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
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

1. Identify Prospective Companies or Organizations
2. Add to WSB’s Targeted List
3. Define Relationships and Contacts
4. Engage with Regular Activities or Engagement Activities
5. Assess Outcomes from the Activities Log
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

- 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
## Engagement Data Points

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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?