Customer Relationship Management

CRM in the Archives

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Institutional Context

- DePaul University founded 1898 as St. Vincent’s College
- 24,000 students
- 4,000 faculty and staff
- 10 colleges and school
- 300 programs of study

- University Archives is one component of Special Collections and Archives Department (SPCA), founded c.1981
- First Director of Records Management hired 2008, in the Office of the Secretary
- Library (SPCA) hires first dedicated University Archivist 2010
- Mandated reporting to Institutional Compliance -- 2011
CRM

Timeline View -- Individual

Email, in-person, phone interactions.

Timeline -- Department

Interactions with different contacts in the same office.
The Process

- Copy/paste data from Compliance reports (Excel) into one worksheet
- Created headings that reflected status with regard to 6 conditions:
  - **Formal records meeting** with me in AY2014 or AY2015 (# of mtgs.)
  - Records **training attendance** in AY2014 or AY2015 (Yes, No)
  - **Transferred records** to in AY2014 or AY2015 (Yes, No)
  - Manually merged records; assigned participation points
  - Data pool of **204 unique individuals**
  - Import into SPSS
Results

Does the number of 2014 interactions impact 2014 donor status?
Results

Does the number of 2014 & 2015 interactions impact 2015 donor status?
Future Directions...

• More Data + More Time = More Depth

• Consider different types of interactions
  • Trainings
  • Formal records meetings
  • Informal interactions
  • Providing reference service
  • Collaboration

• Offices vs. individuals?
Contact

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