the**TargetX**summit
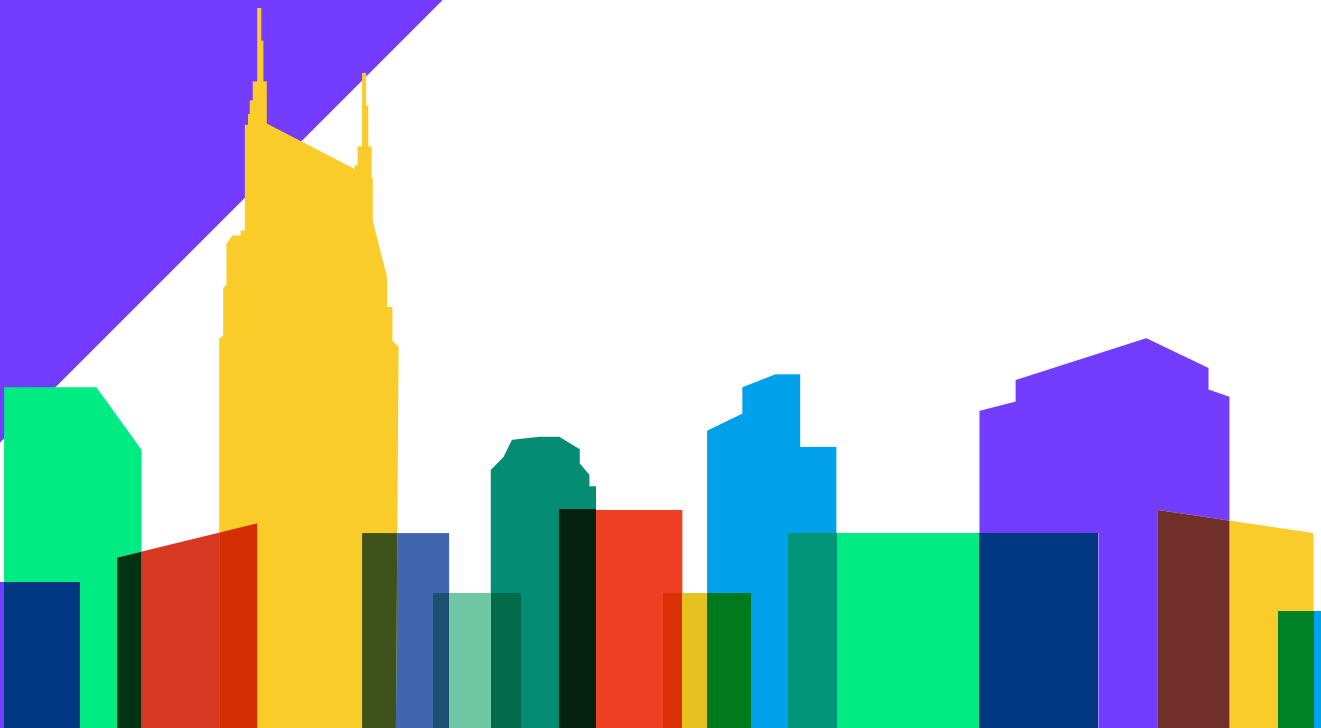
JULY 16 - 17 | NASHVILLE, TN

2018 Schedule

Sunday, July 15, 2018 - Pre-Conference Training
(Additional Registration Required)

8:00 am - 9:00 am - Breakfast

9:00 am - 4:00 pm - Full Day Training
    A. Engagement Tools - Beginner/Intermediate Level
    B. Engagement Tools - Intermediate/Advanced Level
    C. TargetX End User Foundations
    D. Managing the Online App and App Review - Beginner/Intermediate Level
    E. Managing the Online App and App Review - Intermediate/Advanced Level
    F. Advanced CRM Admin Topics
    G. New CRM Admin Basics

10:30 am - 10:45 am - Morning Break

12:00 pm - 1:00 pm - Lunch

2:30 - 2:45 pm - Afternoon Break

Monday, July 16, 2018 - Day 1

7:30 am - 8:30 am - Breakfast

8:30 am - 9:30 am - Opening Keynote

Kick off your Summit experience with this thought provoking session by TargetX CEO, Sasha Peterson. Together, we will uncover how technology innovations will transform the higher education industry and how TargetX's vision for the future will challenge institutions to reimagine the student experience.

