



CRM for Graduate Admissions: Your Key to Student & Faculty Success

Olivia Nash

University of the Pacific Graduate School

Kathryn Hausbeck Korgan

UNLV Graduate College

Council of Graduate Schools Annual Meeting
December 6, 2019



Forward-Looking Statements

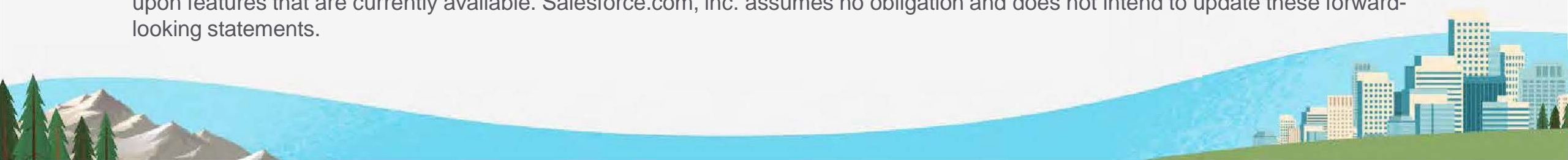


Statement under the Private Securities Litigation Reform Act of 1995:

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.



THANK YOU



Who we are



Kate Hausbeck Korgan, PhD
Dean, Graduate College
University of Nevada, Las Vegas



Olivia Nash
Assistant Dean, Graduate School
University of the Pacific



Today's Agenda

University of the Pacific

- About Pacific
- Building out internal facing CRM to facilitate faculty and staff involvement with the intention of increasing enrollment
- Case Study: Master of Science in Data Science

University of Nevada, Las Vegas

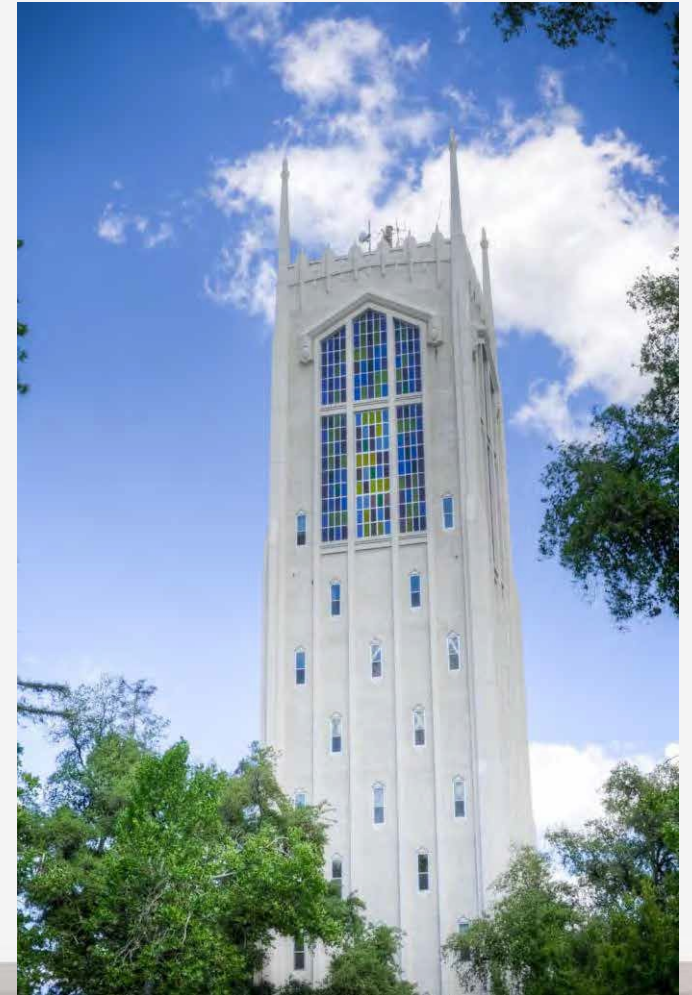
- About UNLV
- Strategies for Building a Lifecycle CRM

University of the Pacific



At a glance

- Private, three city university : Stockton, San Francisco and Sacramento
- Total enrollment (2019): 6,321
 - 3,554 undergraduate
 - 1,143 graduate
 - 1,624 first professional
- 80+ undergraduate majors, 30+ graduate programs, 3 first-professional programs
- Adopted Salesforce with TargetX in 2014; build out for Graduate Admission & Recruitment started in 2015



CRM Challenges at the Graduate Level



- Decentralized nature of Graduate Admissions
- Faculty & staff in graduate programs see the CRM as yet another tool they need to learn
- Department resources (time, support staff, training tools) are limited and spread thin
- Marketing, recruitment and admission are typically not the primary focus in graduate programs
- Programs have different needs, use different applications with varying levels of data insights



Shift in graduate education at Pacific



Launch new revenue-generating graduate programs from 2015-2020

- Athletic Training
- Audiology
- Clinical Nutrition
- Data Science
- Food Studies
- Education (MA & EdD)
- Music Therapy
- Nursing
- Occupational Therapy
- Physician Assistant Studies
- Public Administration
- Public Policy
- Social Work





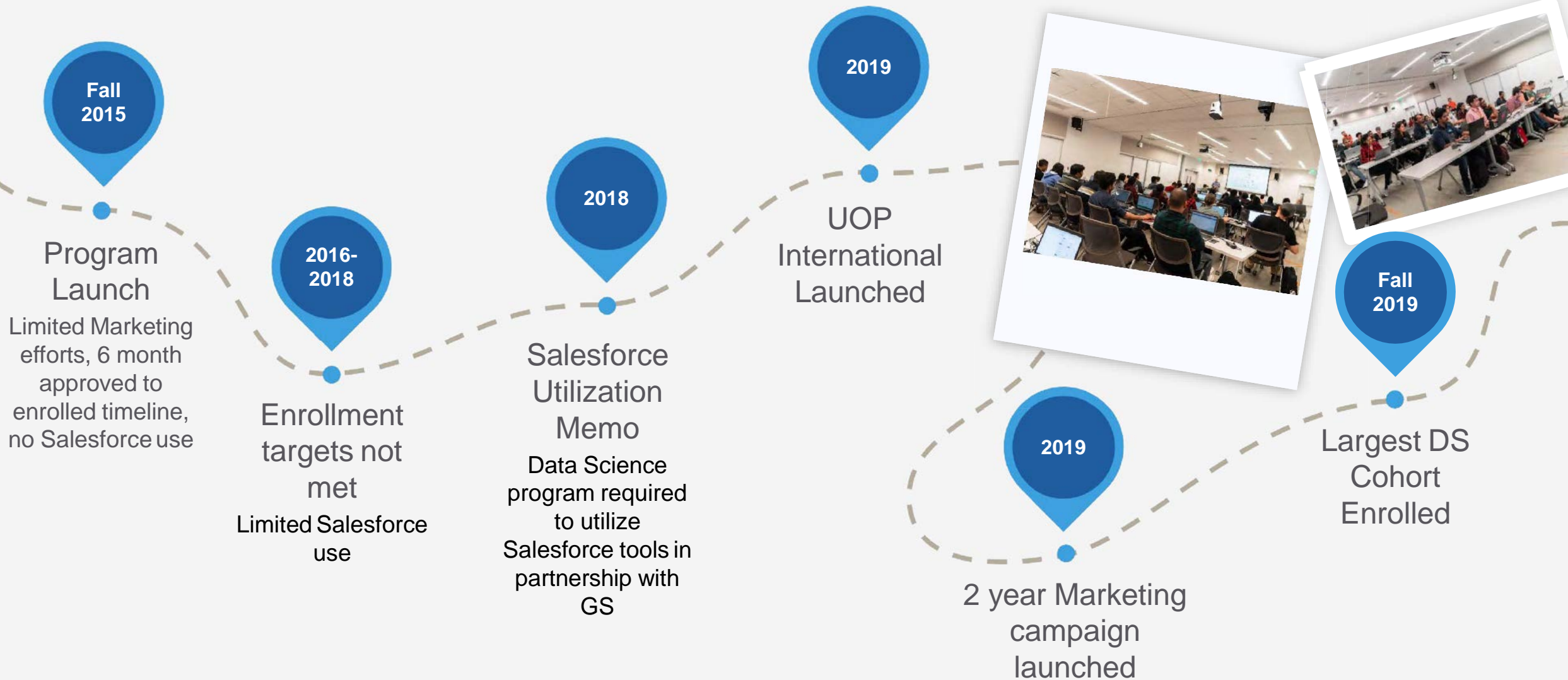
How Pacific currently utilizes Salesforce

Pacific's Graduate School utilizes Salesforce for prospective students and applicants. It is used to track:

- Lead lists
- Inquiries
- Marketing Campaigns
- Prospective Student events
- Email Campaigns
- Applicants (Enrollment Funnel)
- Confirmed and Enrolled Students



