

# CRM Update for CSM Institutional Planning Committee (IPC)

An overview of the Constituent Relationship  
Management (CRM) system

JANUARY 2020



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.



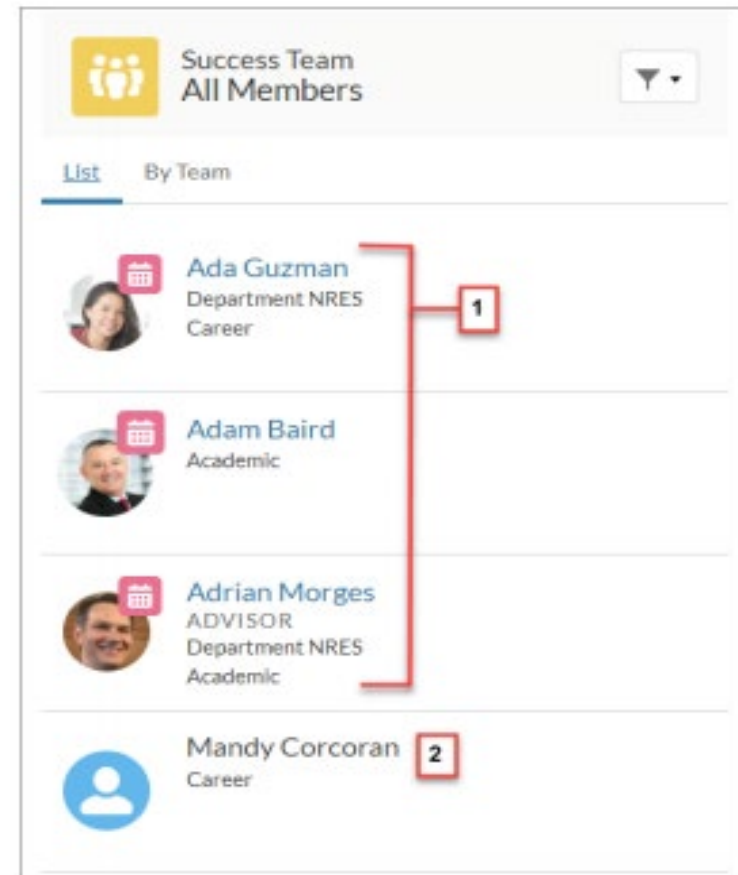
- ▶ Constituent Relationship Management (CRM)
- ▶ Technology system used for managing relationships, i.e. prospective, current and alumni students.
- ▶ Uses student historical and ongoing data to create interventions for
  - ▶ Recruitment and Admissions
  - ▶ Retention and Completion
  - ▶ Alumni and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



The screenshot displays a CRM interface for a 'Success Team' with 'All Members'. The interface includes a header with a group icon and a dropdown menu. Below the header, there are two tabs: 'List' (selected) and 'By Team'. The main content area shows a list of team members, each with a profile picture, name, and role. A red bracket groups the first three members (Ada Guzman, Adam Baird, and Adrian Morges) under a red box labeled '1'. The fourth member, Mandy Corcoran, is under a red box labeled '2'.

Name	Role	Group
Ada Guzman	Department NRES Career	1
Adam Baird	Academic	1
Adrian Morges	ADVISOR Department NRES Academic	1
Mandy Corcoran	Career	2

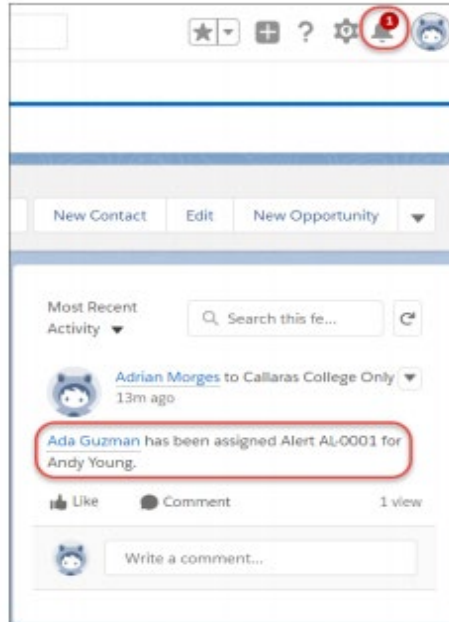
# Overview of CRM Capabilities, cont.

