University Council
April 15, 2019
Committed to Excellence

Drew Foster
Senior, Elementary and Middle-Level Education
Burlington, Iowa
Growing the Purple Circle

Panther Marching Band

UNI Concert Chorale
Supporting the Community

UNI Dance Marathon raised $680,464 for the UI Stead Family Children’s Hospital
Promoting Diversity and Inclusion

UNI Received Grow Cedar Valley’s 2019 Economic Inclusion Partnership Award
COMMENCEMENT TIMES  May 10 and 11, 2019

College of Business Administration  
College of Social and Behavioral Sciences  
May 10, 7:00 p.m.

College of Education  
Division of Continuing Education  
May 11, 10:00 a.m.

College of Humanities, Arts and Sciences  
May 11, 2:00 p.m.
1. The Connected Campus
2. Recruitment Strategies and Operational Improvements
3. Activities Underway and Future Directions
Vision

The Connected Campus

Salesforce for Higher Ed

Faculty & Staff
Prospects

Parents

System of Engagement

Students

Corporations

Alumni

Donors

Marketing

Recruitment

Student Success

Advancement

Community

Analytics

Build Apps

Higher Ed Data Architecture

SIS
Housing
HCM
Financial Aid
LMS
Degree Audit
GL
Meal Plans
Payroll

salesforce.org
Project Goals & Phases

• Unified 360-degree view of constituent interactions

• Manage interactions with and outreach to prospective, current, and former students, as well as alumni, patrons, donors, families, employers, high school personnel, and UNI personnel and organizations

• Variety of methods of communication, supporting personalization and individual preferences

• The management of the complete student recruiting and admissions process for undergraduate, graduate, and distance education programs

• Support student engagement and success, including the ability to quickly identify and contact students who meet defined risk indicators

• The ability to record participation in and maintain relationships with those attending campus-sponsored activities and events.

• A robust, user-friendly system that improves student interactions by delivering an intentional, consistent and sustainable experience

• Review, evaluate, and transform current business and operational practices when appropriate and to decrease the manually intensive nature of current processes
ConnectUNI Team Members:
Maddie Allen-Kasten, University Relations
Trisha Becker, Continuing Education
Josiah Bottleman, Information Technology
Beth Bruns, Continuing Education
Mike Holmes, Information Technology & Project Manager
Russel Karim, Information Technology
Rachel Kleven, Information Technology
Sanjin Rosic, Information Technology
Amy Schipper, Admissions
Linda Schroeder, Admissions
Ashley Stoppel, Enrollment Management
Valerie Turner, Information Technology

Executive Sponsors:
Michael Hager, Senior Vice President, Finance and Operations
Paula Knudson, Vice President, Student Affairs
Jim Wohlpart, Provost & Executive Vice President

Steering Committee:
Kevan Forest, Information Technology
Mike Holmes, Information Technology
Kent Johnson, Continuing Education
Matt Kroeger, Enrollment Management
Marty Mark, Information Technology
Cassie Mathes, University Relations
Kristin Moser, Institutional Research
Patrick Pease, Provost’s Office
Jennifer Waldron, Graduate College

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Recruitment Strategies & Operational Improvements

- **Components of Constituent Relationship Management (CRM)**
  - Salesforce Sales/Service Cloud
    - Manages contact information
    - Tracks interactions with constituents
    - Provides one-on-one communication (email, text, phone, etc.)
  - Salesforce Marketing Cloud
    - Suite of marketing and mass communication tools
      - Email Studio - developing personalized email content
      - Automation Studio - automated mass communications
      - Journey Studio - multi channel communication flows
      - Social Studio - monitor and publish content using social media
  - Form Assembly
    - Develop online forms on websites to load data directly into CRM
Role of Data in Personalized Interactions

Where does the data come from?
- Existing systems (SIS, Admissions Application, Visit System, etc.)
- Purchased Names
- Form Assembly forms on websites

How should the data be used?
- Data & Communication Governance
- Duplicate management
- Reporting
Recruitment Strategies & Operational Improvements

- **More prospective student information, more quickly**
  - Collection via FormAssembly feeds directly to Salesforce
  - Permissions to text, program of interest, parent information

- **Personalized communications**
  - Provide specific information at the time it is expected
  - Increase engagement
  - Build connection to campus

- **Tracking and optimization**
  - Full view of interactions with each student
  - Insights on which touchpoints are driving the most action
  - A/B testing and review
**Recruitment Strategies & Operational Improvements**

- **Single Sends/Automations**
  - Date-based emails sent individually
    - “Deadline is approaching!” or acknowledgement
    - Examples
      - Visit day, scholarship, decision day, FAFSA, housing contract, orientation registration, RaiseMe follow-up (weekly), ACT score received (daily), endorsements & certificates, Birthday greetings (daily)