9:30 am - 10:00 am - Morning Break

10:00 am - 11:00 am - Session 1

a. Leveraging TargetX Events to Find the Next Broadway Star
Michael Aranda, Berklee College of Music
Learn how The Boston Conservatory at Berklee uses the TargetX Events tool to schedule and review auditions from around the world — all in pursuit of the next Broadway star!

b. Product Spotlight Session: TargetX Roadmap Feedback Session
TargetX Product Team

c. Hello from Your Admissions Counselor: Using Events and Email to Connect with Applicants and Prospects
Megan Walsh, West Chester University
At West Chester University's Office of Undergraduate Admissions, we were looking for ways to show our prospects and applicants that "personal touch" or connection. WCU is a large-sized public University, and we want to show the same personalized attention that our applicants receive from small private schools. Our admission counselors were already adding their college fairs and high school visits to our TargetX Events Calendar, and we wanted to use that information to send email campaigns to our prospects and applicants affiliated with those schools. With assistance from TargetX's Nicole Shannon, we were able to set up email campaigns to deploy three days before college fairs and high school visits, signed from the specific admissions counselor. Associate Director of Admissions Megan Walsh will show you how to leverage the next event information on the school detail, including the

newly created Next Event Owner field, to build reports and email templates to let your prospects and applicants know when your admissions counselors are visiting their school.

d. Come Together: Harnessing the Power of Peer Support through User Groups
Jami Holmes, Eileen Reading, University of Maine Farmington & Creighton Dent, TargetX
A User Group with common goals and committed participants can grow into a platform for sharing successes and ideas, bringing forth challenges, and providing support to each other. Come hear the story of the University of Maine System local User Group, created following 7 separate campus TargetX implementations, and learn practical tools for successfully leading a community of users that promotes engagement and innovation.

e. Utilizing the Power of Salesforce for an Innovative Enrollment Process
Matthew Boyce, Kathy Zimmerman, George Mason University
George Mason University and Northern Virginia Community College have recently chosen to grow their relationship to better serve students through a program titled ADVANCE (http://bit.ly/ ADVANCEGMU). This program will provide a significant step forward in providing students a seamless pathway to a bachelor's degree with a strong start at Northern Virginia Community College. But an early issue identified in the project was disparate systems that make it difficult to provide students a seamless experience. We have mapped out a plan by which students can declare their intention to be a part of the program, participate in an online orientation, and complete a programmatic contract through a seamless process, while cutting from PeopleSoft to Salesforce/TargetX to Banner and back to PeopleSoft. Our team is leveraging the power of Informatica, TargetX, and Forms Assembly in an innovative approach to make our "new tools" work with our existing use of Banner, Atomic (UC4/ AppWorx) – to connect in a way that makes the student experience as flawless as one would hope.

f. Why? Then How? - with TargetX Tools!
Kory Gilderman, The College of St. Scholastica
Before we begin work on projects we must ask WHY? Then we can attack the HOW, using many tools. Hear from an I.T. Project Manager at The College of St. Scholastica on the process of eliciting requirements from users, tool selection, the project, and the end result ... victory!

11:10 am - 12:10 pm - Session 2

a. Automation Nation: Keeping your Process Builders in Check

Erin Bailey, Arcadia University

This is the story of an organization that went from 0 to 31 Process Builders (PBs) in less than a year and our journey back to automation moderation. We went through all of the stages of embracing Process Builders. First, there was the intimidation factor. Next came the starter process builder. With the success of the starter PB came the senses of satisfaction and relief (it works & it wasn't so scary). After that, it was like the flood gates opened in our org and everything was a candidate for a Process Builder! The next thing we knew, we had 12 active PBs running off of Application updates and we were getting hit with SOQL errors. That is when we knew we had a PB problem and that we needed to take a step back to evaluate these automations and find areas for consolidation or revisions to increase efficiencies when fired. This session is intended to highlight areas for consideration when deciding to building out PBs in your org (e.g., initial set-up selections, advanced options, using conditions) and to share the lessons we have learned along the way (e.g., maximizing decision diamonds, conditional immediate actions).

b. Product Spotlight: Enrollment Intelligence

TargetX Product Team

c. TargetX Enrollment Management Leadership Panel

Join us for an engaging conversation with several of the country's top enrollment management leaders as we explore the latest topics in the world of recruiting and admissions. With audience participation, this interactive discussion will touch upon various areas including: the evolving shape of today's incoming classes, data-driven decision making, managing shifting campus priorities, and more.

