Dear College Community,

Here's what has been accomplished since our last update in January, and what's on the horizon for the next few months:

1. **Request for Information (RFI) Forms (Phase 1 Launched December 2019):** No new updates.

2. **Success Plans (Phase 2 Launched June 2020):**
    a. **Enrollment Steps Success Plans (Phase 2):** No new updates

    b. **Additional Success Plans (Phase 4):** No new updates.

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

    a. **Continuous Improvement:** The CRM Team is 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. After completing the pilot training the CRM team will begin training for all Marketing Teams.

4. **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.

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):**
      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)

6. **Single Sign On (SSO) and App Development (Phase 2 Launched June 2020):**
   a. **Continuous Improvement:** New logos can now be found for both students and employees using the Student Success Link (SSL) as found in the [OneLogin portal](#).

   b. Various teams are also working to bring MyMajors icons for the colleges to the OneLogin portal as a way for students to engage in career exploration while working with their counselors.

7. **Counseling Appointments (Phase 3 Expected Launch Spring 2021)**: After completing an eight-week training series on the Student Success Link (SSL), counselors continue to attend trainings in smaller groups where they can ask questions, practice in the system, and prepare for their go-live. Counselors plan to go-live with students making appointments in SSL starting April 5, 2021. There will also be a small set of counselors who will begin using the system before April 5. They will be testing and providing feedback to the Counseling Taskforce.

a. Continuing students have been added into the SSL. They now have access to success teams, success plans, and the making of counseling appointments.

b. Work has been finalized to sync student appointments made in the Student Success Link with Non-Counseling Time, i.e. Meetings, Professional Time, etc. so that double booking will not occur once counselors are using the Student Success Link for appointment scheduling.

c. Third Party Schedulers have been trained on how to book appointments on behalf of counselors and students. Third party schedulers will begin using the SSL at the same time as counselors to support appointment bookings and will undergo additional training closer to the Go Live Date.

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

   a. No new update.

9. **Retention/Early Alerts/Canvas (Phase 3 Expected Launch mid-to-end Spring 2021)**
   a. No new update.

10. **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, it will allow the Mogli solution to be implemented shortly after this time period.

11. **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 explore the use of Chatbots as well.

12. **Categorical & Other Programs (Phase 4 Expected Launch Spring 2021 and beyond)**

a. EOPS, Promise and TRiO are currently on hold with their Discovery Process as we focus on the onboarding of their counselors and appointment schedulers in preparation for the Spring 2021.

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.

13. **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. On February 4, the CRM Team hosted the first District Wide CRM Townhall. The team reviewed the work launched in Phase 1 and Phase 2, as well as the work being completed in Phase 3 and Phase 4 of the project. If you missed the Townhall and you're interested in learning more about the work that has been completed and what to expect in future phases, you can watch the [recording here](#).

If you have any questions about the CRM, the implementation, or specific solutions or vendors, please direct your questions to Dean [Max Hartman](#).