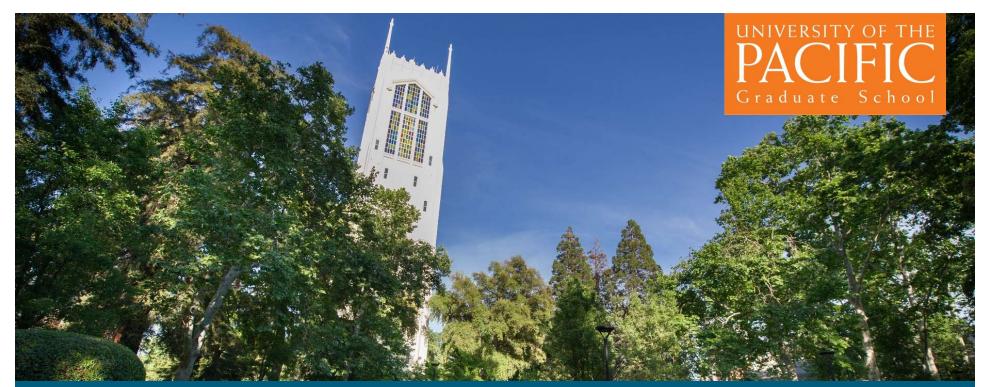
UNIVERSITY OF THE PACIFIC Maximizing marketing efforts through CRM utilization for graduate programs



# 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): 6,423
  - 3,631 undergraduate
  - 1,156 graduate
  - 1,636 first professional
- 80+ undergraduate majors, 30+ graduate programs, 3 first-professional programs



## Graduate School at University of the Pacific

- Admission Processing & Operations
- Recruitment
- Marketing (in partnership with central Marketing & Communications)
- Student Services
- Graduate Assistant Funding
- Graduate Policy



# **Marketing Considerations**

# Questions to consider when developing a marketing budget:

- Has market research been conducted?
- What is the competitive landscape?
- What is the program format (in-seat vs online)?
- Is this a regional or national audience?
- What are your enrollment targets?
- What is your projected gross revenue?



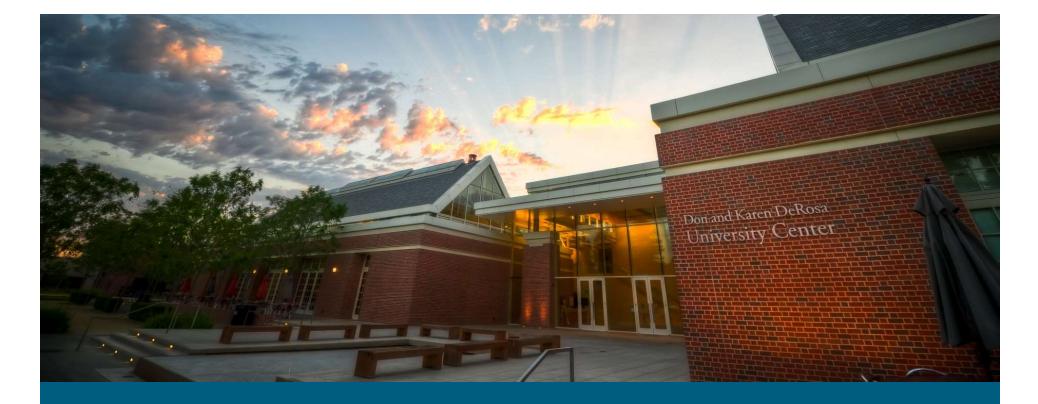
# What to consider when developing your marketing approach:

- Internal Expertise/Resources
- Target Audience
  - Region (targeted geo-fencing opportunities?)
  - Age
  - Academic/Professional Background
- Program differentiators
- Program outcomes
- Potential pipelines



	Marketing /Con		/larketing /Con
Cost effective	Time consuming/constant monitoring required	Marketing (specifically defined digital area) expertise	High cost
Complete control over creative messaging	Dedicated marketing team required for best results	Competitive Bidding	Translating the values and brand
Understanding of institutional brand and values		Continuous monitoring and adjustments	Build-out time (6-10 weeks)
Quick to market		Affiliate marketing relationships	
		Digital marketing technology	

What marketing 'wins' have you had at your institution?



