

# Constituent Relationship Management (CRM)

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Harper College Board of Trustees Meeting  
December 15, 2021

# Content

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# Project Overview

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- Areas of focus
  - Improve/enhance the student onboarding experience.
  - Align departmental communications and create a centralized student prospect record.
  - Increase enrollment and completion.
- Process/requirements:
  - RFP conducted to identify a higher education focused CRM solution.
  - Product must be robust and scalable – Enterprise-wide solution.
  - Salesforce/TargetX was selected.
- Funding Requirements:
  - \$115,000 budget required for launch: August 2020.
  - CRM Coordinator: Summer 2021.

# Project Objectives

- Streamline Enrollment Management processes.
- Consolidate/eliminate disparate systems.
- Centralize communications to enhance students experience when interacting with different offices.
- Improved management and analysis of student interactions throughout the student lifecycle.
- Increase enrollment and completion.

# Milestones Completed

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- An appointment scheduling and event management – May 24, 2021
- New mobile-first credit admissions application – October 6, 2021
- New Knowledge Database system – November 8, 2021
- New Engage queuing system – November 8, 2021
- Introduce Salesforce Case Management System – November 15, 2021
- Enrollment Dashboards: December 2021



# Online Application

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- An easy-to-follow process that students can complete quickly and easily.
- 4,500 applications received since October 6, 2021, launch date.
- Continued development and enhancements planned.



**Thank you for choosing Harper College!**

We look forward to seeing you.

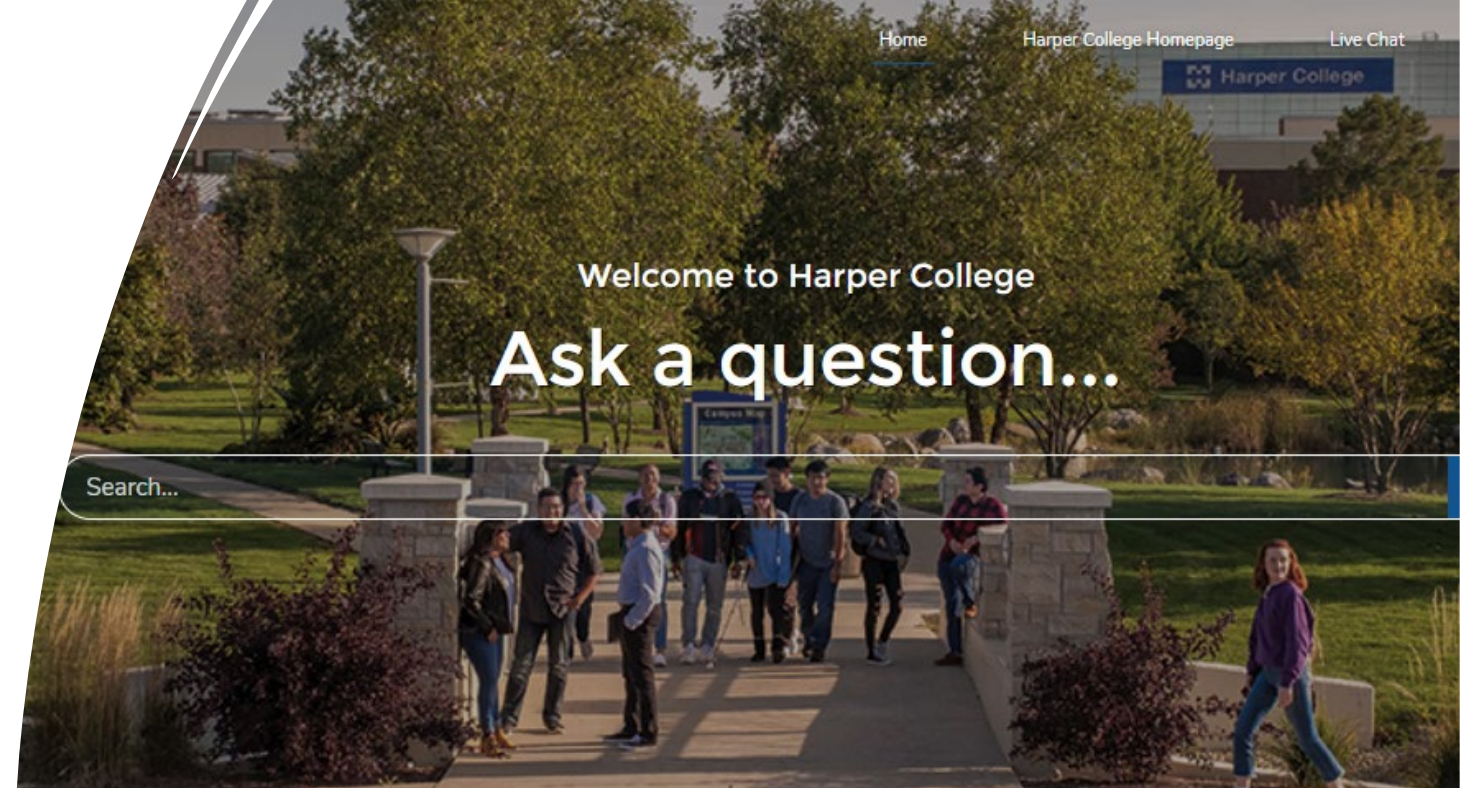
New students please click on the *"Create New User Account"* link below.

