Dear College Community,

Here are the recent CRM Updates to close out the 2019 year. 2020 will bring a busy season of CRM Development, Testing, Training and Launching the various phases of the system. This is what we've been working on:

Phase I: Recruitment and Marketing Update (In Production)

- Request for Information (RFI) Forms are posted on college webpages and students are receiving emails to drive them towards completing an admissions application.
- Student Ambassadors will contact perspective students who have not completed an admissions application after receiving the recruitment emails to answer any questions they may have.

Phase 1: Immediate Next Steps

- **Campus Tours** Requests (Group and Individual) and associated communications about the visit are being configured for production in early Spring 2020.

Phase II: Matriculation and Enrollment Update (In Development)

- Enrollment RX (implementation partner) is in the final testing of full admissions application data integration between CCCApply to Banner to the CRM. This integration will be in "close to real-time" allowing the student information to come over to the CRM almost immediately and begin the Matriculation and Enrollment Steps.
- APEXIT (implementation partner) was onsite the week of December 9-13 to work with ITS on additional systems integrations involving matriculation, course enrollment and academic history from Banner, Data Warehouse (DegreeWorks) data on program completion, Microsoft Outlook email and calendar syncing, and Web X-Tender (Banner Document Management) for forms and transcript viewing. This work is scheduled to be ready for testing in February 2020.
- Marketing Teams have begun building the communications and journeys related to matriculation and enrollment in Marketing Cloud.
- ITS is in the initial set-up and testing of the Single Sign-On (SSO) instance which will allow students (and employees) to log-in once, and have access to various systems such as WEBSmart, Salesforce (CRM) and Canvas.

Phase II Immediate Next Steps:

- In February 2020, employees identified as Success Team members for Matriculation and Enrollment will be trained on the CRM to begin testing the system. These employees include folks involved in certain aspects of Financial Aid, Residency, Success Navigation (Orientation, Assessment/Placement).

Phase III: Counseling and Retention (In Development)

- ***Counseling Divisions, Program Staff and Instructional Faculty*** have finalized initial drafts of:

- A ***"Counselor Dashboard"*** within the CRM of student data elements needed for their work.
- 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.
- This information is currently with the vendor for development.

Dreamforce 2019: The San Mateo County Community College District (SMCCCD) was honored to provide the Education Cloud Keynote address at the 2019 Dreamforce conference held in San Francisco, November 18-22. Salesforce Executives were excited for SMCCCD to share the vision for utilizing the CRM at the colleges and what the future holds for the student experience. The keynote can be found on the [ITS website](#).

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.