



Olivia Nash, Assistant Dean

- Recruitment & Marketing
- Admission Processing & Operations
- Graduate Student Services



University of the Pacific at a glance

- California's first chartered institution of higher education, founded in 1851
- Private, three city university: Stockton, San Francisco and Sacramento
- Total enrollment (2017): 6,307
 - 3,607 undergraduate
 - 1,124 graduate
 - 1,583 first professional
- 80+ undergraduate majors, 30+ graduate programs, 3 first-professional programs
- Launched 13 new graduate programs since 2015



Who has a Customer Relationship Management system (CRM)?

What is a CRM?



Graduate Enrollment Management Pacific's Graduate School CRM Utilization





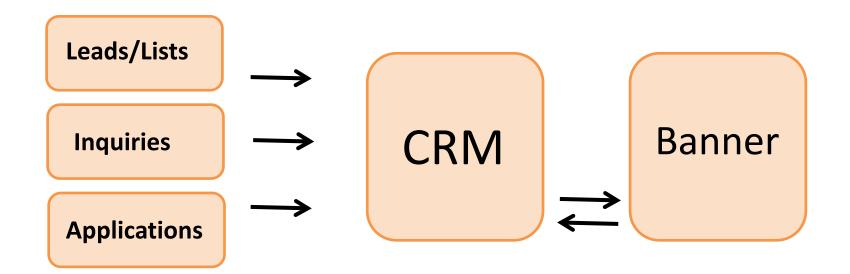
University of the Pacific's CRM

- Salesforce with TargetX platform (Salesforce native in 18 months)
- CRM team of 3 plus Graduate School Operations Lead & Marketing Lead
- Graduate School utilizes the CRM for:
 - Data Storage & Funnel Tracking
 - Event Management
 - Email Campaigns
 - Reporting
 - Data Visualization & Analysis

