

How CRM Reshaped the College of Nursing

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Statusquo 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 What Did We Do? & Salesforce Cases

Application Portal

- Native Salesforce
- Real-time data
- Fully customizable
- Mobile-forward

College of Nursing & Gerontology Interdisciplinary Program

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 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 [UBID](#) to submit the application.

College of Nursing & Gerontology Interdisciplinary Program

Personal Data

Enrollment Questions

Instructions

College Information

Prerequisites Required for Application

Prerequisites Required for Admission

Nursing School Courses

Submit Application

Enrollment Questions

From this page, you will choose whether you are requesting a transcript evaluation or applying for admission.

Do you need a transcript evaluation?

No

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 of 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.

Applying for Nursing or Gerontology?

Nursing BS

Specialty Track/Emphasis

RN-BS Express Pathway

Application Term

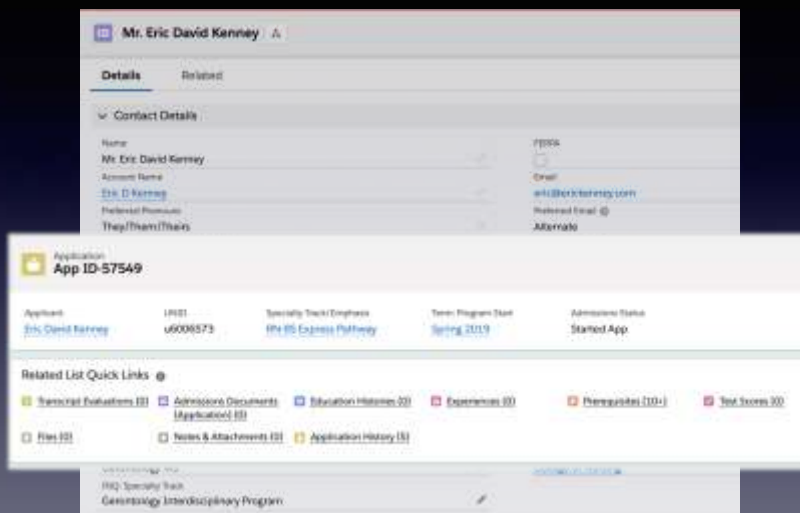
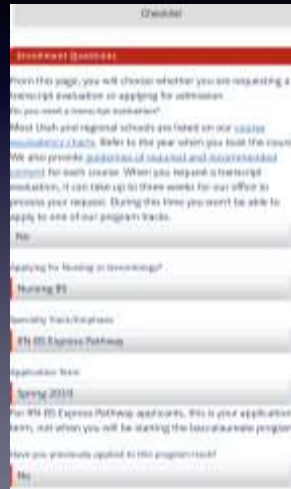
Spring 2019

For RN-BS Express Pathway applicants, this is your application program

Have you previously applied to this program track?

No

Mobile Version



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

Contacts & Case Detail Summary

Cases

20 items - Sorted by Date/Time Opened - Updated a few seconds ago

CASE	SUBJECT	PRIORITY	DATE/TIME OPENED
1	00000349	Sanitize Your new Salesforce security tokens	Medium 3/30/2019 2:55 PM
2	00000347	Website Issues	Medium 3/27/2019 10:39 AM
3	00000080	Update Admissions Mailbox address to include #10000 Express Mailway Agreement	Medium 3/24/2019 2:48 PM
4	00004488	Update Website to PWD Deadline	Medium 3/23/2019 11:19 AM
5	00004782	Re-Evaluate Information sessions	Medium 3/19/2019 11:08 AM
6	00004089	Separate request for all Business related matters	Medium 3/14/2019 10:27 AM
7	00004450	Change Test Location to Online 25th to 25th	Medium 3/11/2019 9:44 AM
8	00004786	RE: College of Nursing Application Update	Medium 2/28/2019 11:41 AM
9	00004786	Work on the page	Medium 2/28/2019 10:08 AM
10	00004777	Re-URGENT - ACTION REQUIRED - Preparing for MARS+24 & MARS+250 for Summer 2019 semester!	Medium 2/25/2019 7:16 PM
11	00004786	Deactivate Admissions Dictionary Not Updating Status	Medium 2/23/2019 8:36 PM
12	00004636	Add New Case button for duplicate contacts	Medium 2/16/2019 10:38 AM
13	00004622	Change Quick Action to change Transcript Case status to 'Closed' v1.0.0	Medium 2/16/2019 10:17 AM

Case Report

REPORT: TOUCH POINTS WITH CONTACT
Touch Points/Source Previous/Current AY
 Summary report of all touch points by source for the previous and current AY

Lead Source	Lead Source Event	Lead Source Start Date	Record Count
Admission Information		October 2018	7
		November 2018	5
	Subtotal		12
Working Appointment		October 2017	1
		November 2017	1
		December 2017	1
		January 2018	1
		February 2018	1
		March 2018	1
		April 2018	1
		May 2018	1
		June 2018	1
		July 2018	1
		August 2018	1
		September 2018	1

Lead Source	Lead Source Event	Lead Source Start Date	Record Count
Event		September 2017	5
		October 2017	21
		November 2017	2
		January 2018	13
		February 2018	30
		March 2018	12
		April 2018	96
	May 2018	1	
	July 2018	432	
	Subtotal		647
Admission Information		May 2018	11
		June 2018	304
	Subtotal		315
Parking/Interviewing		November 2017	55
	Subtotal		55
	Information Session		September 2017
		October 2017	81
		November 2017	98
		January 2018	1
Subtotal			261

Demo

Do one of the following

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



Questions?