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

The screenshot displays the 'Appointment Manager' interface. On the left, there is a 'Tasks' list with columns for 'SUBJECT' and 'PRIO'. Below this, a calendar view for 'Wednesday, April 24, 2019' shows appointment slots: 9:00 AM Available, 3:00 PM SCHEDULED, 4:00 PM Available, 6:30 PM WALK-IN, 5:35 PM Stephanie RH... DEGREE PLAN... In person, and 6:05 PM. A detailed view of an appointment is shown on the right, including the student's name 'Stephanie Rhimes', her profile picture, and appointment details: Topic: Academic, Subtopic: Degree Planning, Status: Attending. Summary statistics show 3 tasks, 1 alert, and 1 appointment. Buttons for 'View Record' and 'View Advisee' are present. The bottom right corner includes 'Notes' and 'Appointment Manager' tabs.

# Overview of CRM Capabilities, cont.

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



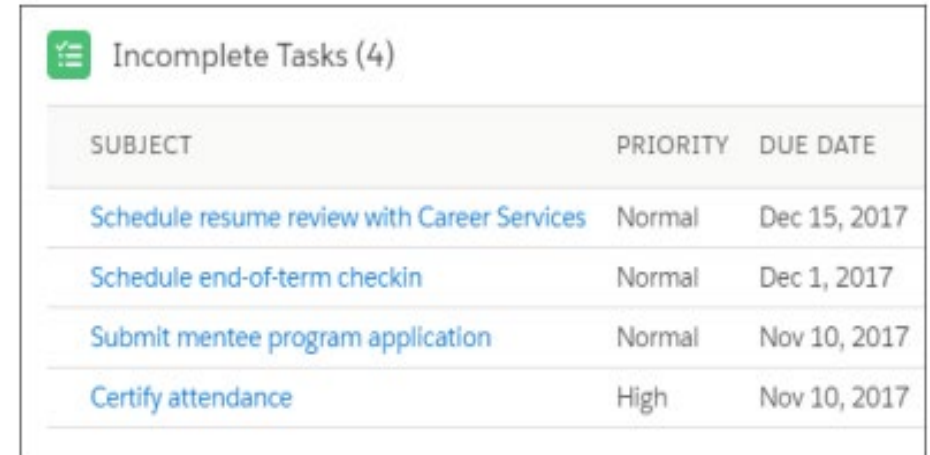
A screenshot of a CRM page titled "Stephanie Rhimes Advisee Record". The page has a header with a yellow folder icon, the title, and buttons for "+ Follow" and "Delete". Below the header are tabs for "Alerts", "Courses", "Advising", "Team", and "More". The "Alerts" tab is selected. The main content area shows "Unresolved Alerts (3)" with a "New" button. Below this is a table with columns: REC..., REAS..., PRI..., CRE..., and STAT... Each row represents an alert.

REC...	REAS...	PRI...	CRE...	STAT...
Financial Aid	Other (Descl...	Normal	Jul 31, 2018	Acknowled...
Financial Aid	Other (Descl...	Normal	Jul 31, 2018	New
Academic	Preparedness ...	Normal	Apr 9, 2018	Acknowled...



# Overview of CRM Capabilities, cont.

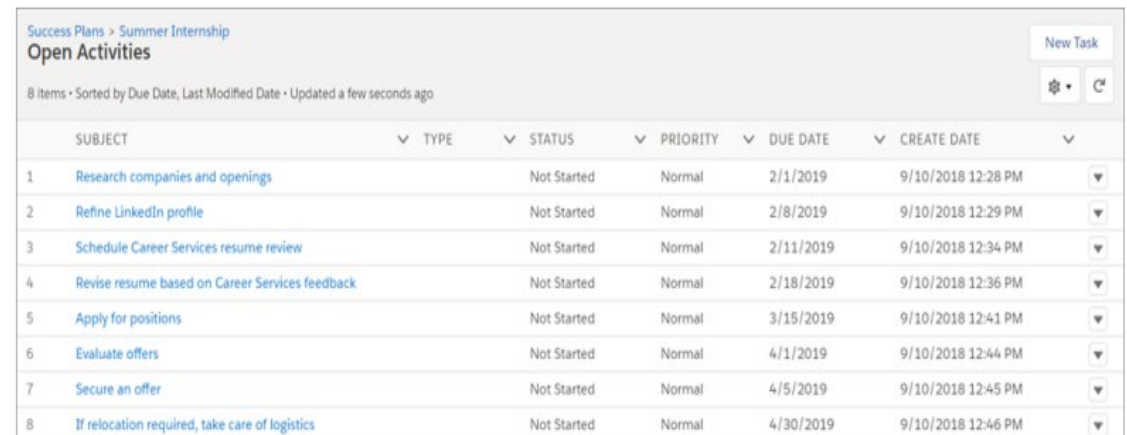
- ▶ Assign Tasks (Individual Tasks to individual students or groups of students)



A screenshot of a software interface showing a table titled "Incomplete Tasks (4)". The table has three columns: "SUBJECT", "PRIORITY", and "DUE DATE". It lists four tasks with their respective priorities and due dates.

