

Campus update on CRM implementation

CSM Announcements

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To: CSM Employees <CSM@smccd.edu>

Dear CSM Community,

As many of you know, College of San Mateo, and the District as a whole, will be adopting a Constituent Relationship Management system (CRM) over the next few years. The CRM will transform the way we interact with students and how students interact with the College. From managing student records and monitoring progress to educational goals, to class registration and marketing outreach, the CRM will allow us to streamline systems that today can be cumbersome and slow.

The focus of the CRM implementation is to architect a suite of well-integrated solutions that will empower our students and campus community to support student success at scale. Teams from across all three colleges, headed by District leadership, have worked diligently over the last two years to select vendors that will guide us through this process.

Now that vendors have been selected, we'll be providing monthly updates to keep the campus community informed about the CRM implementation. Here are this month's updates:

- Salesforce, Enrollment Rx, and ApexIT are the vendors selected to guide us through the CRM implementation.
- Salesforce is the cloud-based platform that will host our CRM and provide the foundation for all the solutions being created. The CRM will complement Banner, working in tandem with Banner to pull data and make it more accessible and user-friendly.
- Enrollment Rx (built on the Salesforce platform) is the vendor that will be building several fundamental parts of the CRM. Some of the first solutions Enrollment Rx is helping us to create include:
 - o Request for information forms, which will allow students inquiring at the College to enter in their contact information and be automatically messaged information to encourage them to apply to the college.
 - o Tour request forms, which will allow prospective students and groups to sign up for tours with the ultimate goal of getting the students to complete the admissions application.
 - o A new admissions application to complement the current CCCApply application. The new admissions application will be mobile friendly and will have students identify their meta major and program of study at

the time of application.

- ApexIT will be working to implement the retention component of the CRM, called Salesforce Advisor Link (SAL), in spring 2020. To support this implementation, vice presidents of instruction are working with Guided Pathways teams to associate meta majors with programs of study, which will allow the automatic assignment of counselors and other support team members to students.
- Deans of counseling are working with their teams to develop the matriculation process maps and associated messages to help get students through the matriculation process. They will hold retreats during the months of May and June to work through these processes. These processes and messages will be built by ApexIT into Salesforce Advisor Link so that matriculation helpers can be assigned to students and they can receive messages to go out at prescribed intervals to help move them through the enrollment funnel (financial aid, assessment, placement, orientation, Student Education Plan (SEP) creation).
- ITS is working on a single sign on (SSO) portal solution that will house many commonly accessed systems for students (and staff) and will house the Salesforce Advisor Link. This will be launched in the spring of 2020 to correspond with the SAL implementation.

As we move forward with the CRM implementation, we will continue to provide informational updates about the process. If you have any questions about the CRM, the implementation, or specific solutions or vendors, please direct your questions to [Lizette Bricker](#).

College of San Mateo