d. A. New User Adoption: Implementation & Beyond

Holly Bierbrauer, Missouri Southern State University

One of the hardest aspects of any implementation is new user adoption. How do you get your employees to take ownership of the software and learn the necessary techniques? At MSSU, we utilized Trailhead to turn training into a game. We created the Trail Blazers mini-game complete with scoreboard, special prizes, and office rewards. I will discuss how this prepared our staff for the on-site training with TargetX, as well as how we continue to use it, now that we are live, to train new staff. I will give real life examples of what did and didn't work, and share the tools that were the most effective. Every office needs a catalyst that will spark true user adoption. Come discover some techniques the can help onboard new users at your school.

e. Year One: Live with SIS Integration and New Processes

Jim Northrop, Sonya M. Crosby, M.S., Steven L. Harris, University of Maryland, Baltimore County
Colleagues at UMBC will share the experience of the first year of use with the TargetX Recruitment Suite. Next there will be detail of an integration of TargetX with SIS (PeopleSoft) which involves populating student application data from Data Warehouse into TargetX. Presenters will also share enrollment related activities resulting from integration. Lastly UMBC will share ideas for the roadmap ahead for recruitment efforts.

f. Application Reviews - Our Story of Going Paperless

Bonnie Fleming, Mike Dyer, College of William & Mary
Learn how William & Mary implemented the Application Review tool for 11 different programs within Graduate Arts & Sciences. This admission process is decentralized and enlists the expertise of faculty members for review. We will share our successes and new opportunities!

12:10 am - 1:30 pm - Lunch

1:30 pm - 2:30 pm - Session 3

TargetX User Groups

TargetX User Groups bring together Higher Education professionals committed to transforming the traditional student life cycle into a dynamic student delight cycle. Connect with like-minded users to network, share best practices, and learn practical lessons for sharpening your CRM strategy and championing innovation on your campus. The TargetX Summit is an annual opportunity to meet User Group leaders and colleagues face-to-face, while the TargetX User Community serves as a year-round platform for engaging in vibrant discussions and educational webinars.

User Group topics include:
- a. Campus Experience
- b. Data & Analytics
- c. Student Success
- d. Community Colleges
- e. Strategic Enrollment Management
- f. Graduate & Adult Programs
- g. Texas Users

2:30 pm - 3:00 pm - Break

3:00 pm - 4:00 pm - Session 4

a. Elevating Efficiency and Service by Combining Admissions and Financial Aid in Salesforce/TargetX at WPI

Adam Epstein, Andrew B. Palumbo, Worcester Polytechnic Institute

Learn how Worcester Polytechnic Institute (WPI) implemented TargetX into an existing mature campus-wide Salesforce org and leveraged the TargetX package for both Admissions and Financial Aid. Through the TargetX portal, SIS integration, and custom development, WPI manages the flow of information among systems to leverage each platform and provide the best user experience and customer service. WPI communicates application statuses, Admissions decisions, and Financial Aid awards via the TargetX dynamic portal in a single online experience for prospective students, and current students use the same portal for subsequent years' financial aid awards. We will discuss our data architecture, integrations with third party systems, and maintenance of our solution on the Salesforce and TargetX platform. Additionally, we will review the development and implementation process into an existing Salesforce org and the change management and adoption relative to end users in the offices of Admissions and Financial Aid.

b. Funneling Social Media Leads

Nate Tucker, Lee University

Learn how the team at Lee University is funneling social media leads through TargetX Campaigns — and how they're doing it without much effort and at a low cost. They'll share how to reach students with social media ads, automate social posting and how tracking your progress can help future budget planning.

c. Product Spotlight: TargetX Email

TargetX Product Team

d. 2 Beards. 1 Brain. Too Broad? Utilizing Form Assembly to individualize the college search experience.

