UD Graduate Program Workshop

Thursday, August 18, 2011

10:00 a.m. – 12:00 p.m.

presents

UD / hobsons® CONNECT®

enrollment management technology CRM

by

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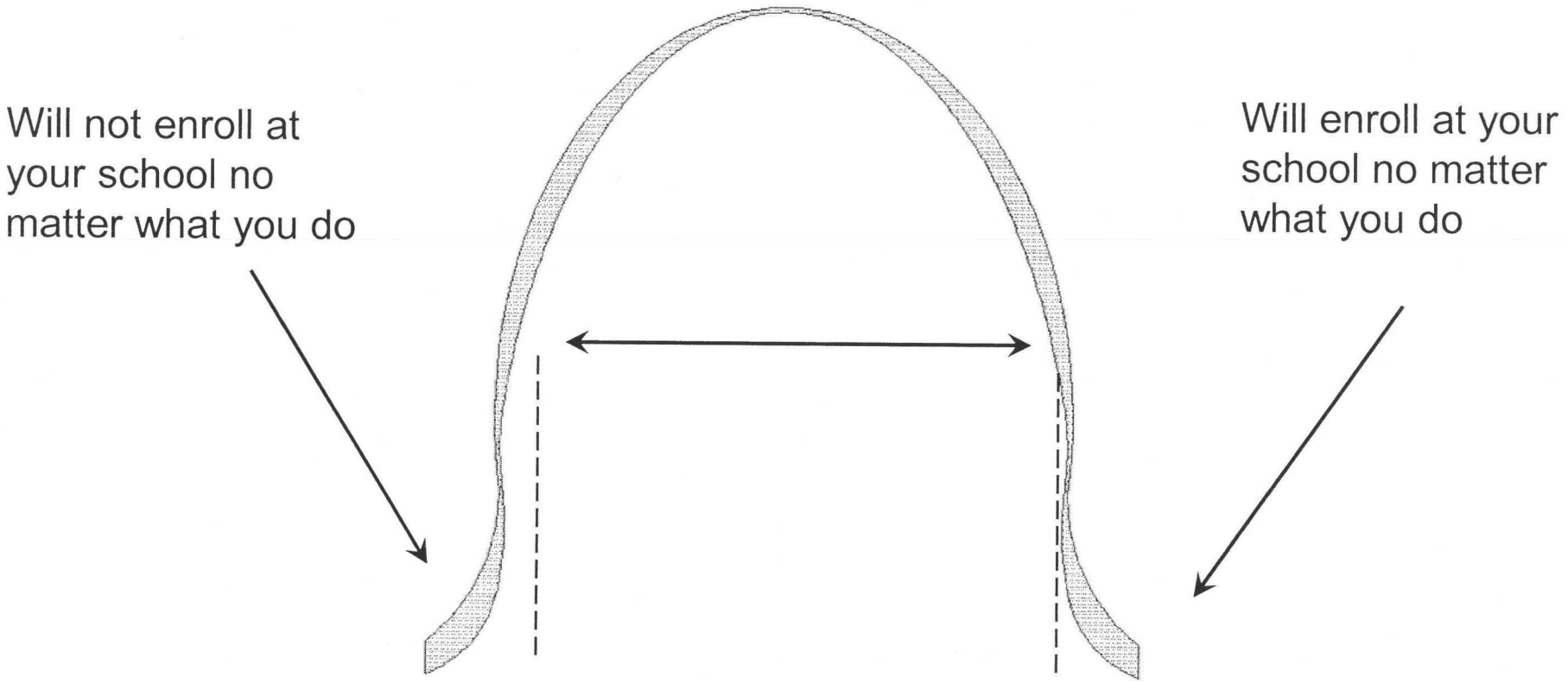
Agenda

1. "Hobsons Online Users Community" – see new UD Group
2. Review your Enrollment Goals
3. Try out the Communication Plan Activity
4. What is Connect CRM?
5. UD Admissions Terminology
6. Product Terminology
7. Filter and Reports/Dashboard demonstration

After today's workshop

1. Continue learning about both Connect and AY using one of the many learning resources (See Training Resources for details)
2. Make an appointment with Judith Miller to try something new
3. Practice, practice, practice
4. Repeat Steps 1 through 3



From: Noel-Levitz

Using a CRM means thinking about your enrollment goals first …

Who?

Every graduate program has a preferred type of student, though it may change from year to year based on current enrollments and graduation rates. What are the characteristics of students you want to enroll in Fall 2012? Who are you trying to "recruit?" How many potentials and inquiries would you need to end with one confirmed student that matches your ideal? Also, who are your competitors (these can be unique by graduate field of study) and are you aware of are what they ar doing?

What?

What is the message I want to send? Should I use my department banner or the UD banner? Should the message contain different information for one group (masters) vs. another (doctorate)? What is my communication plan for each type of inquiry or applicant as they move through the cycle?

Where?

Where would this ideal student be geographically? If they are very far away, should I host an online event for a select few? Also, where are they in the pipeline? And how would their placement in the pipeline be captured by my yearly communication plan? Where in my plan might I predict that a phone call from my Dean or Chair would make an impact on that person's decision to enroll?

How often?

Is this type of student receptive to more than one type of communication? Monthly? Less? More? Should ones be automated based on their actions?

Data

How often should I check my data? What should I look for to see if my efforts are successful? How often should I check, and alter, my strategies?