- **Journeys**
  - Action initiated set of emails
    - “You did X, so here’s what you might want to know.”
  - Currently Running
    - Pre-Senior Slow Track, Post-Admit (Business, Dean + Program, General), Push to Apply Fall 2019, RFI Acknowledgements, Abandoned Application
• View of Main Admit/Commit Journey
Recruitment Strategies & Operational Improvements

- Department of Residence personalized messages in Admitted/Committed Journey
  - Create connection and increase housing apps
Recruitment Strategies & Operational Improvements

● Dean/department/faculty/alumni personalized messages in Admitted/Committed Journey
  ○ Create connection and increase yield
• Additional content requests coming soon
  ○ UGRD/Transfer/Intl Push to Apply (June Kick-off)
  ○ Search to Prospect (June Kick-off)
  ○ Admit/Commit (July Kick-off)
  ○ Visitor (July Kick-off)
  ○ Junior & 3P (August Kick-off)
  ○ Sophomore (September Kick-off)
  ○ Freshman (October Kick-off)

Parent communications to be included in the above are under development as well.
Recruitment Strategies & Operational Improvements

- Mapping of comm. flows across campus
- Content planning/creation/review
- Developing CRM content and journey guidelines for UNI
- Maintenance planning
- Reviewing and adjusting
- Keeping university stakeholders updated on CRM progress—both during implementation and in the future
New Tools for Recruiting Undergraduate Students

1. Timely Turnaround - Data Loading Dashboard

2. Accountability
   a. travel dashboard
   b. top 50 dashboard
   c. activities report

3. Personal Connections
   a. inbound calls result in action (example 1 & 2)
   b. personal email gets opened (example 1 & 2)
   c. there’s still power in the print
   d. but is it 2019 after all - so we can TEXT!
Recruitment Strategies & Operational Improvements

- Continuing Education Prospective Student Journey
  - Completes an RFI form
  - New opportunity created
  - Case created for Enrollment Contact follow up
  - Prospect enters Push to Apply journey
  - Complete your application journey
  - Prospect applies
Recruitment Strategies & Operational Improvements

● **Outcomes**
  ○ More targeted and timely communication with prospective students
  ○ Increased productivity
  ○ Improved integrated internal communication
  ○ Future collaboration with program coordinators for improved case management and customer service
Moving Forward with GARP
  ○ An advisory council will be formed to help direct future enhancements.

Graduate Application Review Portal (GARP)
  ○ Replaced OnBase workflow into CRM with new processes.
  ○ Increased consistency, transparency, and efficiency to provide more timely communications with admitted students.
  ○ Provides Graduate Program Coordinators and faculty access to applications and view documents in portal.
Activities Underway & Future Directions

- Communication Plans
- Data - Systems Integration, Loads, and Access
- Predictive Analytics
- Social Studio
- System Health & Security Posture
- User Access
- Phases 1 & 2 = Event Management, Advising, Case Management
- ConnectUNI Governance
Activities Underway & Future Directions
Thank You!
Policy 4.21—Emeritus/a Status

- Updates the policy statement to clarify who may qualify for and be awarded emeritus/a status
Policy 8.09—Animals on University Owned or Controlled Property

• Clarifies the state and federal laws applicable to service and assistance animals

• Enables the Department of Residence to approve requests for licensed, vaccinated, and properly restrained companion animals to be in residence facilities with their owners
• States the individual owner of an animal under this policy is responsible for damage caused by such animals

• Updates exceptions and exclusions to this policy for cases in which an animal displays aggressive/vicious behavior toward people or other animals
Policy 9.5X—IT Authentication and Authorization

- Provides policy and procedure regarding user authentication and authorization of university IT resources and university data

- Documents procedures for CatID, access to university data; and remote access to UNI IT Resources

- Requires multi-factor authentication at the discretion of the CIO; requires CIO or designee to publish standards and procedures for such authentication
• Outlines procedures for obtaining Elevated Privilege System Accounts, Local Workstation Administrator Accounts, and Service Accounts

• Refers to UNI Policy 9.54—Acceptable Use of IT Resources for violations of this policy

• Provides a glossary of terms
Policy 9.5X—Data Centers

• States the location of the university’s data centers

• Requires university servers to be housed in a university data center; does not preclude use of outsourced or “cloud” data center services if they benefit the university and are approved by the CIO or designee

• Requires the CIO or designee to publish appropriate procedures and standards to protect university data centers
Policy 9.5X—Data Centers

- Outlines procedures regarding data center requirements and ongoing risk assessments
- Designates specific data center employee roles and responsibilities
- Provides a glossary of terms
THANK YOU!