

CRM Update for Cañada Guided Pathways Steering Committee

An overview of the Constituent Relationship
Management (CRM) system

NOVEMBER 2019



SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

Welcome & Agenda Overview

- ▶ Agenda
 - ▶ CRM Background and RFP Process
 - ▶ Overview of the CRM Capabilities
 - ▶ Overview of CRM work thus far
(Phases of Implementation)

CRM Background



- ▶ 2017 Technology Taskforce

- ▶ Improve student experience, outcomes and success

- ▶ Three areas of need:

- ▶ Operational efficiency
- ▶ Expanded use of data
- ▶ Ease of use for students and employees

- ▶ Timeline:

- ▶ March 2018: 7 proposals
- ▶ May-November 2018: Presentations, interviews, clarifications on proposals, best and final
- ▶ December 2018: Recommendation to the Board of CRM Platform and Implementation partners

CRM Background, cont.



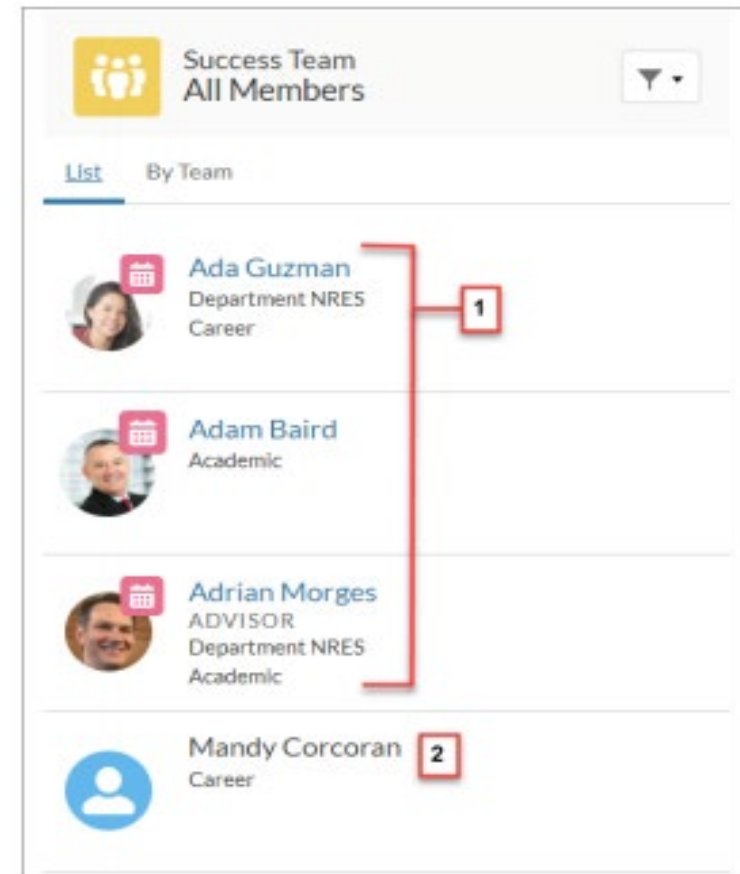
- ▶ Constituent Relationship Management (CRM)
- ▶ Technology system used for managing relationships, i.e. prospective, current and alumni students.
- ▶ Uses student historical and ongoing data to create interventions for
 - ▶ Recruitment and Admissions
 - ▶ Retention and Completion
 - ▶ Alumni and Workforce

Overview of CRM Capabilities

- ▶ System of Engagement vs. System of Record
 - ▶ Engage (and reengage) prospects and current students
 - ▶ Communication (Email/Text/Push Notifications/Phone)
 - ▶ Alerts and Interventions, i.e. Success Plans
 - ▶ Chatbots and Knowledge Base Articles
 - ▶ Integration of systems (Canvas, Banner, Degree Works, Accudemia, etc.)

