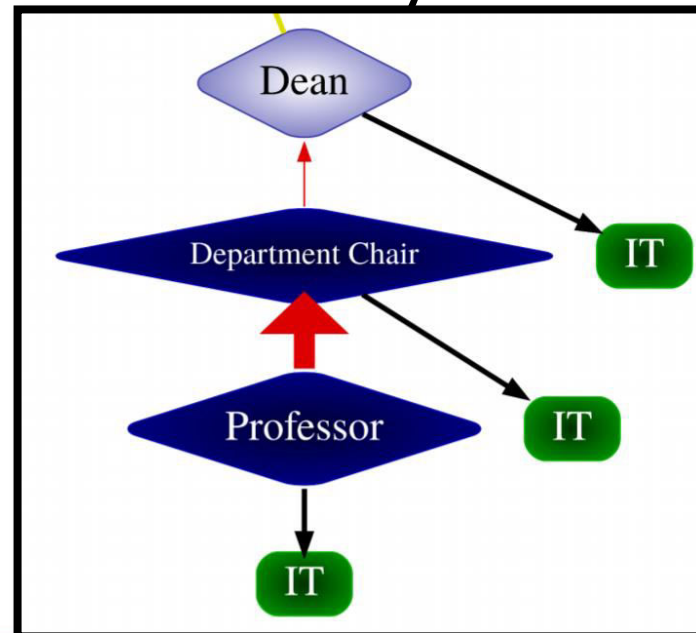
- **Dozens** of tracking functionalities (customized)
- **100** users are enabled for LRM
- **475** Advisory Board Members are in
- **1** solid support team and process

LRM CER: Why the Pause???

- WSB School Leadership Change (Unexpected)
- Gauge LRM CER Stakeholders attitude in one big meeting:
 - Competing/Complementing systems
 - Duplicate data entry
- System integration and data governance policies, and the system of the master records
 - LRM
 - ABE
 - Handshake

LRM CER: Together Forward!

- Published talking points on the intranet
- Authored a knowledge base article to address key data mapping questions
- Focused on classroom engagement activities
- Built relationships with faculty for a school wide adoption



LRM CER: Data Handling SOP for Faculty

Engagement Datapoints

+		
First name	Y	Note
Last name	Y	
Email address	Y	
Employer	Y	<ul style="list-style-type: none"> • Company name • Industry • Account type
State		
City		
WSB hosting business unit	Y	<ul style="list-style-type: none"> • BBA career advising • Accounting department • Grasskemp center • ...
The relationship between the host unit and employer	Y	<ul style="list-style-type: none"> • Advisory board • Employer • Talent development
Relationship status	Y	<ul style="list-style-type: none"> • Current • Prospective • Targeted
Activity type	Y	<ul style="list-style-type: none"> • Case Competition • Event • Speaking Engagement • Mentor Program • Site Visit • Global Trip
Activity subject	Y	
Activity description	Y	
Activity scheduled date		
Activity actual date		
Instructor Name	Y	
Activities Note		

LRM CER Project: What's Next?

- Had a kick off meeting with key stakeholders from Alumni relations and centers to
 - understand data governance best practices and policies
 - **Reduce major excel files with LRM reports**
 - **Focus on classroom experience enhancing external engagements**
- Continue to engage new key users with 1X1 learning session(s)
- Continue to gain school leadership support
 - Dean's Support
 - Associate Dean's Support

LRM CER: Working with Campus Partners

- Dynamics 365 for Outlook
 - Currently exploring options and set up with DoIT
 - Installation
 - Training
- Campus Ecosystem Integration
 - Employer Data in Handshake: still in implementation phase, to be explored
 - Alumni Tracking in ABE – no integration is possible due to privacy policies

LRM CER: Summary

- Our story
 - Challenges
 - How did we address those challenges
 - Lessons learned
 - Where we are now
 - What is next?
- Your suggestions and questions?



Questions