How CRM Reshaped the College of Nursing

Eric Kenney, MPA, MA
Applications Manager, University of Utah College of Nursing

**Status quo State U**

- Rachel Receptionist checks appointments in manually
- Name and date typed into spreadsheet
- Gives yearly totals to Dean Donna
Static Data

- Peter Perspective meets with Abigail Advisor
- Then what happened?
- Did he apply?
- What if Dean Donna wants more granular data?

Connecting the Dots

- Search spreadsheets
- Review application files
- Query emails
Raise Your Hand If

- You collect contact information on printed sign-in sheets?
- You enter data into spreadsheets?
- Have a shared drive folder that isn’t the most organized?
- Have a disorganized application retrieval and storage process?

“There’s a way to do it better - find it.”

– Thomas Edison
What is a CRM

- CRM stands for Customer Relationship Management
- Database to store customer data and interactions
- Allows for comprehensive view of your customer
CRM Options

- Salesforce
- Slate CRM
- NursingCAS
- Many more...

NursingCAS

- Cloud application platform like Common App
- Not a CRM
- Integrates with CRM
Technolutions Slate

- Open-source CRM
- Built for Higher Ed
- External integrations
- Mostly supported by company
- Disconnected databases

Salesforce

- Built for sales initially
- Fully developable platform
- Native integrations
- Massive community of users
- Higher ed is a priority growth area
University of Utah & College of Nursing

- University of Utah
  - Flagship state university
  - 32,760 enrolled students (Fall 2017)
- College of Nursing
  - PhD granting nursing school connected to a teaching & research hospital
  - Four academic nursing programs: Baccalaureate, Master of Science, Doctor of Nursing Practice, and PhD
  - Over 1,000 enrolled students
  - Over 2,000 applications per year

Application Challenges

- Three external application platforms
  - Fire Engine Red for Undergraduate & Scholarship
  - Hobson’s ApplyYourself for Graduate
  - FormStack for Certificates
- Salesforce
  - Glorified Excel workbook
  - Poorly structured data schema
  - Duplicate fields and objects
Pre-CRM vs Post-CRM

Interaction Reporting

- Pre-CRM (Recorded ~300-500/year)
  - Counted Emails
  - Counted Sign-In Sheets
  - Estimated Phone Calls
- Post-CRM (Recording ~1000+ /month)
  - Build and run a report
Salesforce Community & Salesforce Cases

What Did We Do?

Application Portal

- Native Salesforce
- Real-time data
- Fully customizable
- Mobile-forward
Welcome Eric Kenney,

This is your application and admission portal. You will use this portal to submit and track application information, see upcoming important application and admission dates, and receive notices about your application.

Your Status

Started App

Your RN-BS Express Pathway Nursing BS application for is in-progress. All items on the Application Checklist must be received by to be considered. Our team will process your application once it is submitted. Many items on your checklist will not check off until we have done so. Once you submit, you will receive email notification of any further action required.

PLEASE NOTE: There will NOT be a checkmark next to each school name (transcripts) until College of Nursing Student Services verifies them after you submit your application.

Do you need a transcript evaluation?

We want to make sure that courses you have taken meet our prerequisite requirements. Most Utah and regional schools are listed on our course equivalency charts. Refer to the year when you took the course. We also provide guidelines for required and recommended content for each course. When you request a transcript evaluation, it can take up to three weeks for our office to process your request. During this time you won't be able to apply to one of our program tracks. To start a transcript evaluation, proceed with the application and choose "Yes" on the Enrollment Questions page.

Do you need to apply to the University of Utah?

All applicants to the College of Nursing and Gerontology Interdisciplinary Program must apply to the University of Utah. You do not need to be accepted yet, just applied. We will need your UNID to submit the application.
Salesforce Case Tools

- Email-to-Case: Allows anybody to send an email and auto-create a case
- Web-to-Case: HTML form that can put on any website and auto-creates a case
- Automated Processes link to existing contact or create new contact

Record Interactions Automatically

- Front desk sign-in computer (W2C)
- Email Forwarding (E2C)
- Website RFI Form (W2C)
- Quick Entry Phone Form (W2C)
Granular Data

- Set Case Origin
- Set Case Reason
- Allow Program Selection
- Completely Customizable
- All Reportable

Case View by Contact
Case Report

Demo
Do one of the following

- admissions@nurs.utah.edu
- bit.ly/con-desk
- bit.ly/con-web
Questions?