

Strategic Technology Enhancement

Building Roadmaps and
Managing CRM Priorities





KindCon²⁰²⁵



Rowena
Montoya

Director, Central Development
Services | University of California,
San Francisco



Samantha
Schwind, MAS

Associate Director of Solution
Innovation | Colorado State University

Checking In!

Which CRM do you use?

Where are you at in the CRM implementation process?

Do you have an established enhancement request protocol?

Do you have an established roadmap / implementation strategy?

Agenda

CSU's Enhancement Request Process **01**

UCSF's Enhancement Roadmap **02**

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CSU's Enhancement Request Process





We strive to provide
folks what they **need**
to do their best work in
a **sustainable** and
equitable way.



CSU / UA / ITEA Background

Colorado State University (CSU)

- Land Grant Institution est. 1870
- Public Tier 1 Research University
- ~35k current students
- ~270k living alumni
- Sustainable Campus: 2nd highest in US, 3rd in world
- Top 3 Veterinary School

University Advancement (UA)

- Record-breaking >\$231M in FY25!
- Separate from CSU Foundation
- ~150 staff, including ~60 frontline fundraisers
- Includes our Alumni Association

Innovation Technology, Education & Analytics (ITEA)

- Managing Director reports to Exec Director of Advancement Services; embedded in UA (not CSU Central)
- 2-person traditional IT team
- 2-person Analytics team (separate from 4-person Prospect Management & Research team)
- 6-person Solution Innovation team, including Product Manager, SF Admin, SF Developer, Trainer, Programmer, Business Process Analyst

CRM Background

UA's Salesforce & ascend Timeline

- Implementation: Oct '22 – Apr '24
 - Salesforce
 - ascend
 - Blackthorn Events
 - SF Marketing Cloud
 - Conga
 - GiveCampus
 - Givzey
- ~200 users (~40 non-Advancement Campus Partners)
- Now in a post-stabilization phase

Technical Leadership Council (TLC)

- 4 ITEA team members, including Product Manager, SF Admin, SF Developer, and Managing Director
- Initial review / triage of all requests
- Create Work Items in SF Agile Accelerator to document specs, process, decisions
- Final authority on feasibility and timeline of implementations

Enhancement Request Committee (ERC)

- TLC + 12 representatives from Operations, Engagement, and Development units
- ERC Reps “champion” requests from their area
- Authority to give opinions / make decisions for their area
- Communication conduits with units

People

Can we provide training or resources?

What do we actually **need** to work successfully?

Start Here!

Process

What is the current process or workaround?

Can we do it differently?
Is there a better approach?

Maybe it needs more...