# Who has a Customer Relationship Management system (CRM)?



# Graduate Enrollment Management Pacific's Graduate School CRM Utilization

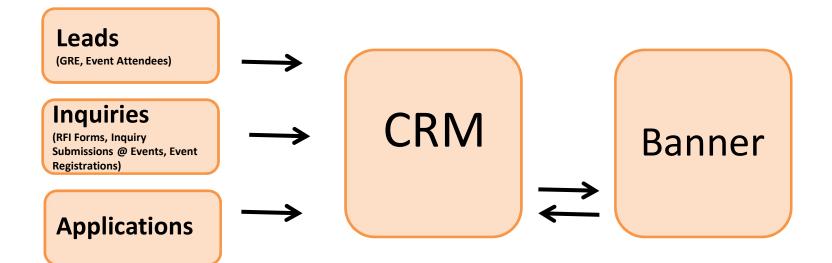


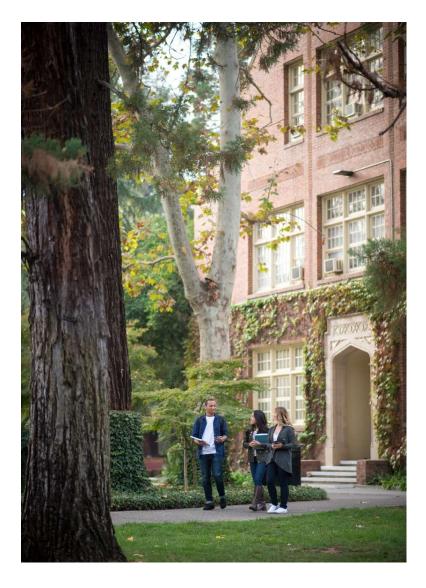


# University of the Pacific's CRM

- Salesforce with TargetX platform CRM team with Graduate School Operations Lead & Marketing Lead
- Graduate School utilizes the CRM for:
  - Data Storage & Funnel Tracking
  - Event Management
  - Messaging/Email Campaigns
  - Reporting
  - Data Visualization & Analysis

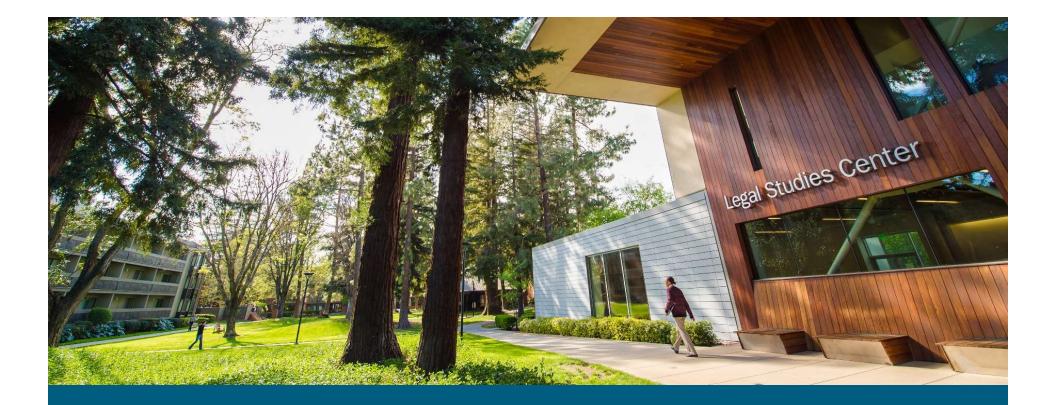
# Pacific's Data Funnel





# Data Capture

- Contact information
- Intended majors, degrees, terms
- Biographical information
- Interest level
- 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



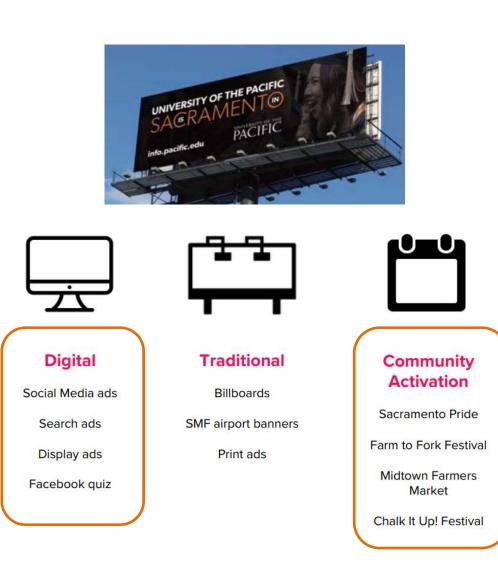
# Marketing Graduate Programs at University of the Pacific

