A Graduate School’s Phased Approach to CRM Starts with Admissions

January 29, 2019

Webinar sponsored by Salesforce.org
Plan for today

• Brief presentations, followed by Q & A

• Webinar **recording and slides** will be **emailed** to participants and **posted** on the CGS website

• Please **submit questions** through the GoToWebinar **control panel**

• **Technical issues?** Troubleshooting help available:
Audio Troubleshooting

• Having trouble hearing us? Try switching to a different audio connection. You can change from Telephone to Mic & Speakers or vice versa without leaving the session.

• If you experience trouble with a telephone connection, click “Problem dialing in?” for an alternate phone number to dial.
Forward-Looking Statements

Statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, Inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, Inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, Inc. assumes no obligation and does not intend to update these forward-looking statements.
A Graduate School’s Phased Approach to CRM Starts with Admissions

January 29, 2019

Webinar sponsored by Salesforce.org
• What is success in a master’s program?
• What attributes are currently used in admissions decisions to predict success?
• What evidence is currently used to evaluate the attributes?

Learn more about this project at the CGS webinar “Master’s Admissions: Transparency, Guidance, and Training” on Tuesday, March 26, 2019 from 2-3 PM EST.

https://cgsnet.org/master’s-admission-attribute-study
Speakers

Dr. Kate Hausbeck Korgan
Dean

Bill Laffey
Senior Solutions Engineer

UNIV GRADUATE COLLEGE

salesforce.org
UNLV is Daring, Different & Diverse

**1957**
- **SEPTEMBER**
  - UNLV Founded

**1965**
- **GRADUATE COLLEGE**
  - Founded

**1967**
- **GRADUATES**
  - First Master’s Grads

**1977**
- **DEGREE**
  - First Ph.D.

**1991**
- **DEGREE**
  - First Doctoral Degree

**2013**
- **New College**
  - 150+ programs, 1k+ GA’s

**2018**
- **Carnegie Tier 1**

**TODAY**
- **STAFF**
  - Semi-centralized; Staff of 25 +20

- **GATEWAY**
  - Grad Rebel Gateway & New Gateway Building
Our System Needs & Challenges

ADAPTABLE SYSTEM:
155 PROGRAMS,
500 CONCENTRATIONS & TRACKS

INTEGRATION

PERSONALIZATION & SINGLE ACCOUNT

USER TRACKING, REVIEWS & RECOMMENDATIONS

GREAT INDUSTRY & PRODUCT PARTNERS

SYSTEM OF ENGAGEMENT

CULTURE CHANGE

DASHBOARD

FUNDING
“The medium IS the message...We shape our tools, and then our tools shape us.”

Marshall McLuhan & Quentin Fiore, 1967
Recruit a highly capable, motivated, and diverse student body

Engage students in research, creative activity, and professional practice

Build the professional and academic skills of students

Leverage students to the next academic and career goal (graduation!)

Ink, like & follow

= Our R2PC Model:
  Recruitment
  Retention
  Progression
  Completion
Building our SF CRM System of Engagement in 3 Phases

**PHASE 1**
recruitment, admissions, funding

**PHASE 2**
1st enrollment to graduation

**PHASE 3**
alumni placement & tracking
Grad Rebel Gateway Phase 1: Recruit, Admit & Fund
Phase 1: Recruiting, Admitting & Funding Students

- Recruitment messaging that is targeted, strategic, and personalized
- Student portal with dynamic widgets
- User friendly application system for admissions
- Easy & integrated Graduate Assistantship application
- Scholarship & Fellowship application embedded in application & GRG
- KIRA online interview integration: holistic admissions and now for GAs, too
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 II "high research activity" institution, the gold standard for university research metrics. We work closely with departments and the graduate faculty to provide our 5,000+ 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 gradadmissions@unlv.edu. If you have questions about the application process, email gradadmissions@unlv.edu.

I hope to see you on campus. Go Grad Rebels!

Katie Hassid-McKort, Ph.D.
Interim Dean, UNLV Graduate College

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 $1.5 million per year to financially support graduate students. We provide 1000+ Graduate Assistantships per year, more than 60 Fellowships, and hundreds of scholarships. Remember, submitting your FAFSA is a great way to qualify for scholarship funds. UNLV’s school code to complete your FAFSA is 002569.

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 webpage.

Questions? Contact our Graduate Financial Services team at gradfinancial@unlv.edu. We’re always happy to help!
This page lists your applications for admission. The application marked as your "Active Application" is the last application you viewed and determines what information you see on the Home and My Funding tabs. To set your active application click on the appropriate App ID.

Applications In Progress: which application would you like to work on now?