Product*

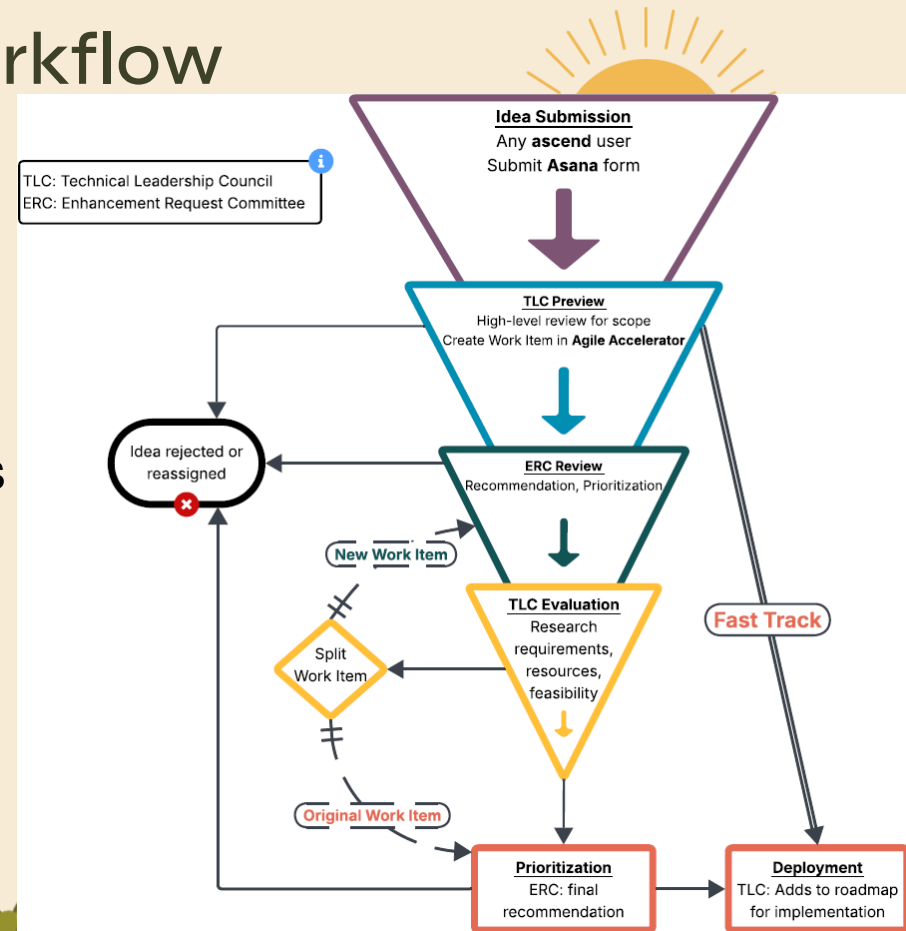
How can we implement this efficiently with minimal increase to our tech debt?

Last resort

*adapted from Prosci's PPT (People Process Technology) Framework

Enhancement Request Workflow

1. Anyone can submit an idea!
2. TLC reviews
3. ERC reviews & prioritizes
4. TLC researches
5. ERC provides final recommendations
6. TLC adds to roadmap & implements



Exceptions to the ERC Workflow

ERC workflow is specific to enhancement requests and does NOT apply to:

- ✓ Routine upgrades (Salesforce, ascend, Blackthorn Events, etc)
- ✓ Traditional SF Admin duties (e.g. picklist options, page layouts)
- ✓ Bug fixes – particularly show-stoppers (e.g. field calculating incorrectly)
- ✓ Requests for SF Lightning reports / dashboards
- ✓ Analytics Team requests (e.g. CRM Analytics dashboards)
- ✓ Fast track (X-small effort, low-risk, uncontested tasks)
- ✓ Ideas not compatible with SF structure and/or organizational priorities (e.g. adding veterinary clients' pets as Constituents in ascend)

