

Dear College Community,

It's time for an update on the CRM, i.e. Student Success Link (SSL)! After successfully launching Phase 2, the team is now moving through Phases 3 and 4 of the project.

Phase 3 includes finalizing the configuration for Counseling so students can complete self-scheduled appointments, implementing Early Alerts, adding a texting solution, and configuring form submission from the Student Success Link.

Phase 4 includes bringing categorical and other programs into the SSL as well as developing Chat Bots, Assessment and Testing coding, and other student types such as Returning, Continuing, and K-12 students. NOTE: Only First Time and First Time Transfer students are currently in the SSL.

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

- 1) **Request for Information (RFI) Forms (Phase 1 Launched December 2019):** All three colleges have RFI forms on their 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. New Recruitment Student Ambassadors have been trained and are following-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:** The CRM Team met with Recruiters and Marketing Teams to discuss ideas for additional uses for RFI informs including RFIs specific to high school students, embedding RFIs in webpages, and analyzing RFI data for conversion rates (RFI to application conversion rates). The groups will continue to work on these initiatives.
- 2) **Success Plans (Phase 2 Launched June 2020):**
 - a. **Enrollment Steps Success Plans (Phase 2):** The colleges have created the enrollment steps students need to complete in order to become enrolled at the college and these appear as "To-Do List" items for the student in their view of the Student Success Link. Students receive automated messages encouraging them to complete the steps at a certain cadence as part of the process.
 - b. **Additional Success Plans (Phase 4):** The CRM Team is actively meeting with EOPS, Promise and TRiO to complete discovery, and draft new Success Plans specific to their programs.
- 3) **Matriculation Messages and Journeys (Phase 2 Launched June 2020):**

- a. **Enrollment Steps Marketing Messages (Phase 2):** The Marketing Teams took the work completed during the matriculation retreats at each college and built the email templates into Marketing Cloud. The ITS CRM Team completed 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 enrollment steps.
 - b. **Continuous Improvement:** Additional messages for registration appointments for continuing students, Skyline Meta Major messages, registration hold messages, and CSM My Major messages have been created since the initial launch in June 2020.
- 4) **Success Team Assignments (Phase 2 Launched June 2020):** 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 Team assignments and those have been programmed into the CRM. Criteria have been determined for:
- a. Financial Aid Team Members
 - b. Residency Specialists
 - c. Success Navigators (those to help with matriculation steps)
 - d. General Counselors (as part of the initial counseling appointment of matriculation)
 - e. Specialized Counselors (Based on criteria such as meta major, EOPS, Promise, etc.)
 - i. **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. **CCCApply to Banner to CRM (Initial Application):** ITS completed the initial integration of CCCApply data elements needed for the Phase 2 launch. There have been a number of areas in which SMCCCD internal controls and processes needed to be reworked in order to move forward with the project. These include(d):
 - i. Program of study updates (Phase 2 complete)

- ii. Student personal email updates (Phase 2 complete)
- iii. Paper admissions application usage (Phase 2 complete)
- iv. Student cell phone number and texting preferences (Phase 3 in progress)
- v. Integration of documents from the CRM to Banner Document Management System (Phase 3 in progress)
- vi. Assessment and Testing Coding (Phase 3 in progress)
- vii. High School and Previous College Coding (Phase 4 in progress)

6) Single Sign On (SSO) and App Development (Phase 2 Launched June 2020): SMCCCD launched the Single Sign On (SSO) experience for students which includes the “mySMCCD Student Portal.”

- a. The [mySMCCD Student Portal](#) allows the student to access a variety of systems such as Canvas, WebSmart, and the SSL while only needing to log-on one time. The technical name for the portion of the CRM we are using is “Salesforce Advisor Link” (SAL). The internal name selected based on the SMCCCD survey results is the “Student Success Link” (SSL).
- b. Continuous Improvement:** ITS has worked to speed up the integration timing between students completing the CCCApply application and the creation of their SSO credentials. Records were previously integrated daily from Banner, and they now come over to the SSL every 4 hours. ITS is continuing work on SSO to be sure the functionality is also working properly for international students as they are processed from their International Admissions Application portal into their SSL portal.

7) Counseling Appointments (Phase 3 Expected Launch Spring 2021): Counselors are in the middle of 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.

- a. Phase 3 includes bringing counselors fully into the SSL and allows students to make appointments with counselors directly. This will support the many case management efforts around Guided Pathways and college redesign projects taking place.
- b. The Counseling Taskforce continues to provide feedback on enhancements to the SSL to improve the experience for counselors and students during weekly meetings. The group meets weekly to review training material and give feedback on the implementation.

8) Document Management System solution (Phase 3 Expected Launch Spring 2021)

- a. The CRM Team has built an initial proof of concept for the Residency Reclassification form which includes a responsive model of displaying questions depending on student responses and the ability to upload supporting

documentation, indexing the documents and integrating the documents over into WebXTender.

8) Retention/Early Alerts (Phase 3 Expected Launch Spring 2021)

- a. Based on discovery meetings between instructional and counseling faculty in the Fall 2019, work has begun with vendor Instructure, on building a way within Canvas, for instructors to submit an Early Alert for students in their course. The Early Alert would be sent over to the SSL so some kind of intervention can take place with the Success Team members assigned to the student.
- b. The Taskforce on Teaching and Learning (TTL) out of the District Academic Senate (DAS) will work to create training for faculty and best practices on the implementation of this process in the Spring 2021.

9) Texting Solution (Mogli) (Phase 3 Expected Launch Spring 2021)

- a. Members of the Enrollment Services Committee (ESC) reviewed the General Self Services Module for Banner 9. This will allow students to indicate their texting preferences in support of a texting solution for SSL. Work is expected to be completed in December 2020 for the General Self Services upgrade to allow for the implementation of Mogli in Spring 2021.

10) Chatbots (Phase 3 Expected Launch Spring/Summer 2021)

- a. Various groups across Admissions & Records (Veterans, Financial Aid, General A&R); Student Accounts and Counseling have been tasked with and are working on developing the Questions, Answers and Resources needed to inform the building of a Chatbot for students (and employees).

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

- a. EOPS, Promise and TRiO are currently going through the Discovery Process to bring various aspects of their programs into the SSL. This includes the creation of Actionable Emails sent to students based on program selection criteria, program application processes and procedures, and data needs. The groups will continue to build out Success Teams, Success Plans and other elements in transitioning into the SSL.

12) International Student Programs (ISP) Updates: The ISP offices have been using the CRM for a number of years to manage the admissions process for international students and the above updates have been incorporated into the same system for ease of navigation.

- a. **Continuous Improvement:** International students now have access to the Student Success Link to create additional applications, receive Success Plans and Success Teams and receive messages around enrollment similar to the domestic

students as described above. The ISP team is working to implement UniBuddy, a recruitment tool which will integrate with SSL as an inquiry tool.

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.