

# CRM ADVISE

DEMC 09 01 2023

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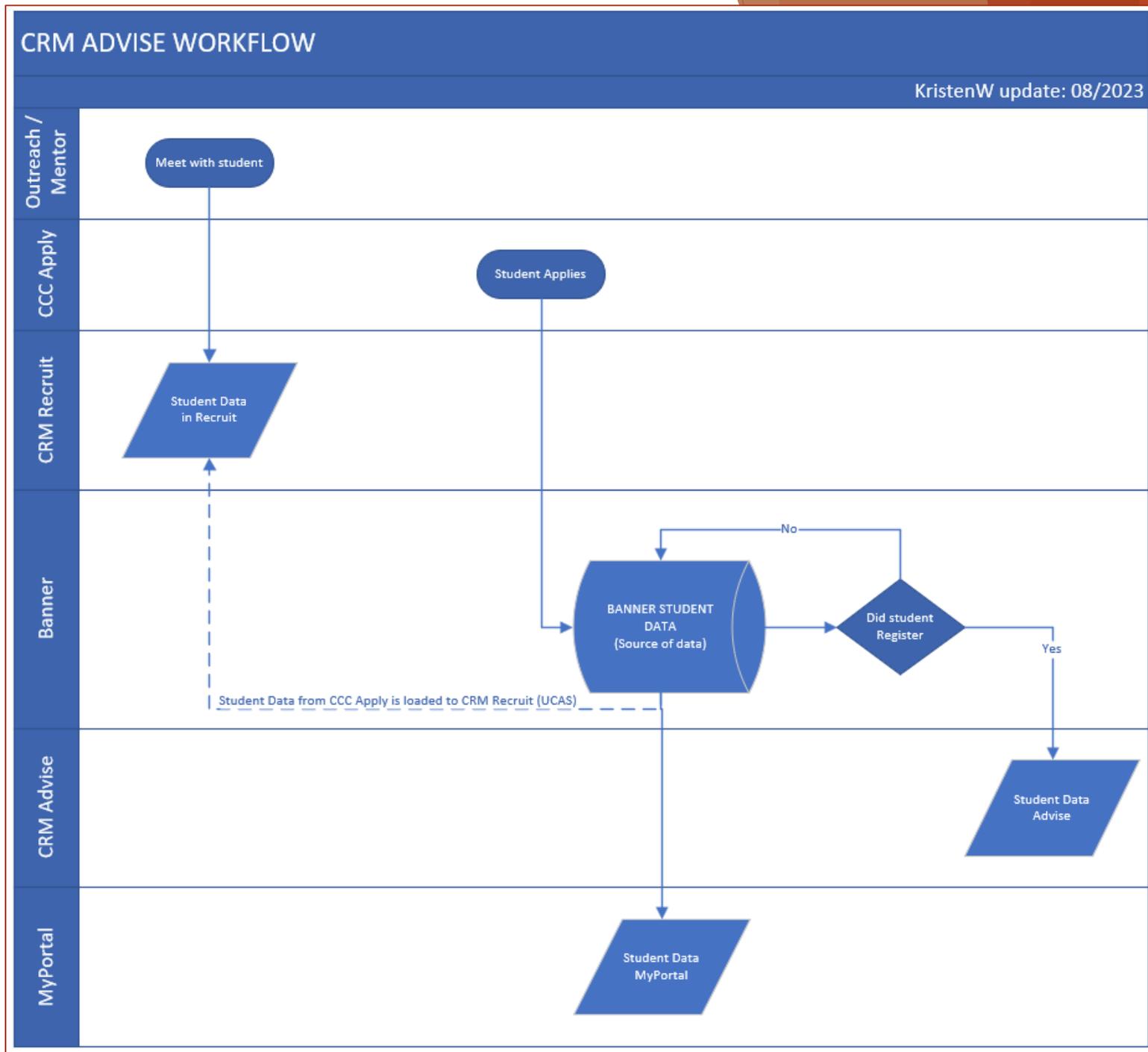
# CRM Advise

- ▶ Banner (Single Source of Data)
- ▶ Interactions initiated and recorded - the 'holistic' picture of support to the individual student.
- ▶ Customize (and standardize) communications to students  
i.e. Enrollment Campaigns
- ▶ Data Informed Decisions enable more effective strategic planning  
i.e. Enrollment / Retention  
What are we measuring and why?
- ▶ What does serving a student look like? KEI v. KPI
- ▶ Improvements in:
  - ▶ Organization Management Processes (i.e. coordinate and allocate resources)
  - ▶ Business Processes (i.e. systematic approach)
  - ▶ Quality of Service
  - ▶ Planning
  - ▶ Accuracy