Key Elements for Transparency

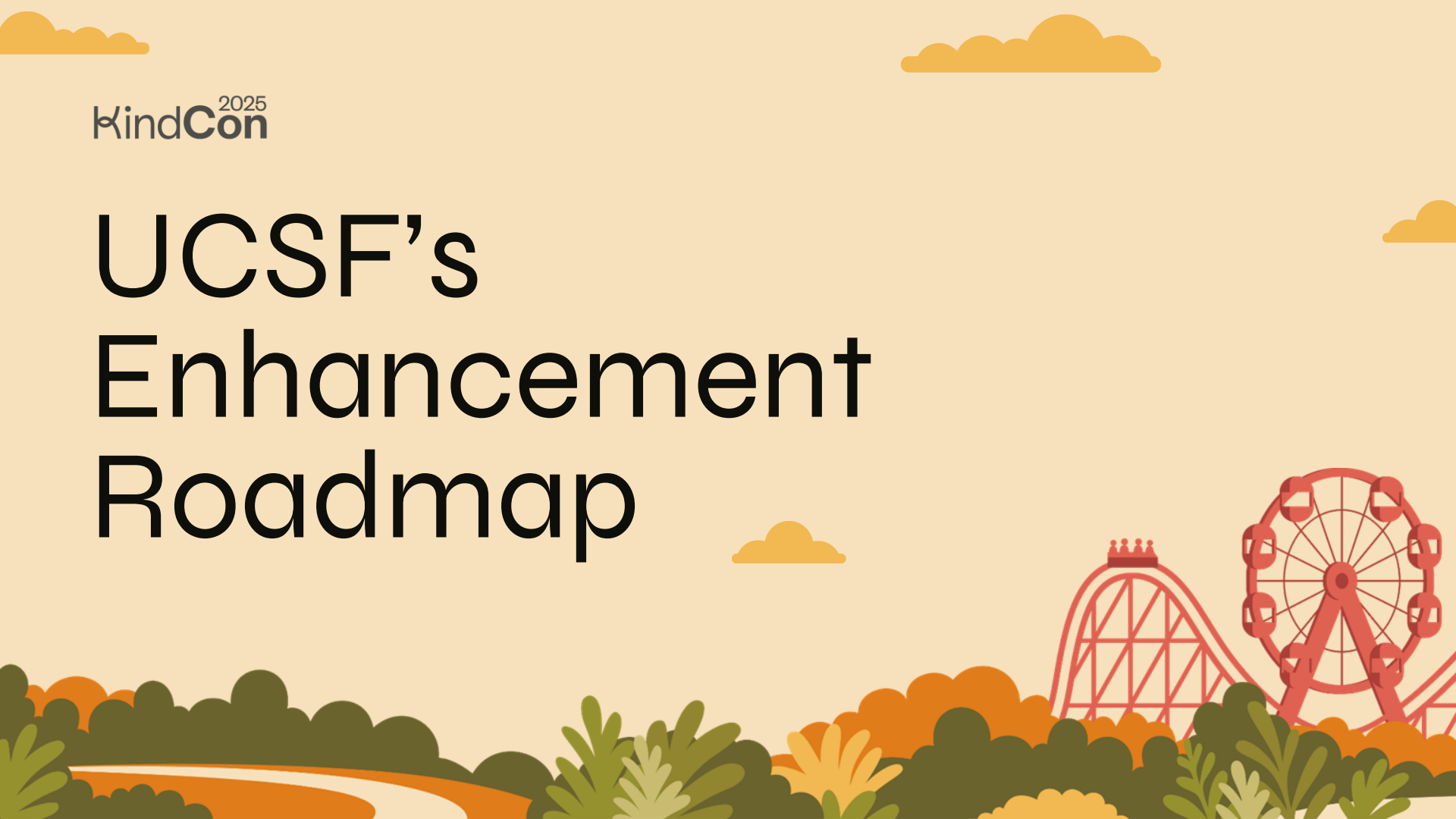
Work Items in Agile Accelerator

- ✓ Public-facing dashboard summarizing Work Items by Status (e.g. new ideas, upcoming releases)
- ✓ Useful Work Item fields: ERC Priority, Priority, T-Shirt Size, Sprint, ITEA Comments, End User Update
- ✓ Reports for evaluating balance of effort across benefiting teams / solutions (e.g. comparing volume for SFMC vs BTE)

Communication in Teams

- ✓ ERC voting using Polls in Teams after each monthly meeting
- ✓ ascend Forum for announcements, questions, collaboration

UCSF's Enhancement Roadmap



Background

About UCSF/UDAR

- US News and World Report Best Hospitals Honor Roll in 2025-2026 (#1 in CA, #1 in Bay Area)
- UDAR raises funds for UCSF Benioff Childrens Hospitals, UCSF Foundation
- In fiscal year 2024, 30,678 generous donors gave a total of \$799.9 million to the UCSF Foundation.

