

Student Success Link (SSL)

Constituent Relationship Management
(CRM/Salesforce)

Board of Trustees Study Session



October 13, 2021



SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

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



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



Phase 1 December 2019

Phase 1

PHASE 1: Recruitment and Marketing

- ▶ Recruitment Discovery & Creation
 - ▶ Discovery
 - ▶ Process Maps
 - ▶ Request for Information (RFI) Forms

The image shows a screenshot of the Skyline College website. The top navigation bar includes links for HOME, ADMISSIONS, ACADEMICS, CAREER, STUDENTS, CAMPUS, and ABOUT. A red box highlights the 'Request Information' button. Below the navigation bar, a green banner announces 'Free COVID-19 testing is now available to San Mateo County Community College District students and employees on campus. Appointments are available Sundays-Thursdays. Sign up at the District COVID-19 testing website.' Below this is a yellow banner with the text 'Latest District-wide COVID-19 information at covid-19.smccd.info.'

The detailed view of the 'Request for Information' form includes the following fields:

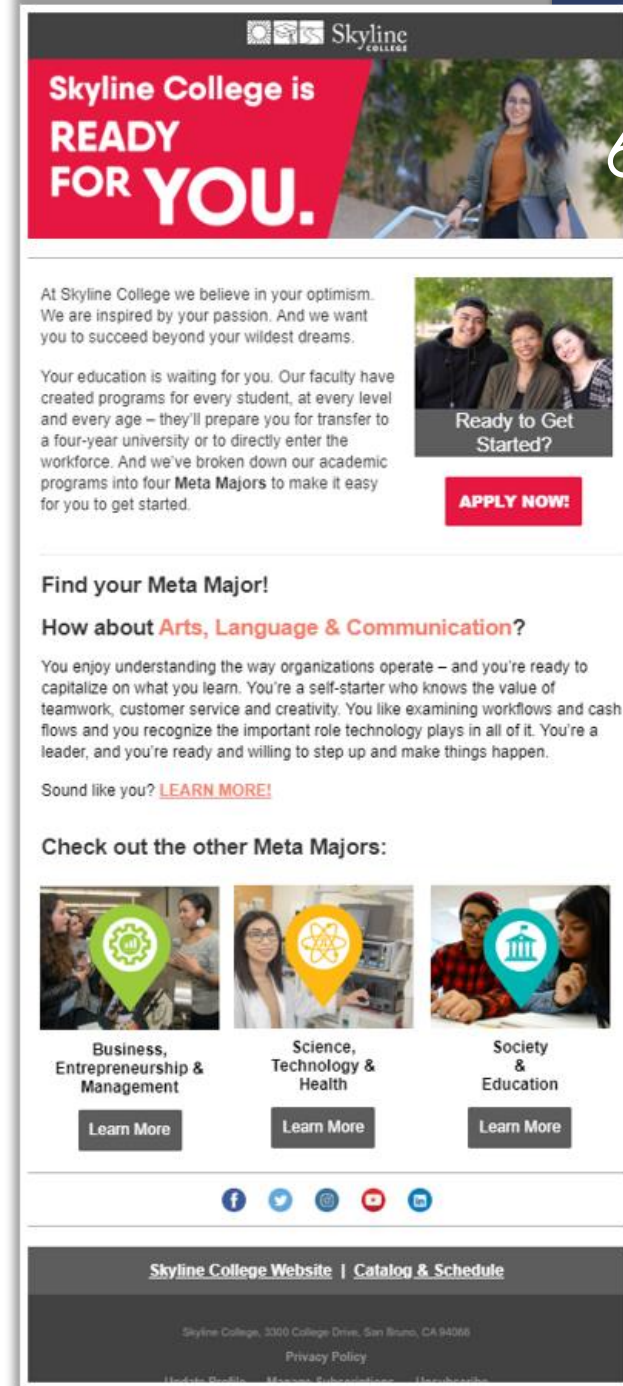
- First Name
- Last Name
- Mobile Phone
- Receive Texts? (Dropdown menu with '--None--' selected)
- Email
- Area of Interest (Dropdown menu with '--None--' selected)

A blue 'Submit' button is located at the bottom of the form. The footer of the page reads 'Skyline College | 300 College Drive, San Bruno, CA 94066'.