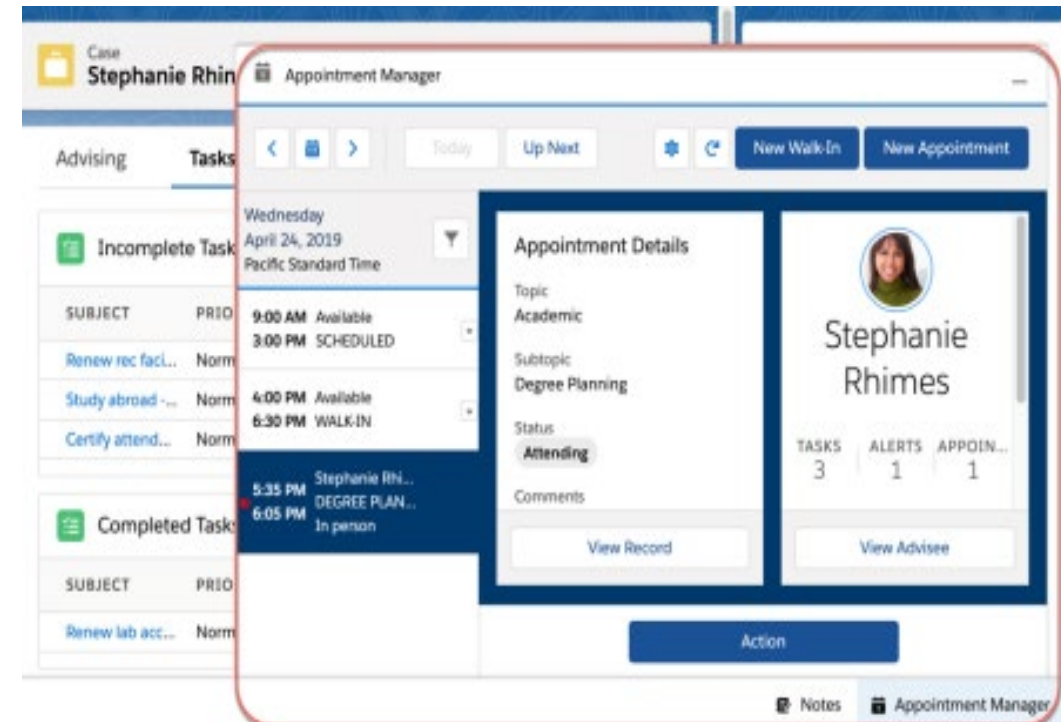
Overview of CRM Capabilities, cont.

- ▶ Success Teams
 - ▶ Recruitment
 - ▶ Financial Aid
 - ▶ Success Navigators
 - ▶ Counselors
 - ▶ Instructional Faculty
 - ▶ Tutors
 - ▶ Program Staff, etc.



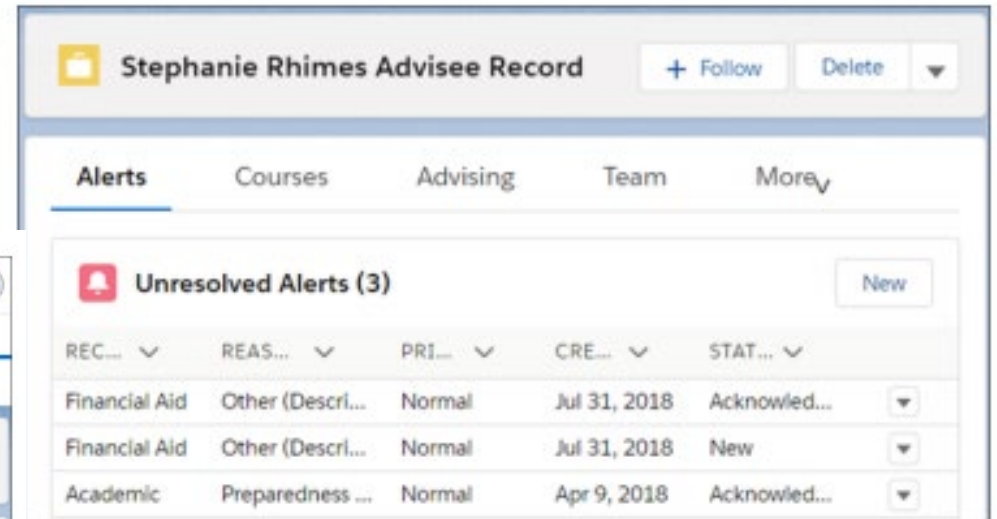
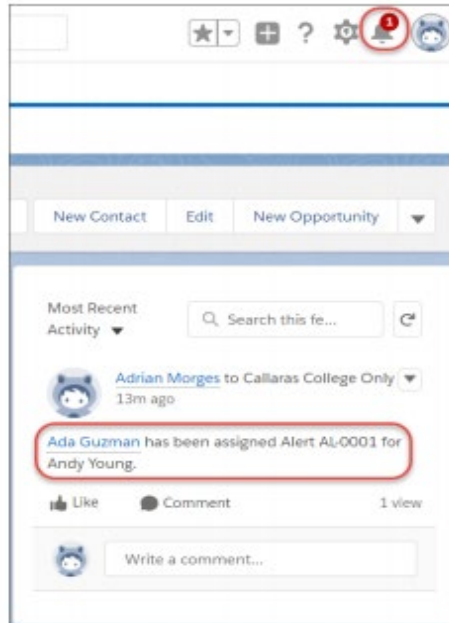
Overview of CRM Capabilities, cont.