Advancement RM at UDAR

- Launched on Salesforce in October 2016 (roundCorner)
- Integrated with Marketing Cloud in 2017
- Launched on Advancement RM in July 2021
- Integrated with Commerce Cloud for Online Giving in 2024
- 213 Users (54 Frontline Fundraisers)

Software Development Project Management

- Scrum Methodology
- 10 Development/Reporting Team Members
- 3 week sprints with several collaboration points with UDAR users
- Use Jira Project Management
- Record estimated level of effort in points for each work item
- Record type of task (bug vs. task/story)

Collaboration Points



Roadmap Review

Monthly stakeholder and technical leadership meeting to discuss and prioritize larger features/functionality



Backlog Review

Stakeholder and Technical Leadership Meeting at the end of every sprint to prioritize the backlog of tasks for the next sprint



Sprint Planning

Technical Team meets at the end of the Sprint to assess unfinished tasks and identify tasks for the next sprint



Solution Design

Technical Team and Business Analysts discuss solutions/tactics for tasks/work items at the top of the backlog and estimates effort

Info Session

Monthly meeting open to all users to share new updates.



Challenges

- Unable to finish work items within the sprint so they needed to be carried over to the next sprint (less time for new features)
- Always shifting deadlines/new features further out on roadmap so we could not give users reliable launch dates

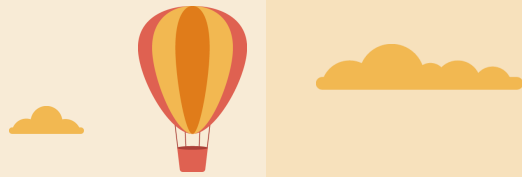


Analysis

- Have recorded estimated effort for tasks since working in Salesforce, but were not recording actual effort, so we did not have a sense of how much work we were actually doing
- Adding bugs in the middle of sprints impacted our ability to finish the work we set out to do at the beginning
- About 20% of the Development team's efforts were used for bugs and maintenance work (not recorded on the roadmap)



Adjustments and Process Changes



- Started recording ACTUAL effort during Sprint Planning
- Lengthened sprints to three weeks
- Formalized process for bringing new items into the sprint outside of Sprint Planning/Backlog Review

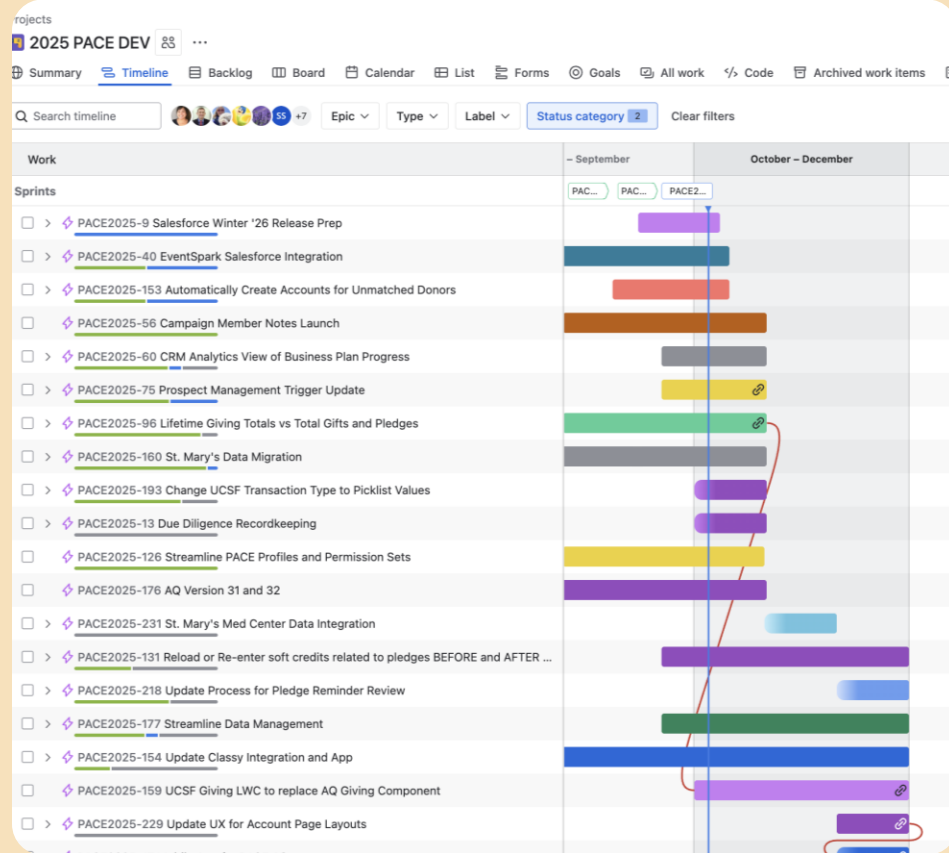
A screenshot of a Jira work item form titled "Improve work item". The form is divided into sections: "Details", "Carryover Story Points", "Story Points Used", and "Actual Peer Review Points". The "Details" section includes fields for Assignee (Sushmita Seth), Reporter (Rowena Montoya), Lead Developer (Sushmita Seth), Peer Reviewer (Rowena Montoya), Due date (Add due date), Priority (High), Story point estimate (34), Peer Review Estimate (Add number), Current AQ Environment (PROD), Sprint (PACE2025 Sprint 3), and Sprint Planning Notes (None). The bottom three sections are highlighted with a red border.