Phase 1

PHASE 1: Recruitment and Marketing

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



The image shows a screenshot of the Skyline College website. At the top, the Skyline College logo is visible. Below it, a red banner reads "Skyline College is READY FOR YOU." with a photo of a student. The main content area features a paragraph about the college's belief in student optimism, followed by a photo of three students and a "Ready to Get Started?" call to action. Below this is a section titled "Find your Meta Major!" with a sub-section for "Arts, Language & Communication" and a "Learn More" link. At the bottom, there are three columns for "Business, Entrepreneurship & Management", "Science, Technology & Health", and "Society & Education", each with a "Learn More" button. The footer includes social media icons, a "Skyline College Website | Catalog & Schedule" link, and contact information.

Skyline College is
READY FOR YOU.

At Skyline College we believe in your optimism. We are inspired by your passion. And we want you to succeed beyond your wildest dreams.

Your education is waiting for you. Our faculty have created programs for every student, at every level and every age – they'll prepare you for transfer to a four-year university or to directly enter the workforce. And we've broken down our academic programs into four **Meta Majors** to make it easy for you to get started.

Ready to Get Started?

APPLY NOW!

Find your Meta Major!

How about **Arts, Language & Communication**?

You enjoy understanding the way organizations operate – and you're ready to capitalize on what you learn. You're a self-starter who knows the value of teamwork, customer service and creativity. You like examining workflows and cash flows and you recognize the important role technology plays in all of it. You're a leader, and you're ready and willing to step up and make things happen.

Sound like you? [LEARN MORE!](#)

Check out the other Meta Majors:

Business, Entrepreneurship & Management

Science, Technology & Health

Society & Education

Learn More

Learn More

Learn More

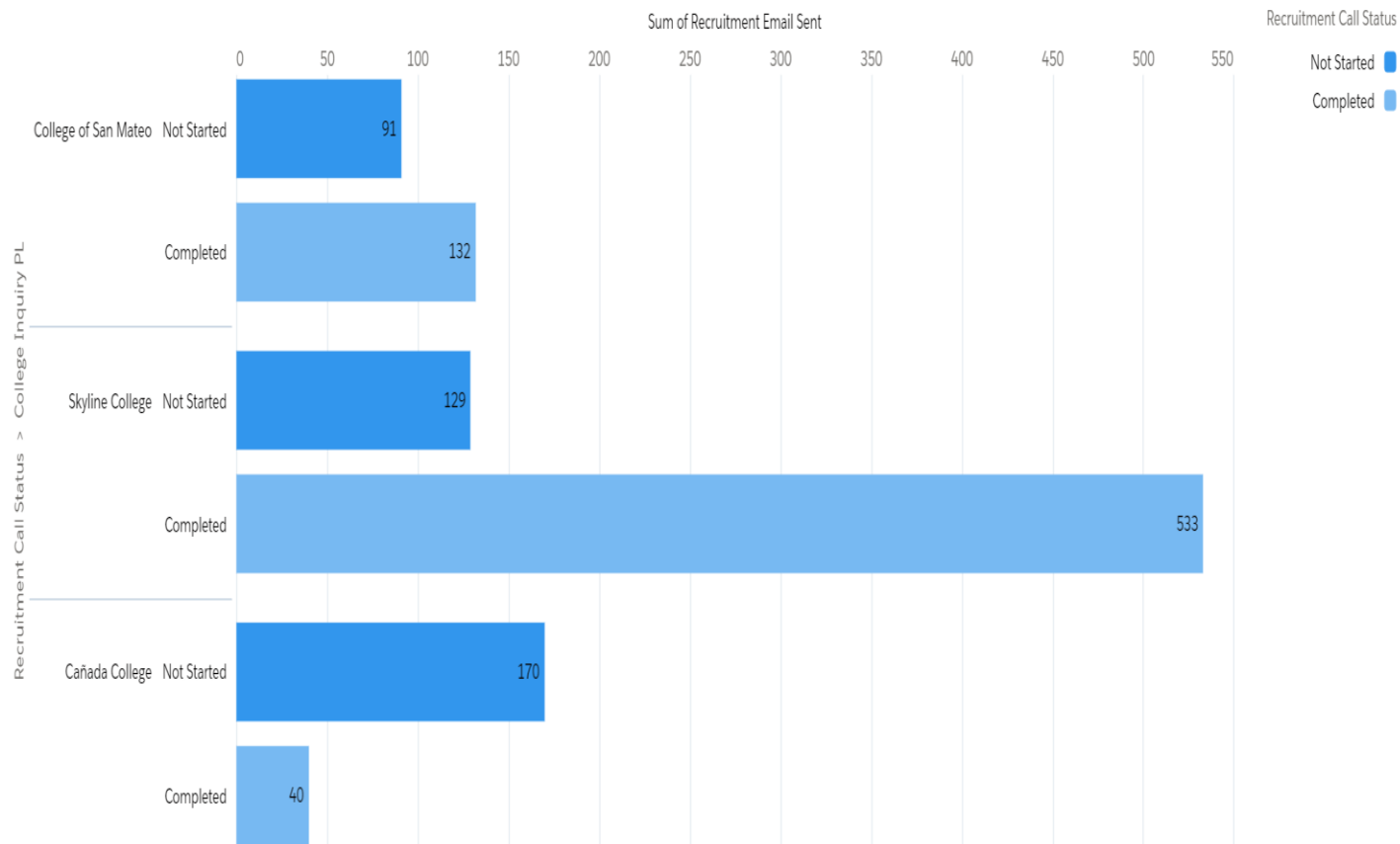
Skyline College Website | [Catalog & Schedule](#)