Case Study: MS in Data Science





Program Specific Report Folders

Reports
All Folders
47 items

REPORTS	Name
Recent	Grad Admission
Created by Me	Grad School
Private Reports	GRAD: Athletic Training
Public Reports	GRAD: Audiology
All Reports	GRAD: Biology
	GRAD: Business/Accounting
	Grad: Clinical Nutrition
FOLDERS	GRAD: Communication
All Folders	GRAD: Cybersecurity
Created by Me	GRAD: Dashboard Reports
Shared with Me	GRAD: Data Science
	GRAD: Education
FAVORITES	GRAD: Education - Sac
All Favorites	GRAD: Engineering
	GRAD: Food Studies
	GRAD: HESP
	Grad: Marketing
	GRAD: Music Education
	GRAD: Music Therapy
	Grad: Nursing
	Grad: Occupational Therapy
	GRAD: PCSP Chemistry
	GRAD: PCSP Pharmacy

Reports
All Folders > GRAD: Data Science
46 items

REPORTS	Name	Description
Recent	Wiley - Applications by Week	
Created by Me	Wiley - Data Science Inquiries by Stage	
Private Reports	Wiley - Applications by Status	
Public Reports	Wiley - Data Science Contacts	
All Reports	Wiley - Data Science Inquiries by Week	
	Data Science Event Reg	
FOLDERS	Inquiries- DS with Source	
All Folders	Data Science Inquiry Aging Report *Demo*	
Created by Me	Data Science - UOPI	UOPI Applicants for Data Science, future t...
Shared with Me	Data Science Inquiries SAC (no events)	All SAC inquiries
	Submitted Apps 2017 - 2018 Budget Year	
FAVORITES	Inquiries 2017 - 2018 Budget Year	
All Favorites	Confirmed Students By Term & Campus	
	Application Submit Date Timeline	
	Application Create Date Timeline	
	Inquiry Timeline	
	Confirmed Student Enrollment History	
	SAC Confirmed Applicants W/ Source Info	
	SF Confirmed Applicants W/ Source Info	
	Inquiries - Data Science 2.0	
	Data Science In-Prof Apps (SF)	In-progress not submitted apps for SF
	Data Science Submitted Apps-Incomplete	
	Data Science Applications - Submitted	



Unique Wiley Contacts

197

[View Report \(Wiley - Data Science Contacts\)](#)



Data Science Inquiries

52 Weeks

601

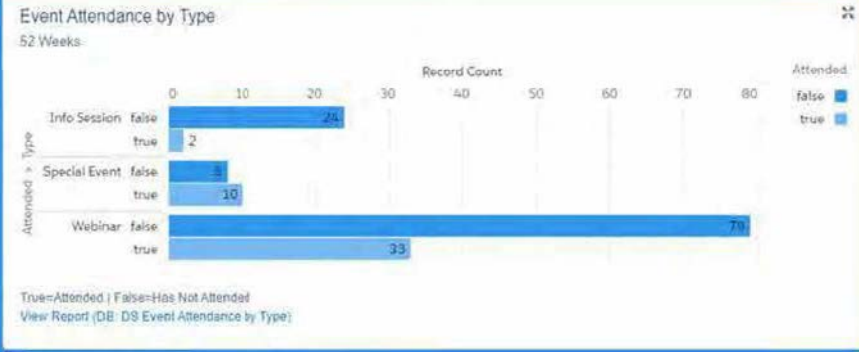
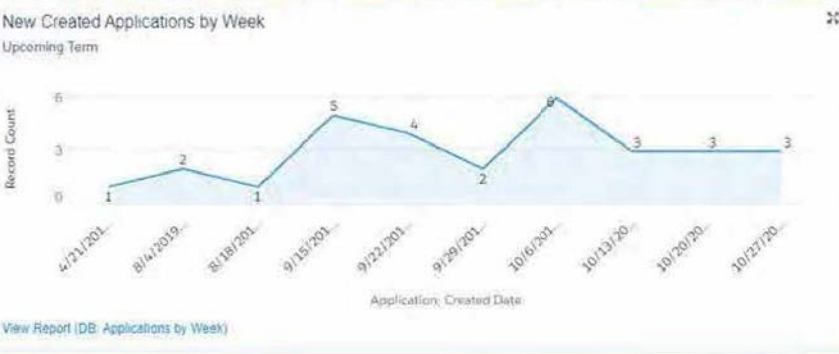
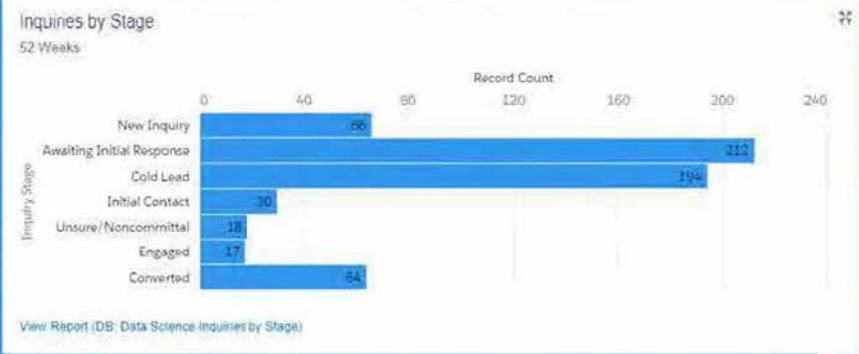
[View Report \(DB: Data Science Inquiries by Week\)](#)

Total Applications

Upcoming Term

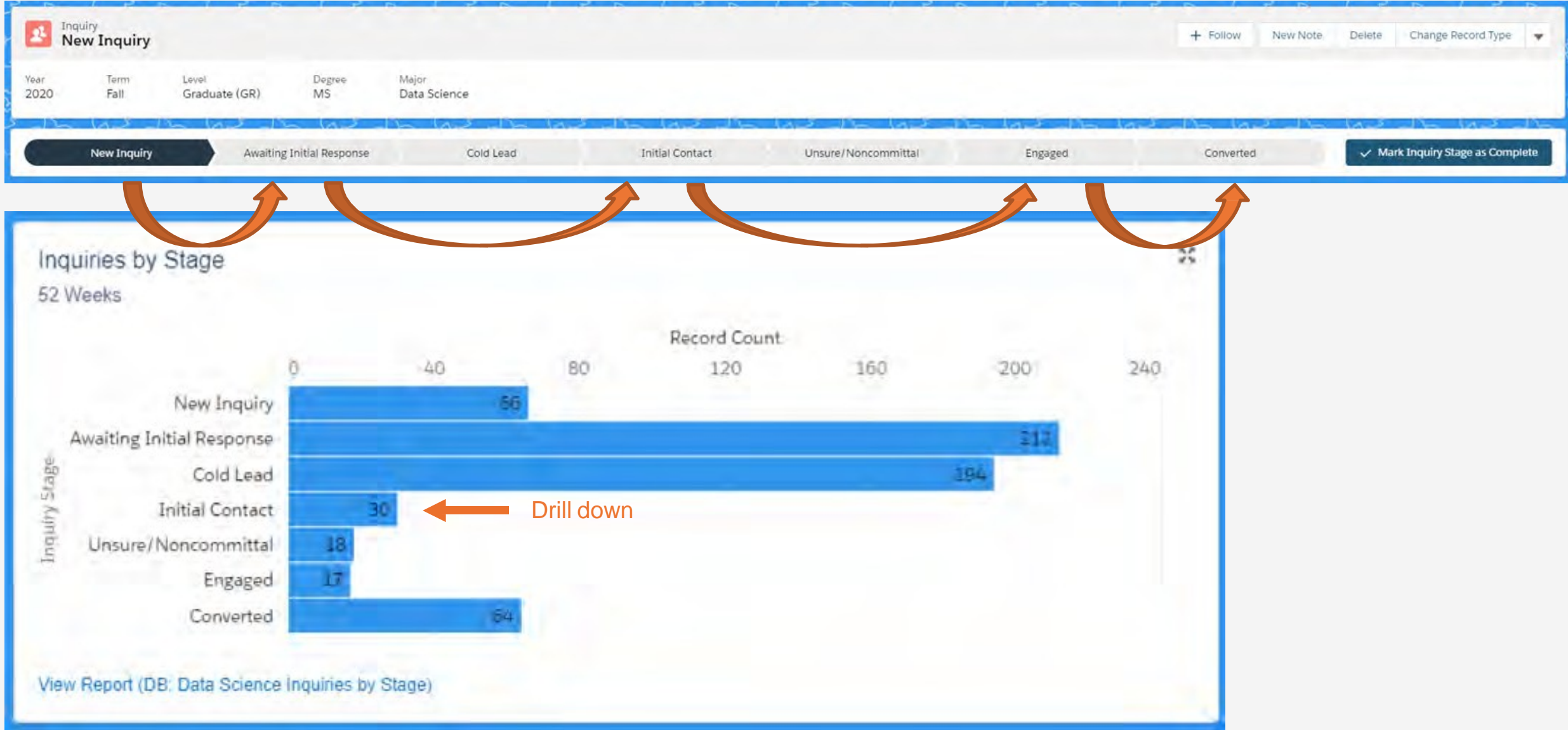
30

[View Report \(DB: Applications by Status\)](#)



