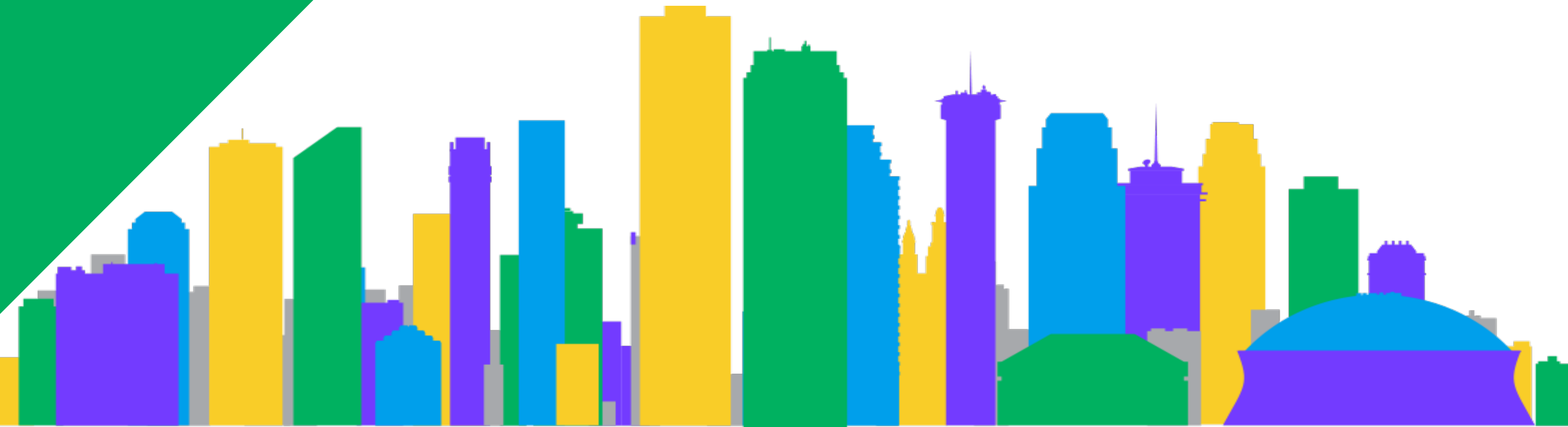
theTargetXsummit

NEW ORLEANS, LA | JULY 15-16

2019 Schedule



Pre-Conference Training
(Additional Registration Required)

Training Part A (Choose 1)

Application Form Building: A Crash Course
In this training, we'll work on building out an application for the coming Fall term, from key questions, and re-usable forms through configuring deadlines. Learn the nuts and bolts of the application form-builder, and pick up best practices to implement in your own organization. This training does not cover security/permissions or community settings and is solely focused on the application form-builder.

Managing Your Application Review Process
Before the start of your Reading Season, attend this session to learn about how to update your Application Review assignments and rubric to work through the changes you need to apply. Our trainers will walk you through updating the fields displaying on the cover sheet, your scoring rubric, and automation that assign reviews so that you have hands-on practice to implement these changes in your own Organization. We'll also include information and suggestions on how to train your users on how to use the Review Tool to read applications.

Moving Prospects Through the Enrollment Funnel
In this session, we'll work together on developing a path to enrollment for students who have not completed a certain action and drive them to the next step in the funnel. We will find students who have applied and been admitted, but have not attended an event on campus during the current recruitment cycle. Then, we'll set up a drip email campaign to those students with separate and targeted resident/non-resident content, encouraging them to plan a visit, and complete the enrollment process.

Data Governance (Advanced Admin Training)
How to make sure your data is secure and maintain data integrity in your CRM.

Training Part B (Choose 1)

Evaluating Your Email Campaigns with Data-Driven Insights
Through the power of reporting and TargetX Email Broadcast Member Data, learn how to create big-picture comparisons of your campaign and broadcast efficacy over time. In this session, we'll examine data from different email campaigns and broadcasts, and discuss ways to both leverage that data to inform future campaigns, and set up mechanisms to ensure consistency in reporting throughout the course of your cycle.

