

Dear College Community,

We're back with another update on the Customer Relationship Management (CRM) tool currently being implemented across the district. The past few weeks have been busy in the CRM world as we get closer to our Phase I launch and continue to develop future phases of the project.

Here's an update as to what has happened since the last report:

RECRUITMENT & MARKETING

Recruitment and Marketing Teams received training from our two implementation partners in preparation for our Phase I "Go-Live" which includes:

- The launching of college-specific ***Request for Information (RFI) forms*** on college websites to allow prospective students to request and receive information related to an Area of Interest. This information is driving them towards completing an admissions application.
- The launching of college-specific ***Tour Request forms*** where students can create customized visits based on their interests. The campus tour is driving them towards completing an admissions application.
- Marketing Teams learned ***Marketing Cloud***, an application that uses data from the CRM to send email and text messages based on the RFI and Tour Requests that are automated, personalized and mobile responsive.

COUNSELING

Counseling Divisions received presentations which included an overview of the CRM for Counselors and a call to action which includes:

- A Review and Recommendation of data elements to display on a "***Counselor Dashboard***" within the CRM.
- The identification of possible alerts including ***Proactive Alerts*** (from data gathered at the time of admission); ***Early Alerts*** (as submitted from Instructional Faculty); and ***End-of-Term Alerts*** (after grades are posted and academic status is determined).
- The identification of possible interventions, i.e. ***Tasks and Success Plans*** to be assigned to students after an alert is posted.
- Counseling Divisions will be working on drafting these items over the next month in collaboration with Program Staff and Instructional Faculty as appropriate.

MATRICULATION & ENROLLMENT

Matriculation and Enrollment Teams finalized documents, processes and communications for Non-Exempt students, i.e. those students who are not exempt from the Student Success & Support Program (SSSP) steps which includes:

- Process maps for **Orientation, Assessment/Placement and Counseling**. (Customized for each colleges' enrollment steps).
- Assignment Rules for **Success Navigators** (who will guide students through the SSSP steps); and **Financial Aid Team Members** (who will assist students in completing various federal and state financial aid applications).
- **Communications** which will be both automatically and manually sent to students nudging them forward in completing the steps needed to get enrolled in their first semester at college.
- Colleges will continue to finalize processes and communications related to **Residency Specialists** (who will assist students classified as out-of-state tuition payers complete necessary paperwork).
- **Additional Student Types**, i.e. Returning, Transfer, Dual/Concurrent Enrollment students will have process maps, Success Navigator assignments, and communications developed for future iterations of the project.

CURRENT TECHNOLOGY INTEGRATION

The **ITS Team** has been working to prepare current technology systems to integrate with the CRM in an optimized and seamless fashion which includes:

- Reconfiguring CCCApply to allow applying students to choose an actual **Program of Study** at the time of application vs. only a major. This is the difference between choosing an "Associate Degree for Transfer in Business Administration" vs. just "Business" which could imply a variety of degrees and certificates under the auspice of "Business". (September 20 Go-Live).
- Reconfiguring CCCApply to allow students to first filter by **Meta Major** (Skyline College only for now) prior to choosing a Program of Study. (September 20 Go-Live).
- Configuring Banner to associate Program of Study with **SEVIS Indicator** (whether the program is eligible for International Students); **AB 705** designation (as either SLAM, BSTEM, BOTH or NONE to allow for the automated or guided self-placement recommendation for the student); and **Meta Major** association (for various assignment rules within the CRM to occur). (September 20 Go-Live).
- Developing the **Single-Sign On (SSO)** portal to bring the various systems (CRM, WEBSmart, Canvas, etc.) used by students (and employees) under one log-in interface for an enhanced user experience.
- Aligning data entry and scribing processes and procedures for **Degree Works** under a centralized system to allow for consistency in data mapping and reporting in the CRM. (Starting with the 19/20 Catalog, Transcript Evaluation Service (TES) will be responsible for scribing Programs of Study for Degree Works.

- Mapping various data fields and processes between CCCApply, Banner, CRM, DegreeWorks, and Canvas to allow for the **integration** between systems.

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.