Program Specific Enrollment Dashboards

Inquiry Funnel



Drilling down into the dashboard



Report: Inquiries with Contact

DB: Data Science Inquiries by Stage

Used for Data Science Dashboard - All Inquiries for the last 52 weeks

Search Add Chart Filter Refresh Edit

Total Records

30

Inquiry Stage	Contact: Contact ID	Inquiry: Inquiry Number	Contact: First Name	Contact: Last Name	Inquiry Email	Contact: Phone	Inquiry: Created Date	Source	Last Data Input Source
Initial Contact (30)	0035A00003ZhIR2	1-61332					10/20/2019	Inquiry - Web Form Short	Inquiry - Web Form Short
	0035A00003UXoYP	1-58627					9/27/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003YcFHz	1-55581					9/16/2019	Inquiry - Web Form Short	Inquiry - Web Form Short
	0035A00003YcOO2	1-55522					9/16/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003YbrvA	1-55508					9/14/2019	Inquiry - Web Form Short	Inquiry - Web Form Short
	0035A00003YbOhA	1-55150					9/11/2019	Inquiry - Other Event	Manual Entry - Inquiry Card
	0035A00003YbG5Y	1-55131					9/10/2019	Inquiry - Web Form Short	Inquiry - Web Form Short
	0035A00003XBdV5	1-53742					8/22/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003XAfJK	1-53687					8/20/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003XAbu0	1-53654					8/19/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003XXZPX	1-53437					8/10/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003XVQT3	1-53222					7/31/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003Wouna	1-52957					7/25/2019	Inquiry - Web Form Short	Inquiry - Web Form Short
	0035A00003Sxo0f	1-52937					7/24/2019	Inquiry - Web Form Short - Data Event	-
	0035A00003WofeN	1-52916					7/24/2019	Inquiry - Web Form Short - Data Event	-
	0035A00003WolzT	1-52847					7/23/2019	Inquiry - Web Form Short - Data Event	-
	0035A00003WmDoB	1-52414					7/11/2019	Inquiry - Web Form - WileyDataScience	Inquiry - Web Form Short - WileyDataScience
	0035A00003WYyrf	1-52404					7/11/2019	-	-
	0035A00003Vz9R6	1-51890					6/21/2019	Inquiry - Web Form Short - Data Event	-
	0035A00003SrvNF	1-51639					6/11/2019	Inquiry - Web Form - Grad Event	Inquiry - Web Form - Grad Event

Unique Wiley Contacts

197

[View Report \(Wiley - Data Science Contacts\)](#)

Wiley Contacts by Stage



[View Report \(Wiley - Data Science Contacts\)](#)

Total Wiley Inquiries

220

[View Report \(Wiley - Data Science Inquiries by Week\)](#)

Total Wiley Applications

10

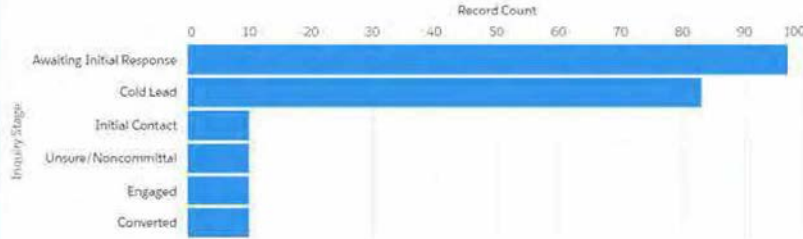
[View Report \(Wiley - Applications by Status\)](#)

Wiley Inquiries by Week



[View Report \(Wiley - Data Science Inquiries by Week\)](#)

Wiley - Data Science Inquiries by Stage



[View Report \(Wiley - Data Science Inquiries by Stage\)](#)

Wiley Applications by Week



[View Report \(Wiley - Applications by Week\)](#)

Wiley Applications by Status



[View Report \(Wiley - Applications by Status\)](#)

Wiley Event Registrations by Week



[View Report \(Wiley - DS Event Registrations by Week\)](#)

Wiley Event Attendance by Type

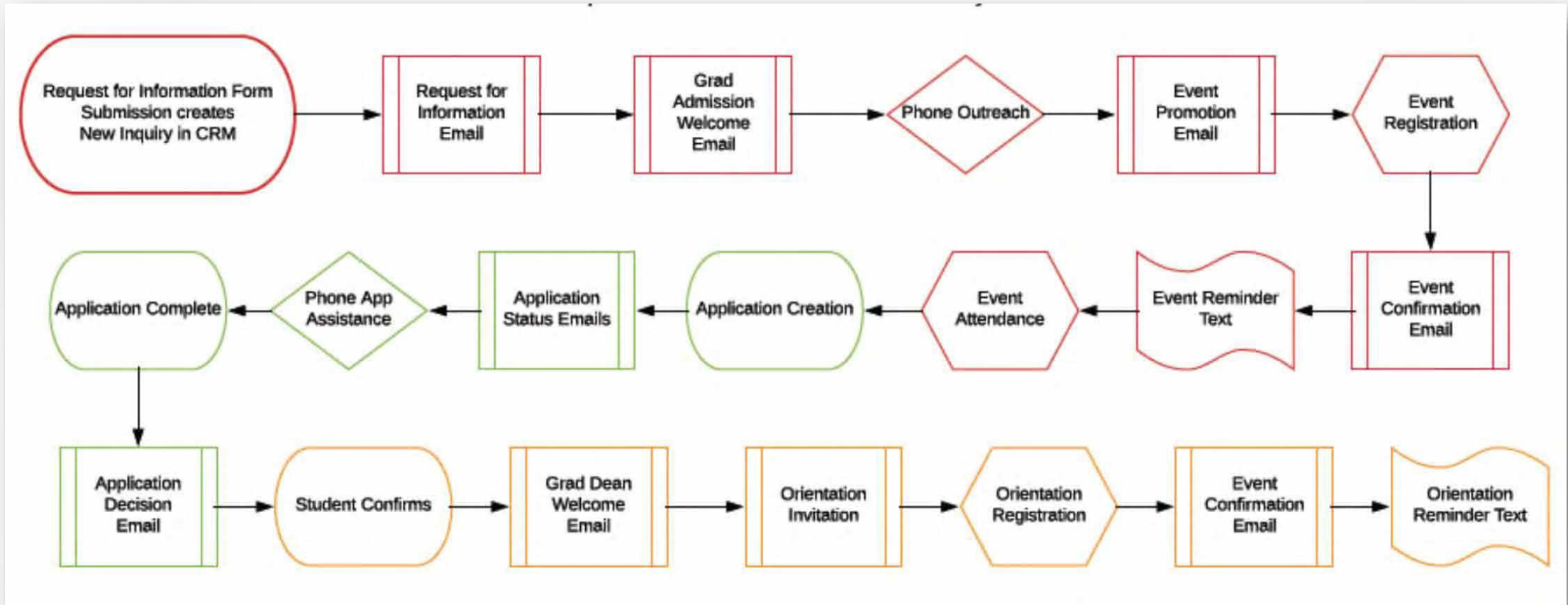


True=Attended | False=Has Not Attended
[View Report \(Wiley - DS Event Attendance - By Type\)](#)



Marketing Campaign Tracking

Outreach Plan



Results

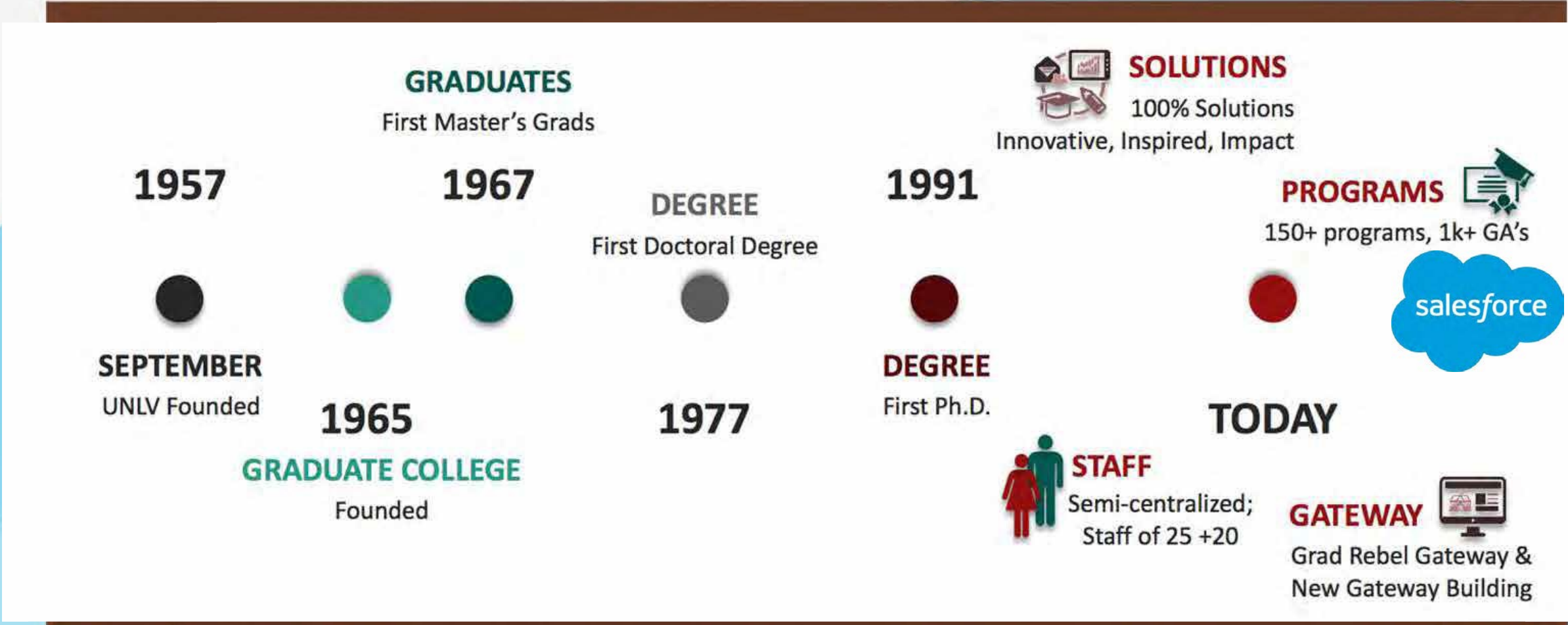


Success in fall 2019 was due to:

- Increased international effort with English Language partner
- Increased & sustained digital marketing efforts
- Systematically reviewing and interpreting enrollment funnel data to identify areas of opportunity for targeting quality or missed inquiry and applicant populations



The Mission is the Message: Building a Successful Lifecycle CRM



Our System Needs & Challenges: The CRM is the Message



**ADAPTABLE SYSTEM:
160+ PROGRAMS,
500+ CONCENTRATIONS & TRACKS**

**SINGLE ACCOUNT
for ADM, \$,
LIFECYCLE**

**INTEGRATION w/
PEOPLESFT SIS**

**REPORTS &
DATA
DASHBOARDS**

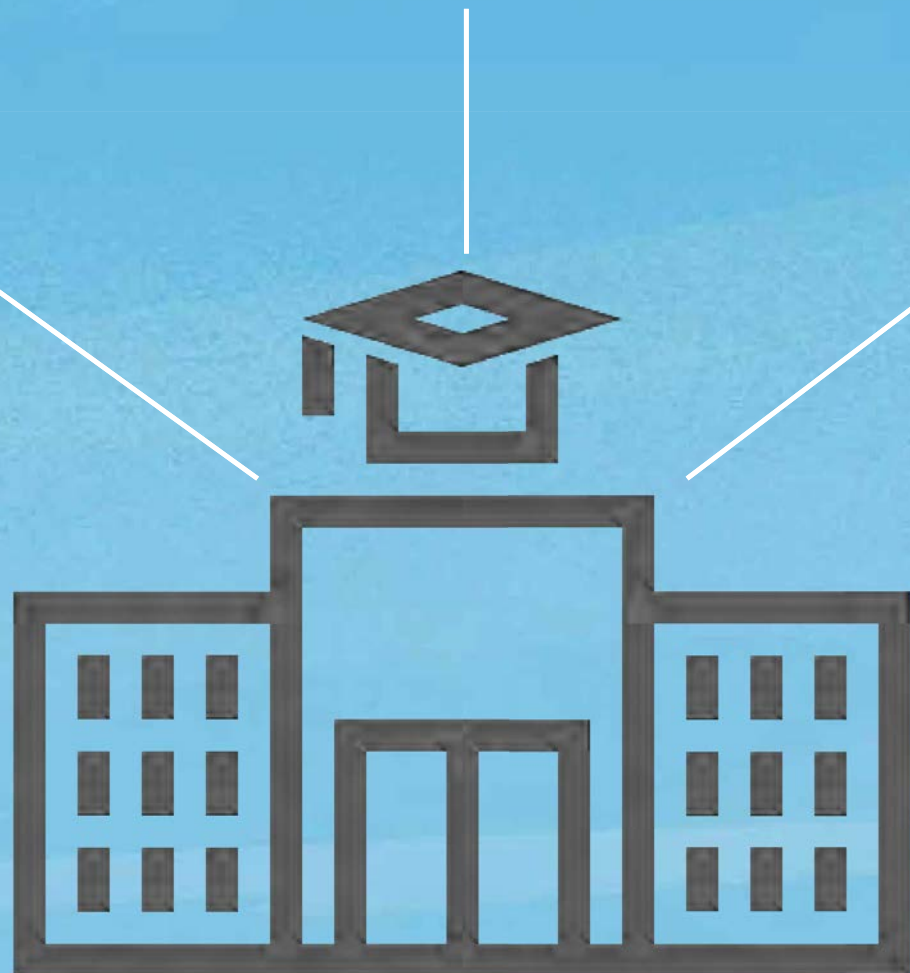
**CULTURE
CHANGE**

PERSONAL PORTAL

**RESPONSIVE: USER
TRACKING, REVIEWS &
RECOMMENDATIONS**

**CUSTOMIZED
SYSTEM OF
ENGAGEMENT**

RESOURCES



We are Strategically Building our CRM Grad Student Lifecycle System of Engagement in 3 Overlapping Phases



2015 - 2019

PHASE

1

recruitment,
admissions,
funding

2017 - 2021

PHASE
PHA₂SE

enrollment
1
to
graduation

2021 - 2023

PHASE
PHA₃SE

alumni
1
placement
&
tracking

We're Building each Stage of our CRM to Face our 3 Constituent Groups & Address their Concerns



Graduate
College

TEAM
PHASE
3

1

For back-end
processes,
communications,
info sharing & R2PC
metrics

Graduate
Programs &
Coordinators

TEAM
PHASE
2

1

For efficient back-
end processes,
communications &
reports/dashboards
& R2PC impact

Prospective
& Current
Graduate

BUDGETS
PHASE
1

1

For responsive,
personalized, easy
interface, individual
on-time comms &
student success



We are Implementing a Grad Student Lifecycle CRM to Show Targeted Benefits & Earn Buy-In



Graduate
College Team

PHASE
CASES

RESOURCES: TIME, \$,
AND STAFF
&
HAPPY
CONSTITUENTS!



Graduate
Programs &
Coordinators

PHASE
DATA & E

FORMS

TIME, EFFICIENCY,
PERSONALIZATION
&
CULTURE CHANGE



Prospective &
Current Grad
Students

PHASE
PERSONAL
INFO

EASE, EFFICIENCY,
RESPONSIVE,
PERSONAL
&
ON TIME INFO



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, Scholarships & Fellowships; Funding Review, Tracking, Processing & GA Data Dashboards

Phase Two for Faculty/Staff & Students



PHASE 2

- **Personalized portal, forms, funding & new applications for current students**
 - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
 - Customized student information in their portal
- **DocuSign forms**
 - EDA: Enrollment, Courses, Graduate Faculty Status
 - Grad Advisory Committee tracking
- **Timely Communications**
 - Authenticated web Cases for interactive & searchable communications
 - RPC: Track & message to promote retention, progression, completion
 - Events and professional & career development engagement tracking
- **Progression & At-risk Tracking**
 - Student messaging & GC/Program alerts



GRAD REBEL GATEWAY

Email (*Required)

Password (*Required)

Login

[Forgot Your Password?](#) | [New User](#)

INNOVATED
IMPACTFUL
INNOVATIVE

GRAD REBEL GATEWAY

[HOME](#)
[APPLICATIONS](#)
[FUNDING](#)
[LOG OUT](#)

YOUR ADMISSIONS CHECKLIST

Keep an eye on your application status and to do list

Plan: Social Work M.S.W.

Term: Summer 2019

Status: Submitted App

JAN
18

NEW GRADUATE STUDENT ORIENTATION

[More Info](#)

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 R1 "very 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 GradRecruitment@unlv.edu. If you have questions about the application process, email GradAdmissions@unlv.edu.

I hope to see you on campus. Go Grad Rebels!
Kate Hausbeck Korgan, Ph.D.
Interim Dean, UNLV Graduate College

CONTACT INFORMATION

Maryann Overcamp-Martini
Graduate Coordinator
socialwork_gradcoord@unlv.edu
(702) 895-3311
[Program Website](#)

APPLICATION DEADLINE

(Year/Month/Date)
Domestic: 2018-12-01
International: 2018-12-01

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

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 \$15 million per year to financially support graduate students! We provide 1,000+ 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 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 GradFinancialSvc@unlv.edu. We're always happy to help!



