CRM for Graduate Admissions: Your Key to Student & Faculty Success

Olivia Nash
University of the Pacific Graduate School

Kathryn Hausbeck Korgan
UNLV Graduate College

Council of Graduate Schools Annual Meeting
December 6, 2019
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Who we are

Kate Hausbeck Korgan, PhD
Dean, Graduate College
University of Nevada, Las Vegas

Olivia Nash
Assistant Dean, Graduate School
University of the Pacific
Today’s Agenda

University of the Pacific
- About Pacific
- Building out internal facing CRM to facilitate faculty and staff involvement with the intention of increasing enrollment
- Case Study: Master of Science in Data Science

University of Nevada, Las Vegas
- About UNLV
- Strategies for Building a Lifecycle CRM
University of the Pacific
At a glance

- Private, three city university: Stockton, San Francisco and Sacramento
- Total enrollment (2019): 6,321
  - 3,554 undergraduate
  - 1,143 graduate
  - 1,624 first professional
- 80+ undergraduate majors, 30+ graduate programs, 3 first-professional programs
- Adopted Salesforce with TargetX in 2014; build out for Graduate Admission & Recruitment started in 2015
CRM Challenges at the Graduate Level

- Decentralized nature of Graduate Admissions
- Faculty & staff in graduate programs see the CRM as yet another tool they need to learn
- Department resources (time, support staff, training tools) are limited and spread thin
- Marketing, recruitment and admission are typically not the primary focus in graduate programs
- Programs have different needs, use different applications with varying levels of data insights
Shift in graduate education at Pacific

Launch new revenue-generating graduate programs from 2015-2020

• Athletic Training
• Audiology
• Clinical Nutrition
• Data Science
• Food Studies
• Education (MA & EdD)
• Music Therapy

• Nursing
• Occupational Therapy
• Physician Assistant Studies
• Public Administration
• Public Policy
• Social Work
How Pacific currently utilizes Salesforce

Pacific’s Graduate School utilizes Salesforce for prospective students and applicants. It is used to track:

- Lead lists
- Inquiries
- Marketing Campaigns
- Prospective Student events

- Email Campaigns
- Applicants (Enrollment Funnel)
- Confirmed and Enrolled Students
Case Study: MS in Data Science

- **Fall 2015**
  - Program Launch
  - Limited Marketing efforts, 6 month approved to enrolled timeline, no Salesforce use

- **2016-2018**
  - Enrollment targets not met
  - Limited Salesforce use

- **2018**
  - Salesforce Utilization Memo
  - Data Science program required to utilize Salesforce tools in partnership with GS

- **2019**
  - UOP International Launched

- **Fall 2019**
  - Largest DS Cohort Enrolled

- **2019**
  - 2 year Marketing campaign launched
## Program Specific Report Folders

### All Folders

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Program Specific Enrollment Dashboards
Inquiry Funnel
Drilling down into the dashboard

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Marketing Campaign Tracking
Outreach Plan
Results

Success in fall 2019 was due to:

- Increased international effort with English Language partner
- Increased & sustained digital marketing efforts
- Systematically reviewing and interpreting enrollment funnel data to identify areas of opportunity for targeting quality or missed inquiry and applicant populations
The Mission is the Message: Building a Successful Lifecycle CRM

- **1957**: UNLV Founded
- **1965**: GRADUATE COLLEGE Founded
- **1967**: First Master’s Grad
- **1977**: First Ph.D.
- **1991**: First Doctoral Degree

**SOLUTIONS**
100% Solutions
Innovative, Inspired, Impact

**PROGRAMS**
150+ programs, 1k+ GA’s

**TODAY**
- **STAFF**: Semi-centralized; Staff of 25+20
- **GATEWAY**: Grad Rebel Gateway & New Gateway Building
Our System Needs & Challenges: The CRM is the Message

Adaptable System:
160+ Programs,
500+ Concentrations & Tracks

Integration with PeopleSoft SIS

Reports & Data Dashboards

SINGLE ACCOUNT for ADM, $, Lifecycle

Responsive: User Tracking, Reviews & Recommendations

Personal Portal

Customized System of Engagement

Culture Change

Resources
We are Strategically Building our CRM Grad Student Lifecycle System of Engagement in 3 Overlapping Phases

**Phase 1 (2015 - 2019)**
- Recruitment
- Admissions
- Funding

**Phase 2 (2017 - 2021)**
- Enrollment
- Graduation

**Phase 3 (2021 - 2023)**
- Alumni placement
- Tracking
We’re Building each Stage of our CRM to Face our 3 Constituent Groups & Address their Concerns

**Graduate Programs & Coordinators**

For efficient back-end processes, communications & reports/dashboards & R2PC impact

**Prospective & Current Graduate Students**

For responsive, personalized, easy interface, individual on-time comms & student success

**Graduate College Team**

For back-end processes, communications, info sharing & R2PC metrics

**PHASE 1**

**PHASE 2**

**PHASE 3**
We are Implementing a Grad Student Lifecycle CRM to Show Targeted Benefits & Earn Buy-In

- **Graduate College Team**
  - PHASE AS IS
  - RESOURCES: TIME, $, AND STAFF & HAPPY CONSTITUENTS!

