

Dear College Community,

Here's what has been accomplished since our last update in May and what's on the horizon for the next few months. To check out previous Phases of implementation, visit the [Technology Taskforce website](#).

1) **Success Plans (Phase 2 Launched June 2020):**

- a. **Continuous Improvement: Enrollment Steps Success Plans (Phase 2):** CSM is implementing MyMajors as an Enrollment Step. Data will integrate from MyMajors to the CRM, and students will have access to MyMajors through Single Sign On.
- b. **Additional Success Plans (Phase 4): Veterans teams** at the three colleges have completed Success Plans that will be assigned to Veteran and Military Connected students with a launch planned for Fall 2021.

2) **Enrollment Steps Marketing Messages and Journeys (Phase 2 Launched June 2020):**

- a. **Continuous Improvement:** CRM Team has completed piloting 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. The CRM Team is scheduling training for all Marketing Teams in the Fall 2021.
 - i. **Skyline ESOL program** has been creating ESL friendly Enrollment Steps messages.
 - ii. **CSM and Cañada Assessment Centers/Counseling** are working to improve the process and messages related to the Assessment Enrollment Step including the adding of the ability for students to schedule assessment appointments, as needed.
 - iii. **Assessment & Placement Codes:** Assessment Codes for ESL/ENGL/MATH are continuing to be refined to ensure the correct codes are being used to support Assessment Codes in the SSL. This work will continue during the Fall 2021 prior to SSL integration.

3) **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 were built into the system and trained during the Spring 2021. Success Teams will continue to be added and trained during the Summer 2021. Deans of Counseling continue to modify existing Success Team assignments based on college initiatives and improved data modeling.
- b. **Veterans Teams** at the three colleges have developed the criteria for Veteran Success Team assignments which will include Veterans Counselors, School Certifying Officials and Veterans Resource Center Coordinators.

4) Counseling Appointments (Phase 3 Launched Spring 2021):

- a. The CRM Team completed adding new Counseling appointment Topics and SubTopics that have been provided by the Counseling Taskforce and Categorical Programs and they are live in production. The new Counselors and Third Party Schedulers have been trained in new Topics and SubTopics.
- b. Counselors have been trained on configuring their Availability, and have added their schedules for Summer and Fall.
- c. The CRM Team has launched Queue Management, a feature that will allow for virtual Drop In appointments to be managed by individual counselors, programs, or divisions. Counselors will begin using this feature over Summer 2021 and Fall 2021.
- d. Returning Student Success Plans are being developed and will be implemented over August/September. Returning students needing to complete some or all matriculation steps will be messaged similar to New Students nudging them forward in completing their enrollment steps.
- e. Exempt Student Success Navigator messaging is being created for new Exempt students with expected implementation over August/September.

5) Retention/Early Alerts/Canvas (Phase 3 Expected Launch Fall 2021)

- a. The CRM Team in collaboration with the Deans of Counseling and the Dean of Academic Support and Learning Technologies (ASLT) will work over the summer in preparation for a Fall 2021 launch. Instructional Technologists are working training for faculty for Flex Day.

6) Texting Solution (Mogli) (Phase 3 Expected Launch Fall 2021)

- a. **Student cell phone number and texting preferences** (Phase 3 in progress)
Students and employees can now indicate their preferences in **General Self Service** located in the [OneLogin Portal](#).
- b. The updated Communications Policy was approved by the Board of Trustees on April 28th. Marketing Teams are starting to interpret the Board Policy to develop a Texting Standard Operating Procedure (SOP) to support both Marketing Cloud Journeys, individual counselor/program texting and other college student communications.

7) Chatbots (Phase 3 Expected Launch Fall 2021)

- a. Final revisions to the content of Admissions & Records, Financial Aid and Veterans, and Counseling is expected to be completed by the end of July. During the summer, teams will work to refine content, update websites and solidify

processes so the Chatbots can be created in an anticipation of a launch in Fall 2021.

8) Categorical & Other Programs (Phase 4 Launch Spring 2021 and beyond)

- a. EOPS, Promise and TRiO have resumed their Discovery Process and will be meeting with the CRM team over the Summer to discuss requirements. This includes a deeper look at Appointment Topics, Reporting and Success Plans.
- 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.

9) **International Student Programs (ISP):** ISP Offices will continue going through discovery to their student enrollment process to see where the use of automation and alignment with the Domestic student experience can occur.

10) **Forms in the SSL:** Integration of documents from the CRM to Banner Document Management System (WebXTender) is being redesigned from the original proof of concept to support more seamless integration. During August/September 2021 the new process should be completed.

11) High School and Previous Colleges (Phase 4 in progress). College CEEB Codes have been validated; HS CEEB Codes are still in progress of being validated. Banner is currently being aligned with the updated College Codes to support transcript evaluation Success Plans and messaging in the SSL.

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**.