Phase Two for Faculty/Staff & Students



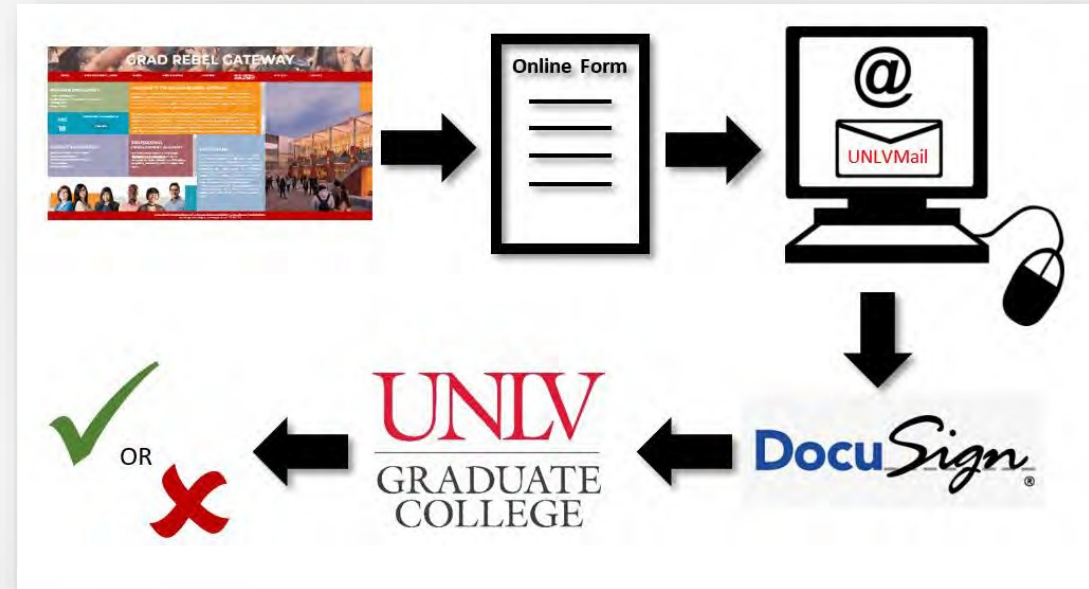
PHASE 2

- **Personalized portal, forms, funding & new applications for current students**
 - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
 - Customized student information in their portal
- **DocuSign forms**
 - EDA: Enrollment, Courses, Graduate Faculty Status
 - Grad Advisory Committee tracking
- **Timely Communications**
 - Authenticated web Cases for interactive & searchable communications
 - RPC: Track & message to promote retention, progression, completion
 - Events and professional & career development engagement tracking
- **Progression & At-risk Tracking**
 - Student messaging & GC/Program alerts

Phase 2 Roll-Out: Online E-Forms in our Grad Rebel Gateway



- FormBuilder Rx
 - Web forms for students
- Grad Faculty Status & Committee Tracking
 - EDA: affiliations w/ privileges
- Program Enrollment
 - Form requirements
 - Status of forms
- Forms
 - Tracking
- DocuSign
 - Create envelopes
 - Route for signatures



Student Form Requirements



▼ Program Form Requirements

Appt of Adv Comm Form	Required	Culm Exp - Dissertation	Not Required
Appt of Faculty Adv Form	Not Required	Culm Exp - Pro Doc Comm	Required
Prospectus Approval Form	Not Required	Culm Exp - Pro Doc No Comm	Not Required
Plan of Study Form	Required	Culm Exp - Thesis	Not Required
Adv to Candidacy Form	Required	Culm Exp - Committee	Not Required
		Culm Exp - No Committee	Not Required

▼ Program Form Statuses

Appt of Adv Comm Status	Approved	Culm Exp - Dissertation Status	
Appt of Faculty Adv Status		Culm Exp - Pro Doc Comm Status	
Prospectus Approval Status		Culm Exp - Pro Doc No Comm Status	
Plan of Study Status		Culm Exp - Thesis Status	
Adv to Candidacy Status		Culm Exp - Committee Status	
Culm Exp Results Status		Culm Exp - No Committee Status	



Online Form



GRAD REBEL GATEWAY

HOMEPROGRAM ENROLLMENTFORMSAPPLICATIONSFUNDINGPROFESSIONAL DEVELOPMENTMYUNLVLOG OUT

Required Forms

Additional Forms

APPOINTMENT 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](#)

Student Information

NSHE ID	<input type="text" value="0000000000"/>
First Name	<input type="text" value="Payam"/>
Last Name	<input type="text" value="Test"/>
Rebelmail	<input type="text" value="ezatpoor@unlv.nevada.edu"/>
Phone	<input type="text" value="(702) 112-2111"/>
Degree Plan	<input type="text" value="Hispanic Studies M.A."/>

Committee Composition

Advisory Committee Chair	<input type="text" value="--None--"/>
Advisory Committee Co-Chair	<input type="text" value="--None--"/>
Advisory Committee Member 1	<input type="text" value="Alicia Rico"/>
Advisory Committee Member 2	<input type="text" value="Deborah Arteaga-Capen"/>
Additional Advisory Committee Member 1	<input type="text" value="Francois-Nicolas Vozel"/>
Adv Comm. Member 1 Name	<input type="text" value="Giuseppe Natale"/>
Additional Advisory Committee Member 2	<input type="text" value="Ileana Margarita Jara"/>

Form Tracking



DocuSign Status Detail

[Edit](#)
[Delete](#)
[Clone](#)

Form F-4760	Sent 2/26/2019 4:22 PM
Envelope# DSX-0000932	Last Viewed 2/26/2019 6:07 PM
DocuSign Envelope ID [REDACTED]	Voided Reason
Sender University of Nevada, Las Vegas	Voided Reason Extended
Sender Email grad.systems@unlv.edu	Completed
Subject Change of Advisory Committee for [REDACTED]. (Action Required)	Declined
Envelope Status Sent	Voided
Form Name [REDACTED]	Declined Reason
	Declined Reason Extended

▼ Related Objects

Time to Complete	Hours Sent to Sign	1,389.74
Minutes to Complete	Sent Age	58
Days to Complete		
Hours to Complete		
Number Completed		
Completed Age		

DocuSign Recipient Status

[New DocuSign Recipient Status](#)

[DocuSign Recipient Status Help ?](#)

Action	DocuSign Recipient Name	DocuSign Recipient Email	DocuSign Routing Order	Recipient Status	Date Sent	Date Delivered	Date Signed	Date Declined	Declined Reason
Edit Del	Coreen	[REDACTED]	1	Completed	2/26/2019 4:22 PM	2/26/2019 5:19 PM	2/26/2019 5:21 PM		
Edit Del	Jennifer	[REDACTED]	2	Completed	2/26/2019 5:21 PM	2/26/2019 6:07 PM	2/26/2019 6:07 PM		
Edit Del	Marina	[REDACTED]	2	Completed	2/26/2019 5:21 PM	2/28/2019 8:40 AM	2/28/2019 8:41 AM		
Edit Del	Andrew	[REDACTED]	3	Completed	2/28/2019 8:41 AM	2/28/2019 9:09 AM	2/28/2019 9:10 AM		
Edit Del	Richard	[REDACTED]	3	Sent	2/28/2019 8:41 AM				
Edit Del	Stephen	[REDACTED]	4	Created					
Edit Del	F-4760: GCCH		5	Created					
Edit Del	Celinda	[REDACTED]	6	Created					

Completed Form



DocuSign Envelope ID: [REDACTED]

UNLV GRADUATE COLLEGE CULMINATING EXPERIENCE RESULTS

This form must be submitted by masters/specialist/diploma students who are not required to have an advisory committee.

STUDENT INFORMATION

FIRST NAME: Luis LAST NAME: [REDACTED]
NSHE ID: [REDACTED] PLAN: Management Information Systems M.S.
PHONE: [REDACTED] REBELMAIL: [REDACTED]@unlv.nevada.edu
SUBPLAN(S): Non-Thesis

CULMINATING EXPERIENCE INFORMATION

Describe Culminating Experience: Capstone
Paper/Project Title (if applicable): [REDACTED]

LM I certify that all information provided on this form is true and complete.
INITIAL

LM I understand that in order for my degree to be conferred, I must apply to graduate in MyUNLV by the appropriate deadline (<https://www.unlv.edu/graduatecollege/graduation-deadlines>).
INITIAL

TO BE COMPLETED BY Graduate Coordinator or Department Chair

Culminating Experience Results: Pass Culminating Experience Completion Date: 05/01/2019
Culminating Experience Comments: [REDACTED]

APPROVAL SIGNATURES

FACULTY ADVISOR	DATE	RECOMMENDATION
<u>[REDACTED]</u>	<u>4/1/2019</u>	<u>Approve</u>
<small>AGEBE3AC14894AC...</small>	<small>DATE</small>	<small>RECOMMENDATION</small>
GRADUATE COORDINATOR / DEPARTMENT CHAIR		

GRADUATE COLLEGE USE ONLY	Date Initiated: <u>2019-04-01</u>
<u>[REDACTED]</u>	<u>4/2/2019</u>
<small>DFFE70B2F05C450...</small>	<small>DATE</small>
DEAN, GRADUATE COLLEGE	Denied
	<small>DECISION</small>
COMMENTS: The student has not yet completed their culminating experience for their program. This form should be resubmitted after May 1, when a final decision can be determined for the results of the culminating experience.	
Form Code: 58	

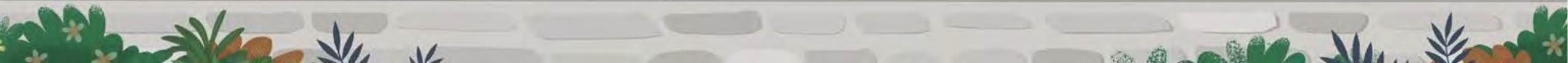


Phase Two for Faculty/Staff & Students

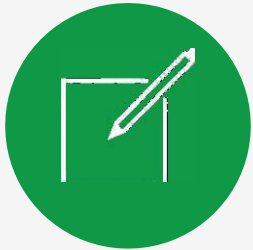


PHASE 2

- **Personalized portal, forms, funding & new applications for current students**
 - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
 - Customized student information in their portal
- **DocuSign forms**
 - EDA: Enrollment, Courses, Graduate Faculty Status
 - Grad Advisory Committee tracking
- **Timely Communications**
 - Authenticated web Cases for interactive & searchable communications
 - RPC: Track & message to promote retention, progression, completion
 - Events and professional & career development engagement tracking
- **Progression & At-risk Tracking**
 - Student messaging & GC/Program alerts



CASES Use, Outcomes & Reporting



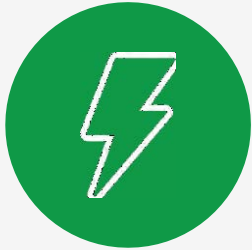
ISSUE TRACKING

Cases are created through email, web forms, & manual entry. Staff send email responses directly from the case record. This 'conversation' is saved to the contact's record.