Skyline College, 3300 College Drive, San Bruno, CA 94066

Privacy Policy

Phase 1 Continuous Improvement: RFI Dashboards

Student Ambassador Activity Report



▶ Request for Information (RFI) Conversion Rates

- ▶ % of Students who applied after RFI was submitted
 - ▶ Cañada College: 19%
 - ▶ College of San Mateo: 28%
 - ▶ Skyline College: 30%
 - ▶ **District Average: 25%***

*December 2019-September 2021

Phase 2 June 2020



Phase 2: Success Plans: Enrollment Steps

A Success Plan is a collection of Tasks assigned to the student.

Search... SEARCH

HOME MYTEAM MY TASKS MY APPOINTMENTS

TODAY IS WEDNESDAY, FEBRUARY 3, 2021

▼ This Week 2

<input type="checkbox"/> Subject	Success Plan	Status	Priority	Due Date
<input type="checkbox"/> 1. Apply for Financial Aid	CSM Enrollment Steps	Not Started	High	2/5/2021
<input type="checkbox"/> 2. Attend Orientation	CSM Enrollment Steps	Not Started	High	2/6/2021

▼ This Month 4

<input type="checkbox"/> Subject	Success Plan	Status	Priority	Due Date
<input type="checkbox"/> 3. Complete Assessment	CSM Enrollment Steps	Not Started	High	2/7/2021
<input type="checkbox"/> 4. Attend Counseling Appointm...	CSM Enrollment Steps	Not Started	High	2/8/2021
<input type="checkbox"/> 5. Register for Classes	CSM Enrollment Steps	Not Started	High	2/9/2021
<input type="checkbox"/> 6. Pay Fees	CSM Enrollment Steps	Not Started	High	2/10/2021

Phase 2: Marketing Cloud: Enrollment Messages

Marketing Cloud:

Messages are automatically sent at a programmed cadence to nudge the student forward in their enrollment journey.

COUNSELING

GETTING STARTED AT SKYLINE COLLEGE

Hello <Preferred First Name>,

Now that you have completed your English and/or Math Assessment, it's time to set up an appointment with a counselor to talk about how you'll succeed at Skyline College!

In your first hour-long counseling appointment you will both review your MyMajors Assessment, review your English/Math placement, and co-create a Student Education Plan (SEP), your individual road map to achieve your education goals.

To schedule your appointment, please login to the Student Success Link found on the [MySMCCD Student Portal](#).

Please bring with you any necessary documents, such as other institution transcripts, AP Scores, etc.

If you have any questions about the enrollment process, please contact me or the counseling front desk at any time. We look forward to being part of your education journey.