Alex Landen, Matt Mortier, Ashleigh Spatt, Eastern Michigan University

This session will explore the issue of individualizing the college search experience. The college search is filled with information and none of it seems to be targeted toward the individual student. With increasing numbers of inquiries and less funding for staff and travel, admissions offices face a challenge. We will discuss how we have used forms to collect information and create a more targeted system for identifying students and distributing information. We will discuss examples of created forms and how they are useful in both in person and electronic communication plans.
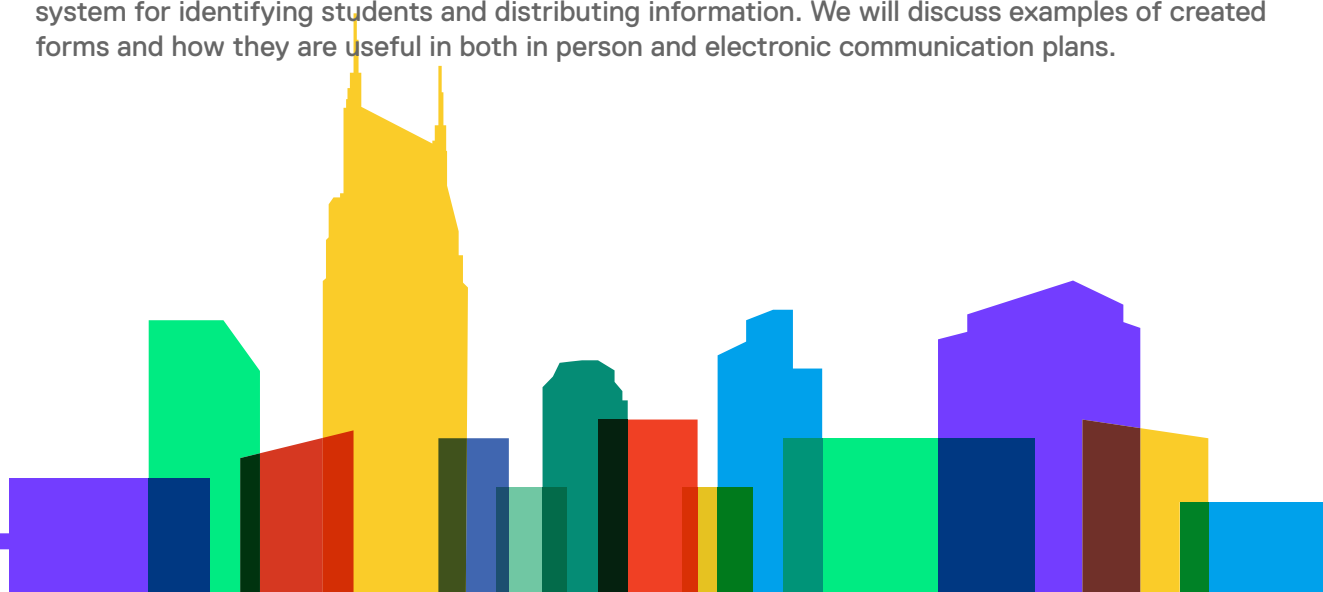
d. Preparing for Go-Live

Margaret Mandich, Josh Schwartz, TargetX

Getting ready to go-live with your new TargetX tools is an exciting moment for your institution! TargetX wants to ensure we work collaboratively with your team in preparing for this big day. This session will guide your team through the process by offering best practices and highlighting the steps needed for your go-live day.

e. Your Analysis Mr. Data?

Jay Murray, Jeff Shpunt, Western Connecticut State University

Prior to implementing TargetX, WCSU was primarily a paper and pencil enrollment environment. In this presentation, WCSU will discuss how we are leveraging our data to make informed decisions and grow enrollment. Utilizing reports, dashboards, our Axiom data integration Hub to our SIS, and the MapAnything tool. All the while avoiding the pitfalls caused by Roast Beef.

f. Automate Loading Data with Little to No Duplicates!

Jen Perlee, Champlain College

Sick of loading hundreds of records into Salesforce only to discover later that half of them were duplicates and now you have to merge them all? Do you have multiple vendors that you get lists of prospective students from? Want to automate almost the entire process? Using DemandTools/JobBuilder/Informatica and a little magic (scripting) I'll show you how to automagically look up records in Salesforce so you can UPDATE existing records and INSERT new records all at the same time.

4:30 pm - 6:30 pm - Happy Hour

Join us to toast to a successful first day!

Tuesday, July 17, 2018 - Day 2

7:30 am - 8:30 am - Breakfast

8:30 am - 10:00 am - Higher Ed Leadership Panel
Moderated by Scott Jaschik, CEO and Editor, Inside Higher Ed
This engaging and personal panel discussion, featuring leaders from all facets of higher ed, will shed light on tough issues facing higher education today and how we can (and should) address those challenges.