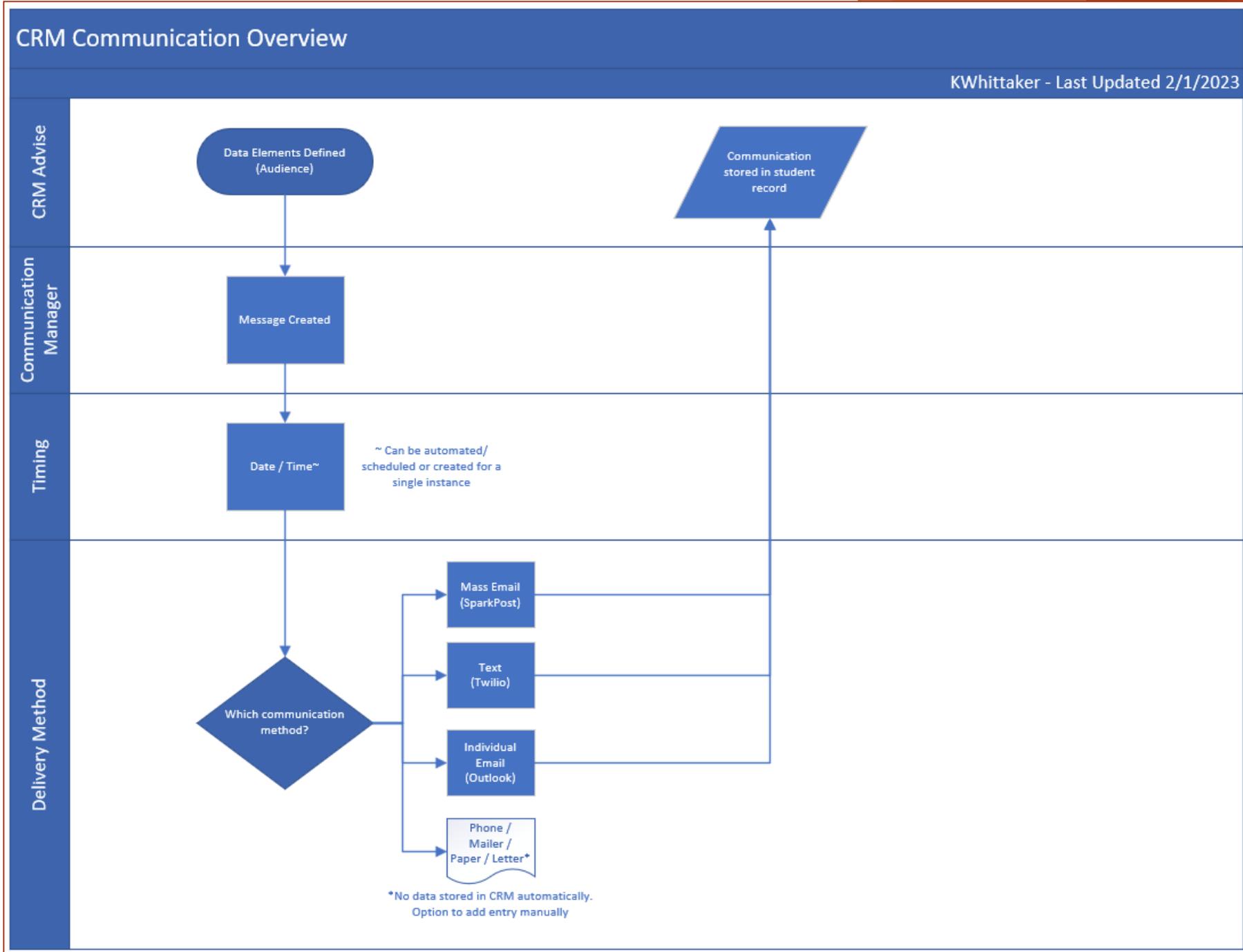
# CRM Project



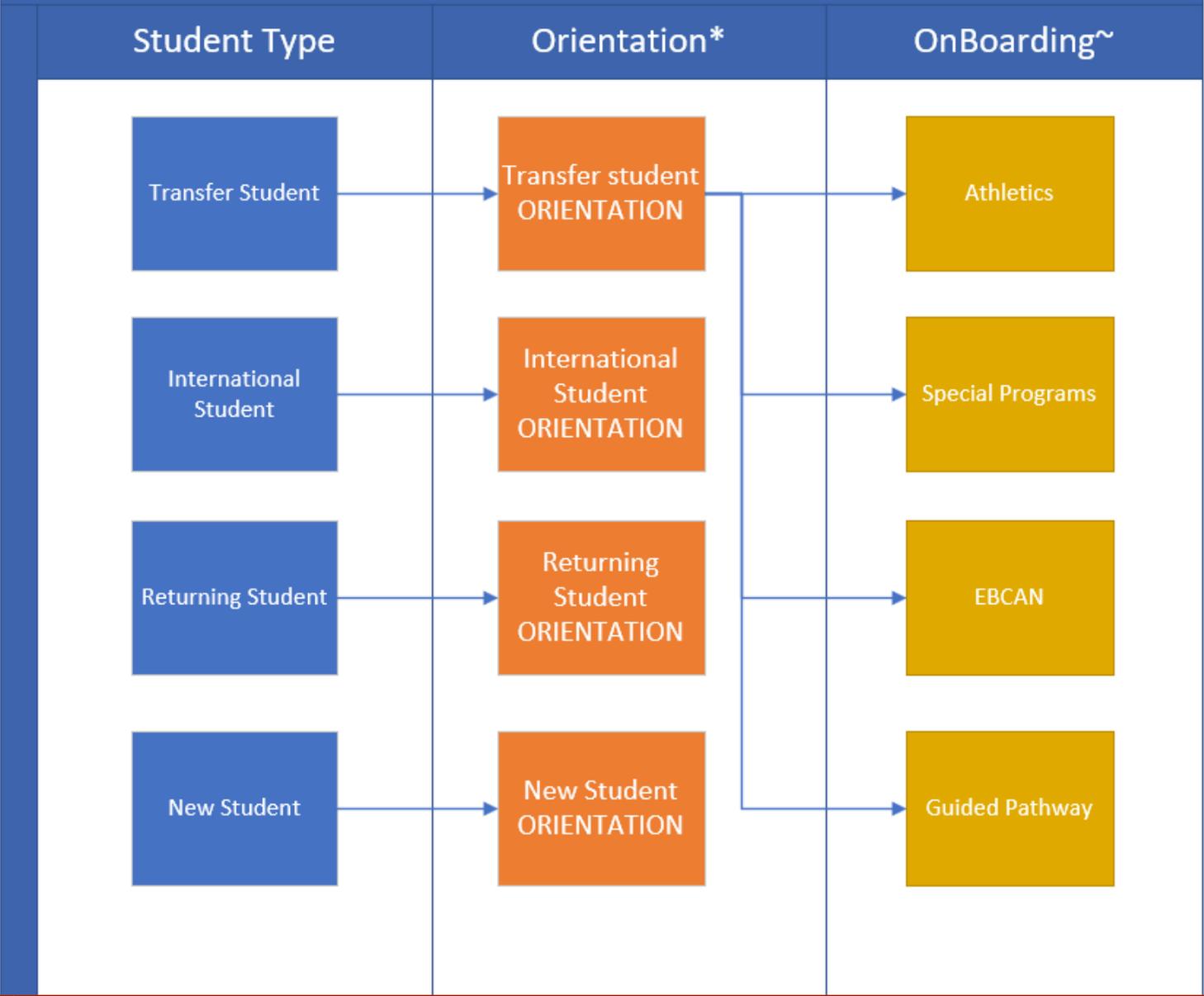
# Workflow Process



# Communication Workflow Process



# Orientation Business Process



\*Orient to the College

~Onboard to the Programs

Example: Orientation

# What's Next

- ▶ Provisioning: September 9<sup>th</sup>
  - ▶ Summer grades
  - ▶ Fall 2023
  - ▶ Turn on sync process
- ▶ Go Live: Bring Online Sept 11-15
  - ▶ Give users access to log in via MyPortal
  - ▶ Resources and How To's Available
  - ▶ Learn how to pull reports / lists
- ▶ Trainings
  - ▶ Open Houses (9 AM - 6 PM)
    - ▶ Monday: Sept 18 Chabot (Room 303)
    - ▶ Tuesday: Sept 19 LPC (Room 1945)
  - ▶ More to be scheduled

## ▶ Phase 2 Defined

- ▶ Defined after users are navigating the system, providing feedback.
- ▶ Added Functionality
  - ▶ Texting
  - ▶ Case Management
  - ▶ Success Teams
  - ▶ Student Score
  - ▶ Alerts
  - ▶ Connections with MyPortal
  - ▶ Communications
  - ▶ Other

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