- ▶ Appointment Scheduling
 - ▶ Scheduled Appointments, Drop-In Appointments, Welcome Center Scheduling
 - ▶ Integration with Outlook/Google Calendars
 - ▶ Automated reminders to students



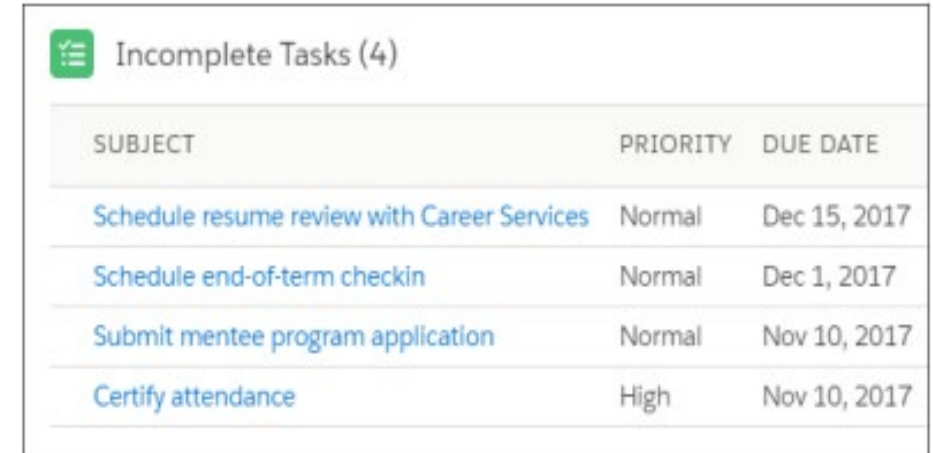
Overview of CRM Capabilities, cont.

- ▶ Alerts (Proactive, Early, Post Term)
 - ▶ Systems Integration (Automated)
 - ▶ Manual Submission



Overview of CRM Capabilities, cont.

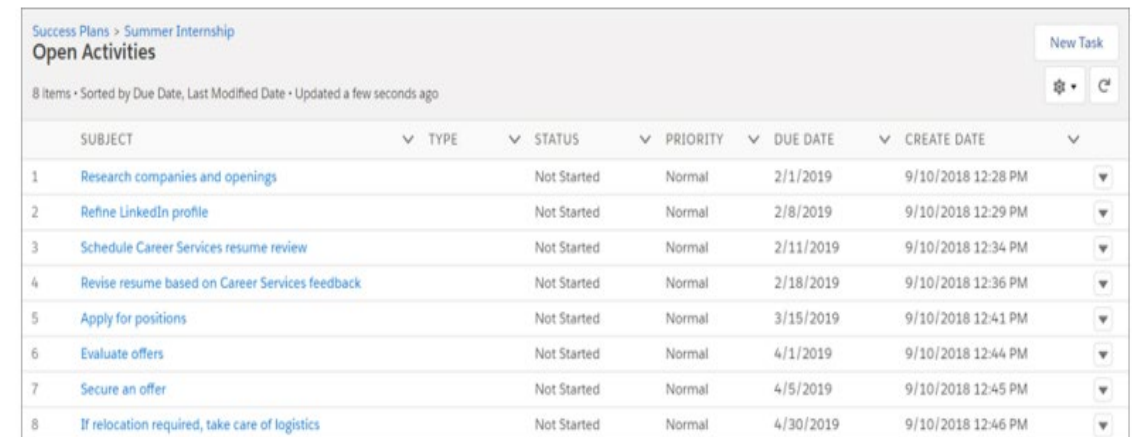
- ▶ Assign Tasks (Individual Tasks to individual students or groups of students)



