Student Success Link (SSL)
Constituent Relationship Management (CRM/Salesforce)
Board of Trustees Study Session

October 13, 2021
2017 Technology Taskforce

- Improve student experience, outcomes and success

Three areas of need:

- Operational efficiency
- Expanded use of data
- Ease of use for students and employees

Timeline

- March 2018: 7 proposals
- May-November 2018: Presentations, interviews, clarifications on proposals, best and final
- December 2018: Recommendation to the Board of CRM Platform and Implementation partners
Consortium Relationship Management (CRM)

- Technology system used for managing relationships, i.e., prospective, current, and alumni students.

- Uses student historical and ongoing data to create interventions for
  - Recruitment and Admissions
  - Retention and Completion
  - Alumni and Workforce
Phase 1 December 2019
PHASE 1: Recruitment and Marketing

- Recruitment Discovery & Creation
  - Discovery
  - Process Maps
  - Request for Information (RFI) Forms
Phase 1

PHASE 1: Recruitment and Marketing

- Marketing Discovery & Creation
- Marketing Cloud
- Communication Flows
- Student Journeys
Phase 1 Continuous Improvement: RFI Dashboards

- **Request for Information (RFI) Conversion Rates**
  - % of Students who applied after RFI was submitted
    - Cañada College: 19%
    - College of San Mateo: 28%
    - Skyline College: 30%
    - **District Average: 25%***

*December 2019 - September 2021*
Phase 2 June 2020
A Success Plan is a collection of Tasks assigned to the student.

Phase 2: Success Plans: Enrollment Steps
Phase 2: Marketing Cloud: Enrollment Messages

Marketing Cloud:
Messages are automatically sent at a programmed cadence to nudge the student forward in their enrollment journey.
Phase 3: Success Teams

Success Teams: Preprogrammed Assignments based on student attributes
Phase 3: Student Appointment Scheduling

Adjust Current Semester Courses
MONDAY, OCTOBER 4, 2021
9:00 AM to 10:00 AM
Sandy Allen
VIRTUAL: HTTPS://SMCCD.ZOOM.US/J/6822537626

Add Comments

Reschedule or Cancel

Join Web Meeting
Phase 3: Appointment Management

La Pulga Messi
College of San Mateo
Allied Health (Associate Degree)

Last Appointment: Sep 30, 2021
Initial Success Team Assigned: FERA

Unassigned

Activity
Upcoming & Overdue
Leo Messi has an upcoming task with Leo Messi

No past activity. Past meetings and tasks marked as done show up here.
Phase 3.5: Events & Forms

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Below is your list of registered courses for the Fall 2021 term. Select ALL courses that you are requesting certification for, regardless if you have already requested certification for the term.

**REMINDER:** Courses must appear in your Student Education Plan (SEP) as created by your counselor.

**College Location - Course Number - Course Name - Credit Hours**

- [ ] College of San Mateo - ADM120-4 - Criminal Investigation - 3
- [ ] College of San Mateo - ADM185-4 - Intro to Forensic Science - 3
- [ ] College of San Mateo - BIOL132-4 - Human Biology Laboratory - 1
- [ ] College of San Mateo - MATH200-4 - Elem Probability & Statistics - 4
- [ ] College of San Mateo - MATH800-4 - Just-In-Time Sup Elem Prob & Stat - 2

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<table>
<thead>
<tr>
<th>Status</th>
<th>Event Name</th>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Description</th>
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<tbody>
<tr>
<td>Register</td>
<td>Skyline Orientation Event - July</td>
<td>Tue, July 13, 2021</td>
<td>10:00AM - 12:15PM</td>
<td>Building 10</td>
<td>Academic standing workshop for reinstatement.</td>
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<td>Register</td>
<td>Skyline Reinstatement Workshop - July</td>
<td>Mon, July 19, 2021</td>
<td>08:00AM - 11:30AM</td>
<td><a href="https://rmccd.zoom.us/j/207654100">https://rmccd.zoom.us/j/207654100</a></td>
<td>Academic standing workshop for reinstatement.</td>
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<td>Academic standing workshop for reinstatement.</td>
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<td>Skyline EOPS Workshop</td>
<td>Mon, September 20, 2021</td>
<td>08:00AM - 11:30AM</td>
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<td>EOPS Meet and Greet event</td>
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<td>Skyline Meta Major Orientation - Business, Entrepreneurship &amp; Management</td>
<td>Mon, September 20, 2021</td>
<td>09:00AM - 11:30AM</td>
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# What's Next? Project Prioritization

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<tr>
<th>Project Name</th>
<th>Level of Effort</th>
<th>% of Project Completion</th>
<th>Process Improvement</th>
<th>Compliance</th>
<th>Enrollment</th>
<th>Completion</th>
<th>Communication</th>
<th>Disproportionately Impacted</th>
<th>Board Priority</th>
<th>CAN RANKING</th>
<th>CSM RANKING</th>
<th>SKY RANKING</th>
<th>AVERAGE RANKING</th>
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<td>K-12 in the CRM</td>
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<td>Degree Works Upgrade</td>
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Questions? Comments....

Discussion...