

Coffee Chat Nuggets September 7, 2022

Sales Force with Alan Gibson segments will be recorded
Affiniquet is primary application, Salesforce is a part of this platform
Salesforce streamlines procedures and processes which is part of Enterprise CRM which gives 360 view of data. Between now and December will be the discovery period

https://pennstateoffice365-my.sharepoint.com/:x:/g/personal/ajg6181_psu_edu/EX6ytbn5Xx1MsHieFxFxABruDOnTBdBPeRMj7xniyN6g?wdLOR=cDA01ADB5-0998-7A4F-85C0-9DE29C2BA480

This document gives a timeline of implementation. A group of superusers (change ambassadors) have been identified and will serve as resource and point of contact for your unit, team building, and collaboration are goals

Watch for LaunchPad article for roadmap for Enterprise CRM transformation. This will show timelines for discovery and design phases. January 2023 AWA data will start moving to Salesforce. Change Ambassador group will be main advisory group to analyze processes. 24 month timeline to complete conversion.

Once conversion is complete getting data will be much easier, ie pulling invitation lists. Making updates to records will be easier as well, updating RoCs etc.

On Launch pad within IS training resources there is a Salesforce folder with training links and training trails. Try to stay on 3 listed trails and complete those first. You can learn in the platform
<https://pennstateoffice365.sharepoint.com/sites/DDARISTrainingResources/Shared%20Documents/Forms/AllItems.aspx?csf=1&web=1&e=ZZJugN&cid=973c59ba%2D894a%2D44cc%2D95a0%2D4eb6343fdc24&FolderCTID=0x0120004610AE524D34B44981B27D53A0F58886&id=%2Fsites%2FDDARISTrainingResources%2FShared%20Documents%2FSalesforce%2FSalesforce%20Trailheads&viewid=a2cadedcd%2Dedf8%2D48eb%2Daca1%2D4398e356ef67>

Previous SalesForce article on LaunchPad:

<https://sites.psu.edu/ddarlaunchpad/2022/06/22/enterprise-crm-update-june-2022/>