SUBJECT	PRIORITY	DUE DATE
<a href="#">Schedule resume review with Career Services</a>	Normal	Dec 15, 2017
<a href="#">Schedule end-of-term checkin</a>	Normal	Dec 1, 2017
<a href="#">Submit mentee program application</a>	Normal	Nov 10, 2017
<a href="#">Certify attendance</a>	High	Nov 10, 2017

- ▶ Create Success Plans (Multi Step goals)



A screenshot of a software interface showing a table titled "Open Activities" under the heading "Success Plans > Summer Internship". The table has columns for "SUBJECT", "TYPE", "STATUS", "PRIORITY", "DUE DATE", and "CREATE DATE". It lists 8 items, all with a status of "Not Started".

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

Email

Area of Interest

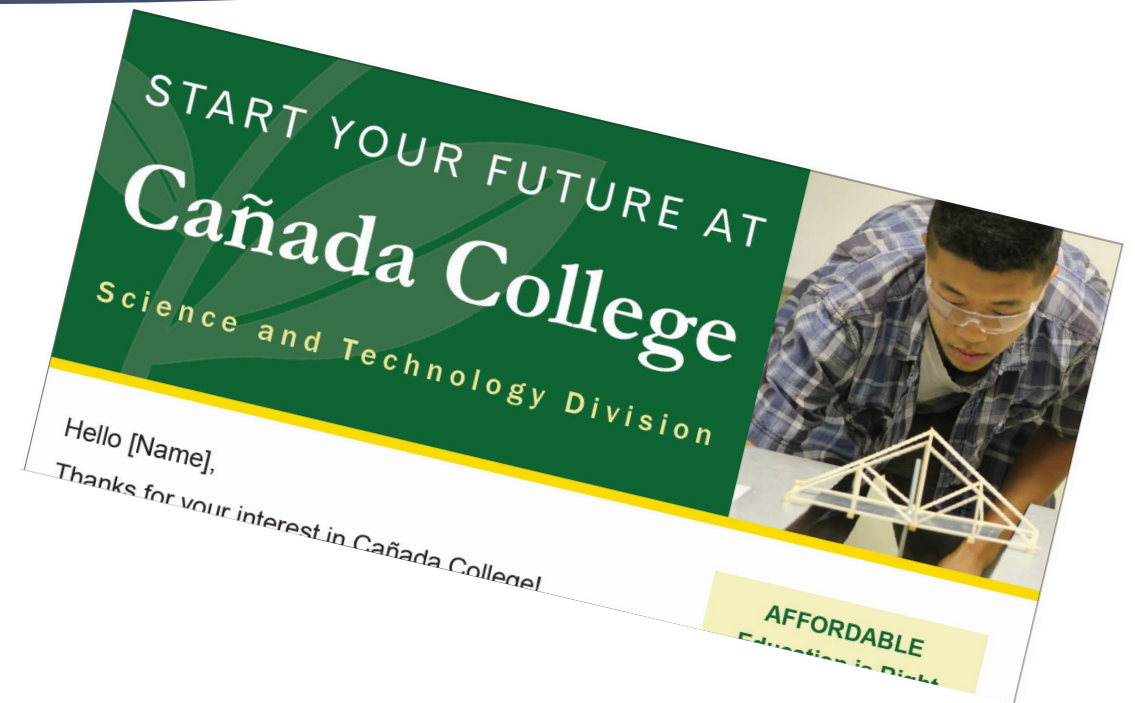
Submit