COMMUNICATION PLAN ACTIVITY

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Communication Plan: _____
Target Audience: _____
Color on Calendar: _____

☐ **Letter**
☐ **E-mail**
☐ **Phone Call**

Sequence/When to queue: _____
Topic/Call to action: _____
Filter: _____
Attributes: _____

☐ **Letter**
☐ **E-mail**
☐ **Phone Call**

Sequence/When to queue: _____
Topic/Call to action: _____
Filter: _____
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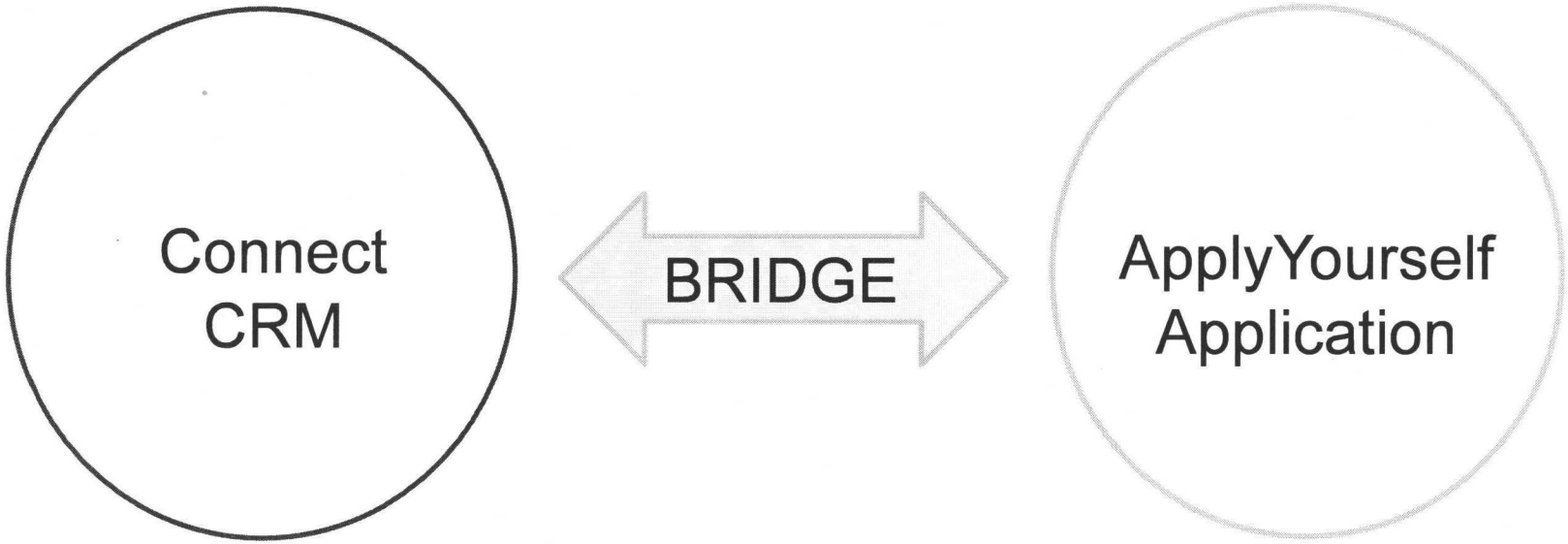
Connect and ApplyYourself



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What am I looking at when I click the CRM tab?

CRM means Constituent Relationship Manger. Our CRM is also known as EMT Connect. Here is what you see and what it does:

Contacts Tab

Think individuals; individuals can be looked up, imported, watched for changes, filtered (this is called a query in the application), and exported as an excel file. Exports can be automated – such as the weekly report your department receives containing anyone who completed your College level graduate Interest page. *The most important thing to know in this tab is how to find and enter a contact, and also how to build a filter.*

Communications Tab

Think communications; e-mail templates created, used, sent, and queued. Also an overall communications folder for each program exists here where you can make and view your own calendar. *The most important thing to know in this tab is how to create and queue an e-mail.*

Events & Interviews Tab

Think event management; create an invitation, post a registration form, collect RSVP's, send thank you notes. Generally speaking, this is a new area for UD grad programs to explore. *The most important thing to know in this tab is nothing - unless you are going to host an event ☺.*

Content Tab

Think surveys; RSVP results; VIP content. *This most important thing to know in this tab is how to create, send and collect results from a survey.*

Reports Tab

Think funnel and dashboard; track an individual from **prospect** through application through decision and matriculation. This tool is excellent for determining how a prospect/inquiry first heard about your program all the way through how they ended up via the application system. It is also excellent as a daily or weekly reference for gauging your how you are meeting your enrollment goals as you approach an upcoming term or semester. However…

The most important thing to know in this tab is that this is not the official tool for reporting on UD applicants and into matriculation, etc. ***The official tool for this type of UD data is Cognos.***

Chat Tab

Think live chat; schedule a chat event; create a chat room; establish moderator access; filter for inappropriate content. *The most important thing to know in this tab is nothing - unless you are going to host a chat ☺.*

UD Admissions Terminology Distinctions

Real Life	CRM/Application Codes
A person that was uploaded into the system	Prospect
A person who inquired on their own	Inquiry
Started an application	In-Process Applicant
Submitted an application	In CRM this person would have an application "Submitted" date. **In UDSIS this person would be APPL***
Admitted	**ADMT or COND ADMT***
Offer accepted	**DEIN***
Matriculated	**MATR***
Registered	

These are UDSIS codes, however they can be pulled using the Hobsons CRM and application systems as well.

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Product Terminology Distinctions

Connect		ApplyYourself
Instance	↔	WebCenter
Contacts	↔	Applicants
Attributes	↔	Fields/Questions
Filter	↔	Query
Known Layouts	↔	Export/Import Templates

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