<Success Navigator Name>
<Success Navigator Email>
<Success Navigator Phone Number>

Skyline College Website | [Catalog & Schedule](#)

Skyline College, 3300 College Drive, San Bruno, CA 94066
Unsubscribe

Meet Your Success Navigator

GETTING STARTED AT SKYLINE COLLEGE

Hello <Preferred First Name>,

Welcome to Skyline College! My name is <Success Navigator First Name> and I am your Success Navigator here at the College. My role is to help you get through the various steps needed to get you registered in your classes and started on your higher education goals!

I'll be contacting you through email to help answer any questions about your next steps and encourage you to make progress in enrolling at Skyline College. So check your email frequently so you don't miss a beat!

I'll be following up soon with next steps in your enrollment steps - make sure you get started as soon as possible so you can register for your classes. You can monitor your enrollment steps in your Student Success Link, found on the [MySMCCD Student Portal](#). As you complete each step I'll send you a follow up email to help with the next step.

If you have any questions along the way, just let me know!

I look forward to working with you!

<Skyline Success Navigator Member>
<Skyline Success Navigator Phone Number>
<Skyline Success Navigator Email Address>

Skyline College Website | [Catalog & Schedule](#)

Skyline College, 3300 College Drive, San Bruno, CA 94066
Unsubscribe

RESIDENCY

GETTING STARTED AT SKYLINE COLLEGE

Hello <Preferred First Name>,

Welcome to Skyline College! My name is <Residency Specialist First Name> and I am your Residency Specialist here at the College. It looks like you have been classified as an "Out-of-State Student" based on the answers to questions in your admissions application and I wanted to make sure this classification is correct.

Students classified as "Out-of-State" are assessed fees that can be SIGNIFICANTLY HIGHER than students classified as "In-State", so if there's a chance that you shouldn't be classified as an Out-of-State student, I want to help you make that change!

Take a look at the [Residency Reclassification Questionnaire!](#)

After reviewing the Residency Reclassification Questionnaire, you think you may qualify as an In-State student, fill it out and bring in any supporting documentation to the Admissions and Records Office so we can see if you qualify. If you have any questions along the way, just let me know!

I look forward to working with you!

Hi <Trojans!>

<Residency Specialist First Name>
<Residency Specialist Phone Number>
<Residency Specialist Email Address>

Skyline College Website | [Catalog & Schedule](#)

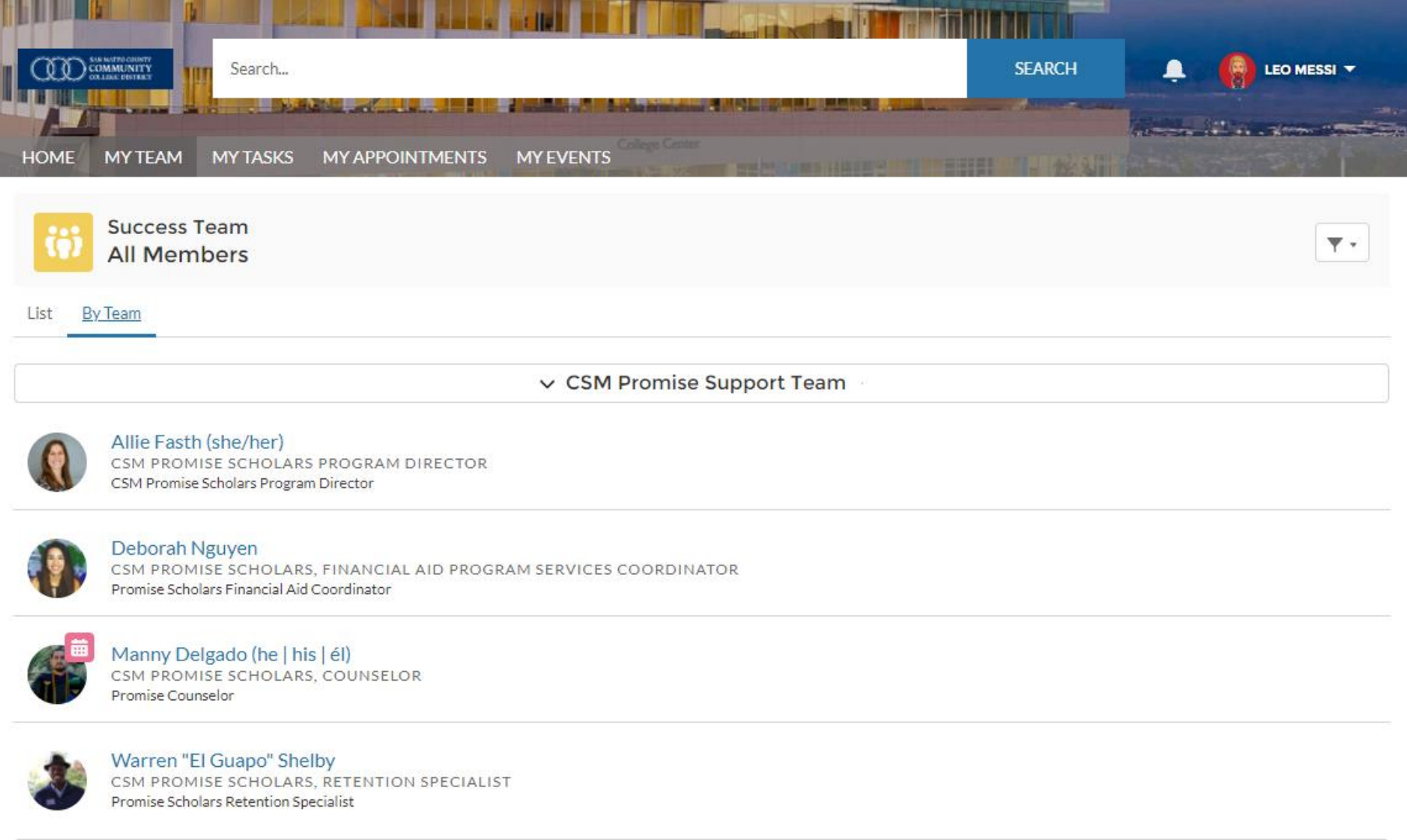
Skyline College, 3300 College Drive, San Bruno, CA 94066
Unsubscribe

