Cañada College

CAMPUS ANNOUNCEMENT

Dear College Community,

It's time for an update on the CRM! After successfully launching Phase 2, the team is now moving into 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 CRM. Phase 4 includes categorical and other programs, as well as additional services for students such as Success Teams, Success Plans, and Appointment Scheduling. Phase 4 also includes Chat Bots, Assessment and Testing, and other student types such as Returning, Continuing, and Concurrent Enrollment students.

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

1. **Request for Information (RFI) Forms:** All three colleges launched Request for Information (RFI) forms on 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. Student Ambassadors in the Recruitment Offices have followed-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 first CI analysis took place in September, and the CRM team checked in with the college recruiters to see how the first year has been going. We reviewed issues, potential solutions, and enhancements.

2. **International Application Updates:** The International Students Offices have been using the CRM for a number of years to manage the admissions process for international students. The ITS CRM team worked with the college ISP offices and district ISP personnel to update the application to align with the new data architecture shared on the domestic side in order to utilize the same Salesforce platform throughout the district.

    a. **Continuous Improvement:** The CRM team has worked with the International team on continuous improvement efforts. This includes adding a feature in the International Applicant Portal so students can submit more than one application, as well as updates to the application and incorporating matriculation steps for international students into the system. We are also supporting the International team as they implement UniBuddy, a recruitment tool which will integrate with the CRM.

3. **Enrollment Steps Success Plans:** Phase 2 of implementation included the enrollment steps for new students to higher education. These are students considered “non-exempt” from the matriculation steps of orientation, assessment/placement, and counseling/SEP creation. The colleges have created the enrollment steps students need to complete in order to become enrolled at the college as these will appear as “To-Do List” items for the student.

    a. **Integration:** ITS staff completed the integration necessary for the CRM, Banner, and Marketing Cloud to move information back and forth between these areas.

    b. **Continuing Improvement:** Previously students saw their enrollment steps “To- Do List” as view only. Improvements were made to allow a student’s enrollment step to be marked “complete” when Banner indicates the student has satisfied that step. ITS has also completed the integration needed to support sending registration emails from the CRM to continuing students. Now students will receive their registration dates from the CRM rather than Banner and if a students’ registration date changes after the initial message is sent, the student will receive an updated message with their new date.

4. **Success Team Assignments:** 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. Recruiters
b. Financial Aid Team Members
c. Residency Specialists
d. Success Navigators (those to help with matriculation steps)
e. General Counselors (as part of the initial counseling appointment of matriculation)
f. Specialized Counselors (Based on criteria such as meta major, EOPS, Promise, etc.)
    i. **Continuous Improvement:** Success Team assignments were implemented in Phase 2, but will also be used for categorical and other programs during the implementation for Phase 4. The CRM team is in the discovery phase with these programs with a goal to implement in Spring 2021.

5. **Matriculation Messages and Journeys:** The Marketing Teams took the work completed during the matriculation retreats at each college and built the email templates into Marketing Cloud during the month of January. The ITS CRM Team has 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 matriculation processes.

    a. **Continuous Improvement:** The CRM launched matriculation messages as part of Phase 2, but additional messages have been added as we move forward with other phases. Additional messages include messages for registration for continuing students, Skyline Meta Major messages, CSM My Major messages and eventually new Cañada students will receive messages from the CRM specifically to their identified Interest Areas.

6. **Systems Integrations:** Integration of various data systems is one of the most time-intensive parts of the CRM project. The ITS team has been working with our implementation partners, Enrollment RX and APEXIT, to build out the integrations so that the necessary data is in the CRM for both students and employees. Updates on various integrations:

    a. **CCCApply to Banner to CRM (Initial Application):** ITS finalized the integration of CCCApply data elements needed for the Phase 2 launch in the spring. This has led to a number of areas in which SMCCCD internal controls and processes needed to be reworked in order to move forward with the project. This includes:

        i. Program of study updates

        ii. Student personal email updates

        iii. Paper admissions application usage

7. **Single Sign On (SSO) and App Development:** As part of Phase 2 implementation of the CRM, SMCCCD launched the Single Sign On (SSO) experience for students which includes the "mySMCCD Student Portal." The mySMCCD Student Portal allows the student to access a variety of systems such as Canvas, WebSmart, and the CRM 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 survey results is the "Student Success Link" (SSL).

    a. **Continuous Improvement:** Since the launch of SSO in Phase 2, ITS has worked to speed up integration timing to make a more seamless process for students. Records were previously integrated daily from Banner, and they now come over to the CRM every 4 hours.

8. **Counseling Appointments**: Counselors were trained on the use of Student Success Link (SSL) and the process by which they set up their calendars in the system to allow students to self-schedule appointments. Phase 3 includes bringing counselors fully into the SSL and allowing students to make appointments with counselors directly. This will support the many case management efforts around Guided Pathways and college redesign projects taking place.

a. **Discovery**: The CRM team has worked with the deans of counseling across the district to create a Counseling Taskforce. The taskforce is made up of counselors from all three colleges who can provide feedback on the CRM and help develop solutions and enhancements on configuration related to counseling and appointments. The CRM team has met twice with the taskforce and will continue to meet to develop solutions.

9. **Phase 3 and 4:** Phases 3 and 4 are planned to launch in Fall 2020 and Spring 2021. The CRM Team is working to complete the required discovery and process maps for these phases. After discovery and process maps are completed, each feature will be given a more specific launch date.

   a. Phase 3
      i. Document Management System solution
      ii. Retention/Early Alerts
      iii. Texting Solution/Mogli
      iv. Counseling Appointments
   b. Phase 4
      i. Grant/Categorical Programs/Additional Services
      ii. Assessment and Testing
      iii. Chatbots

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.