DATA ANALYSIS

Salesforce tracks the number of cases created, comments, emails, interactions, case owners, the length of time since the case last changed status or owner, and the case history.



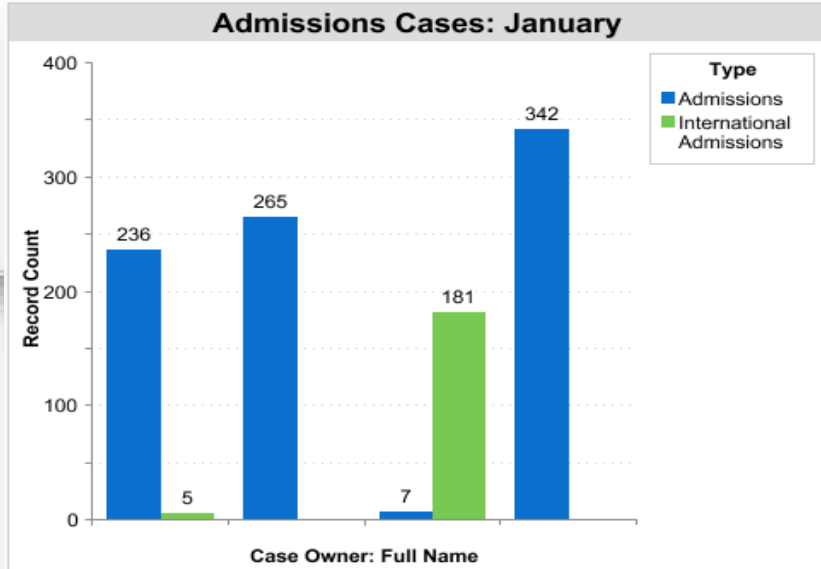
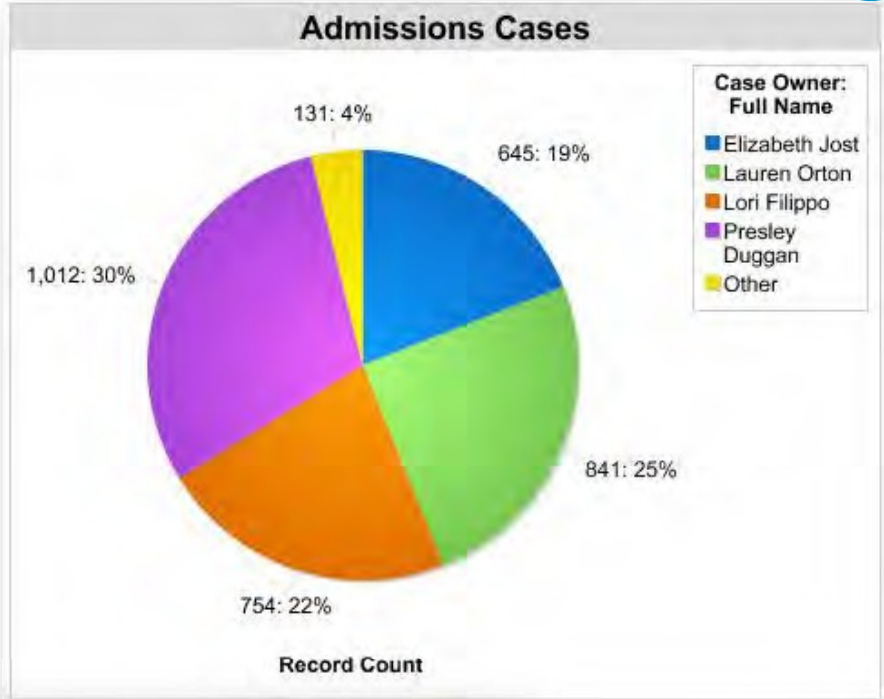
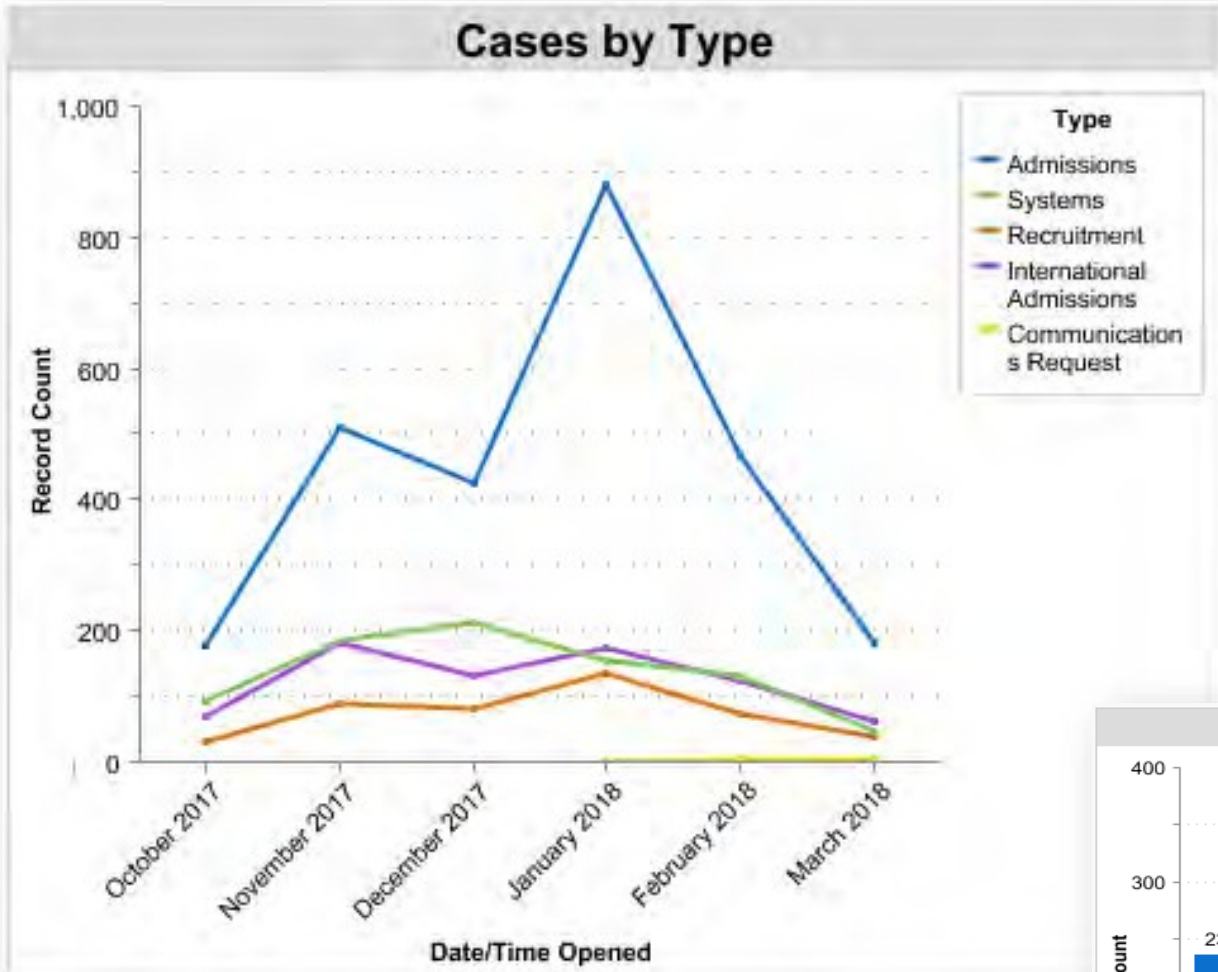
BUSINESS PROCESSES

