

Dear College Community,

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

- 0) **Request for Information (RFI) Forms (Phase 1 Launched December 2019):** No new updates.
- 1) **Success Plans (Phase 2 Launched June 2020):**
 - a. **Continuous Improvement: Enrollment Steps Success Plans (Phase 2):** Cañada has disaggregated the Assessment Step from the Counseling Enrollment Step where it was previously combined. It is now it's own Enrollment Step.
 - b. **Additional Success Plans (Phase 4):** Veterans teams at the three colleges are working on Success Plans that will be assigned to Veteran and Military Connected students with a launch planned for July 2021.
- 2) **Enrollment Steps Marketing Messages and Journeys (Phase 2 Launched June 2020):**
 - a. **Continuous Improvement:** The 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 over the Summer.
 - i. Skyline ESOL program is looking to create ESL friendly Enrollment Steps messages.
 - ii. CSM and Cañada 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.
- 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 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.
 - 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) **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)
Students and employees can now indicate their preferences in **General Self Service** located in the [OneLogin Portal](#).
- 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).
- v. Canvas Integration of Early Alerts (Phase 3 configured and tested. Will launch in Fall 2021).

5) **Single Sign On (SSO) and App Development (Phase 2 Launched June 2020):**

- a. **Continuous Improvement:** No new updates.

6) **Counseling Appointments (Phase 3 Expected Launch Spring 2021):** Counselors went live with the Student Success Link on April 5th. Counselors now have counseling appointments in the system, and students can self-book appointments. Welcome Center Staff continue to support students and counselors with third party scheduling.

- a. The CRM Team is working to add new Counseling appointment Topics and SubTopics that have been provided by the Counseling Taskforce and Categorical Programs. Counselors have been trained in new Topics and SubTopics, and there are trainings scheduled for Third Party Schedulers during the week of 5/24. These will be live starting with Summer Availability Scheduling.
- b. Counselors have been trained on configuring their Availability, and are currently working on adding their schedules for Summer and Fall.
- c. The CRM Team is configuring Queue Management, a feature will allow for virtual Drop In appointments to be managed by individual counselors, programs, or divisions. This will be available starting with Summer Availability Scheduling.
- d. Returning Student Success Plans are being developed and will be implemented over the summer. 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.

7) **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 at Skyline completed an Early Alert Working Session on May 5th with College personnel to discuss the new process for Early Alerts. Teams will work over the summer in preparation for a Fall 2021 launch.

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

- a. The updated Communications Policy was approved by the Board of Trustees on April 28th. This lays the foundation for us to operationalize the use of texting within the Student Success Link. Over the summer, Marketing Teams will work with the campus constituents to develop a Texting Standard Operating Procedure (SOP) to support both Marketing Cloud Journeys and individual counselor/program texting.

9) 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 May. 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 by the end of Fall 2021.

10) 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.

- 11) 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.

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.