

Dear College Community,

We're back with another update on the Constituent Relationship Management (CRM) tool currently being implemented across the district. Here's a high-level breakdown of some key informational points this month:

**TIMELINES:**

There are many phases of implementation involved in establishing a Constituent Relationship Management (CRM) tool. These phases include initial discovery, current business process analysis, mapping out what the solution will look like, building that vision, training users, and implementing continuous improvements.

It's a detailed, and complicated process – one that's iterative so that some phases may progress faster than anticipated, and others slower. For example, a small group that has an already well-defined and documented business process might move faster through the implementation steps. Larger groups with less defined business processes will more than likely take a bit longer.

Here are the various phases of the CRM implementation and rough timelines for the entire process:

- Phase I: Inquiry to Application (Recruitment, Admission and Marketing) - **October 2018-September 2019**
- Phase II: Enrollment Funnel and Matriculation - **November 2018-February 2020**
- Phase III: Counseling and Retention - **September 2019-May 2020**
- Phase IV: Grant/Categorical Programs - **October 2019-June 2020**
- Phase V: Faculty, Early Alert and Canvas - **November 2019-March 2021**
- Phase VI: Workforce Development - **March 2020-September 2020**
- Phase VII: Alumni Relations - **June 2020-December 2020**

**STAFFING:**

Implementing and sustaining a system like a CRM requires additional staffing within the ITS department. In January 2019, the Board of Trustees approved four new ITS positions. Here's a little bit about the positions, what they'll do in relation to the CRM and where we're at in the hiring process.

- **Director of the CRM:** This position will oversee the technical operations and staff of the CRM. This person will work directly with college leaders to conduct training and visioning sessions in the sustainability and optimization of the CRM.
  - **Search Update:** This position is Open Until Filled and the search committee has begun reviewing the initial batch of applications. While this position is being staffed, Chief Technology Officer (CTO) Daman Grewal is filling in as the CRM Technical Lead as he has extensive CRM experience from his previous institutions. We expect to have someone on board by August.
  
- **Systems Administrator:** This position configures the CRM to meet the needs of the district and helps to manage user accounts by provisioning licenses and setting up security settings and workflows.
  - **Search Update:** This search is complete with the successful candidate set to begin at the beginning of June. Steven Yee was selected for this position and has served as a Salesforce Administrator at a number of companies prior to joining the district.
  
- **Senior Programmer II (Integration):** This position will serve as the main integration specialist between the CRM and other systems such as Banner, Canvas and Degree Works to ensure all of the systems are sharing information appropriately. This position will also serve as the Data Warehouse specialist to ensure the PRIE offices have the data needed to build reports.
  - **Search Update:** Suneetha Pasumarthi made a successful lateral transfer within ITS, transitioning from working with the Financial Aid module in Banner into this role.
  
- **Senior Programmer I (Salesforce):** This position is the main developer within Salesforce and will program and develop applications within the Salesforce platform. This position will be the lead in bringing on applications like a texting and document management solution within Salesforce.
  - **Search Update:** This position is currently posted and Open Until Filled.

### **CCCApply**

ITS will be working with college staff over the summer to reconfigure CCCApply to allow for students to choose a Meta Major and Program of Study from the time of application. This will allow for more accurate “student intent” information to be populated into the CRM and Degree Works as counselors and staff work with students on their educational plans. The reconfiguration is expected to be completed over the summer.

### **SCHEDULING IMPLEMENTATION PARTNERS:**

Our implementation partners (Enrollment RX and ApexIT) are coordinating their schedules as various components of their CRM build out are dependent on each other. We will plan on having them onsite concurrently over the months of June and July as they build out a more detailed project schedule for the implementation. In the meantime, Enrollment RX will begin working with the International Student Programs staff on upgrading their current Salesforce instance in anticipation of district-wide project.

As we move forward with the CRM implementation, we will continue to provide informational updates about the process. If you have any questions about the CRM, the implementation, or specific solutions or vendors, please direct your questions to your College Contact.