Assignee	Sushmita Seth Assign to me
Reporter	Rowena Montoya
Lead Developer	Sushmita Seth
Peer Reviewer	Rowena Montoya
Due date	Add due date
Priority	High
Story point estimate	34
Peer Review Estimate	Add number
Current AQ Environment	PROD
Sprint	PACE2025 Sprint 3
Sprint Planning Notes	None
Carryover Story Points	Add number
Story Points Used	Add number
Actual Peer Review Points	Add number

Roadmapping Adjustments



- Actively managed roadmap in Jira
- Include space for bugs and maintenance in the roadmap and a bug buffer (80% new features/improvements, 20% maintenance and bug buffer)



Old Roadmap

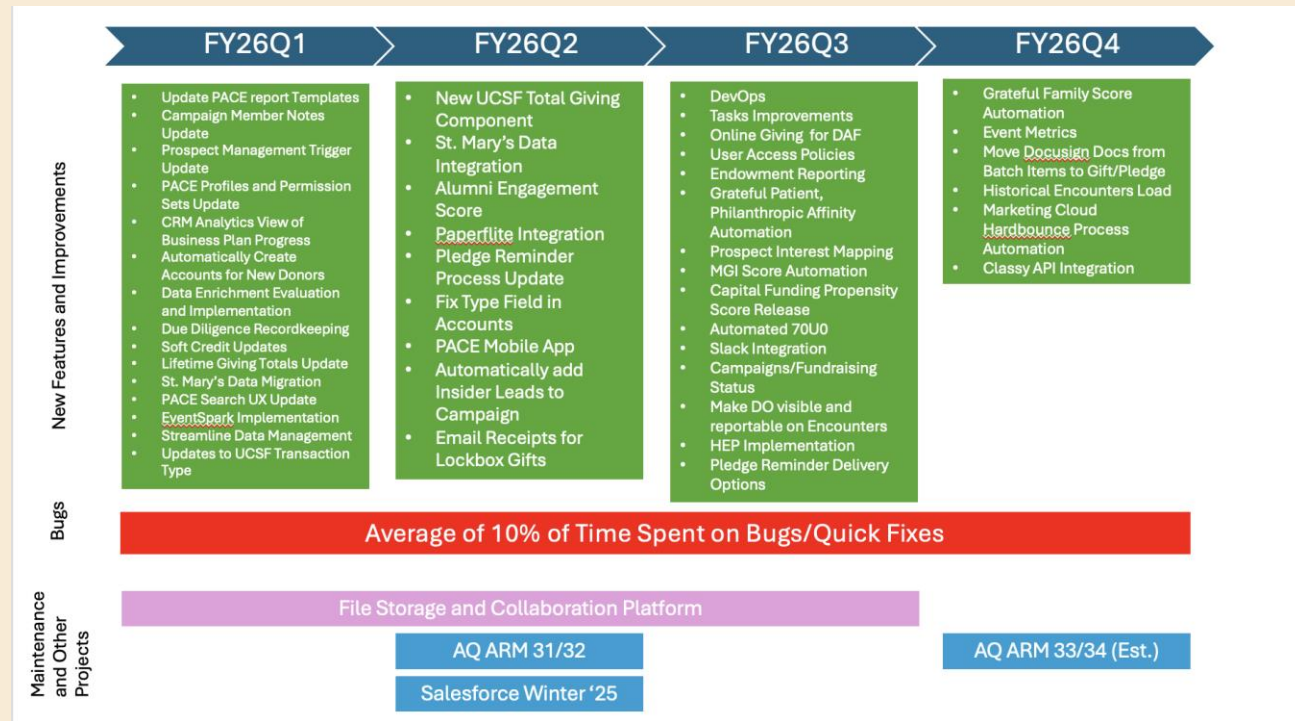
PACE AQ Roadmap

	TBD	FY23 Q1	FY23 Q2	FY23 Q3	FY23 Q4	FY24
Bio-Demo	Update/Improve Bio Demo Cases Update Marketing Email Preferences when Lead is Manually Converted Access/permission set for Board Engagement team to update relationships Nominations tracking	Unverified Birthday Field	Automatically update manually converted Grateful Patient Leads	Marketing Cloud Hardbounce automation		
Prospect Development		Rescore all models in PROD - 1. MGI 2. Affinity 3. PGP 4. GPP 5. SIS	Grateful Family Model Release Wealth Engine Birthdates	Dental Center Integration with Epic/PDS MGI Score Automation	Capital Funding Propensity Score Release Some Model Score Automation Prospect Interest Mapping	AQ Prospect Holding Pool Re-release pipeline program Wealth Engine Integration Relationship Science Integration Wealth X Integration Velocity Score

Page 1 of 2 224 words English (U.S.) Text Predictions: On Editor Suggestions: Showing



Current Roadmap