- **Graduate Programs & Coordinators**
  - PHASE D A S E
  - FORMS
  - TIME, EFFICIENCY, PERSONALIZATION & CULTURE CHANGE

- **Prospective & Current Grad Students**
  - PHASE P R O S E N A
  - INFO
  - EASE, EFFICIENCY, Responsive, PERSONAL & ON TIME INFO
Grad Rebel Gateway PHASE 1: Recruit, Admit & Fund

**Admit:** Offers, Tracking, Yield Management

**Applicant:** GC & Dept. Messaging based on Applicant Status

**Prospect:** RFI, Tracking, Outreach

**FUND New & Current Students:** GAs, Scholarships & Fellowships; Funding Review, Tracking, Processing & GA Data Dashboards
Phase Two for Faculty/Staff & Students

- **Personalized portal, forms, funding & new applications for current students**
  - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
  - Customized student information in their portal

- **DocuSign forms**
  - EDA: Enrollment, Courses, Graduate Faculty Status
  - Grad Advisory Committee tracking

- **Timely Communications**
  - Authenticated web Cases for interactive & searchable communications
  - RPC: Track & message to promote retention, progression, completion
  - Events and professional & career development engagement tracking

- **Progression & At-risk Tracking**
  - Student messaging & GC/Program alerts
GRAD REBEL GATEWAY

BECOME A UNLV GRAD REBEL

Hello—I'm so glad you're interested in graduate education at UNLV! We're here to help. Our mission is to advance graduate education at UNLV, which was recently classified as a Carnegie R1 “very high research activity” institution. Use Gold standard for university research metrics. We work closely with departments and the graduate faculty to provide our 3,000+ graduate and professional students with outstanding educational and professional development opportunities in our more than 150 graduate programs. If you have questions about beginning graduate studies at UNLV or would like to schedule a campus tour, email GradRecreation@UNLV.edu. If you have questions about the application process, email GradAdmissions@UNLV.edu.

I hope to see you on campus. Go Grad Rebels!
Kate Henshaw-Jones, Ph.D.
Interim Dean, UNLV Graduate College

CONTACT INFORMATION
Margaret Overcamp-Martini
Graduate Coordinator
socialworkgradcoun@unlv.edu
(702) 895-3241
Program Website

APPLICATION DEADLINE
(Year/Month/Date)
Domestic: 2022-12-01
International: 2023-12-01

These Summer 2021 deadlines are specific to your application for Social Work M.S.W.

FINANCE YOUR STUDIES

We know that graduate school is a financial commitment, but we're here to support you!

The UNLV Graduate College spends approximately $16 million per year to financially support graduate students. We provide 1,000+ Graduate Assistantships per year, more than 50 Fellowships, and hundreds of scholarships. Remember, submitting your FAFSA is a great way to qualify for scholarships and loans. UNLV's school code to complete your FAFSA is 003555.

For more information, and to submit applications for Graduate Assistantships, scholarships, and fellowships, click on the Funding tab above and visit our Graduate Financial Services website.
Questions? Contact our Graduate Financial Services team at GradFinancialServ@UNLV.edu. We're always happy to help!

Future Students | Financial Resources | Professional Development Academy | Current Students | Graduate Catalog
unlv.edu/graduateschool | gradcollege@unlv.edu | (702) 895-3241
Phase Two for Faculty/Staff & Students

- **Personalized portal, forms, funding & new applications for current students**
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- **Progression & At-risk Tracking**
  - Student messaging & GC/Program alerts
Phase 2 Roll-Out: Online E-Forms in our Grad Rebel Gateway

- FormBuilder Rx
  - Web forms for students
- Grad Faculty Status & Committee Tracking
  - EDA: affiliations w/ privileges
- Program Enrollment
  - Form requirements
  - Status of forms
- Forms
  - Tracking
- DocuSign
  - Create envelopes
  - Route for signatures
### Student Form Requirements

#### Program Form Requirements

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Online Form

GRAD REBEL GATEWAY

APPONITION OF ADVISORY COMMITTEE FORM

The Graduate Advisory Committee (GAC) is responsible for guiding the student through the graduate program, assisting the student with his/her professional paper, thesis, or dissertation, and administering the final examination or culminating experience. Committee members must have appropriate permissions to serve in their respective roles. For additional information about graduate faculty status, visit this site.