# PACE FIC SACRAMENTO

More career opportunities than microbrews during beer week.

info.pacific.edu





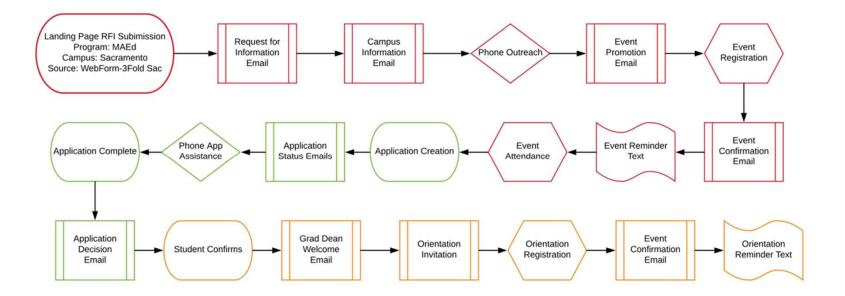
## UNIVERSITY OF THE PACE FIC SACRAMENTO

University of the Pacific has a long and proud history in Secramento, with its McGeorge School of Law being founded here in 1934. With the addition of scandemic programs in Data Science, Degree Completion, Educational Leadership, Health Care, Law and Public Policy, Pacific's Sacramento Campus provides you both the schedule flexibility and personal attention to achieve your goals in the industries growing in our region.



I-1359	nd i l'ad i l'ad i l'ad i l'ad i l'ad i -	+ Follow New Note Delete Change Record Type
New Inquiry Awaiting Initial Resp	ponse Cold Lead Initial Contact Unsure/Noncommittal	Engaged Converted V Mark Inquiry Stage as Complete
Details Chatter Related		📴 Notes (0)
✓ Information		
Inquiry Number I-1359	Degree MPA	New Task Log a Call
Contact Grad Pitt	Major Public Administration	Create a task Add
Inquiry Emell gpitt@sharklasers.com	Inquiry Term and Year Law Spring 2017	Filters: All time - All activities - All types
Year 2017	Compus	Next Steps
Term	Concentration	No next steps. To get things moving, add a task or set up a meeting.
Lavol Graduate (GR)	Non Pacific Anticipated Major	Past Activities
Student Type Graduate (G)	Inquiry Stage  New Inquiry	Keith DeVaul logged a call with Grad Pitt
Highest Education Level	Comments  Grad is very interested and will be awarded his BA 05/01/2017	Follow Up with Grad Pitt     Nov 6, 2017     Keith DeVaul had a Task with Grad Pitt
Send Inquiry E-mail		Load More Past Activities
✓ System Information		
	New Inequity Availing Initial Rec	Num bragely     Awaiting Initial Reporter     Cost Least     Initial Contact     Unsure/Noncommittat       Details     Charter     Related         Information               Pupping Number         Pupping Number         Pupping Number         Pupping Number           Pupping Number         Pupping Number         Pupping Number

# Creation of a customized CRM journey assists student move through the enrollment funnel



### PACIFIC



#### MAEd, Educational

#### Entrepreneurship

Dear (IContact.FirstName),

Thanks for your interest in our MA in Education with a concentration in Educational Entrepreneurship. We have created a distinct program with a very different kind of graduate academic experience.

#### This graduate degree is designed for:

- Educators who want to become entrepreneurial
- Entrepreneurs who want to impact education
   Social entrepreneurs who want to change the world

#### The program is one of the first degrees of its kind. We are looking for change-makers ready to create real impact.

Websile



Our program is built for working professionals and our students experience the best of both online and in-person learning. We offer weekly online datas sexialism and an anonthylin person reakency experience at the Saczamento Camput. This files/ble hybrid delivery allows students to develop meaningful relationships and earn a degree while balancing personal and professional communets.

Hook forward to talking with you as you move forward in considering our program. Piease feel free to contact me at <u>btaylor@pacific.edu</u> or 916.325.4627. I'm happy to answer any questions you have about joining our community here at Pacific.