10:00 am - 10:30 am - Morning Break

10:30 am - 11:30 am - Session 5
a. To Telemarket, or Telecounsel, That is the Question
Justin Gish, Megan Anderson, Western Michigan University
In January of 2018, Western Michigan University began using TargetX's telemarketing function to undertake telecounseling campaigns. These campaigns ranged from birthday greetings to follow ups with applicants who did not finish or submit their applications.

b. Algorithms, Apps and Attribution: The 2018 Social Admissions Report
Gil Rogers, NRCCUA, Sasha Peterson, TargetX
We've reached a very interesting phase with respect to how colleges and universities can use data, analytics, and social media to find, engage, and convert prospective students. In the early days of social media, building a following was "free". Now, with constant changes to algorithms on social networks, a rise in adoption of private messaging apps, and more and more ways to "pay for eyeballs" on the web; building (and engaging with) a following comes at a significant investment of resources. This means using the right channels and attributing enrollment outcomes to digital marketing and social media is a necessity. This session will provide an updated view of the social media landscape and where students are looking on the web for college information. Additionally, we'll dive deeper into the use of private messaging apps than ever before.

c. Product Spotlight: TargetX Insights
TargetX Product Team

d. Utilizing Salesforce Tasks to Actively Engage in Meaningful, Personal Communication with Students.
Amanda Courtney, TargetX
Most Admissions Counselors have desks covered in sticky notes and notepads of phone numbers, or a separate calendar full of appointments to remind them when to call or send something to a student. By using Salesforce tasks, an Administrator and End-User team can determine what communication should happen when and create a robust communication plan outside of broadcast emails and marketing mailings. For an End-User to take these scheduled tasks and use the "Follow-up Task" feature in Salesforce, a Counselor is able to maintain contact with the student, building a level of trust and a relationship with that student. Studies indicate that for many students, the relationship built with a counselor makes a difference in the institution that they choose. Utilizing these features in Salesforce allows Counselors to get back to doing what they do best, recruiting students and building relationships and letting Salesforce do the remembering for them.

e. Data, Decisions, and Documentation: How to Avoid Doom in Managing your CRM
Lisa Raine, Freed-Hardeman University
Two years after implementing TargetX and going through three different CRM Coordinators, we realized we had a very broken system. Decisions made during implementation and throughout the management of our system did not reflect the true admissions process, were inefficient, and actually caused the functionality of the CRM to compete against itself. The system had not been updated in two years, there was no documentation about the creation of workflows and fields or how these changes impacted the system as a whole, and workflows were not functioning as expected. These issues not only impeded our implementation of new pieces like Group Assignment and the new Online Application, but also affected our day to day recruiting. Our experience could have easily been avoided with proper CRM management and cooperation between IT and Admissions. To fix our system, we combed through every workflow, report, email template, and end user roles and made necessary updates. With these updates, the relationship between IT and Admissions mended, and help from TargetX, we were able to produce a properly functioning system. Even though we have a ways to go in producing an optimally functioning system, we have made major strides in our own knowledge and ability to manage our CRM, recruiting efficiency, reporting accuracy, and overall end user satisfaction. This session is designed to give you points to consider from our experience so you can have a successful implementation and management of your CRM.

f. From Front-line to Home Office; Using your CRM to manage One Stop Student Services.

Lisa Perry, 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. 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 our challenges, success stories and our plan for expansion to other student service areas on campus.

11:30 am - 12:45 pm - Lunch

12:45 pm - 1:45 pm - Session 6

a. The Everlasting Evolution of your CRM

Amanda Lucas English, University of South Carolina Palmetto College, Mickey Baines, Kennedy & Co.

Learn how to take your CRM beyond installation and maintenance to modification to support recruitment and admissions staff needs.

b. Custom Orientation Registration leveraging multiple modules

Michael Roe, Western Michigan University

This session demonstrates Western Michigan Universities orientation registration scheduling solution and leveraging the Events module, Form Assembly, the Portal, Process Builder and a custom object. The solution is used to schedule 19 multi-day events for 4 student types. Pre-filled forms allow students to not have to re-enter information in the system that we already have. The use of test flag on the student contact record also allowed us to test this on the live portal.

c. Product Spotlight: SMS

TargetX Product Team

d. Life in the fast lane. Zero to Live in 30 days
Shannon Nusbaum, Jason Faulk, Longwood University

If the world of Admissions isn't exciting enough, add securing a contract, building, testing, and implementing a new CRM and application in 30 days! Bonkers! With the help from our Target X implementation team, the impossible became possible. Collaboration, great communication, and out-of-the-box ideas were key to ensuring success beginning with an aggressive implementation timeline that utilized a phased in approach of different Target X modules to align with the enrollment cycle phases; application generation, completion, yield, and summer melt. In this session, learn the good, the bad, and the "oops, now we know" experiences that has provided a more streamlined, improved customer service experience and business processes for our most important people, our students.