If you already have an account, log in with the email address you provided. If you are not sure what your password is use the *"Forgot Password"* link below to reset it.

If you need assistance, please contact Admissions Outreach at

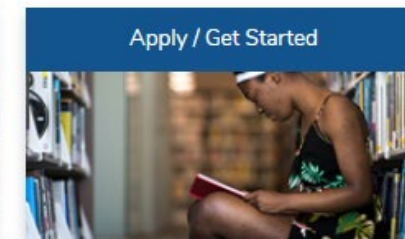
# Salesforce Knowledge

- Allows students to find answers to common questions 24 hours a day.
- Over 860 total views since our launch on November 8, 2021.



## We are here to help.

A place where you can easily find solutions and get support.



### Trending Questions

Am I in the Harper district?

Can I apply online?

Can I be admitted with an HSED or GED?

Can I apply for a scholarship before getting...

Who is the school president?

Do you offer tutoring services?

Do I have to declare a major to apply?

How do I apply?



# One Stop Appointment

Location: Building A  
Parking: Lot 2 or 2A (West Algonquin Road Entrance)  
Please check in at the Information Desk in Building A when you arrive for your appointment.  
[VISIT WEBSITE](#)

**WHEN**  
16 Thursday, December 16, 2021 9:00 AM - 5:00 PM CST

**One Stop Appointment 9:00a - 9:15a**  
December 16 9:00 AM- 9:15 AM CST  
15 minutes appointment

One Stop Appointment 9:15a - 9:30a

## CHOOSE EVENTS

THIS HAS SUB EVENTS  
Please select the event(s) you would like to attend below.

**One Stop Appointment 9:00a - 9:15a**

December 16 9:00 AM- 9:15 AM CST

**One Stop Appointment 9:15a - 9:30a**

December 16 9:15 AM- 9:30 AM CST

**One Stop Appointment 9:30a - 9:45a**

December 16 9:30 AM- 9:45 AM CST

**One Stop Appointment 9:45a - 10:00a**

December 16 9:45 AM- 10:00 AM CST

**One Stop Appointment 10:00a - 10:15a**

December 16 10:00 AM- 10:15 AM CST

# Event Management

- Students can schedule appointments and sign up for events online.
- Over 3,000 appointments scheduled in the system since May 24, 2021.



# Engage

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- Manage walk-up appointments for various departments.
- Work in collaboration with the Case Management System.
- 400 students have used Engage since going live on November 8, 2021.