Thanks again for your interest in Pacific.

Brest Taylor, Ed.D. Program Lead. Claudational and Social Entrepreneuriship Assistant Professor Beneral School of Education in Sacramento Contectils Beneral in Sociamentos Decontacilyation Decontacilyati

#### UNIVERSITY OF THE PACIFIC



#### You're invited to our

**Design Studio** 

Register

Thursday, November 8th 6:00pm/7:30pm Sacramento Campus - Rotunda, Campus and Law Library

#### Learn about becoming a leader who inspires and innovates

join us for a hands on, experiential session to learn how to apply Design Thinking to a real-world challenge. This method is used as one of the foundational tools for our three graduate programs in Sacramento:

- MA, Educational Entrepreneurship
   MA, Organizational Learning and Effectiveness
- EdD, Educational and Organizational Leadership

Make an immediate impact to your career by fostering innovation through learning, leadership, and change.

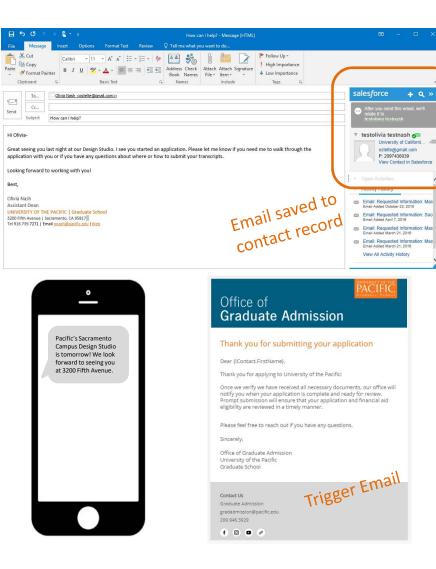
rough learning, leadership, and change.

In this workshop, you will learn about human-centered design through active participation with a small team of professionals from various sectors.

You will also have an opportunity to ask questions to program faculty, staff, and students. We look forward to helping you transform your career and becoming part of our innovative learning community.

Benerd School of Education in Sacramento University of the Pacific

Contact UN Secretification product of the second coast Email Broadcast Email Broadcast



## **Electronic Communication Plan- Email Triggers**

ELECTRONIC COMUNICATIONS FLO	W: GRADUATE			-	
Email Name	Theme	Content Type	Content Title	Audience	Trigger
Programmatic auto response	Request of information	Email	E-Com: <program> 1</program>	Inquiry	Inquiry form completed
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

#### UNIVERSITY OF THE PACIFIC



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

Register

Education
Law
Public Administration

- 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 financial aid.

We look forward to meeting you!

University of the Pacific Graduate School

#### Contact Us Graduate Admission gradinfo@pacific.edu 916.739.7281

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# **Broadcast Email Campaigns**

#### ▼ Campaign Email Intelligence Report

lumber Sent	3406		
3ounced Back	12	0.4%	
Received	3394	99.6%	
/iewed HTML	678	19.9%	
Dpt Out	12	0.4%	
nteracted	358	10.5%	
http://www.pacific.edu	8	0.2%	
https://fonts.googleapis.com/css?family=Open+Sans	340	10.0%	
https://pacific.secure.force.com/events/targetx_ev	27	0.8% 📕	
https://www.facebook.com/universityofthepacific	1	0.0%	
https://www.instagram.com/universityofthepacific	3	0.1%	
Did Not Interact	3048	89.5%	

Created By Myrna Barrera-Torres, 10/24/2017 9:51 AM

Last Modified By TargetX Integration, 11/27/2017 11:08 PM

Custom Links

View All Campaign Members
View Campaign Influence Report

Other Information				
original_recipient_count	3,306	# Viewed_HTML	877	
# Sent	3,387	# Interacted	<b>4</b> 56	
# Bounced	12	# Opted Out	2 12	
# Forward to Friend By		# Received	3,375	
# Forward to friend To		IncludeF2FLink		
max_email		includeProfileUpdateLink		
FromEmail	gradinfo@pacific.edu	includeTrackableURL	✓	
From Owner Email		Query		
FromVanity	University of the Pacific Graduate School	query_category	1	
Recipients Receive Once		query_type	R	
ReplyEmail	gradinfo@pacific.edu	reply Owner Email		
ReplyVanity	University of the Pacific Graduate School	reportID	00O31000006XrPT	
EmailTemplate	00X5A0000011d6OUAS			
Email Groups				Chat