Phase 3 Spring 2021



Phase 3: Success Teams

Success Teams:
Preprogrammed
Assignments
based of
student
attributes

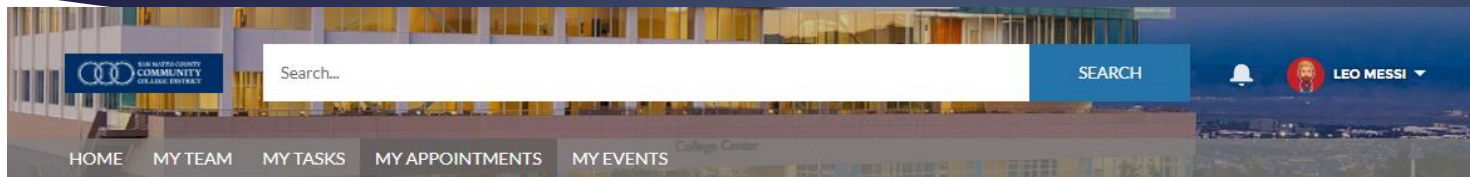


The screenshot displays a university portal interface. At the top, there is a search bar with the text "Search..." and a "SEARCH" button. To the right of the search bar, there is a notification bell icon and a user profile for "LEO MESSI". Below the search bar, there is a navigation menu with the following items: HOME, MY TEAM, MY TASKS, MY APPOINTMENTS, and MY EVENTS. The main content area shows a "Success Team" section with the title "Success Team All Members" and a filter icon. Below this, there are two tabs: "List" and "By Team". The "By Team" tab is selected. A dropdown menu is open, showing "CSM Promise Support Team". Below the dropdown, there is a list of team members:

- Allie Fasth (she/her)**
CSM PROMISE SCHOLARS PROGRAM DIRECTOR
CSM Promise Scholars Program Director
- Deborah Nguyen**
CSM PROMISE SCHOLARS, FINANCIAL AID PROGRAM SERVICES COORDINATOR
Promise Scholars Financial Aid Coordinator
- Manny Delgado (he | his | él)**
CSM PROMISE SCHOLARS, COUNSELOR
Promise Counselor
- Warren "El Guapo" Shelby**
CSM PROMISE SCHOLARS, RETENTION SPECIALIST
Promise Scholars Retention Specialist