<table>
<thead>
<tr>
<th>Name</th>
<th>Level of Study</th>
<th>Program of Study</th>
<th>Term of Admission</th>
<th>Admission Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>App ID: 73354</td>
<td>Masters</td>
<td>Business Administration M.B.A.</td>
<td>Fall 2019</td>
<td>Under Departmental Review</td>
</tr>
<tr>
<td>App ID: 73557</td>
<td>Masters</td>
<td>Management Information Systems M.S.</td>
<td>Fall 2019</td>
<td>Under Departmental Review</td>
</tr>
<tr>
<td>[Active Application]</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Admission Deadline: 2/1/2019

International Deadline: 12/15/2018

These Fall 2019 deadlines are specific to your application for Social Work M.S.W.

For more information visit the Graduate College Website.

Checklist:
- Curriculum Vita/Resume
- Statement of Intent
- Transcript: University of Nevada Las Vegas
- Transcript: Mesa Community College
- Transcript: College of Southern Nevada
- Application Recommendation: An
- Application Recommendation: Iv
- Application Recommendation: Ka

Contact UNLV Graduate College

4505 S. Maryland Pkwy, Las Vegas, NV, USA, 89154-1017
gradcollege@unlv.edu
(702) 895-3320
https://www.unlv.edu/graduatecollege

Graduate Coordinator Contact Information

Name: Maryann Overcamp-Matsini
Email: socialwork.graduate@unlv.edu
Phone: (702) 895-3311
Website: http://www.unlv.edu/degree/msw
Phase 1: Recruitment, Admissions & Funding for Faculty/Staff

- Flexibility and easy customizations: dynamic applications
- Easy to use back-end reviews & workflows for department recommendations
- Tracking metrics & data dashboards
- Training and self-reliance to make updates
- GA allocation tracking
- Track prospects - messaging via Marketing Cloud
- KIRA online interview integration
Grad Rebel Gateway Phase 1: Recruit, Admit & Fund

Applicant: GC & Dept. Messaging based on Applicant Status

Prospect: RFIs, Journeys & Automations, Tracking

Admit: Offers, Tracking, Yield Management

FUND: New & Current Students; GAs; S/F; Funding Review & Processing
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; S/F; Funding Review & Processing
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; S/F; Funding Review & Processing
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; S/F; Funding Review & Processing
Use this page to apply for funding opportunities. If you have multiple applications for admission, ensure that you have indicated which application should be considered your active application before creating a new Graduate Assistantship or Scholarship/Fellowship application. All funding applications must be associated with degree-seeking applications. Click on the 'My Application' tab above to see which application is currently selected.

**Graduate Assistantship Applications:** Graduate Assistants, or GAs, have a unique dual role: they are both graduate degree-seeking students and research or teaching assistants who contribute to the academic mission of the university. Graduate students awarded these competitive positions receive a stipend and benefits package for their work in the classrooms, offices, and laboratories of the university. For more information please visit the Graduate College website.

<table>
<thead>
<tr>
<th>Name</th>
<th>GA Department</th>
<th>Requested Start Term</th>
<th>Status</th>
<th>Date Submitted</th>
<th>Action Required</th>
<th>Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>App ID: 4717</td>
<td>History</td>
<td>Fall 2018</td>
<td>Offer Accepted</td>
<td>1/19/2018</td>
<td>View Next Steps</td>
<td></td>
</tr>
<tr>
<td>App ID: 4717</td>
<td>History</td>
<td>Fall 2017</td>
<td>Offer Accepted</td>
<td>5/10/2017</td>
<td>View Next Steps</td>
<td></td>
</tr>
</tbody>
</table>

**Scholarship/Fellowship Applications:** Apply for a variety of scholarships and fellowships. The majority of scholarships/fellowships are awarded by academic year and must be submitted by December 1st for the following academic year. For more information please visit the Graduate College website.

<table>
<thead>
<tr>
<th>Name</th>
<th>Scholarship/Fellowship</th>
<th>Award Year</th>
<th>Application Deadline</th>
<th>Status</th>
<th>Date Submitted</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>App ID: 4717</td>
<td>Alumni Association Scholarship</td>
<td>2018</td>
<td>12/1/2017</td>
<td>Offer Accepted</td>
<td>11/26/2017</td>
<td>None</td>
</tr>
</tbody>
</table>

Create New Graduate Assistantship Application

Create New Scholarship/Fellowship Application
Grad Rebel Gateway CRM: Phase Two for Students

- Include all current students in our CRM, as well as Law, Dental & Medical Students
- Implementation of DocuSign for all forms
- RPC: Message & intervene to promote retention, progression, completion
- Register & track GC events, Professional Development Academy activities
- Dynamic and personalized communications depending on your lifecycle stage via Marketing Cloud
- Authenticated Web to Case in GRG Portal
GRADUATE STUDENT LIFECYCLE

EARLY
- DOCTORAL
- MASTER'S

MID
- DOCTORAL
- MASTER'S

LATE
- DOCTORAL
- MASTER'S
WELCOME TO THE NEW GRAD REBEL GATEWAY!