## Waiting List

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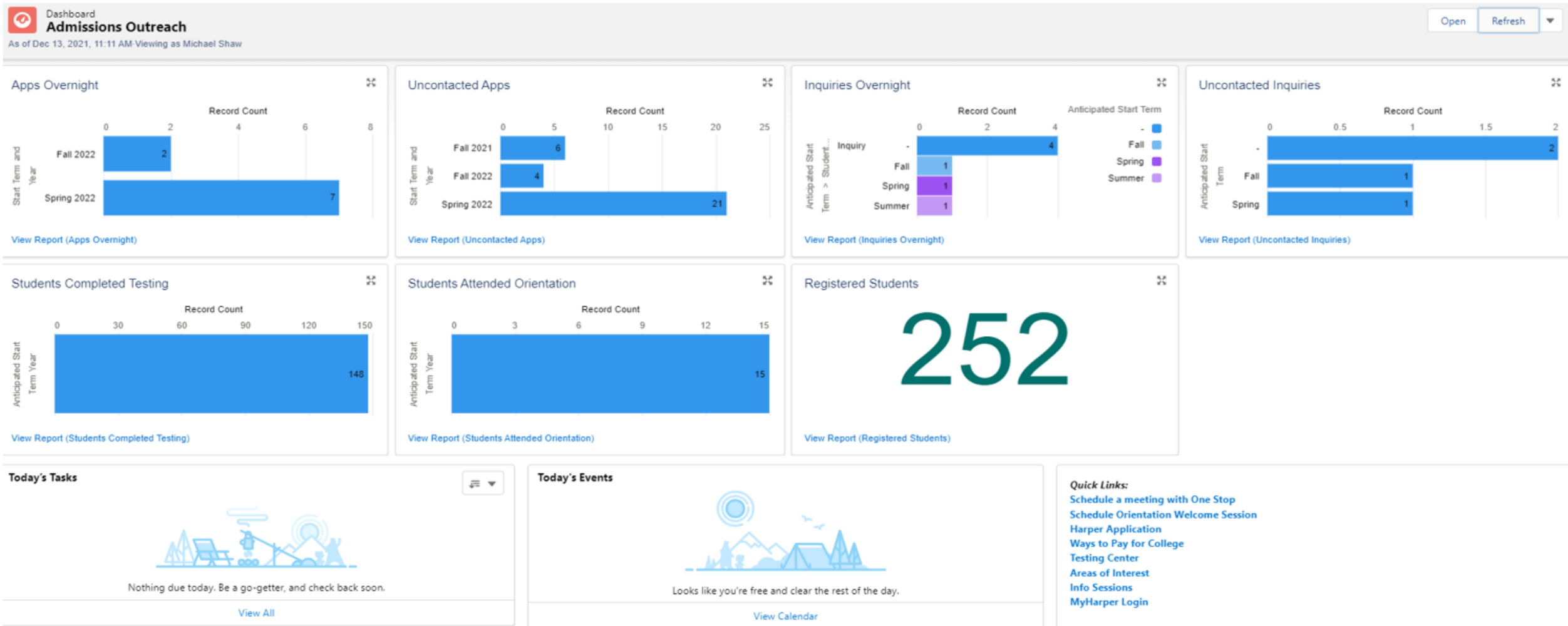
**Muhammad F.**

Advisor: First Available

Nov 19, 2021, 12:52:47 PM

# Dashboards and Reports

- Create custom dashboards and reports for team leaders
- Improved tracking of students through the enrollment funnel
- Real-time score cards for staff members



# Centralizing Communications

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- Centralizing communications to better coordinate student engagement throughout the campus.
- Office below will leverage/incorporate the CRM. – June 1, 2022

Admissions Outreach  
Adult Education  
Admissions Processing  
Business Office  
Center for New Students and Orientation  
Continuing Professional Education

Marketing  
One Stop Center  
Registrar's Office  
Testing Center  
University Center  
Workforce Solutions

# Upcoming Milestones

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- Creating new/enhanced workflow and communication processes for prospective students. - January, 2022
- Include limited enrollment programs in new application process. – March, 2022
- Prospects Scoring - April, 2022

Questions?

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