Profiles, Permissions and Roles, Oh My!

Understanding permissions is key in ensuring long-term adoption of the CRM, and secures your organization from unexpected changes. This session covers the basic terminology and architecture of Salesforce permissions, and further delves into how to best manage access to data and tools in the TargetX Product Suite. You will also learn how to effectively utilize the Permission Scanner to assess permissions for each TargetX package and provide updates to those who may be missing permissions. Finally, we'll discuss the relationship between Page Layouts and other types of permissions, and discuss recommendations around Record Types.

The Foundations of Simplifying Your App

Looking for a way to simplify the maintenance and management of your Online Application? This session offers a way to do just that. We'll be examining a Fall term application from a prior year cycle, and updating the build to reflect a streamlined approach to the architecture. Learn how to use features like conditional key questions, cards and questions and leveraging option groups to work smarter, not harder when it comes to updates.

Customizing Your TargetX Experience (Advanced Admin Training)

How to configure your custom page layouts and utilize lightning apps.

Training Part C (Choose 1)

Error-Handling and Resolution for CRM Admins

This session equips CRM Administrators with the knowledge and tools to resolve common errors in the CRM. In a test environment, we will work through errors common in Group Assignment Administration, Online Application Administration and errors your applicants may encounter, data integrations and product permissions, and take away clear steps towards resolving those errors in your own CRM instance.

Leveraging Applicant Dashboard Features

Offering your prospective students a real-time view into their status at your institution, the TargetX Applicant Dashboard is one of the most valuable tools in your arsenal... but are you maximizing its potential? This session will walk you through steps to get the most out of your Dashboard and allow you to work on a sample in real-time to activate desired features. Create and publish Decision Letters, discuss use cases for supplemental forms, allow your applicants to remind or change their Recommenders, and more!

Leveraging TargetX for Off-Campus Recruitment

Learn how the CRM can support your off-campus recruitment efforts. From best practices for entering inquiry cards, setting up and managing school visits and fairs, developing automation to support your communication, and ways to solicit feedback about your visit experiences.

Leadership for the CRM Admin

This session will cover running the ship, roles/profiles, managing changes, updates and new features/functionality.

Full-Day Training

TargetX End User Foundations

This introductory course is best for users who have little to no prior experience using the CRM as business users; this will not cover CRM administration. Designed as a “Day in the Life” experience, this session includes a high-level CRM overview, an outline of the data model and hierarchy, and hands-on activities to help you learn how to navigate the CRM, understand data related to your students and applications, and learn the foundations of reporting.

Conference Sessions

(Session times to be announced)

Leadership Track - Sponsored by Kennedy & Company

Breaking Down Silos: How IT, Marketing, and Recruitment Can Solve Problems Together

Ellen Johnson, Kris Carlson, The College of Saint Scholastica

Learn how one school went through a reimplementation of their TargetX Platform and marketing systems working across enrollment, recruitment, marketing, and information technology while putting the student experience at the forefront of every decision.

CRM Admin & Governance Panel

Panelists to be announced

Join us for an interactive conversation with a diverse panel from across the country. This Q&A style, interactive session will feature a panel discussion on some of the most relevant topics and issues facing higher ed leaders today.

End User Empowerment: Doing More with Less

Kristi Forman, Christian Brothers University

Christian Brothers University, a small, private institution in Memphis, TN subscribed to the TargetX platform in March 2015. Little did they know that it would take over two years to go live with the product and another year to feel somewhat functional. CBU realized early on that they needed a CRM administrator, but quickly realized that they could not financially afford one. Had it not been for the empowerment of end users to drive and complete the implementation, CBU would not be where it is today with a fully functional CRM that has created numerous efficiencies for their recruitment efforts. By loosening the reigns, teaching the talented, and eliminating creative barriers, CBU has empowered its employees, provided invaluable professional growth, and built a CRM that is resulting in record enrollment numbers.