Student Information

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Committee Composition

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<tr>
<td>Co-Chair</td>
<td>Deborah Artega-Capen</td>
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<tr>
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<td>Giuseppe Istrate</td>
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<td>Serna Marguerre Jars</td>
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Form Tracking

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  - **Subject**: Change of Advisory Committee for [Name] (Action Required)
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  - **Form Name**: [Name]

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  - **Hours to Complete**: [Hours]
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**UNLV GRADUATE COLLEGE**

**CULMINATING EXPERIENCE RESULTS**

This form must be submitted by masters/specialist/diploma students who are not required to have an advisory committee.

**STUDENT INFORMATION**

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<th>PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Management Information Systems M.S.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>PHONE</th>
<th>EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>@unlv.nevada.edu</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUBPLAN(S)</th>
<th>Non-Thesis</th>
</tr>
</thead>
</table>

**CULMINATING EXPERIENCE INFORMATION**

Describe Culminating Experience: **Capstone**

Paper/Project Title (if applicable):

**I certify that all information provided on this form is true and complete.**

LM INITIAL

I understand that in order for my degree to be conferred, I must apply to graduate in MyUNLV by the appropriate deadline (https://www.unlv.edu/graduatecollege/graduation-deadlines).

LM INITIAL

**TO BE COMPLETED BY**

Graduate Coordinator or Department Chair

<table>
<thead>
<tr>
<th>Culminating Experience Results</th>
<th>Culminating Experience Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass</td>
<td>05/01/2019</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Culminating Experience Comments</th>
</tr>
</thead>
</table>

**APPROVAL SIGNATURES**

**FACULTY ADVISOR**

**DATE**

**RECOMMENDATION**

Approved by: [Signature]

4/1/2019

**GRADUATE COLLEGE USE ONLY**

Date Initiated: 2019-04-01

**COMMENTS:**

The student has not yet completed their culminating experience for their program. This form should be resubmitted after May 1, when a final decision can be determined for the results of the culminating experience.

Form Code: 58
Phase Two for Faculty/Staff & Students

- **Personalized portal, forms, funding & new applications for current students**
  - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
  - Customized student information in their portal

- **DocuSign forms**
  - EDA: Enrollment, Courses, Graduate Faculty Status
  - Grad Advisory Committee tracking

- **Timely Communications**
  - Authenticated web Cases for interactive & searchable communications
  - RPC: Track & message to promote retention, progression, completion
  - Events and professional & career development engagement tracking

- **Progression & At-risk Tracking**
  - Student messaging & GC/Program alerts
ISSUE TRACKING
Cases are created through email, web forms, & manual entry. Staff send email responses directly from the case record. This ‘conversation’ is saved to the contact’s record.

DATA ANALYSIS
Salesforce tracks the number of cases created, comments, emails, interactions, case owners, the length of time since the case last changed status or owner, and the case history.

BUSINESS PROCESSES
Cases centralize communications & improve transparency. Increases accountability & efficiency of teams & staff.

Cases have allowed us to improve customer service and efficiency, while ensuring consistency of messaging.
SalesForce Cases

**Cases by Type**

- **Type**
  - Admissions
  - Systems
  - Recruitment
  - International Admissions
  - Communication Request

**Admissions Cases**

- Case Owner: Full Name
  - Elizabeth Jost: 131 (4%)
  - Lauren Otton: 645 (19%)
  - Lori Filippa: 754 (22%)
  - Presley Duggan: 841 (26%)
  - Other: 1,012 (30%)

**Admissions Cases: January**

- **Type**
  - Admissions: 236
  - International Admissions: 265
  - Communication Request: 181

**Date/Time Opened**

- October 2017: 200
- November 2017: 400
- December 2017: 600
- January 2018: 800
- February 2018: 600
- March 2018: 400
Tracking Metrics

Cases provide data on types of issues so we know where to focus resources and communication efforts.
Phase Two for Faculty/Staff & Students

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GRADUATE STUDENT LIFECYCLE

EARLY
- DOCTORAL
- MASTER'S

MID
- DOCTORAL
- MASTER'S

LATE
- DOCTORAL
- MASTER'S
Strategic Student Communications

• Student Lifecycle On-time Info.
• Early/Mid/Late Career Support
• Form & Milestone Requirements
• At-Risk Students

• Weekly Newsletter for Students
• Monthly Newsletter for Faculty & Staff
• All branded for culture building
WORKSHOPS & PROFESSIONAL DEVELOPMENT OPPORTUNITIES

Nov. 13: How to Design Interactive Course Activities
3:30-7 p.m., Zoom meeting ID: 89917083788 Password: 2K3B4Kts (Ms. Yi, 456-455-0014 (ext))
This workshop focuses on enhancing instructional design and teaching strategies for interactive learning. Participants will learn how to develop engaging, student-centered activities that promote critical thinking and active participation in the classroom.

