



CAMPUS ANNOUNCEMENT

Dear College Community,

Here's what has been accomplished since our last [update in February](#), 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. Enrollment Steps Success Plans (Phase 2):** Cañada is working to disaggregate the Assessment Step from the Counseling Enrollment Step where it is currently combined.
 - b. Additional Success Plans (Phase 4):** No new updates.
- 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.
- 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 will begin working through their discovery process in conjunction with the vendor to fulfill grant requirements prior to June 30.

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. **CCCApply 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.

b. Skyline and CSM will soon have MyMajors icons in the OneLogin portal as a way for students to engage in career exploration while working with their counselors.

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. These will be live starting with Summer Availability Scheduling.
- b. 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.
- c. New Returning Student Types will be created to distinguish Returning students needing to complete Matriculation Steps vs. Those who do not. This will all for segmentation of Enrollment Steps and Marketing messages as part of matriculation requirements. New and Returning Student Appointment Topics and Subtopics will also be available starting with Summer Availability Scheduling.
- d. Additional students continue to be added to the Student Success Link including K-12 and Concurrent Enrollment Students and Students who have not recently been active.

7. Retention/Early Alerts/Canvas (Phase 3 Expected Launch mid-to-end Spring 2021)

- a. The CRM Team in collaboration with the Deans of Counseling and the Dean of Academic Support and Learning Technologies has scheduled an Early Alert Working Session with Instructional Faculty to discuss the new process for Early Alerts. This session will take place on May 5th.

8. Texting Solution (Mogli) (Phase 3 Expected Launch Spring 2021)

- a. The updated Communications Policy is going through the District Participatory Governance Committee (DPGC) which will lay the foundation for us to operationalize the use of texting within the Student Success Link. Once that is finalized, the CRM Team will work with the campuses to develop a Texting Standard Operating Procedure (SOP) Development to support both Marketing Cloud Journeys and individual counselor/program texting.

9. **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. Counseling is beginning to build out the context to the use Chatbots as well.

10. **Categorical & Other Programs (Phase 4 Expected Launch Spring 2021 and beyond)**
 - a. While the district is continuing to work with EOPS, Promise and TRiO on CRM implementation, we are currently on hold with the official Discovery Process as we focus on the launch of counselors and appointment schedulers in the CRM.

 - 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):** Since ISP Offices have been using Salesforce for their Admissions Application for the past few years, the timing is allowing us to integrate some of the new functionality with Student Success Link into their processes. The groups are currently 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 Dean [Max Hartman](#).