A screenshot of a table titled 'Incomplete Tasks (4)' with a green icon. The table has three columns: SUBJECT, PRIORITY, and DUE DATE. It lists four tasks: 'Schedule resume review with Career Services' (Normal, Dec 15, 2017), 'Schedule end-of-term checkin' (Normal, Dec 1, 2017), 'Submit mentee program application' (Normal, Nov 10, 2017), and 'Certify attendance' (High, Nov 10, 2017).

SUBJECT	PRIORITY	DUE DATE
Schedule resume review with Career Services	Normal	Dec 15, 2017
Schedule end-of-term checkin	Normal	Dec 1, 2017
Submit mentee program application	Normal	Nov 10, 2017
Certify attendance	High	Nov 10, 2017

- ▶ Create Success Plans (Multi Step goals)



A screenshot of a table titled 'Open Activities' under the heading 'Success Plans > Summer Internship'. It includes a 'New Task' button and a '8 Items • Sorted by Due Date, Last Modified Date • Updated a few seconds ago' status bar. The table has columns for SUBJECT, TYPE, STATUS, PRIORITY, DUE DATE, and CREATE DATE. It lists eight activities, all with a status of 'Not Started' and a priority of 'Normal'.

	SUBJECT	TYPE	STATUS	PRIORITY	DUE DATE	CREATE DATE	
1	Research companies and openings		Not Started	Normal	2/1/2019	9/10/2018 12:28 PM	▼
2	Refine LinkedIn profile		Not Started	Normal	2/8/2019	9/10/2018 12:29 PM	▼
3	Schedule Career Services resume review		Not Started	Normal	2/11/2019	9/10/2018 12:34 PM	▼
4	Revise resume based on Career Services feedback		Not Started	Normal	2/18/2019	9/10/2018 12:36 PM	▼
5	Apply for positions		Not Started	Normal	3/15/2019	9/10/2018 12:41 PM	▼
6	Evaluate offers		Not Started	Normal	4/1/2019	9/10/2018 12:44 PM	▼
7	Secure an offer		Not Started	Normal	4/5/2019	9/10/2018 12:45 PM	▼
8	If relocation required, take care of logistics		Not Started	Normal	4/30/2019	9/10/2018 12:46 PM	▼

Overview of CRM work thus far....

PHASE 1: Recruitment and Marketing

- ▶ Recruitment Discovery & Creation
 - ▶ Process Maps
 - ▶ RFI Forms
 - ▶ Tour Requests