Goal Setting, People Prepping, Buzz and Buy-In: Utilizing Change Management Strategy for a Successful Implementation

Jennifer Veltri, Skagit Valley College

You just got TargetX and want it to work miracles NOW! But implementing it involves more than just a technical solution; it's an exercise in change management. By coupling TargetX and change management strategies, Skagit Valley College has made significant strides in both admission conversion and student retention. Learn how to be strategic and thoughtful about your implementation, from preparing the data and people to creating the buzz and buy-in that will allow TargetX to serve your college for years to come.

Making Enrollment Goals Actionable in Your CRM

Kennedy & Company

Significant work happens 'behind the scenes' to organize fields, build reports, and create dashboards, but how do you use the CRM to really improve your ability to convert inquiries and applicants? How do you create reports that quickly inform leadership how you are tracking toward institutional goals? This session will go beyond the technical configuration to talk about how to really use the CRM to create and track actionable enrollment goals for your institution.

The Role of Lifecycle CRM in Your Retention Strategy

Kennedy & Company

At a time when technology can now support an institution's strategies to retain students, connecting the power of CRM to identify and engage students in danger is not only a possibility, but a necessity. In this session, we will review specific ways institutions can use TargetX and Salesforce to help your support teams identify those students in need and trigger the appropriate responses to assist them.

Defining Your Salesforce Org Strategy

Adam Park, TargetX

In the world of Salesforce, there is a key difference between single platform and single org. Join us for a panel discussion of TargetX employees who will discuss when it might be appropriate to implement more than one org on campus.

Managing the CRM Track

Automating Application Processes

Joel Clasemann, The College of Saint Scholastica

Are you struggling with delays on your application because you have too many workflows and processes running? Are you running into situations where you have processes triggering other processes? Come see how The College of Saint Scholastica blended many workflow rules and process builder processes into a a few handy flows as a way of streamlining system processing, collecting many workflows/processes in one place, and combining automation that crosses many objects.

Becoming a New Admin

Melody Beacher, College of Charleston

The purpose of this session would be for technical people to meet to discuss strategies and techniques for becoming a new administrator of an existing TargetX environment. Once the TargetX solution is implemented, it can take on the identity of the College or University based on the needs of the environment. For a new administrator, it is critical to understand the as-is state of the platform and the goals of the users prior to implementing changes. In this session, we will discuss ways to learn the technical lay of the land under the hood of TargetX, capture incidents and enhancement requests from your users, and determine ways to prioritize and manage these requests for success moving forward.

Data Protection – How Not to Panic and Make it a Positive

Josh Dean, Lancaster University, UK

Since the introduction of the European Union’s General Data Protection Regulations last year, how we store, manage and communicate using the vast amounts of data available for us to collect is now a high priority for every organisation working with European citizens, regardless of where in the world they are. With plans internationally for more rigorous data protection rights and the public’s growing suspicion of how organisations use data, getting a head start (or catching up) with the rights your data subjects demand is now a critical part of any CRM process. From privacy policies, legal basis and managing preferences, the pressure is on CRM Managers and Administrators to ensure that their data collection methods and communications fit within this new world. This presentation will explore some of the challenges Lancaster University faced when coming up against data protection legislation, how the demands on our business have shifted to manage much stricter controls of marketing communications and how we are using TargetX and Salesforce to give users more onus over their contact preferences. Putting more power in the hands of our prospects and applicants is becoming the norm and this presentation will show how to make a positive impact out of this.

Go Live Without Going Crazy: The Dos and Don’ts of Implementing Two-way Data Communication Between TargetX and Your SIS

Shannon Nusbaum, Jason Faulk, Longwood University

We conquered building, testing and implementing a new CRM and application in 30 days! Our next journey: implementing two-way data communication between Target X and our SIS! Starting with an aggressive timeline was not the best approach, so we learned. Join us on our 18 month journey of taking the next step in streamlining our processes. Hear the good, the bad, and the “oops, now we know” experiences from both our office of admissions as well as our integration specialist.