ANNOUNCEMENTS

Thesis & Dissertation Office Hours
Students have questions about their thesis or dissertation can take advantage of the Graduate College's Thesis and Dissertation Office Hours. Attendees will be able to discuss their research, methodology, or any other aspect related to their thesis or dissertation.

DEADLINES

Nov. 16: UNLV International Gaming Institute Problem Gambling Research Seed Grant
UNLV's International Gaming Institute is seeking to fund a new initiative this year. The deadline for submissions is Nov. 16. For more information and to apply, please visit the UNLV International Gaming Institute website.

EVENTS & ACTIVITIES

Nov. 12-16: Rebel Homecoming
UNLV is proud to celebrate its annual homecoming celebration. This event brings together students, faculty, staff, and community members to celebrate the UNLV community and show their school spirit. There will be live music, food trucks, and much more. Check the UNLV events calendar for more information.

WELLNESS

Nov. 14: Rebel Reel Turkey Trot
7:00 a.m., WMC
Campus Recreation Services will be partnering with Three Square to collect canned foods to be distributed to the Southern Nevada community. The Turkey Trot will also give away a Statue of Liberty to the first 100 runners. For more information, please visit the UNLV events calendar.

GRADUATE STUDENT CALENDAR
GRADUATE COMMUNITY NEWS
GRAD REBEL CATWALK

INSPIRED. INNOVATIVE. IMPACTFUL.
BEST PRACTICES
Welcome to the new academic year!
A number of upcoming important projects may augment the mentorship that you provide to your graduate students.
Read More

A Message from Dean Kate Korgan
Welcome back to the new academic year! I hope that you enjoyed the right combination of everything that you most needed this summer — relaxation, productivity, fun, downtime, writing, whatever! And I hope you’ve returned invigorated and ready to tackle the academic year ahead. We have a lot going on, so it’s going to be a busy, productive, and yes, even fun year ahead!
Read More

NEWS & ANNOUNCEMENTS
We’re Moving ... Soon!
The Graduate College will soon be moving across Maryland Parkway into the new University Gateway Building (GTW), just south of Goffs Rd. The new home of the Graduate College, which will be on the second floor of GTW, will feature our Professional Development Academy Commons — a computer lab and collaborative work space for UNLV graduate students — and a Graduate Faculty/Professional Learning Center.
Dear_

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In luctus tincidunt, da laborum commodo, una in dapibus tincidunt, dolor a volutpat ut, volutpat eu, ullamcorper vitae. Pellentesque volutpat eu, ullamcorper vitae, sed elementum ut, volutpat eu, ullamcorper vitae.

In id nisi ut a suscipit id interdum. Ut nee commodo odio. Pellentesque rhoncus lectus sed erat ultrices, ac lectus duis eu magna. Massa nec id tempus massa justo, mollis tellus arcu, pharetra enim. Mauris massa eu, volutpat nunc, massa nunc vel, volutpat nunc commodo ut, aliquam eu.

Proin phasellus sed magna eget vel, tellus eu, mollis commodo tellus. Sed vel, volutpat eu, ullamcorper vitae, sed elementum ut, volutpat eu, ullamcorper vitae.

Nulla eget nisl. Aliquam vestibulum ante, sed justo sit amet tincidunt. Nam tempus id, suscipit id, volutpat eu, ullamcorper vitae, sed elementum ut, volutpat eu, ullamcorper vitae.

Sincerely -

[Image]
UNLV Graduate College Case Study:
One Strategy for CRM Success & Mission Fulfillment

MISSION
Top Tier & R1

MESSAGE + BENEFITS
Elevated Experiences
Heightened Efficiency
Enables Strategic Actions
Metrics Track Success & Opportunities

MEDIUM
Salesforce CRM & EnrollmentRx

CRM Benefits

Buy-in
Drives Growth

* Marshall McLuhan & Quentin Fiore (1967) *The Medium is the Massage*
Thank You to our UNLV GC Systems & Data Team

Janine Barrett, Ex. Dir., Systems & Operations
Maulik Maniar, Systems & Data Analyst
Payam Ezatpoor, Systems & Data Analyst
Kara Wada, Ex. Dir., Grad Enrollment Management

And so much gratitude to our terrific UNLV colleagues from the MyUNLV & Office of Information Technology teams