Phase 3: Student Appointment Scheduling

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Search... SEARCH LEO MESSI

HOME MY TEAM MY TASKS MY APPOINTMENTS MY EVENTS

Schedule an Appointment

Upcoming Past Cancelled

SCHEDULED APPOINTMENT

Adjust Current Semester Courses



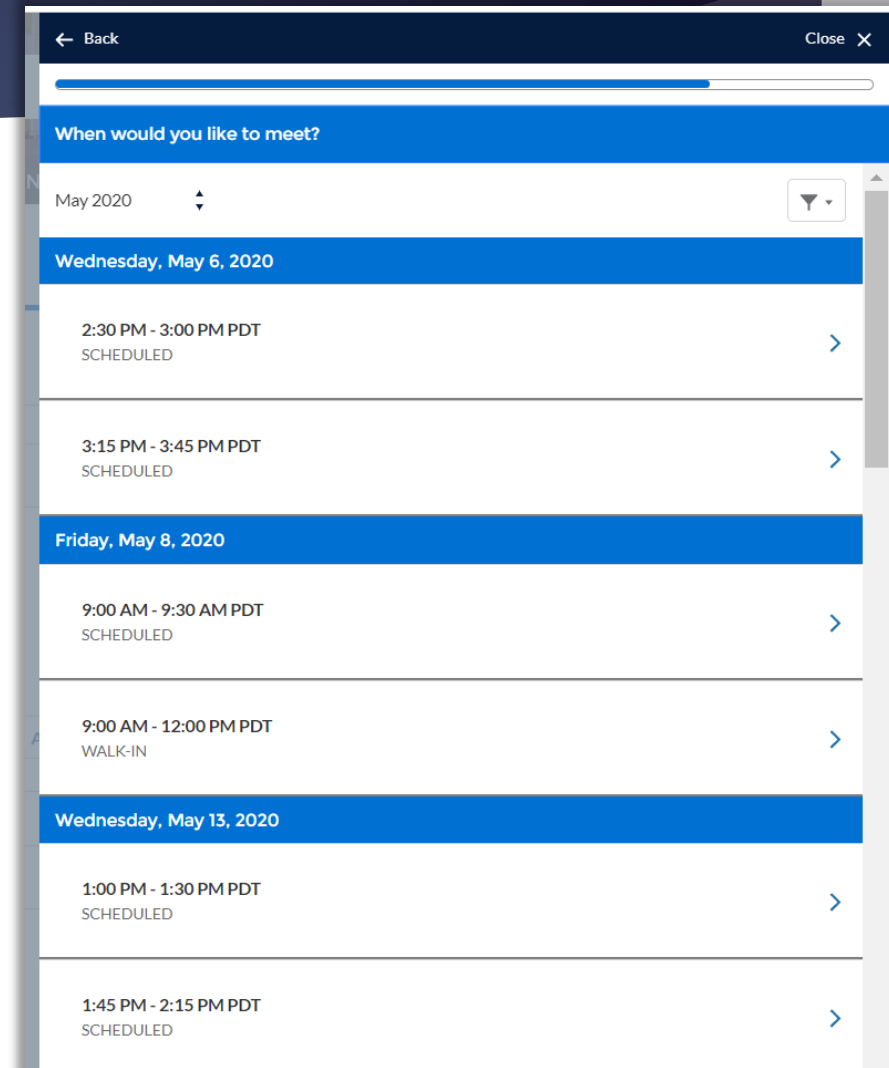
MONDAY, OCTOBER 4, 2021
9:00 AM to 10:00 AM

Sandy Allen
VIRTUAL: [HTTPS://SMCCD.ZOOM.US/J/6822537626](https://smccd.zoom.us/j/6822537626)

Add Comments

Reschedule or Cancel

Join Web Meeting



← Back Close ×

When would you like to meet?