A		В	C	D	E	F	G	Н	1	J	K
Gradua	te Mark	keting Recr	uitment Calend	lar 2017-18		Social Media	Event Marketin				
Publish (	Date	Channel 🗸	Theme	Content/Event Name	Headline/Subject Line	Call to Action		Format	Link	Registration Link	Program
11/2/20	017	Social media	Event Engagement	Cyber Events Post		Register	SOECS				Cybersecur
11/2/2	017	Email	Open House	SAC Open House No Show Registrants Email		Engage	No Show Registrants				All-SAC
11/2/2	917	Email	Event Engagement	MAOLE Webinar Invite Email	Couldn't make it to our Open House? Join us for- our webinar	Register	MAOLE No Events				SAC MAEd
11/3/2	017	Email	Event Engagement	Bagap Virtual Fair- Reminder Email  -		Register	prospective- Students				All-SF
<del>11/6/2</del>	017	Email	Event Engagement	Pizza Social: SOECS Reminder Email		Register	Cybersecurity Inquiries				Cybersecur
11/6/2	017	Event	Online Recruitment Fair	BAGAP Virtual Fair	SF Programs Virtual Fair hosted by BAGAP	Apply	Prospective Students				All-SF
11/7/2	917	Email	Event Engagement	MPP/MPA- November Events- Email		Register	All MPP/MPA	MPP/MPA			MPP/MPA
11/8/20	017	Event	In-person Info Session	Pizza Social: Cyber, Data & Engineering Graduate Programs		Apply	AUSOECS		5pm-6pm	orce.com/events/tar tx_eventsbeventsp	ge All-SOECS
11/8/2	017	Social Media	TBD	FS Social: TBD	TBD	TBD	All Social Media				Food Studie
11/9/2	017	Event	Webinar	MAOLE Webinar		Apply	MAOLE No Events	SacEd			SAC MAEd

## Salesforce Contact Record View

### **Email Campaigns**

ail Campaign Activity								
Campaign	Date/Time	Received	View	Interact	Profile Update	Opt Out	Forward By	Message
GRAD: PA Virtual Fair July 2016	2016-07-11 16:23:20	~	~					View   Resend
RAD: BSE Pizza and Basketball Event Invite Jan 2016	2016-01-06 18:59:44	~	~	~				View   Resend
GRAD: Sac Info Session Invite Oct 2015	2015-10-07 15:38:37	V	~					View   Resend
GRAD: Info Sessions Fall 2015 (Reminder 2)	2015-09-30 19:11:37	~	~					View   Resend
GRAD: Info Sessions Fall 2015 (Reminder)	2015-09-25 12:15:30	~	~					View   Resend
GRAD: Info Sessions Fall 2015	2015-09-17 13:02:04	~						View   Resend

### Trigger emails + BCC to Salesforce emails

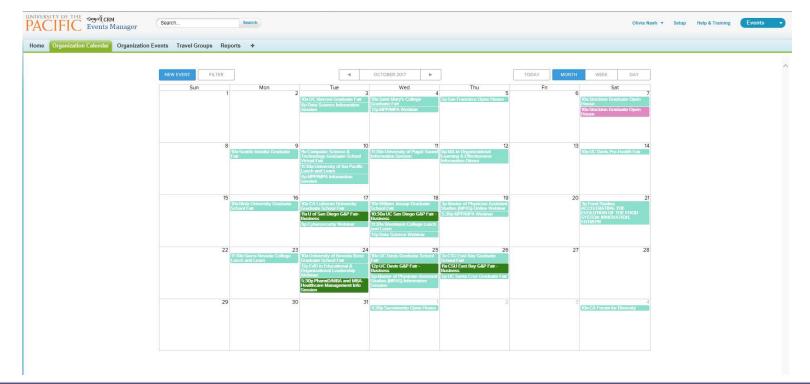
Activity	Log a Call (Mail Merge) Send an	Email) [View All]				Activity History Help
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit   Del	Call		1	10/10/2017	Olivia Nash	11/29/2017 12:39 PM
Edit   Del	Email: Requested Information: Master of Physician Assistant Studies at University of the Pacific		1	1/6/2016	John Sterni	1/6/2016 5:52 PM
Edit   Del	Email: Requested Information: Master of Public Policy		1	1/6/2016	John Sterni	1/6/2016 5:48 PM
Edit   Del	Email: Requested Information: Master of Public Policy		1	1/6/2016	John Sterni	1/6/2016 3:42 PM