Transitioning to Lightning: End User Training Programs

Mary Elizabeth Chambliss, Ciara Duncan, The University of Alabama at Birmingham

A year ago at the University of Alabama at Birmingham, all end users were in Salesforce Classic. Now they’re in Lightning. Through large intensive trainings, small mini-sessions, personalized training materials, and homework assignments, the CRM teams for UAB’s Graduate School and Undergraduate Admissions have created a comprehensive training program for end-users of all levels of experience to guide them through the transition process. While Undergraduate moved all their users over at once, Graduate moved users in small batches. Ciara Duncan, Graduate CRM Administrator, and Mary Elizabeth Chambliss, Undergraduate CRM Administrator, discuss the positives and negatives of both approaches, and the middle ground they have reached to help the various departments across campus coming in as new users to Lightning.

Higher Ed Success Stories Track

Bring It On: Double the Apps and Half the Staff

Lisa Raine, Freed-Hardeman University

What happens when student search works, your applicant pool doubles, and you lose half of your experienced staff? You get your arsenal of TargetX tools together and develop innovative ways to leverage resources. Join this session for a discussion of the TargetX tools that helped us efficiently engage and enroll students.

City Year's TargetX Success Story

Reid Lawrence, Jason Holton, City Year Inc.

As an educational non-profit, City Year annually recruits 3,000 AmeriCorps members to serve one-year terms in 29 cities across the US. To effectively do this, City Year required a CRM that could support the volume of applications and traffic to the Online Application. TargetX became the perfect partner for us, as it's Salesforce-based platform allows City Year to scale its recruitment efforts to match the organization's goals to grow and allows our recruitment and admissions staff to collaborate more easily. The candidate experience has also improved, allowing them to apply and schedule their interview in the same system and the average time from starting an application to submitting an application dropped by 5.2 days in the first year of using TargetX.

Furthermore, our recruitment and admissions department gained a valuable partner in TargetX, who has been able to customize their Decision Module and provide tools to support our admissions processes, including helping us build two separate application review paths to support our First Year AmeriCorps member application and second year Corps Member application, each with its own unique set of reviews. Through TargetX, we have also been able to leverage Form Assembly and its pre-fill function to provide application snapshots to non-admissions staff who are involved with admissions decision-making without those individuals needing a Salesforce license. Leveraging TargetX's tools and its Salesforce platform also allows us to integrate with other systems City Year uses for communication and marketing as well as having a direct integration with our hiring and human resource system.

How End User Feedback is Bringing Sexy Back

Zephyr Ethier, Katharine Fairchild, Antioch University

The easiest part of implementation is writing the check. The hardest part? Engaged and enthusiastic end-user adoption that drives long-term success and enrollment strategy. In our presentation we will share the Antioch University strategy for overcoming that challenge through early engagement of end-user feedback. We will share the strategy we developed and the tools we used, along with the outcomes and solutions we implemented with the support of our PremierX team.

Not Your Mother's/Grandmother's/Great-Grandmother's Admissions Office

Jeffrey Shpunt, Jay Murray, Western Connecticut State University

Western Connecticut State University has been around for over 110 years and up until recently our admissions processes felt about the same age. From an admissions processing standpoint, the last 6 years without a doubt have been the most exciting in our history. With the help of TargetX, our institution has done a complete 180, moving from a traditionally paper-heavy institution to a modern paper-less admissions institution. Hear about the tools we leveraged and the growing pains we went through to transform our 18th century admissions process to a modern 21st century industry leader.

Record Breaking Enrollment: Keeping Numbers Up During Implementation

Kristi Forman, Erica Mitchell, Christian Brothers University

While most universities see a slump in new enrollment during new system implementations, Christian Brothers University, a small, private institution in Memphis, TN, was able to achieve two consecutive years of record breaking Freshman enrollment while implementing TargetX. Learn how they strategically and continuously altered processes to achieve success while going through a longer than normal implementation.

