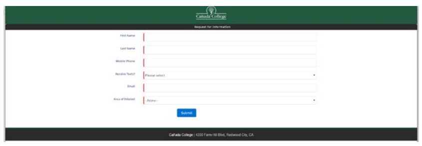
Dear College Community,

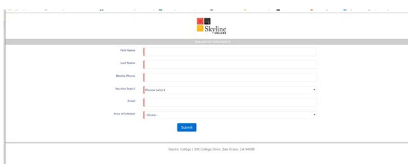
It has been another busy month preparing for the CRM Launch. Here are the updates:

Phase I: Recruitment and Marketing Update (Nearing Go Live)

- Completed the Request for Information (RFI) forms data fields for submission into the CRM. ***Request for Information (RFI) forms*** allow prospective students to request and receive information related to an Area of Interest. This information is driving them towards completing an admissions application.

- Completed the branding of the ***Request for Information (RFI) forms*** for public website publication.





- Completed the Email templates to be sent to students from Marketing Cloud who completed an RFI form. These messages are automated, personalized and mobile responsive.

- Completed the ***integration between the CRM and Marketing Cloud*** to allow RFI data to be sent to Marketing Cloud and vice-versa regarding student progression in the journey. This will allow Student Ambassadors in the Recruitment Offices to follow-up with students who have not completed an Admissions Application after a specified number of days.

Phase 1 Immediate Next Steps:

- ***Completion of integration*** between Banner and the CRM to inform the Marketing Cloud journeys as to whether a student has completed an Admissions Application. This will remove a student from the Marketing Journey that is trying to get them to apply for admission.
- Completion of testing and **putting into production** for all RFI Forms, Student Journeys, Email Communications and CRM integrations.

- **Final training** for Student Ambassadors and Recruiters on the use of the CRM in managing the Prospective Students. (Scheduled for October 25th).
- **Campus Tours** (Group and Individual) to be configured, tested and put into production.

Phase II: Matriculation and Enrollment Update (In Development)

- APEXIT (implementation partner) has begun ***configuring the CRM*** according to the Matriculation process maps and additional documentation provided from the Matriculation Retreats held in May at the three colleges.
- ITS mapped the data elements from Banner to the data elements needed for the ***Automated assignments*** of Success Team Members for matriculation and enrollment.

Phase II Immediate Next Steps:

- Marketing Teams will begin building the communications and journeys related to matriculation and enrollment.

Phase III: Counseling and Retention (In Discovery)

- ***Counseling Divisions, Program Staff and Instructional Faculty*** are finalizing 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.

Ongoing (Technical and Integration):

- Completed an upgrade to the International CRM instance to the ***Educational Data Architecture (EDA) Model*** (Thanks to the International Staff who helped with testing).
- Finalizing integration documentation, configuration and testing of Banner, Salesforce (CRM) and Marketing Cloud in support of various phases of implementation.

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.