We are so excited to unveil the new look and functionality of our student portal. As we embarked on building this new phase of the Grad Rebel Gateway, we had you, our students, in mind. You’ll still log in here to apply for admission to any future graduate certificates or programs, as well as to submit all of your GA, scholarship and fellowship applications. And stay tuned: in the coming months, this personalized portal will offer even more functionality for current graduate students.

Our first step toward expanding your Grad Rebel Gateway is our transition to e-forms. We’re happy to share that all the paper forms you’re accustomed to completing for the Graduate College are now in the Grad Rebel Gateway as electronic forms. From now on you just log in to your personalized Grad Rebel Gateway portal to access, complete, and submit these forms. These new forms will be routed electronically to the appropriate individuals for review and signature, and you’ll be able to track the status of your forms as they move. We hope this change will provide a stress-free means to submit and track your forms, making the process easier for you.

FIND FUNDING

The UNLV Graduate College spends approximately $15 million per year to financially support graduate students. We provide 3,000+ Graduate assistantships per year, more than 60 fellowships, and hundreds of scholarships. Remember, submitting your FAFSA is a great way to qualify for scholarship funds. UNLV’s school code to complete your FAFSA is 002299. For more information, and to submit applications for Graduate Assistantships, scholarships, and fellowships, click on the Funding tab above. Friendly reminder: apply by Dec. 1 each year to compete for fellowships/fellowships for the following academic year.
Completed forms will automatically route for review and signature to the name/emails listed under "Approval Signatures." You can track the progress of these forms by viewing the "Recommendation" field for each signer, which will populate as the form is signed. If your form status is Declined, Denied, or Canceled click on the Form ID and view the comments at the bottom of the form for more information.

The following forms have been created by you. Click on the Form ID to review the form.

### Appointment of Advisory Committee Form

<table>
<thead>
<tr>
<th>FORM ID</th>
<th>FORM NAME</th>
<th>STATUS</th>
<th>COMPLETED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-0971</td>
<td>Appointment of Advisory Committee</td>
<td>Approved</td>
<td>12/08/15</td>
</tr>
</tbody>
</table>

### Plan Of Study Form

Create New Plan Of Study Form

### Culminating Experience Results - Masters Degree with Advisory Committee

Create New Culminating Experience Results Form
Completed forms will automatically route for review and signature to the name/emails listed under “Approval Signatures”. You can track the progress of these forms by viewing the “Recommendation” field for each signer, which will populate as the form is signed.

The following forms have been created by you. Click on the Form ID to review the form.

### Appeal Form

<table>
<thead>
<tr>
<th>FORM ID</th>
<th>FORM NAME</th>
<th>STATUS</th>
<th>COMPLETED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-2881 (Active)</td>
<td>Appeal Form</td>
<td>Routing for Signatures</td>
<td></td>
</tr>
</tbody>
</table>

Create New Appeal Form

### Authorization For Overload Form

<table>
<thead>
<tr>
<th>FORM ID</th>
<th>FORM NAME</th>
<th>STATUS</th>
<th>COMPLETED DATE</th>
</tr>
</thead>
</table>

Create New Authorization for Overload Form

### Change of Advisory Committee Form

<table>
<thead>
<tr>
<th>FORM ID</th>
<th>FORM NAME</th>
<th>STATUS</th>
<th>COMPLETED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-2894 (Active)</td>
<td>Change of Advisory Committee</td>
<td>Submitted</td>
<td></td>
</tr>
</tbody>
</table>

Create New Change 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 [page](https://www.unl.edu).

### Student Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSHE ID</td>
<td>00000000000</td>
</tr>
<tr>
<td>First Name</td>
<td>Payam</td>
</tr>
<tr>
<td>Last Name</td>
<td>Test</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:ecalpoor@unh.nevada.edu">ecalpoor@unh.nevada.edu</a></td>
</tr>
<tr>
<td>Phone</td>
<td>(702) 112-2111</td>
</tr>
<tr>
<td>Degree Plan</td>
<td>Hispanic Studies M.A.</td>
</tr>
</tbody>
</table>

### Committee Composition

- **Advisory Committee Chair**: [Name]
- **Advisory Committee Co-Chair**: [Name]
- **Advisory Committee Member 1**: [Name]
- **Advisory Committee Member 2**: [Name]
- **Additional Advisory Committee Member 1**: [Name]
- **Additional Advisory Committee Member 2**: [Name]
Dear [Name],


Sincerely, [Your Name]
Grad Rebel Gateway: Phase Two for Faculty/Staff

- First placement to graduation
- RPC: Track, message & intervene to promote retention, progression, completion; Professional & Career Development
- Build a two-way bridge between MyUNLV (PeopleSoft) and Grad Rebel Gateway (Salesforce)
- Add Graduate Faculty & Grad Advisory Committee tracking
- Implement SF Cases for interactive & searchable communications between all GC areas & students
- DocuSign forms
University of Nevada, Las Vegas
grad.systems@unlv.edu

Dear Shannon Sumpter,

This form has been routed to you for your review and signature. After you have electronically approved the form, it will be routed to the next appropriate person for approval.