Technology Innovations Track

A Customized Approach to Confirm Your Enrollment

Manoj Muthireddy, Robert Bird, The University of Akron

Email + Form Assembly + a Customized Object + Dashboards = Confirm your enrollment. How UA is leveraging multiple TargetX features to encourage students to confirm their enrollment.

Automatic Document Indexing to Your SIS

Joe McVey, West Virginia University

Conga is a powerful document generation tool, but did you know there is an add-on that can be used to automate the creation of documents based on Salesforce workflow rules? Join West Virginia University as we demonstrate how we use Conga Trigger and Informatica Cloud to automatically generate and index documents into our SIS.

From Front-line to Home Office; Using Your CRM to Manage One Stop Student Services

Carlton Stroud, University of California - Merced

Learn how Enrollment Management at the University of California, Merced has leveraged their CRM to provide seamless service to our customers. Using a One Stop model, the Students First Center (SFC) provides customer service to our campus population regarding Admissions, Financial Aid, Registrar related services and billing. Additional offices in Housing/Residence Life, Student Business Services, and Academic Advisors are starting to leverage the use of the CRM. The SFC uses an 80/20 model as a baseline for measuring services. The idea is that 80% of the services could be provided by a SFC staff member, with a potential 20% of cases needing to be referred to a specialist in a "Home Office." Through the use of our CRM, cases are created for every transaction. Cases track the type of service provided, the delivery type, the outcome and the referral rate. This system has been in use for the past 5 years. Over time we have expanded this to manage our Drop for Non-payment process, our queuing system, event management and various workflows. This presentation will cover challenges, success stories and our plan for expansion to other student service areas on campus. We will examine the data gained from the full implementation of the queuing system and where we are going next with it.

From Spreadsheets to Salesforce – Handling Appeals

Ruben Lubers, University of California - Merced

Learn how the University of California Merced campus transformed its appeal and special population processes from email and spreadsheets to a more streamlined process in Salesforce. Investigate ways to use FormAssembly, Salesforce cases, and other objects to process late application requests, different type of appeal requests and responses to special population invitations. Explore single form and more complex multiple form submission processes and how these interact with Salesforce.

During this session, we will cover the creation and design of FormAssembly forms, the Salesforce connector between FormAssembly and Salesforce and Salesforce objects about workflow. As well as discuss best practices learned by the Merced campus.

Hacking the Events Feature For Courses

Steve Goff, Northwest Lineman College

Utilizing the standard events feature in TargetX to create Courses that can take payments, register the student, utilize a waiting list. This unique way of hacking the standard events allows us to post the optional course into the student portal and allow the enrolled student to register and pay for the class through the student portal utilizing the same payment gateway connector we use for app and lab fee payments.

Make Your Application Community Feel More Like Home

Cooper Fellows, Champlain College

By utilizing custom Visualforce pages, a bit of APEX, a sprinkling of CSS and a dash of JavaScript, you can create a smooth visual transition from your website to the online application site. It's not all about the looks, as these changes allow for more targeted email communications as well as personalized registration and login links, reducing the likelihood of duplicate Community User accounts. Want to go farther? Add character counters and client side validation to your application. Never have a 6 month old apply again!

Recruitment Track

A Case for Micromanagement: Dashboards and Reports

Michelle Dougherty, Saint Mary's University of Minnesota

Once upon a time we had a CRM and each user created their own reports and list views. When staff turned over the new hire had to either start from scratch or interpret the old information. When we launched Target X we began managed dashboards and reports. This allows the whole team to reference common information, but dynamically for their area. We found success in staff training and troubleshooting, with the ease of being able to say "take a look at your second row." It aided in user adoption, with less set up and learning time, and provides common language for staff absences, vacations, or new hire training. Logic errors or new field building takes less time to resolve by only needing to update one report rather than many.