College of San Mateo

Request for Information

First Name

Last Name

Mobile Phone

Receive Texts? Please select

Email

Area of Interest --None--

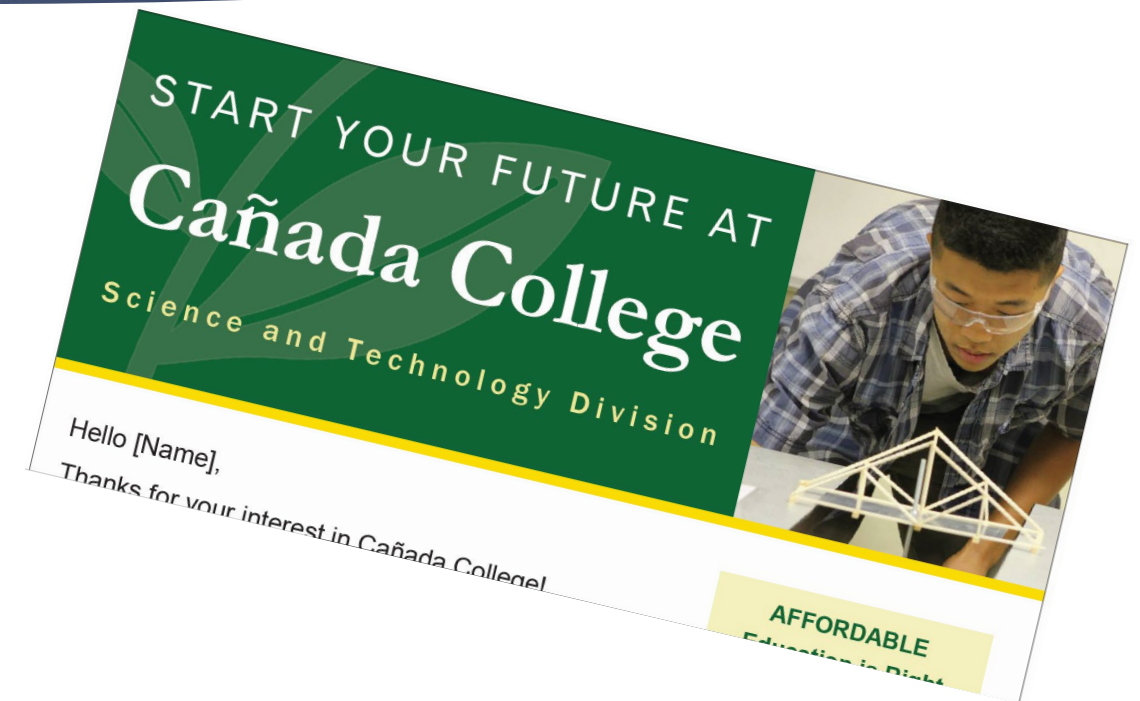
Submit

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Overview of CRM work thus far....cont.

PHASE 1: Recruitment and Marketing

- ▶ Marketing Discovery & Creation
 - ▶ Marketing Cloud
 - ▶ Communication Flows
 - ▶ Student Journeys

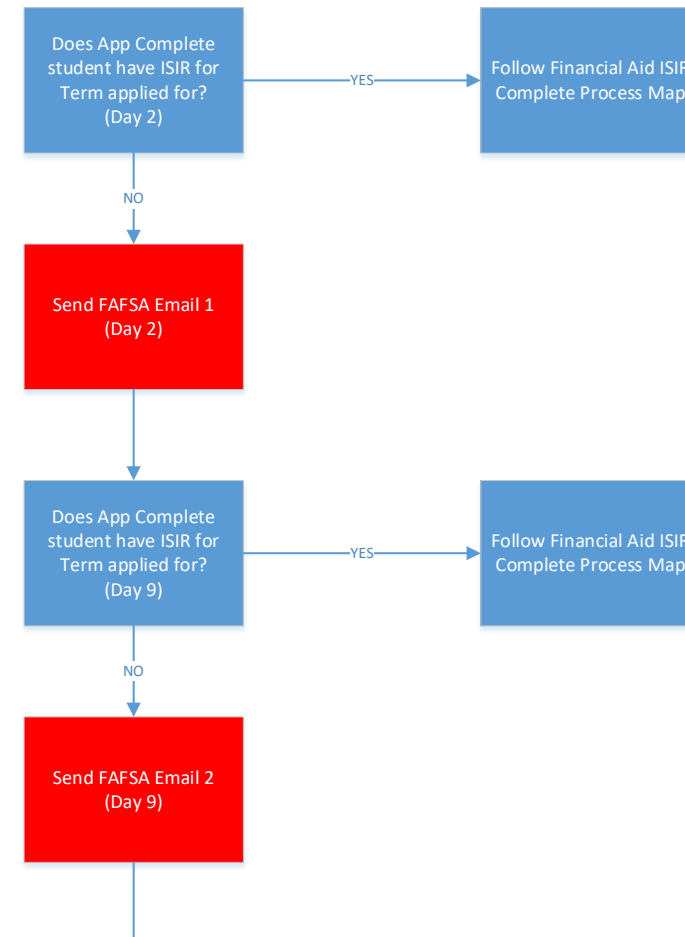


Overview of CRM work thus far....cont.

