

Dear College Community,

Welcome Back from Winter Break! We hope you had a restful time and are ready to jump back in to assisting students and learning more about the implementation of the Student Success Link, i.e. the CRM.

Here's what has been accomplished since our last [update in November](#) and what's on the horizon for the next few months:

- 1) **Request for Information (RFI) Forms (Phase 1 Launched December 2019):** No new updates.
- 2) **Success Plans (Phase 2 Launched June 2020):**
  - a. **Enrollment Steps Success Plans (Phase 2):** No new updates.
  - b. **Additional Success Plans (Phase 4):** No new updates.
- 3) **Enrollment Steps Marketing Messages and Journeys (Phase 2 Launched June 2020):**
  - a. **Continuous Improvement:** The CRM Team is developing training for Marketing Teams so they can build journeys, create automation, and manage messages more autonomously for both Matriculation and other programs and messages for the future.
- 4) **Success Team Assignments (Phase 2 Launched June 2020):**
  - a. **Continuous Improvement:** As programs continue through discovery as part of Phase 4, additional Success Team members will be built into the system and trained during the Spring 2021. Deans of Counseling continue to modify existing Success Team assignments based on college initiatives and improved data modeling.
- 5) **Systems Integrations (Ongoing):** Integration of various data systems is one of the most time-intensive parts of the CRM project as we bring more data and systems into the SSL.
  - a. **CCCAApply to Banner to CRM (Initial Application):**
    - i. Student cell phone number and texting preferences (Phase 3 in progress)
    - ii. Integration of documents from the CRM to Banner Document Management System (Phase 3 in progress)
    - iii. Assessment and Testing Coding (Phase 3 in progress)
    - iv. High School and Previous College Coding (Phase 4 in progress)
- 6) **Single Sign On (SSO) and App Development (Phase 2 Launched June 2020):**
  - a. **Continuous Improvement:** No new updates.

- 7) Counseling Appointments (Phase 3 Expected Launch Spring 2021):** Counselors have completed an 8 week training session on the use of the Student Success Link (SSL) and the process by which they set up their calendars in the system to allow students to self-schedule appointments. Counselors plan to go-live with students making appointments in SSL starting April 5<sup>th</sup>, 2021. There will also be a small set of counselors who will begin using the system before April 5<sup>th</sup>. They will be testing and providing feedback to the Counseling Taskforce.
- a. Work has begun to add continuing students into the SSL. Once they are added they will also have access to success teams, success plans, and the making of counseling appointments.
  - b. Work has been finalized to sync student appointments made in the Student Success Link with Non-Counseling Time, i.e. Meetings, Professional Time, etc. so that double booking should no longer occur once counselors are using the Student Success Link for appointment scheduling.
- 8) Document Management System solution (Phase 3 Expected Launch Spring 2021)**
- a. No new update.
- 9) Retention/Early Alerts/Canvas (Phase 3 Expected Launch mid-to-end Spring 2021)**
- a. Our vendor has finished their initial development of the Early Alert system in Canvas for Instructional Faculty to utilize to send an Early Alert to a students' Success Team so that some kind of intervention can take place. Initial testing by the SMCCCD teams has occurred and the two groups are working out the final details before moving the Early Alert interface into Canvas production, i.e. Live instance.
- 10) Texting Solution (Mogli) (Phase 3 Expected Launch Spring 2021)**
- a. The move of General Self Services (Banner) to production is expected for January/February 2021. This will allow the Mogli solution to be implemented shortly after this time period.
- 11) Chatbots (Phase 3 Expected Launch Spring/Summer 2021)**
- a. Final revisions to the content of Admissions & Records, Financial Aid and Veterans are in the works which will allow for the building of Chatbots during the Spring 2021.
- 12) Categorical & Other Programs (Phase 4 Expected Launch Spring 2021 and beyond)**

- a. EOPS, Promise and TRiO are currently on hold with their Discovery Process as we focus on the onboarding of their counselors and appointment schedulers in preparation for the Spring 2021.
- b. As the Marketing Teams are trained on the creation of journeys in Marketing Cloud, the Actionable emails created will be built to recruit students for the programs based on the criteria identified during the Fall semester.

**13) International Student Programs (ISP):** No new updates.

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.