Engagement Strategies for Overcoming Challenges in International Student Recruitment

Emily Moreno, Leah Martin, TargetX

Explore challenges to international student enrollment and how you can leverage TargetX to simplify and clarify the student enrollment experience.

Holistic Application Review in TargetX

Sheila Gray, Carlos Favela, Texas Tech University

Texas Tech University has experienced record enrollment since 2010. We admit approximately 17,000 first time in college students annually, and half of these students are reviewed through our Holistic Review Process. Join the functional and technical leads on our Application Review team to learn how Texas Tech is using Target X to streamline the application review process and provide decisions much faster than ever before!

New Group Assignment Functionality

Daniel Bedard, University of UMass - Lowell & Bryan Woods, TargetX

Collaborative presentation with Bryan Woods extolling the benefits of the new TargetX Group Assignment set-up and functionality. UML can speak to how it helped us with our Territory Assignments.

TargetX and Telemarketing: Utilizing the Telemarketing Tool to Support Recruitment Initiatives and to Help with Gathering Data

Brianna Vento, Emily Seggie, West Virginia University

Why is telemarketing communication important? How will using the TargetX telemarketing tool be beneficial for recruitment? What are some best practices when utilizing the telemarketing tool? These are just some of the many questions that will be answered! The goal of this presentation is to give a broad overview of the telemarketing tool. We will begin by discussing some of the data that supports why telemarketing communication is still important for recruitment as well as demonstrate how to get started with using the tool. We will also discuss some best practices such as using “key words” in call comments to enhance recruitment initiatives.

Simple Survey = Visit Victory

Martin Aucoin, Belmont Abbey College

Stuck with a campus visit evaluation survey that no one responds to? See how Belmont Abbey College utilized TargetX Events, FormAssembly, and Dashboards to effectively promote feedback, collect actionable data, increase conversion, save time, enhance the visit experience, and boost morale.

Retention & Student Success Track

Best Practices with Retention Module

Kennedy & Company

Linking Outlook calendar to appointment scheduler/creating the formula for the score card and other configuration steps to help advisors and success coaches more effectively connect with students.

Can You Do More in the Next Year Than Has Been Done in the Last 60 Years?

Sasha Peterson, TargetX

When I asked my dad about his college experience he shared a specific moment during his first day that stuck with him. The professor stood in front of his class and plainly asked everyone, “Take a look to your right, now take a look to your left, and remember those faces. Remember them today because by the end of the semester, one of them won’t be here anymore.” Now, for the record, I’m not calling my dad old… but he was, in fact, attending college a pretty long time ago.

Come spend an hour talking about how you can begin improving the student experience, and thus student success, with simple steps to change campus culture. Leave with 3 major steps you can do, with no software, to begin to impact your campus.

How To Create an Engaging and Welcoming Community Through Schools App

Damian Salonick, Sarah Gibbs, TargetX

In this session, we will discuss best practices for making your Schools App an engaging and welcoming environment for students to connect. By diving into outreach methods, crafting announcements, and creating contests top motivate student engagement, we will give clients the tools needed to make the most of Schools App, which in turn will boost matriculation of admits to attend.

Revolutionizing Retention with TargetX

Alison Fernandez, Jennifer Veltri, Skagit Valley College

Beginning in 2015, Skagit Valley College implemented a comprehensive advising model that integrates professional advisors with faculty advisors to meet specific student success retention goals. The implementation involved scaling a small case management advisor model from special populations, to a larger pilot, and finally to full institutional adoption. A major support for this work has been TargetX, which was implemented in tandem with the professional advising model.

By utilizing the functionality of TargetX, we have been able to track our students’ successes, proactively outreach to offer students support, and vastly increase communication to students, all of which has resulted in significant retention results. Additionally, TargetX’s ability to provide timely data via reports has driven student centered course scheduling, which can be particularly challenging within a community college. This workshop will highlight the increases in SVC’s retention data and the specific ways SVC has utilized TargetX to increase retention, increase staff efficiency, ease workloads, and provide students with a case management model of support.

