



**Salesforce/Ascend Implementation-  
University Advancement Project Teams**

Project Leadership

<b>Role</b>	<b>Required Time</b>	<b>Responsibilities</b>	<b>Staff</b>
Executive Sponsor	5%	<ul style="list-style-type: none"> <li>• Lead stakeholder</li> <li>• Sets vision and overall objectives</li> <li>• Final decision maker</li> </ul>	Monique Dozier
Project Sponsors	25%	<ul style="list-style-type: none"> <li>• Provides oversight for program</li> <li>• Clears roadblocks and ensures participation of all relevant parties</li> <li>• Makes key program decisions and sets project priorities</li> </ul>	Josh Carter, Kim McDade
Technology Sponsor	25-50%	<ul style="list-style-type: none"> <li>• Provides technical oversight for program</li> <li>• Clears technical roadblocks and ensures participation of all relevant parties</li> </ul>	Mai Vang

Project Management Team

<b>Role</b>	<b>Required Time</b>	<b>Responsibilities</b>	<b>Staff</b>
Primary PM Contact	50%	<ul style="list-style-type: none"> <li>• Works directly with Attain Partners Project Manager to ensure end-to-end engagement</li> <li>• Coordinates internal UA project management resources (leads weekly PM meeting)</li> <li>• Monitors project timeline, billable hours, and risks</li> <li>• Responsible for delivery of project components</li> </ul>	Mai Vang
Project Manager	15-20%	<ul style="list-style-type: none"> <li>• Coordinates client decision-making and manages resolution of open issues</li> <li>• Coordinates sign-off for all deliverables</li> <li>• Assists with project reporting, including managing milestones, issues, risks, and key actions</li> </ul>	Kim Byrd
Logistics & Support	15-20%	<ul style="list-style-type: none"> <li>• Assists with project logistics and scheduling</li> <li>• Assists with room reservations and coordinates on-site visits and meetings</li> <li>• Provides administrative support to Project Management team</li> </ul>	LaDonna Ardary, Stephanie Falcone

## Change Management & Training Team

Role	Required Time	Responsibilities	Staff
Change Management & Training Lead	10-15%	<ul style="list-style-type: none"> <li>Works directly with Attain Partners Change Management team as primary contact</li> <li>Coordinates efforts of UA Change Management team</li> <li>Responsible for programs to aid UA staff in technology adoption and new user training</li> </ul>	Vanessa Torrez
Change Champion	5%	<ul style="list-style-type: none"> <li>Change Champions can expect to commit up to 4 hours a month engaging with Organizational Change Management workstream, sending communications, attending Town Halls, etc.</li> <li>Advise and assist with UA staff training, including recommending approaches and developing training programs</li> </ul>	Crystal Sankey, Brock Cavett, Margene Mastin-Schepps, Alexis Szewczuga, Brandon Westenberger
Change Internal Communications Team	5%	<ul style="list-style-type: none"> <li>Assist with crafting all staff communications to keep team engaged and up-to-date on project progress</li> </ul>	Kim Byrd

## Data Team

Role	Required Time	Responsibilities	Staff
Data Lead	100%	<ul style="list-style-type: none"> <li>Key Resource for ensuring that RE data is complete, clean, and ready for the migration process into ascend/Salesforce</li> <li>Develops and tracks the data migration plan and the migration results reports. Manages the data dictionary, data models, and data flow models. Leads and performs all data migration, synchronization, and cleanup related to duties associated with the UCR system. Works with UCR staff to develop the archival strategy.</li> </ul>	Iris Tam
Data Team	25-50%	<ul style="list-style-type: none"> <li>Assists with data cleanup, documenting UA data dictionary, data mapping from RE to ascend/Salesforce and recommends / implements strategies to aid data integrity</li> </ul>	Kim McDade, Brandon Westenberger, Rudy Rodriguez, Matt Heimdahl, Dalyn Montgomery

## Integrations Team

<b>Role</b>	<b>Required Time</b>	<b>Responsibilities</b>	<b>Staff</b>
Integrations Lead	25-50%	<ul style="list-style-type: none"> <li>Leads integration strategy for UA and UCR systems to ascend/Salesforce</li> <li>Architects and maintains data warehouse</li> </ul>	Data Engineer, Salesforce Administrator (both <i>new temp funded positions split funded with ITS</i> )

## Key Stakeholders

<b>Role</b>	<b>Required Time</b>	<b>Responsibilities</b>	<b>Staff</b>
Department Leads	5%	<ul style="list-style-type: none"> <li>Key decision maker for each department impacted by the project</li> <li>Supports project sponsor in cross-program decision-making</li> <li>Facilitates issue identification and resolution within their department</li> <li>Coordinates resources within their department</li> </ul>	Kim McDade, Annya Lott, Johnny Cruz, Jorge Ancona, Josh Carter, Matt Gunkel

## Business and Technical Subject Matter Experts & End Users

*Will be most active during a ~ 5-week sprint associated with each functional module. Will not require full-time commitment throughout the duration of the entire project.*

<b>Role</b>	<b>Required Time</b>	<b>Responsibilities</b>	<b>Staff</b>
Bio Demographical Patrick	25-50%	<ul style="list-style-type: none"> <li>Provides required documentation, demonstrations, and information to facilitate assessment and project processes</li> <li>Participates in requirements and business process focus groups, user acceptance testing, and training</li> <li>Provides detailed business and technical reviews of current systems, business processes, applications, etc.</li> <li>Participates in requirements and business process validation sessions,</li> <li>Supports ongoing change management by becoming a solution expert and internal solution champion</li> </ul>	Patrick Nance, Kimberley Harvie, Tiffany Dana, Elliot Emmer, Anna Gonzalez, Brandon Westenberger
Gift Processing Patrick			Patrick Nance, Christine Zepeda, Delphina Hughes, Brendan Jones, Kimberley Harvie, Luke Chen, Rudy Rodriguez
Stewardship & Memberships Ian			Ian Foster, Devlin Smith, Mia Janvier (MJ), Sharilyn Berry, Anna Gonzalez, Eveleen Samayoa, Miranda Moore, David Briseno
Prospect Development Kimberley			Kimberley Harvie, Heather Morales, Matt Heimdahl, Patrick Nance, Jasmine Hill, Gwen Thibeaux, Tim Kelleher

## Marketing Cloud Implementation

Role	Required Time	Responsibilities	Staff
Marketing Cloud Lead	25-50%	<ul style="list-style-type: none"><li>• Serve as lead strategic resource for Marketing Cloud implementation, including ensuring relevant stakeholders are brought in and helping to define requirements and coordinate decisions</li></ul>	Kelly McGrail
Marketing Cloud Implementation Team	25-50%	<ul style="list-style-type: none"><li>• Provides required documentation, demonstrations, and information to facilitate assessment and project processes</li><li>• Participates in requirements and business process focus groups, user acceptance testing, and training</li><li>• Provides detailed business and technical reviews of current systems, business processes, applications, etc.</li><li>• Participates in requirements and business process validation sessions,</li><li>• Supports ongoing change management by becoming a solution expert and internal solution champion</li></ul>	TBD as we get closer to sprint

*Additional Business and Technical SME teams to be identified as we progress through the project include Alumni/Donor Portal and Event Management.*