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

## PHASE 1: Recruitment and Marketing

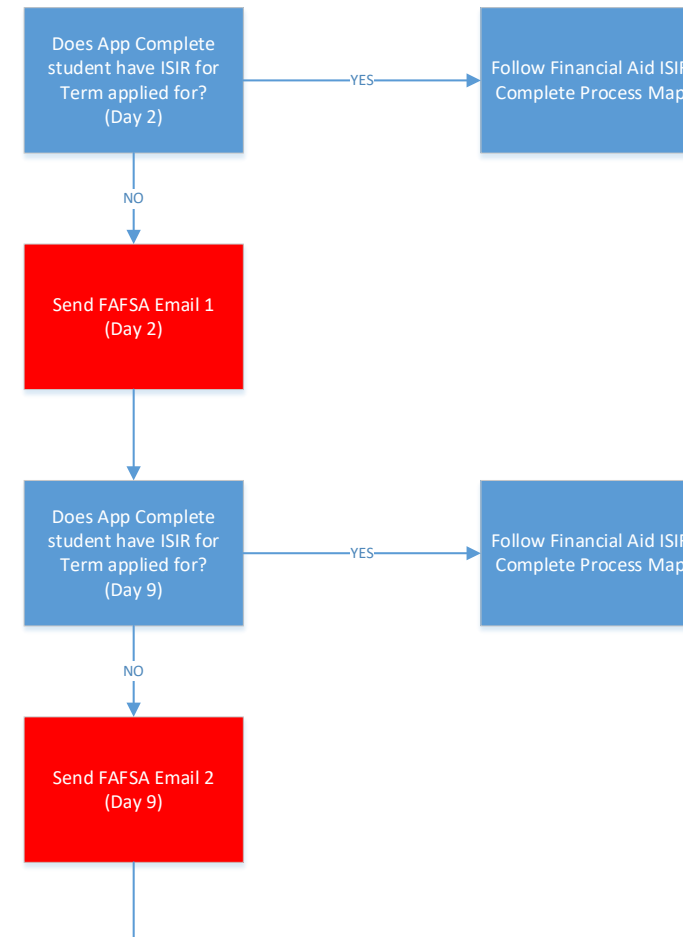
- ▶ Marketing Discovery & Creation
  - ▶ Marketing Cloud
    - ▶ Communication Flows
    - ▶ Student Journeys



# 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

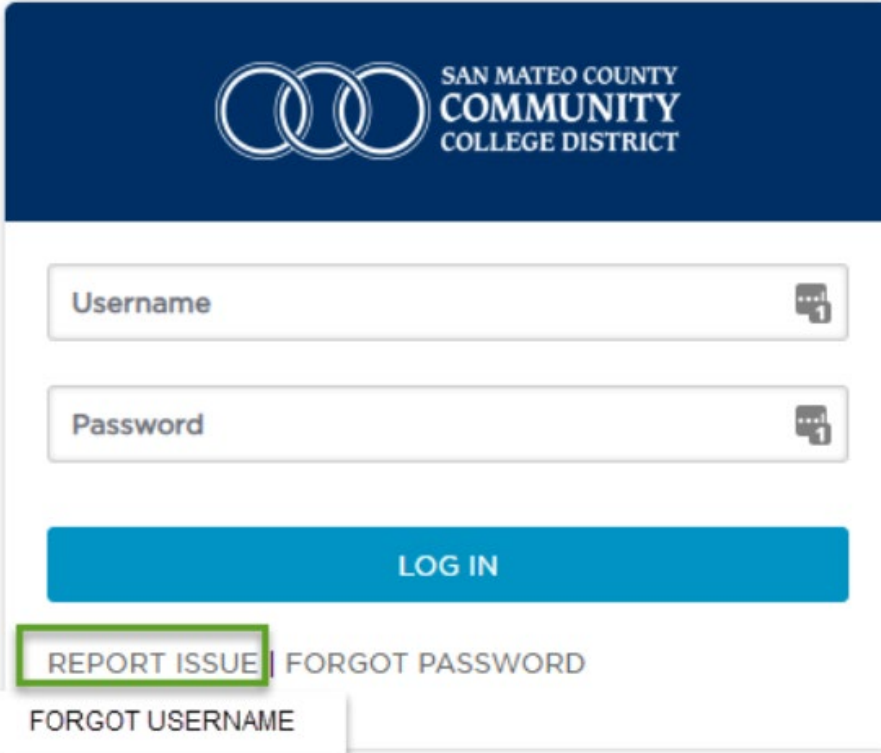
- ▶ Counseling Information Meetings
  - ▶ Counselor Data Dashboards
  - ▶ Working Sessions w/Instructional Faculty
    - ▶ Alerts w/Associated Tasks and Success Plans
- ▶ SARS/MIS Data Mapping (Appt. Types & Topics)
- ▶ Appointment Configuration

### ▶ **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)



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COLLEGE DISTRICT

Username

Password

LOG IN

REPORT ISSUE | FORGOT PASSWORD

FORGOT USERNAME