Tracking Your Traffic: Using TargetX Engage to Collect, Manage, and Predict Walk-in Workflow

Jay Stefanelli, Rutgers University

On any given day, higher education administrators face innumerable challenges in their pursuit of fostering student success. Understanding the nature of the flow of student traffic and the needs of the student is critical for the success of all parties involved in the process. As the role of enrollment management offices continues to increase in both scale and scope, it is imperative for administrators, and units that support students, to develop sustainable strategies in strengthening student engagement and subsequently student development. Universities of the future must be bold in seeking out and advancing technological solutions, that emphasize data collection for decision-making purposes, that boost efficacy, agency, and build on firmly-established practices and traditions of student affairs scholars and professionals. During this session, the presenters will explore some of the challenges experienced in their Office of Student Services, the vision and goals to enhance the student experience, the initiatives determined to do so, the implementation of a new technology, and the commitment to continuous data collection and process improvement via a sustainable feedback mechanism. It is within the context of enhancing job satisfaction for staff members, that students find an enhanced experience where they are given voice and agency in shaping their experience.

Marketing & Communications Track

How to Integrate Marketing Communications

Nicole Shannon, Leah Ackerman, TargetX

Tired of managing all of your correspondence in a scary spreadsheet? Join two of the TargetX team to learn the best way to manage your communication to prospective students in a way that prioritizes efficiency rather than quantity. We'll discuss best practices and tools for creating conversations (NOT marketing lingo), appealing to the post-millennial generation and integrating all outbound messaging (email, SMS and print), so that any given day, you know what you're sending to your students.

Is Email Dead - or Did College Admissions Kill It?

Hayley Wolf, TargetX

A response to a prospective student's email analysis posted on Reddit. We will look at what schools are doing wrong when it comes to email marketing (from the student's perspective) and then walk through 10 takeaways on how your can adjust your email strategy to minimize email fatigue and build credibility and interest with prospective students.

Keeping Students Engaged From Admit to Enrollment

Katie Umberger, Rondene Grinam, George Mason University

While focus is often placed on the recruitment of students, keeping students engaged from admit to enrollment is just as important to avoid melt. At George Mason, we keep admitted students engaged through social media, email, texting and utilizing their admissions portal. These strategies allow our incoming students to meet new members of their class, quickly take next step actions, and register for events. As a university with a large transfer population, these strategies have proven particularly successful in keeping incoming transfer students engaged and providing a support system for them.

Reimagining Your Admissions Forms

Kate Homer, Amanda Courtney, TargetX

Looking in to how to think strategically about admissions forms (FA) and possible solutions to qualify inquiries. Creating forms that will not scare prospects away from inquiring. When i was on the client side, I fought to have 2 inquiry forms:

1. Simple, 5 questions
2. A follow up form that was sent 8 hours later with 4 pages of questions

We were able to focus the admissions team attention on the students who were filling out the second form as they were more invested in the process.”

Rethinking Communication Flows in Rolling Admissions

Amanda Courtney, TargetX & Paula Nuckles, Monmouth University

Traditional Admissions policies lead well to a communication plan with defined start and stop dates, however, Rolling Admissions allows students in the funnel at all different times, meaning that the time to send important communication. By rethinking the Communication funnel from days passed to percentage of time passed in the recruitment cycle, Students are receive the intended messages within the recruitment cycle. Rethinking the funnel means thinking about the time the student enters the funnel until the National Candidates Reply Date for their Start Term and Year as 100% of the students recruitment time in the funnel. Through formula fields on the Contact object, you can determine what percentage of time has elapsed in a student’s recruitment and communications can be managed to send once certain percentages of time has passed. This session would also include an Open Forum to discuss the challenges of Rolling Admissions with regards to communication and recruitment.