e. Managing it All
Lisa Magnarella, Renee Springate-Lewis, Marist College

This presentation speaks to users who manage daily operations by illustrating how Marist re-engineered operational workflow using Cases. With tens of thousands of records, and a large staff, our biggest challenge was workflow management: record updates, reports, e/mailings, technical questions, user inquiries, etc. There was no simple process for submitting requests, and little quality control. Keeping track of it all was impossible. Supervisors were in the dark as their staffs worked in silos. Communication lagged. Questions went unanswered. Priorities misaligned. Getting work done quickly, efficiently and effectively was a big problem. Our team transformed this by leveraging Salesforce Cases. Customizing Cases established order where there was none. Standard formats are used, and specific information is required for every Case. Moreover, the requester takes more ownership of the request, and in turn, the user fulfilling it has clear direction. Overall, we can track and report on workflow. And we have a history to circle back to, which is great, considering how many things we repetitively do each year. Not only have we customized Cases, we went beyond that and created specific Case record types to assign requests using Queues and Approvals. We also created fields that link to relevant Event, Recruitment Manager and Application fields. As workflow centralized and standardized, efficiency, accuracy and productivity soared dramatically.

1:45 - 2:15 pm - Afternoon Break

2:15 - 3:15 - Session 7

a. Mapping Your Processes to Deliver an Exceptional Student Experience
Roberta Oberpriller, The College of St. Scholastica

The College of St. Scholastica first implemented TargetX in 2013. We are now implementing the TargetX Application, Applicant Portal and Application Review. This latest implementation has included a remodeling of our existing environment. Our stated goal is that the student experience should drive our process. Join us as we discuss how we are using business process mapping to meet this goal as well as insuring simplicity, sound business practice, tidiness and intended use of the TargetX delivered package and scalability for future initiatives. Our journey will explore how we are using process mapping to shift away from our old focus of the processes driving the student experience to delivering an exceptional student experience.

b. Product Spotlight: Student Success Center
TargetX Product Team

c. Utilizing Lighting Apps to drive Yield Calls, Dashboards, and Communications!
Cole Motley, University of Michigan-Dearborn

The University of Michigan-Dearborn has built a Lightning Application for Admissions Counselors to perform their yield calls. Each Counselor uses a dynamic dashboard to track their progress! Managers use another dashboard to track total progress. Lastly, utilize the data collected to drive communications to admitted students.

d. How NOT to Implement your CRM
Sara Bofferding, Pablo Alvarez, Embry-Riddle Aeronautical University

Follow along on the harrowing journey that Embry-Riddle Aeronautical University went through during their CRM implementation. Learn from their trials and tribulations, their highs and their lows and their overall experiences, to aid in a successful implementation for your institution and to advise you on what NOT to do.

e. TargetX Technology Leadership Panel

Join our panel of education technology leaders as we explore the latest topics in the world of IT in higher education. With audience participation, this interactive discussion will touch upon various areas including: data governance & change management, staying ahead of the latest technologies, adapting to today's mobile landscape, and more.

3:30 - 4:30 - Session 8

a. A "Dashboard Confessional" Texas Tech Edition
Carlos Favela, Texas Tech University
Dashboards are filled with intriguing data that comes in many shapes and sizes. Come learn about Texas Tech University's use of dashboards and hidden secrets that their dashboard may hold.

b. TargetX Product Spotlight
TargetX Product Team

c. Getting the Most Out of Peer to Peer Interactions with Schools App
Dali Hatanville, Texas A&M University-Commerce
Hear from Texas A&M University-Commerce about how they are using Schools App to engage students not only with each other but with staff. TAMUC had over 10,000 student-to-student messages in their first six months using Schools App. Learn their best practices, key staff who stay involved with admitted students and how they involve current students in their process.

d. Fine tuning all of your Salesforce instruments and processes
Steven Dumbleton, Gustavo Suarez, Embry-Riddle Aeronautical University
Learn about Embry-Riddle's journey into how we use the system developed features to complement our efforts into keeping our Salesforce organization healthy and updated through the use of System Overview, Optimizer, Debug log, Health checks and field tracking history. This session will also cover the creation of Reports and Dashboards to track the login history, user adoption, change management policies. The extensive collaboration with power users and stakeholders to effectively communicate upcoming changes and gauge end user engagement.

4:30 - 4:45 - Conference Wrap Up
Is there something you missed during our two days of content? This is your chance to check out our extracurriculars, take the research survey, schedule an appointment to meet with the team or participate in the Power of X activity!