Dear College Community,

It's time for an update on the CRM! The teams have been quite busy over the past few months getting ready for our next phases on the implementation.

Here's what has been accomplished and what's on the horizon for the next few months:

1) **Request for Information (RFI) Forms:** All three colleges launched Request for Information (RFI) forms on college homepages which have resulted in hundreds of prospective students inquiring with the colleges, being sent automated information through the use of Marketing Cloud, and encouraged to apply. Student Ambassadors in the Recruitment Office have followed-up with students who haven't applied after receiving the automated messages to help answer any questions they may have about coming to the college.
    a. **Continuous Improvement (CI) Process and Data Analysis:** Recruitment and Marketing Teams will begin to analyze the internal processes and conversion rates related to the RFI process to determine ways to improve the process and messaging. The first CI analysis will take in mid-March.

2) **International Application Updates:** The International Students Offices have been using the CRM for a number of years to manage the admissions process for international students. The ITS CRM team worked with the college ISP offices and district ISP personnel to update the application to align with the new data architecture shared on the domestic side in order to utilize the same Salesforce platform throughout the district.
    a. **Testing and Configuration:** The new updates to the International Admissions Application should be in production by the end of February.

3) **Enrollment Steps Success Plans:** The next phase of implementation will include the Enrollment Steps for New Students to High Education. These are students considered "Non-Exempt" from the matriculation steps of orientation, assessment/placement and counseling/SEP creation. The colleges have created the Enrollment Steps students need to complete in order to become enrolled at the college as these will appear as "To-Do List" items for the student.
    a. **Integration Testing:** Currently ITS Staff are working on the integration necessary for both the CRM, Banner and Marketing Cloud to move information back and forth regarding these areas. This will allow for:
        i. The student to receive customized messages and calls when they are not progressing in their enrollment steps.
        ii. Banner to receive information on student meeting attendance to report back through MIS.

4) **Success Team Assignments:** The CRM has built in functionality to be able to assign Success Teams to students based on programmed criteria. The colleges have worked to determine the beginning of Success Teams assignments and those have been programmed into the CRM. Criteria has been determined for:
   a. Recruiters
   b. Financial Aid Team Members
   c. Residency Specialists
   d. Success Navigators (Those to help with matriculation steps)
   e. General Counselors (As part of the initial counseling appointment of matriculation)
   f. Specialized Counselors (Based on criteria such as Meta Major, EOPS, Promise, etc.)
      i. **Testing and Configuration:** This initial phase of assignments is starting to be tested by the vendor and internal ITS staff during the month of February and March.

5) **Matriculation Messages and Journeys:** The Marketing Teams took the work completed during the Matriculation Retreats at each college over the summer and built the email templates into Marketing Cloud during the month of January. The ITS CRM Team is now mapping the email messages to the appropriate data fields in the CRM, in order to create customized messages for each student along with building the journeys, i.e. Process Maps developed by the colleges for their matriculation processes.
   a. **Testing and Configuration:** The ITS CRM Team will conduct the initial testing of the Matriculation Messages and Journeys throughout the month of March.

6) **Systems Integrations:** Integration of various data systems is one of the most time intensive parts of the CRM project. The ITS team has been working with our implementation partners, Enrollment RX and APEXIT, to build out the integrations so that the data that needs to be in the CRM for both students and employees, is readily available. Updates on various integrations:
   a. **CCCApply to Banner to CRM (Initial Application):** ITS is in the final stages of testing this integration prior to production. This has led to a number of areas in which SMCCCD internal controls and processes need to take place in order to move forward with the project. This includes:
      i. Program of Study Updates
      ii. Student Personal Email Updates
      iii. Paper Admissions Application Usage
      iv. The CRM Implementation Team is working with staff to update processes around these areas in order to proceed with the project.

b. **Banner to CRM (Continuing Integration):** This is well underway as members of APEX IT and District ITS work to identify and map the appropriate fields that will change more frequently after the student has applied. For example, phone number, grades and being a member of a Learning Community. As we continue to test this component of the project we may experience similar needs in updating business processes.

7) **Single Sign On (SSO) and App Development….INPUT DESIRED:** As part of the implementation of the CRM, SMCCCD will launch a Single Sign On (SSO) experience for students which will include a Student Portal. The Student Portal will allow the student to access a variety of systems such as Canvas, WebSmart, and the CRM while only needing to log-on one time. The technical name for the portion of the CRM we are using is called Salesforce Advisor Link (SAL). **We'd like to brand this in a way that makes sense to employees and students, so please encourage feedback as to the name in this short survey.**

As the project is constantly evolving, some of the work has shifted in scope and timeliness. Checkout the Technology Taskforce website for timelines and past updates.

If you have any questions about the CRM, the implementation, or specific solutions or vendors, please direct your questions to your College Contact.