PHASE 2: Matriculation and Enrollment

► Matriculation Discovery & Creation

- Process Maps
- Financial Aid
- Residency
- Orientation
- Assessment/Placement
- Student Education Plan (Counseling Appt)



Overview of CRM work thus far...cont.

PHASE 3: Retention and Counseling

- ▶ Counseling Information Meetings
 - ▶ Counselor Data Dashboards
 - ▶ Working Sessions w/Instructional Faculty
 - ▶ Alerts w/Associated Tasks and Success Plans
- ▶ SARS/MIS Data Mapping (Appt. Types & Topics)
- ▶ Appointment Configuration

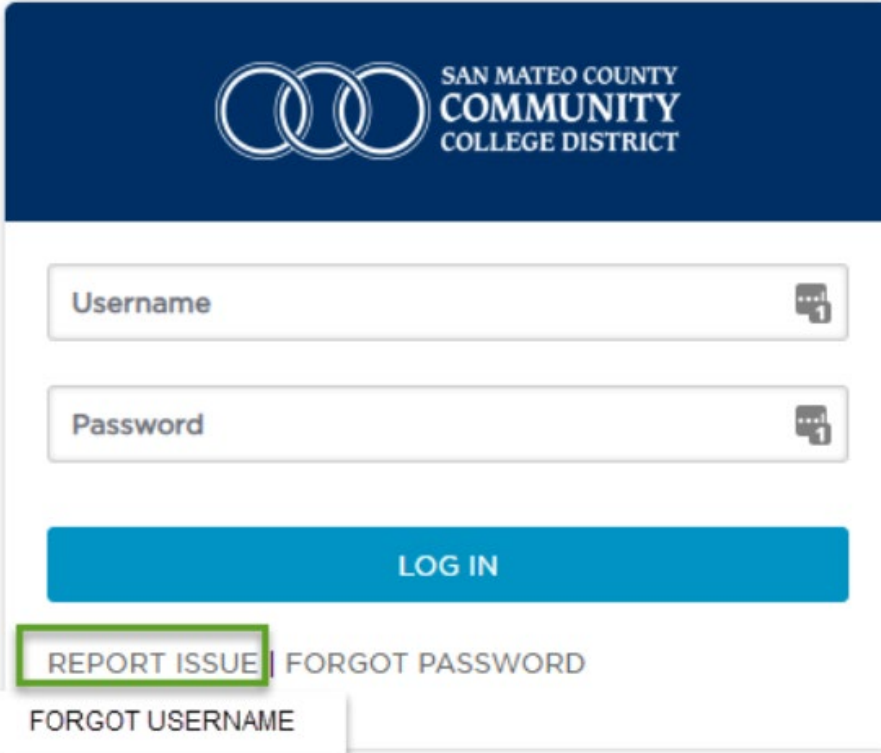
▶ Early Alerts:

- ▶ Grade Concern
- ▶ Failure Concern
- ▶ Missing/Late Assignment
- ▶ Attendance Concern
- ▶ Participation Concern
- ▶ Preparedness Concern
- ▶ Personal Concern
- ▶ Career Exploration Needed
- ▶ Recognition

- ▶ **NOTE:** There will be a comments section for each early alert submitted for the instructional faculty member to add comments about the alert.

Overview of CRM work thus far...cont.

- ▶ MULTIPHASE: Data Integration
 - ▶ Banner:
 - ▶ CCCApply,
 - ▶ Matriculation Data
 - ▶ Canvas (Instructure)
 - ▶ DegreeWorks
 - ▶ Data Warehouse
 - ▶ Single Sign On (SSO)



The screenshot shows the login interface for the San Mateo County Community College District. At the top is a dark blue header with the college's logo and name. Below this are two input fields for 'Username' and 'Password', each with a small icon of a speech bubble and the number '1' indicating a required field. A large blue 'LOG IN' button is positioned below the password field. At the bottom, there are three links: 'REPORT ISSUE' (highlighted with a green box), 'FORGOT PASSWORD', and 'FORGOT USERNAME'.

SAN MATEO COUNTY
COMMUNITY
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Username

Password

LOG IN

REPORT ISSUE | FORGOT PASSWORD

FORGOT USERNAME