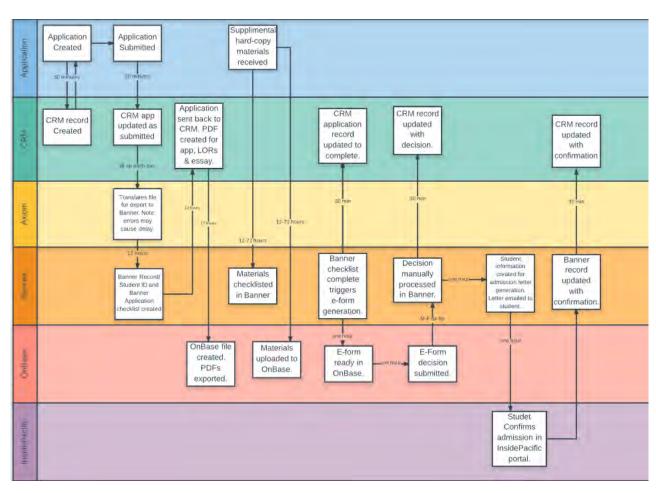


Data Storage and Funnel Tracking

Data Funnel



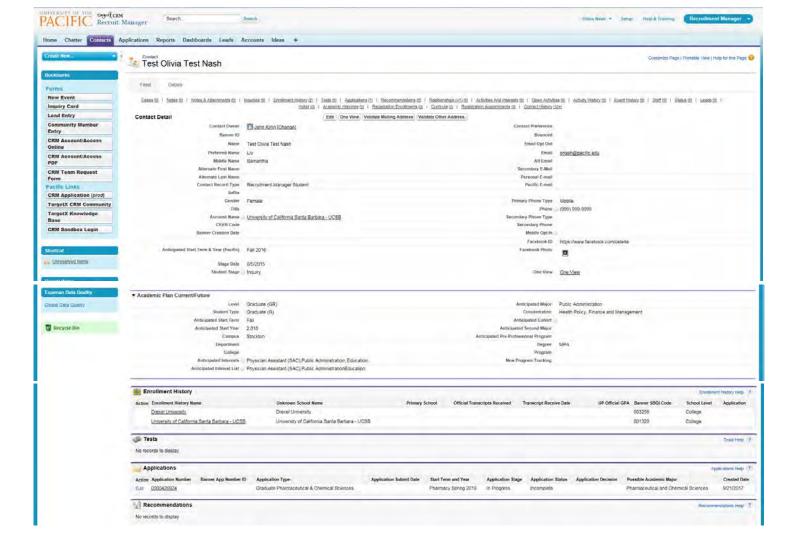
Admission Workflow





Data Capture

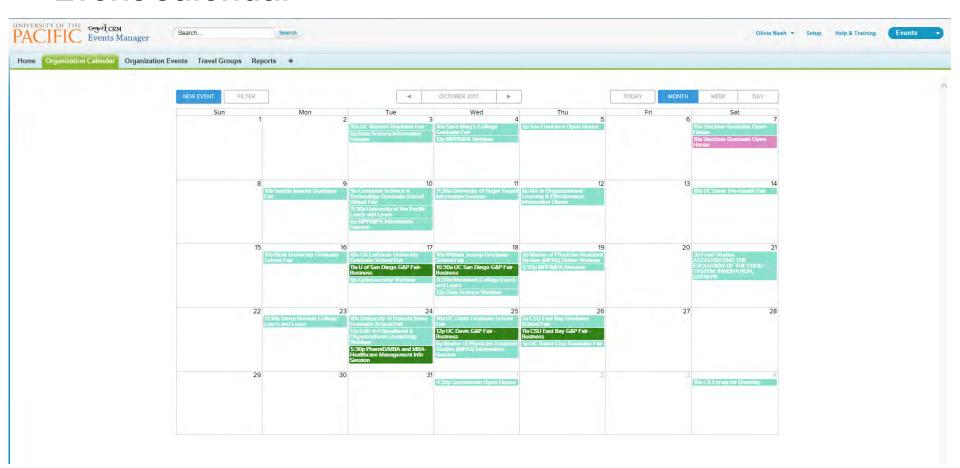
- Contact information
- Intended majors, degrees, terms
- Biographical information
- Interest level (low interest, high interest)
- Source type
- Emails received- mass and personal
- Events registered/attended
- Full application including enrollment history, recommendations, test scores, etc.
- Phone calls, in-person meetings, notes
- Build out custom fields