## **Event Tracking**





## **Event Calendar**



ar Eve	ent Histor	у	New Contact Schedule Item				Event History Help (?)
Action	Event ID	Contact Schedule Item: Contact Schedule Name	Event Name	Attended	Canceled	Contact Schedule Item: Created Date	Start Date and Time
Edit	330397	000051984	EdD Information Dinner	✓		10/30/2015	Nov 19, 2015 5:30PM PST
Edit	344697	000093073	Graduate Reception ; Sacramento 2017			8/31/2017	Sep 14, 2017 4:30PM PDT
Edit	344359	000097546	Graduate Reception : Sacramento 2017 (Staff)	1		9/25/2017	Sep 14, 2017 4:30PM PDT
Edit	344697	000097596	Graduate Reception : Sacramento 2017	✓		9/25/2017	Sep 14, 2017 4:30PM PDT

PACIFIC Admission	
Manual Entry Form	
This from the second data and the formula for the second data and	
This form is use for manual data entry only for pacific admission staff/students.	
Data Source Pacific - Inquiry Grad	
Sample Grad Inquiry Card	
Request more information about graduate programs PACIFIC	
Rea an an an an Ann Ann Ann Ann Ann Ann An	
l aur la compansión de la Compansión de la compansión de	
Nytering Destruct of Control - C Direct - C	
Bernet Bholine () Bennet Die Ferlan Attent Bernet y Septh	
Name and Contact Information	
First Name *	
Middle Name	
Last Name *	
Email *	
Verify Email *	
Birthdate (mm/dd/yyyy)	
Gender Please select V	
Address Information	

Anticipated Start Term	Please select V
Anticipated Start Year	▶ Please select ∨
Campus/Location *	Please select V
Anticipated Program *	Please select V
Anticipated Program D	Degree Please select V
Employment Informatio	n
Job Title	
Office of Admission Use Is there an Event Code	
Office of Admission Use Is there an Event Code	
Dffice of Admission Use Is there an Event Code Event Type/Code: * This is a 6 digit number of	Listed? • • YES NO
Office of Admission Use Is there an Event Code Event Type/Code: * This is a 6 digit number of please select NO to the qu	Listed? • • YES NO
Office of Admission Use Is there an Event Code Event Type/Code: * This is a 6 digit number of please select NO to the qu Rep Code: Send E-Com 1 (For Grad	Listed? • • YES NO the event in Salesforce. If you DO NOT have a number, lestion above
olease select NO to the qu Rep Code: Send E-Com 1 (For Grad Flow) *	Listed? • • YES NO the event in Salesforce. If you DO NOT have a number, restion above Please select duate Comm. Yes No
Office of Admission Use Is there an Event Code Event Type/Code: * This is a 6 digit number of please select NO to the qu Rep Code: Send E-Com 1 (For Grad	Listed? • • YES NO the event in Salesforce. If you DO NOT have a number, restion above Please select duate Comm. Yes No
Office of Admission Use Is there an Event Code Event Type/Code: * This is a 6 digit number of please select NO to the qu Rep Code: Send E-Com 1 (For Grad flow) *	Listed? • • YES NO the event in Salesforce. If you DO NOT have a number, restion above Please select duate Comm. Yes No

## Reporting

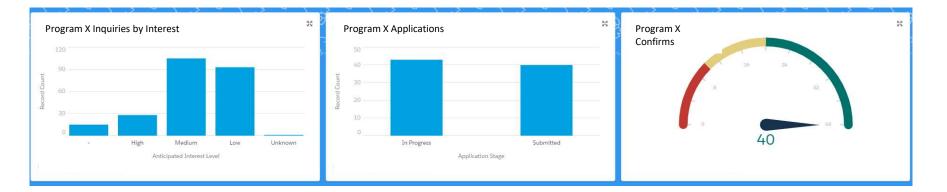
PACIFIC Recruit. Manager	Search	Search	Switch to Lightning Experience	Olivia Nash 🔻	Help & Training	Recruitment Manager 👻	
Home Chatter Contacts Applications R	eports Dashboards Leads	Accounts Ideas +					