Please note the following:
The Graduate Advisory Committee (GAC) is responsible for guiding the student through the graduate program, assisting the student with her/his 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: https://www.unlv.edu/graduatecollege/graduate-faculty-status

Sincerely,
UNLV Graduate College
<table>
<thead>
<tr>
<th>Requested Graduate Faculty Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UNLV Faculty Member</strong></td>
</tr>
<tr>
<td><strong>Faculty Category</strong></td>
</tr>
<tr>
<td><strong>GFS Department</strong></td>
</tr>
<tr>
<td><strong>College</strong></td>
</tr>
<tr>
<td><strong>CV/Resume</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Max file size is 2MB and supported file formats are pdf, doc/docx</td>
</tr>
<tr>
<td>I am qualified for and requesting the following GFS privileges:</td>
</tr>
<tr>
<td><strong>Grad Advisory Committee Chair</strong></td>
</tr>
<tr>
<td><strong>Grad Advisory Committee Member</strong></td>
</tr>
<tr>
<td><strong>Grad Teaching</strong></td>
</tr>
<tr>
<td><strong>Extra Grad Advisory Committee Member</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Acknowledgements/Signatures</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand that upon leaving the university, I am required to complete a Graduate Faculty Leaving Form</td>
</tr>
<tr>
<td><strong>Please Initial</strong></td>
</tr>
<tr>
<td><strong>Applicant</strong></td>
</tr>
<tr>
<td><strong>Applicant Email</strong></td>
</tr>
<tr>
<td><strong>Department Chair</strong></td>
</tr>
<tr>
<td><strong>Department Chair Email</strong></td>
</tr>
<tr>
<td><strong>College Dean</strong></td>
</tr>
</tbody>
</table>
LINK, LIKE, FOLLOW, and LEVERAGE!

PHASE 3
Challenges

- Dream Expansion
- Customization Needs
- Unequal Engagement Across Programs
- Time
- Staff
- Systems Integration
Outcomes & Successes

Streamlined Processes
Meet our Diverse, Custom Needs
Great External Partnerships
Spinoff Successes
Happy Acclimated Staff
Lifecycle Communications
Campus Support & Enthusiasm
Path Aligned with Metrics, Mission, & Goals
Our Medium is the Message

It’s not just the info, it’s the EXPERIENCE

GRAD REBEL GATEWAY

A people-driven platform, with a LIFECYCLE perspective
Thank You to our UNLV GC Systems & Data Team

Janine Barrett, Executive Director of Systems & Operations
Maulik Maniar, Systems & Data Analyst
Payam Ezatpoor, Systems & Data Analyst
Kara Wada, Executive Director of Grad Enrollment Management & Honorary Systems Team member

And so much gratitude to our terrific UNLV colleagues from the MyUNLV team & Office of Information Technology!
Preparing for a CRM within Grad Programs

Bill Laffey
Senior Solutions Engineer

salesforce.org
Preparing for a CRM within Grad Programs

• What are your current needs?
• What are your current challenges?
• Data, Integrations, Workflows... oh my!
• Who should be involved?
• The ‘B’ Word
• Mapping out your Business Process Analysis
• Test Drive solutions... What’s the best fit... Who will be your partner
• Utilize available resources - https://cgsnet.org/best-practices
Recruiting and Admissions 360° View

- Recruiting
- Communities
- Online Applications
- Application Review
- Acceptance
- Enrollment Management
- Onboarding Journey
- Campus Events/Orientations
- Task Management & Forms
- Enrollment

- Marketing
- Multi-channel Journeys
- Advertising
- Social Engagement
- Awareness Building
- Inquiry

Salesforce Confidential. Not for external distribution.
Questions?

Type them into the Questions box on the GoToWebinar control panel.
Thank You for Participating!

- Webinar recording and slides will be emailed to participants and posted on the CGS website within one week of the webinar. Please share with interested colleagues.
- Next CGS Webinar: “Results from the Fall 2018 CGS International Graduate Admissions Survey” on February 12, 2019 from 2:00 - 3:00 PM EDT.