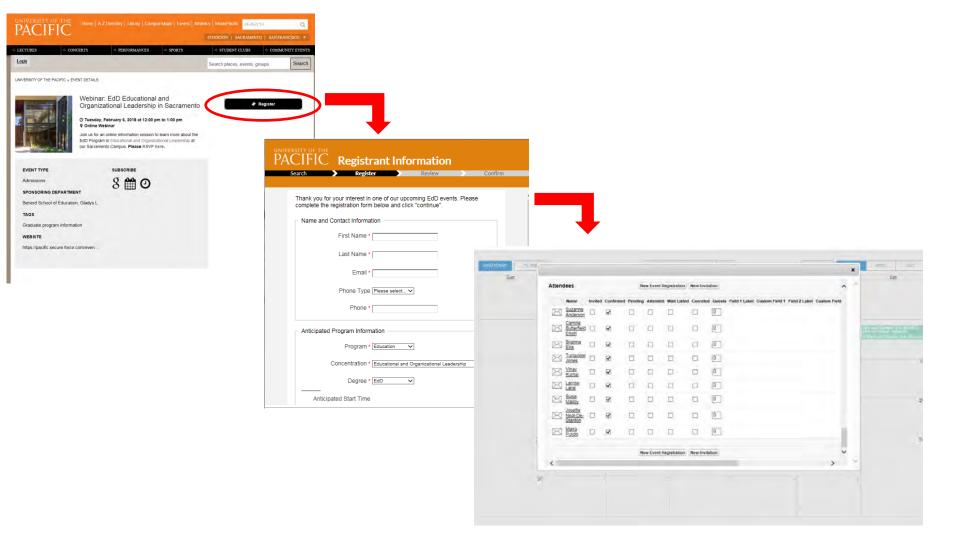




Event Management

Event Calendar







Manual Entry Form

| | Pacific - Inquiry Grad | ~ |
|--|--|---|
| mple Grad Inquiry Card | | |
| Request more information about | graduate programs PACIFIC | |
| | | |
| | | |
| The state of the s | May 4th pay may disken Unit water of the Plants I | |
| | | |
| Name and Contact Informa | tion | |
| First Name * | | |
| Middle Name | | |
| Last Name * | | |
| Email * | | |
| Verify Email * | | |
| Birthdate (mm/dd/yyyy) | | |
| Gender | Please select 🗸 | |
| Address Information | | |

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| Imployment Information Informa | Campus/Location * | Please select ✓ |
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Email Campaigns

3 ways Graduate School uses the CRM for Emails

- Electronic Communication Plan- trigger emails
- Mass communication campaigns
 - Event promotion (Grad School + Program Specific)
 - GRE campaigns (program specific)
 - Deadline reminders
- BCC to Salesforce function



Electronic Communication Plan- Email Triggers

| ELECTRONIC COMUNICATIONS FLOW: GRADUATE | | | | | | | |
|---|------------------------|--------------|---|----------------------------|---|--|--|
| Email Name | Theme | Content Type | Content Title | Audience | Trigger | | |
| | Request of information | Email | E-Com: <pre><pre><pre><pre><pre><pre><pre><pre></pre></pre></pre></pre></pre></pre></pre></pre> | Inquiry | Inquiry form completed | | |
| Programmatic auto response Grad Admission auto reponse | Drive to apply | Email | E-Com 2 | Inquiry | Inquiry form completed | | |
| Submit app reminder | Drive to submit app | Email | E-Com 3 | In-Progress Applicant | Application started | | |
| Supplimental items reminder | Drive to complete app | Email | E-Com 4 | Submitted Applicant | Application submitted | | |
| App complete email | App notification | Email | E-Com 5 | Complete Applicant | Application complete | | |
| App Decision | Decision notification | Email | Graduate Admission Decision | Applicants with a decision | Decision processed- maual | | |
| Confirmation reminder | Confirm enrollment | Email | E-Com 7 | Accepted applicants | Accepted but not confimed after 3 weeks | | |
| Grad Studies Dean email | Welcome to Pacific | Email | E-Com 8 | Confirmed applicants | At time of confirmation | | |



ONLY 2 DAYS LEFT TO REGISTER



Don't miss out! Join us at the

Sacramento Open House

Wednesday, November 1st 4:30pm-7:00pm Grand Salon



An inside look at our campus and graduate programs

We invite you to take advantage of this opportunity to meet with program faculty and staff, and the graduate admission team. We will have representation from the following programs:

- Data Science
- Education
 Law
- Public Administration
- Public Policy
- Physician Assistant
- Degree Completion Program

Those in attendance will get a chance to win a Pacific swag bag

Join us for an evening of socializing, appetizers and drinks. Experience our campus through student-led tours and gain insight about graduate linancial aid.

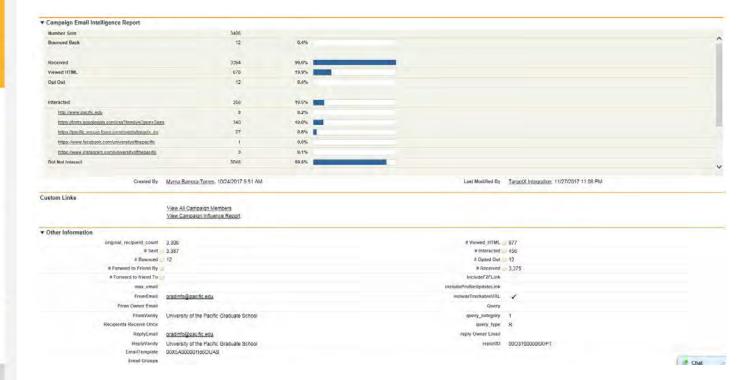
We look forward to meeting you!