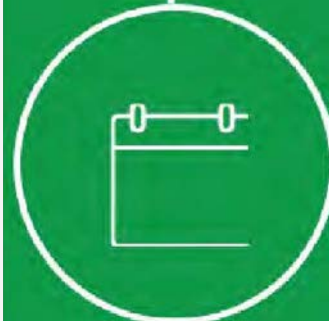
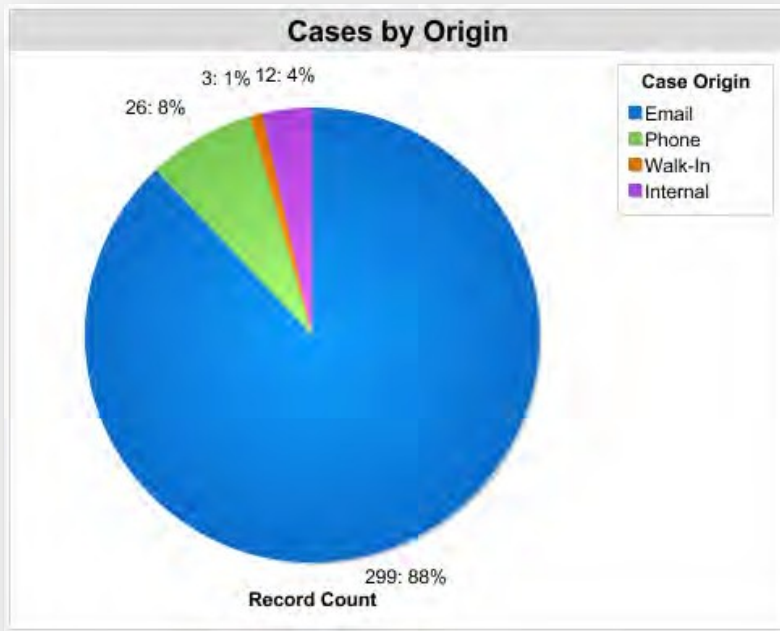
Cases centralize communications & improve transparency. Increases accountability & efficiency of teams & staff.

Cases have allowed us to improve customer service and efficiency, while ensuring consistency of messaging.



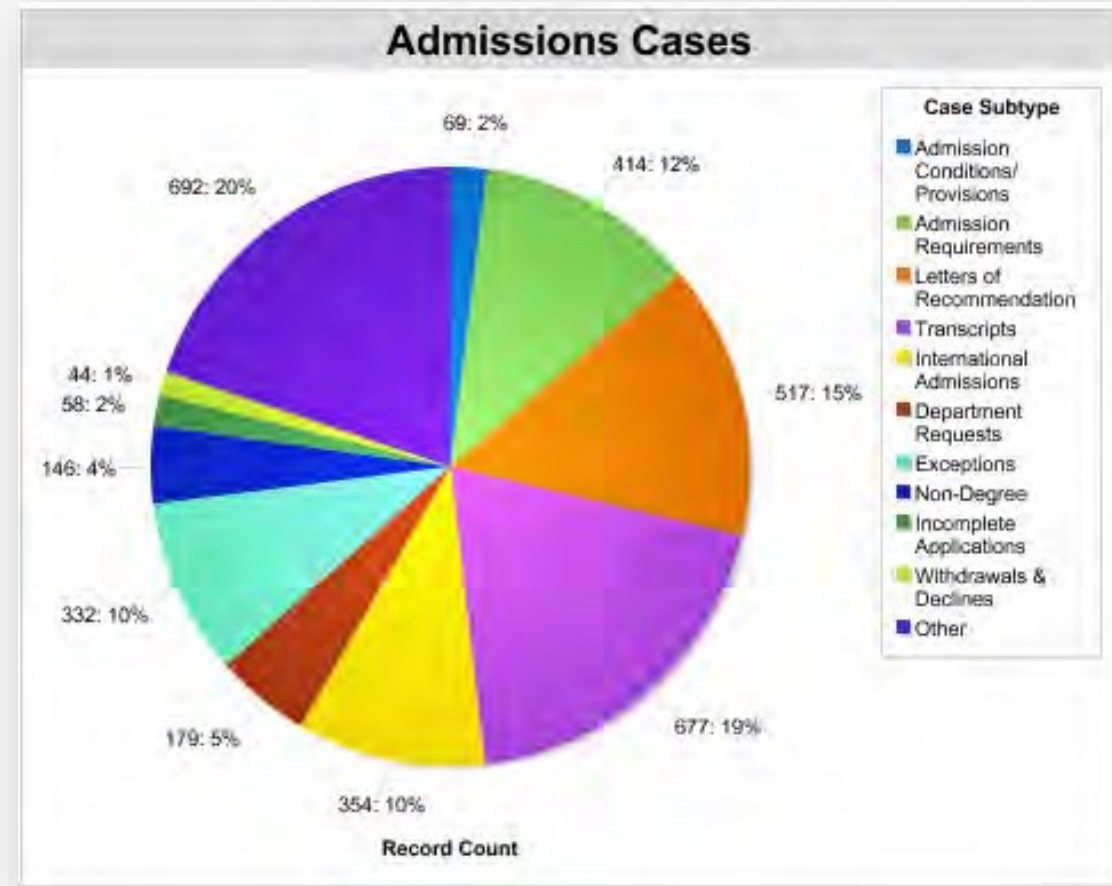
SalesForce Cases





Tracking Metrics

Cases provide data on types of issues so we know where to focus resources and communication efforts.

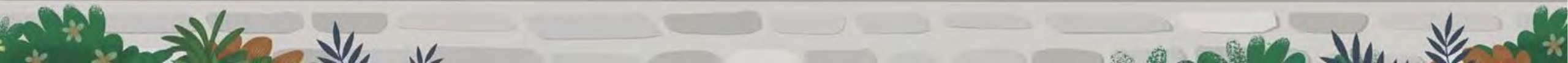


Phase Two for Faculty/Staff & Students



PHASE 2

- **Personalized portal, forms, funding & new applications for current students**
 - IntegrationRx: PeopleSoft system of Record & Salesforce system of Engagement
 - Customized student information in their portal
- **DocuSign forms**
 - EDA: Enrollment, Courses, Graduate Faculty Status
 - Grad Advisory Committee tracking
- **Timely Communications**
 - Authenticated web Cases for interactive & searchable communications
 - RPC: Track & message to promote retention, progression, completion
 - Events and professional & career development engagement tracking
- **Progression & At-risk Tracking**
 - Student messaging & GC/Program alerts



GRADUATE STUDENT LIFECYCLE

EARLY

DOCTORAL

MASTER'S

MID

DOCTORAL

MASTER'S

LATE

DOCTORAL

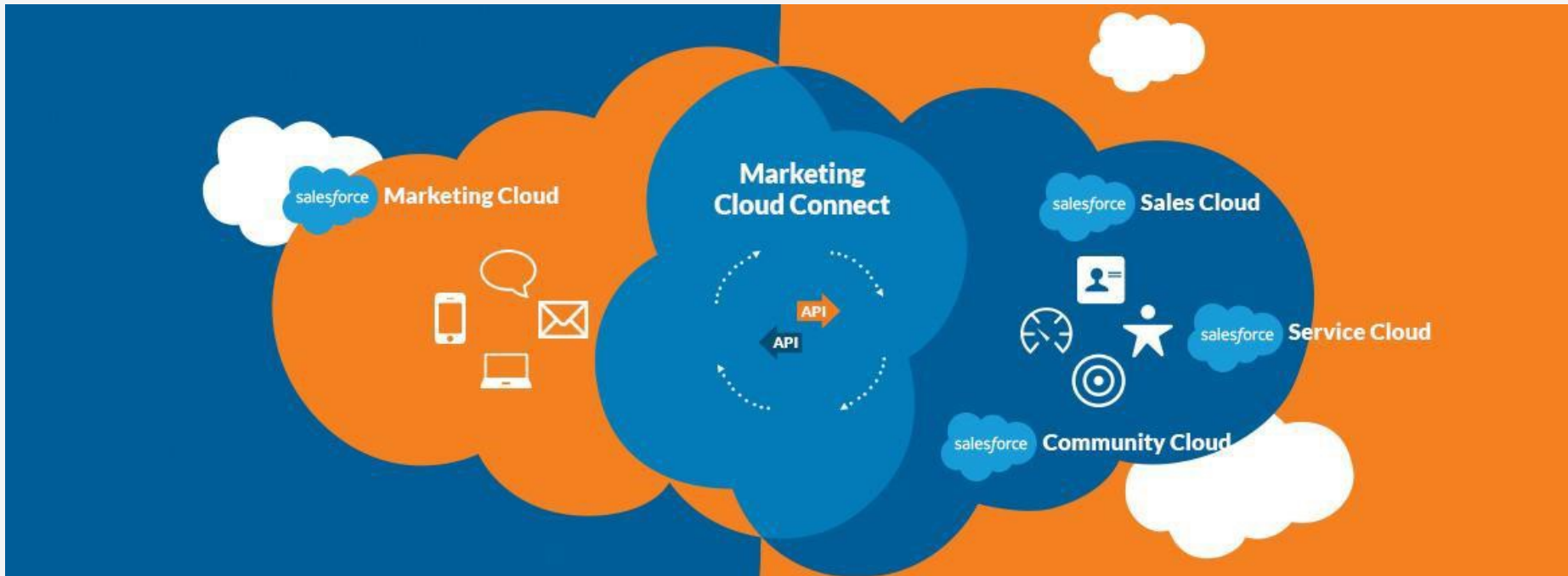
MASTER'S



Strategic Student Communications



- Student Lifecycle On-time Info.
- Early/Mid/Late Career Support
- Form & Milestone Requirements
- At-Risk Students
- Weekly Newsletter for Students
- Monthly Newsletter for Faculty & Staff
- All branded for culture building



WORKSHOPS & PROFESSIONAL DEVELOPMENT OPPORTUNITIES

See a complete workshop and professional development opportunity schedule.