May 2020

Wednesday, May 6, 2020

2:30 PM - 3:00 PM PDT
SCHEDULED

3:15 PM - 3:45 PM PDT
SCHEDULED

Friday, May 8, 2020

9:00 AM - 9:30 AM PDT
SCHEDULED

9:00 AM - 12:00 PM PDT
WALK-IN

Wednesday, May 13, 2020


1:00 PM - 1:30 PM PDT
SCHEDULED

1:45 PM - 2:15 PM PDT
SCHEDULED

Phase 3: Appointment Management

Advisor Link Cases Leo Messi

Leo Messi 00026212 Cases



La Pulga Messi
College of San Mateo
Allied Health (Associate Degree)

TASKS: 1 ALERTS: 2 APPOINTMENTS: 1

Last Appointment: [Sep 30, 2021](#)

Initial Success Team Assigned: FERPA:

Advisee Details

Preferred Full Name
La Pulga Messi

Email
leotestmessi@gmail.com

SMCCD Email
leomessi@my.smccd.edu

Home Phone
(510) 659-9423

Mobile

Case **Advisee Case** [+ Follow](#) [Assign Success Team](#)

Appointment Scheduler [New Appointment](#)

Appointments Team Success Plans Courses Alerts Notes Tasks

Upcoming Appointments (1) [New Appointment](#)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Adjust Current Semester Courses	Sandy Allen	Attending	10/4/2021, 9:00 AM

Past Appointments (191)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Educational Planning (Complete plan)	Sandy Allen	Attended	9/30/2021, 2:00 PM
Academic	Change of Major	Karrie Mitchell	Attending	9/30/2021, 5:00 AM
Academic	Degree/Transfer Progress Check	Sandy Allen	Attended	9/1/2021, 5:00 AM
Academic	Adjust Current Semester Courses	Sandy Allen	Attended	8/20/2021, 11:00 AM
Academic	Educational Planning (1-2 semesters)	Fay Faridnia (Bilingual: English and Farsi)	Attended	8/19/2021, 1:15 PM

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

[Meet with Math Fac...](#) Aug 27

[Leo Messi](#) has an upcoming task with [Leo Messi](#)

No past activity. Past meetings and tasks marked as done show up here.

Phase 3.5: Events & Forms

HOME MYTEAM MYTASKS MYAPPOINTMENTS VETERAN FORMS **EVENTS**

Events

Status	Event Name	Date	Time	Location	Description
Register	Skyline Orientation Event - July	Tue, July 13, 2021	10:00AM - 12:15PM	Building 10	
Register	Skyline Reinstatement Workshop - July	Mon, July 19, 2021	09:00AM - 11:30AM	https://smccd.zoom.us/j/2076554108	Academic standing workshop for reinstatement.
Register	Skyline Reinstatement Workshop - August	Mon, August 2, 2021	11:00AM - 1:30PM	Building 10	Academic standing workshop for reinstatement.
Registered Cancel	Skyline EOPS Workshop	Mon, September 20, 2021	09:00AM - 11:30AM	Building 10	EOPS Meet and Greet event
Register	Skyline Meta Major Orientation - Business, Entrepreneurship & Management	Mon, September 20, 2021	09:00AM - 11:30AM	Building 10	Business Meet and Greet event

Below is your list of registered courses for the Fall 2021 term.

Select ALL courses that you are requesting certification for, regardless if you have already requested certification for the term.

REMINDER: Courses must appear in your Student Education Plan (SEP) as created by your counselor






College Location - Course Number - Course Name - Credit Hours

*

- College of San Mateo - ADMJ120-4 - Criminal Investigation - 3
- College of San Mateo - ADMJ185-4 - Intro to Forensic Science - 3
- College of San Mateo - BIOL132-4 - Human Biology Laboratory - 1
- College of San Mateo - MATH200-4 - Elem Probability & Statistics - 4
- College of San Mateo - MATH800-4 - Just-in-Time Sup ElemProb&Stat - 2

Next

What's Next? Project Prioritization

Project Name	Level of Effort	% of Project Completion	Process Improvement	Compliance	Enrollment	Completion	Communication	Disproportionately Impacted	Board Priority	CAN RANKING	CSM RANKING	SKY RANKING	AVERAGE RANKING
K-12 in the CRM		15%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	7	8	6
Transcript Evaluation in the CRM		30%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	3	4	6
Degree Works Upgrade		60%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	15	1	7
Forms in the CRM		10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	4	17	7
Veterans in the CRM & New Compliance Needs		70%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	1	19	8

Questions? Comments...

▶ Discussion...