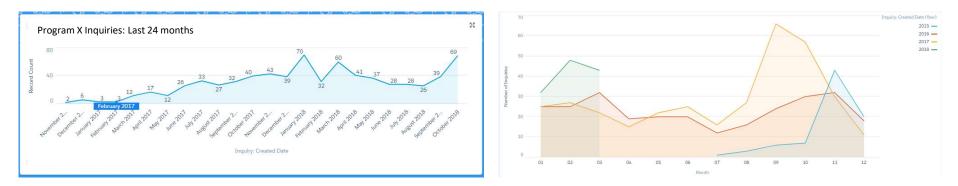
Guided Tour | Help for this Page 🥝

#### Reports & Dashboards New Report... New Dashboard...

olders	All Fold	ers					 		
Find a folder	Q. 3fold	Ø					All Items	<ul> <li>All Types</li> </ul>	
Grad Admission	Action	Name	ø	Folder	Created By +				
Grad School Dashboards GRAD: Athletic Training GRAD: Audiology GRAD: Biology	•	All Grad Inquiries-Sac (3fold) 2017 3 fold report		Grad Admission	Barrera-Torres,				
	•	3Fold Graduate Campaign Inquiries Inquiry report for 3Fold central graduate campaign 2018		Grad Admission	Barrera-Torres,				
GRAD: Business/Accounting GRAD: Communication	•	Big Source And Anton Ant		Grad Admission	Barrera-Torres,				
GRAD: Cybersecurity GRAD: Dashboard Reports	•	Cybersecurity Inquiries (3fold)		GRAD: Cybers	. Barrera-Torres				
GRAD: Data Science		Cybersecurity Applications (3Fold)		GRAD: Cybers	Barrera-Torres				
GRAD: Education GRAD: Education - Sac	•	3Fold Data Science Inquiries Inquiries from 3fold campaign 2018		GRAD: Data S	. Barrera-Torres,				
GRAD: Education - Sac Dashboards GRAD: Engineering		Bold Data Science Applications Applicants from 3Fold Data Science campaign 2018		GRAD: Data S	Barrera-Torres,				
GRAD: Food Studies		3Fold Graduate Campaign Applications		Grad Admission	DeVaul, Keith				
Grad: Marketing		3Fold Grad Campaign Event Rosters		Grad Admission	DeVaul, Keith				
GRAD: Music Education		All 3Fold Inquiries		GRAD: Public	DeVaul, Keith				
GRAD: Music Therapy GRAD: PCSP Chemistry GRAD: PCSP Pharmacy	•	3Fold Grad Campaign Inquiries MPP/MPA MPP & MPA Inquiries Submitted Through 3Fold's Graduate Campaign		GRAD: Public	DeVaul, Keith				
<ul> <li>GRAD: Physician Assistant</li> <li>GRAD: Psychology</li> <li>GRAD: Public Policy and Administratio</li> </ul>	•	3Fold Grad Campaign Applications MPP/MPA Applications through 3Fold's Grad Campaign who selected MPP/MPA		GRAD: Public	DeVaul, Keith				
Grad: Recruiting Inquiry Report Dashboards	•	3Fold Sac Campaign Inquiry Report All inquiries for 3Fold Sac Campaign		Grad Admission	DeVaul, Keith				
Inquiry Reports IPS IPS Dashboards		Big 3Fold Sac Campaign Applications Applications submitted after a 3Fold inquiry		Grad Admission	DeVaul, Keith				
Lightning Communities Dashboards	•	T Data Science 3Fold report		Grad: Marketing	DeVaul, Keith				
Prospect Report Dashboards	1-18 of 1	•				≪ ∢ Previous Next ► >>		Pa	age 1

## **Dashboards & Analytics**





Do we have time? If so... Go to Salesforce to Review Student Record

## UNIVERSITY OF THE PACIFIC

Q & A

## **Contact Information**

Andrea Golato, Ph.D. Dean, The Graduate College Texas State University agolato@txstate.edu Janet V. DeLany, Ph.D. Dean, Office of Graduate Studies Towson University jdelany@towson.edu Olivia Nash Assistant Dean, Graduate School University of the Pacific <u>onash@pacific.edu</u>