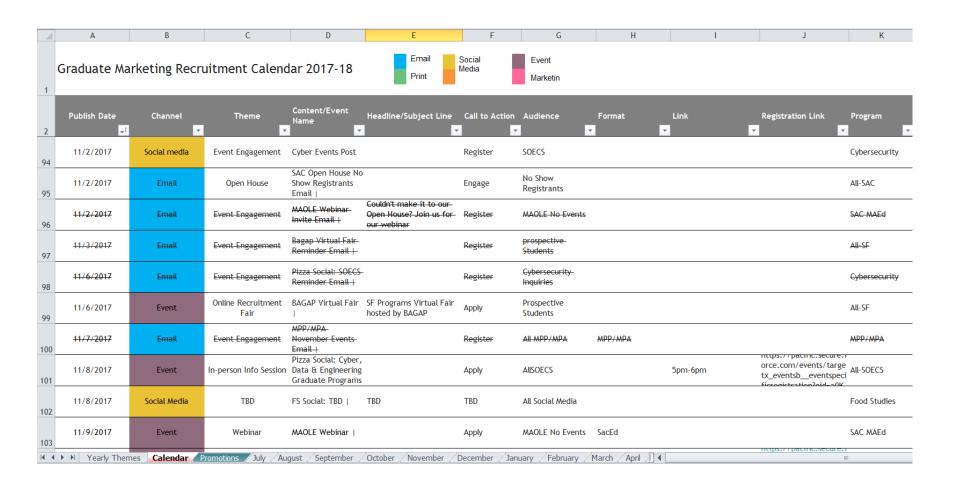
University of the Pacific Graduate School

Contact Us
Graduate Admission
gradinfo@padficedi
916,739,7281

f 30

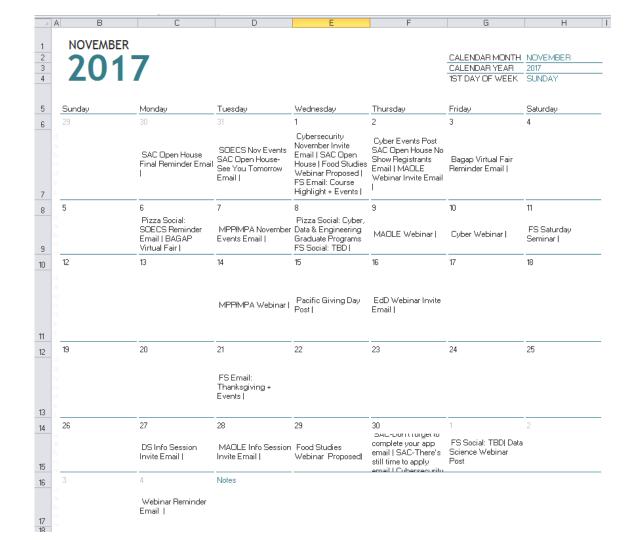
Mass Email Campaigns





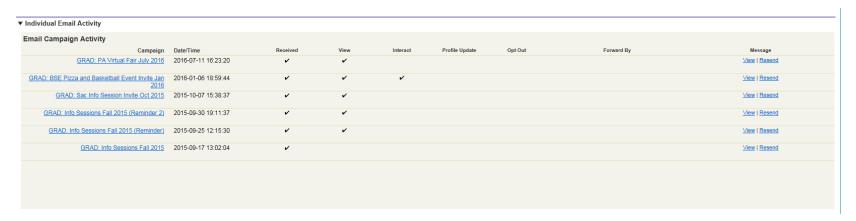
Calendar:

- Emails
- Events
- Social media



Salesforce Contact Record View

Email Campaigns



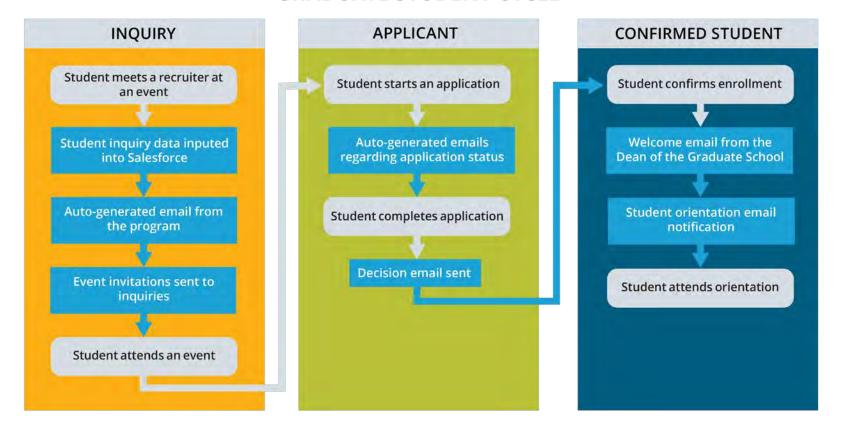
Trigger emails + BCC to Salesforce emails

| Activity I | Activity History Log a Call Mail Merge Send an Email View All Activity History Her | | | | | | Activity History Help ? |
|------------|--|--------------------|------------|------|------------|-------------|-------------------------|
| Action | Subject | | Related To | Task | Due Date | Assigned To | Last Modified Date/Time |
| Edit Del | Call | | | ✓ | 10/10/2017 | Olivia Nash | 11/29/2017 12:39 PM |
| Edit Del | Email: Requested Information: Master of Physician Assistant Studies at University | ity of the Pacific | | ✓ | 1/6/2016 | John Sterni | 1/6/2016 5:52 PM |
| Edit Del | Email: Requested Information: Master of Public Policy | | | ✓ | 1/6/2016 | John Sterni | 1/6/2016 5:48 PM |
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Result- complete snapshot of student lifecycle from inquiry through enrolled student

GRADUATE STUDENT CYCLE





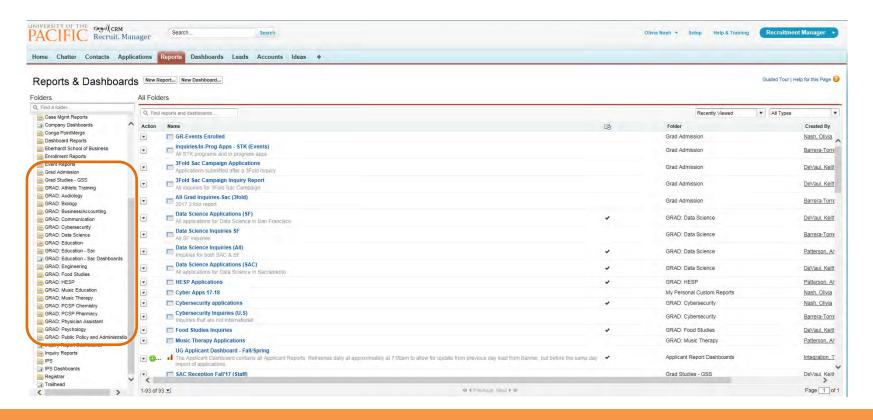
Reporting

You can report on any data set in the CRM

- Applicant reports for programs
- Inquiry reports for programs
- Lead/inquiry reports for digital marketing
- Events reports showing program, attendance, applications started
- Confirmed student reports
- Enrolled student reports



Individualized report folders for programs





Data Visualization & Analysis

Go to Analytics Studio