The ‘Why’ and ‘How’ of the Top 5 Web Form Practices

Brian Heger, Maryville University & Ryan Barresi, TargetX

This session will explore the theory behind the best practices for providing users with an excellent experience completing web forms. But, the fun doesn’t stop there! In addition to providing the ‘why’ behind what makes an effective web form, we’ll also dig into the ‘how’. Watch brief demos of the execution behind the best practices, and leave this session with the knowledge and tools to build web forms that delight your customers.

New Users Track

10 Things to Know Before Going Live

Joanna Tucker, Laura Dyer, Piedmont College

In this session we will share 10 important things you must know before going live as well as tips for surviving implementation and tricks for daily processing. Some topics include Dup Checker, Reporting, Informatica, Email Campaigns, and more! You don’t know what you don’t know until you “Go Live.” Let us help you avoid making the same false assumptions and mistakes we did.

Second Year: From Implementation to Optimization

Carla Flynn, Kim Laing, Southern CT State University

You survived implementation - congrats!...but now the real work begins. How can you optimize TargetX to best suit your institution’s needs. Come learn how Southern CT State University honed TargetX so their UG admission staff could work smarter not harder to meet their enrollment goals.

Tales of Integration and Implementation

Eric Johnson, Josephine Dorazio-Giardina, Mount Wachusett Community College

How MWCC took our need for a CRM from idea to proposal to project plan to working implementation. Lessons learned along the way from leadership buy-in to staffing needs and technical experiences. How we adapted the CRM to MWCC and how MWCC has adapted to the CRM. Our next steps along the journey. The implementation never ends and you will always be tweaking and improving every day.

Using Professional Development to Better Your Staff Efficacy, Adoption, and Avoid Errors

Michelle Dougherty, Saint Mary's University of Minnesota

Get to know your ecosystem (do TargetX trainings, TargetX webinars, but also Salesforce trainings, Accelerators, and Trailheads), this helps you and your school manage better understand the tools at your disposal and the TargetX advantage over a custom build platform. Introduce your higher-level management to your eco system (help to avoid conflicting projects with "we can already do that"). Use Trailhead to cross train, this helps non-IT leads or stakeholders understand the scope of their requests of IT. They can spark new creative ideas, locate trouble spots, and help leads succinctly communicate the action-ability of the idea to IT. Use Trailhead and your own custom videos to onboard new staff users, providing a consistent training experience (avoid one to one training which may have gaps; we are in education folks so use a lesson plan). Do regular communal trainings and let others share their successes or best practices. Yes, even remotely! Revisit your best practices and setting constant standards two or three times a year to locate new opportunities and prevent rouge use. Set adoption expectations for users of new tools that roll out. Form Assembly is your friend. Create forms to reduce errors in common task, such as updating a mailing address or uploading an attachment. Student first, but also Staff first for usability as a client of the CRM system.

Utilizing Effective Documentation to Engage Your Users

Sue McKibben, The University of Akron

This presentation will highlight a variety of documentation templates used by the University of Akron – including business process documentation, checklists and job aids. Benefits of proper documentation include gaining buy-in from all constituents, as well as assisting employees with the knowledge and skills needed to maximize productivity. Business process documentation is used to capture a high-level overview of major processes, such as high school visits and first year freshmen application processing. This documentation identifies the what, why, who, when and how for each step in the business process. Checklists are used to assist with frequent processes, such as setting up events and high school visits. The checklists help to clarify the steps required in a simple and concise manner. Job aids are created to assist Admission Officers with frequent functions, such as working with events and setting up high school visits and college fairs. The job aids are an alternative to a training manual and allow the Admissions Officers to quickly get the help they need, in an easy-to-follow manner. The presentation will provide examples of the documentation which can easily be modified to accommodate any institution and engage your end users.

What to Expect When in Implementation

Drew Hart, Elizabeth Hoblitzell, Amanda Eaton, TargetX

The presentation will describe in detail what institutions should expect from the beginning to the end of their implementation. This will allow for the new clients to be fully informed and be prepared on the expectations for both the client and the institution.