Things we are still working on



- Fully utilizing project management software for automating analysis
- Automated view of roadmap for users

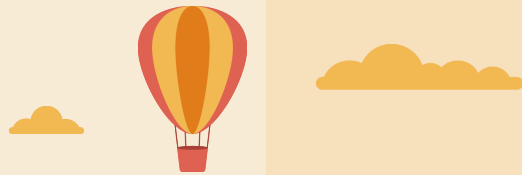
Questions for us?



Questions for Discussion



Discussion



IDEA SUBMISSION

- Does your organization have a way to intake enhancement ideas?
- Are there limits to who can submit or what can be submitted?
- What is the minimum information required?
- What tool(s) do you use for gathering ideas?

REVIEWING IDEAS

- Who is responsible for reviewing submissions?
- How do you determine which are “good” ideas?
- How do you determine feasibility?
- What tool(s) do you use to document / share out status?
- How do you record *proposed* Level of Effort?

PRIORITIZATION

- Who has a voice in prioritization? Who is the ultimate authority?
- What factors (should) impact your prioritization decisions?

IMPLEMENTATION

- Does your organization have an overall roadmap? Is it shared broadly with users?
- What tool(s) do you use for sprint planning?
- Are you accounting for knows (e.g. upgrade schedule) and unknowns (e.g. bug fixes) in your sprint planning and roadmap?
- How do you track *actual* Level of Effort?
- What do you do when things take more work than expected?

Rowena Montoya

www.linkedin.com/in/rowenamontoya
rowena.montoya@ucsf.edu

*Director, Central Development Services
University of California, San Francisco*

Samantha Schwind, MAS

www.linkedin.com/in/samantha-schwind
Samantha.Schwind@colostate.edu

*Associate Director of Solution Innovation
Colorado State University*

Thank
you.