Nov. 13: How to Design Interactive Course Activities
5:30-7 p.m., Webex meeting ID: 803671083 Password: 2kJMeXma (US) +1 415-655-0001 (toll)

This workshop is for sharing information of course design technologies. Attendees will learn about the technologies that can be used to design online instructional activities and interactive content that can be used within online classes and in face-to-face environments. Learn more.

ANNOUNCEMENTS

Thesis & Dissertation Office Hours

Students with questions about their thesis or dissertation can take advantage of the Graduate College's thesis and dissertation office hours every Tuesday and Thursday from 12-2 p.m. Please email gradrebel@unlv.edu to schedule an appointment.

DEADLINES

See a complete deadline schedule.

Nov. 15: UNLV International Gaming Institute Problem Gambling Research Seed Grant

UNLV's International Gaming Institute is seeking grant proposals from graduate students and faculty studying problem gambling. Multiple small grants of up to \$3,000 each and a larger grant of up to \$15,000 will be awarded. Learn more.

EVENTS & ACTIVITIES

See a complete events and activities schedule.

Nov. 12-16: Rebel Homecoming

UNLV's newly reimagined annual Homecoming celebration that brings alumni, students, faculty, staff, and community members together to celebrate the UNLV community and spirit will take place Nov. 12-16. Mark your calendar for Window Painting on Nov. 12, the Rebel Homecoming Festival and Scarlet and Gray Homecoming Parade on Nov. 15, and the Rebel Block Party and Homecoming Football Game on Nov. 16. Learn more.

WELLNESS

Nov. 14: Rebel Rec Turkey Trot

7-9 a.m., RWC

Campus Recreational Services will be partnering with Three Square collecting canned foods to be distributed to the Southern Nevada community. The Turkey Trot 5K features a 5K or 1-mile stroll on the UNLV campus. All ages, experience levels, and speeds are welcome to participate. Each participant will receive a free T-shirt and the opportunity to win a holiday season food gift basket! Don't miss out on your chance to kick off the holiday season and support a great cause. Learn more.

GRADUATE STUDENT CALENDAR

GRADUATE COMMUNITY NEWS

GRAD REBEL GATEWAY



INSPIRED. INNOVATIVE. IMPACTFUL. unlv.edu/graduatecollege

Grad Rebel Gateway Login | Rebel Password | Subscribe

To email me send to: rebebel@unlv.edu

Unlv email list and the UNLV Graduate College, 200 S. Maryland Parkway, Ste. 100, Las Vegas, NV 89155, USA



INSPIRED INNOVATIVE IMPACTFUL

BEST PRACTICES

Welcome to the new academic year!

A number of upcoming important projects may augment the mentorship that you provide to your graduate students.

[Read More](#)



“ A Message from Dean Kate Korgan

Welcome back to the new academic year! I hope that you enjoyed the right combination of everything that you most needed this summer -- relaxation, productivity, fun, downtime, writing, whatever! And I hope you've returned invigorated and ready to tackle the academic year ahead. We have a lot going on, so it's going to be a busy, productive, and yes, even fun year ahead!

[Read More](#)

NEWS & ANNOUNCEMENTS

We're Moving ... Soon!

The Graduate College will soon be moving across Maryland Parkway into the new University Gateway Building (GTW), just south of Cafe Rio. The new home of the Graduate College, which will be on the second floor of GTW, will feature our Professional Development Academy Commons -- a computer lab and collaborative workspace for UNLV graduate students -- and a Graduate Faculty Commons, housing



GRAD REBEL



Dear _

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In teger commodo, urna in dapibus tincidunt. duis lorum malle suada orci, sed pulvinar libero mi at d olmr. Ut odio urna, scelerisque Eget volutpatat. ullamcorper id libero. Praesent volutpat ligula a tellus congue, sed scelerisque elit firilibus. Maecenas lobtmis dolor non vulputam dignissim. In e, libero magna. Ut tempus mattis suada. stfm. Nulla FX)rtitor mauris id. Id tuctus dolor dignissim at In lacus iems in magna molestie rutrum. Phasellus placerat eleifen di ante. eglit tves Ubuhi. Jm quam egestas a. In ip:um libero. w hricula, vel tortor sed, mollis commode fells. Proin fiiugiat saplen lobortrs. auctor e)(a, vol. utpat quam.

In id nisi et sus suscipit interdum. Ut nee commodo odio. Praesent rhoncus lectus sed erat ultricls, ac luctus dui cxmgue. Maecenas ullam corp er ornare justo, facti sts cff qua diam posue re nee. Vc;istibu lum ia cu lis aliquet justo .ac facilisis. N-uUam in ligula eulsmod. viverra nibh nee, suscipit fells. Etiam. pu vinar nunc quisjusto p:)rta, ac votli. lpat nunc gravida. Nunc massa nu lla, rhoncus nee commodo et. aliquam l:;get nisl. Aliquam vestibull. im sed ante in p:)rta. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. ut: p:)rta sodales m . nee l'11Jlputate mi dignissim id. Vivamus vulp1utate purus lorem, a sagltls eall tempor eaget Aenean sed enim consecren. Jlf, accumsan turps vitae. 11...tus th lu s. Pro Jh vel du l etegat massa omare omare.. Cjls nu 1faf lorem., ma:i:imus fauci: bus piellentesque nee. g:ravida eu nunc. Cura bi tur laculi s:se m r viverra.

Suspe:andisse lac us nisi, interdum 11: get ante elementum, bibendum tristique einfm. Maecenas gra'll idafelis vel sem dictum, euism od. lnteger suscipit arcu ac ac:1 semr:ier. at commode dui cursu. s. Nulla oon sectetur volutpat pretium. In matris nulla. etementum eget luctus eu., molestie et massa. Ut dui diam, eteifend hendrerit felts vel efficitur vulpu tate. cdfo. Mauris allquet urna sit amet rlsus sodales feugiat Nulla a diam gravida, pulvinar velit 5uscipit, accumsan metus. Nam tiE' mpusti. nclidunt rfsus sed euismod. Cu. rabltur tincidunt massa sed magna sollicitudin, vel c: onsequat augue facilisis. Vivamus ac nunc -vel diam al 1ctos sodales.

Vestibulum id erat libero. Fusce hnd elacinla mi, quis p)S1Jereelit gravida sed. Integer suscipit nunc et nisi mollEISTiepharetra. Aliquam sit amet lpsum semper. dictumjusto sed, sceleirisque tellus. Pe lente. squ e dictum w, s. l: lbulum nibh eu feugiat Cras tincidunt dapibus sod alles. Donec: mi augue, porta. non od. io ac, allqulc't suscipit nibrJ. Pellentesque ornare Jpsum invelit cu. rsus bibendum.

Mauris sed justo slc'd felis dapibus posul: re vitae 11: l. libero. Praesent et lorem tristique. dictum velit ut. cursus ore . QJrabitur wtputate l: trisus ac tempus. Oon. ec ut m | c sem . Sed quis leo oic. Maecenas maSS: isapl, en. sag itt is ldi. bendumnee, mlutpat v, itae m assa, eras non scelerisque; arcu. lct blbendum lpsum. Etiam llibero massa, venenatis ac pu ustid p: rrtitor impierdiet arcu. Duis sit amet eros orcl. Pellentesque purusjusto, tincidunt sit amet risus et pellentesque l'atiquet odio. Sed tristiqtUe ipoS1...Jere nlsI sit amet Interdum . Phasellus mattis tellus vel ulramcorper aliquam. In l: h h sse platea di:: tumst. PrnlN sit amet tincidunt lorem. Nam . Id tempus ant e Aliquam ultricies do torquam, l scelerisque metus- fEuglat vel.

Sincerely -

INSPIRED. INNOVATIVE. IMPACT

unlv.edu/graduatecollege

UNLV Graduate College Case Study: One Strategy for CRM Success & Mission Fulfillment



MISSION
Top Tier & R1



Mission + Medium

salesforce

MEDIUM
Salesforce CRM
&
EnrollmentRx

CRM Benefits

**MESSAGE +
BENEFITS**

Elevated Experiences
Heightened Efficiency
Enables Strategic Actions
Metrics Track Success &
Opportunities

Buy-in
Drives Growth



* Marshall McLuhan & Quentin Fiore (1967) *The Medium is the Message*

Thank You to our UNLV GC Systems & Data Team



Janine Barrett, Ex. Dir., Systems & Operations

Maulik Maniar, Systems & Data Analyst

Payam Ezatpoor, Systems & Data Analyst

Kara Wada, Ex. Dir., Grad Enrollment Management

*And so much gratitude to our terrific UNLV colleagues
from the MyUNLV &
Office of Information Technology teams*





THANK YOU

UNIVERSITY OF THE
PACIFIC
Graduate School

UNLV | GRADUATE
COLLEGE