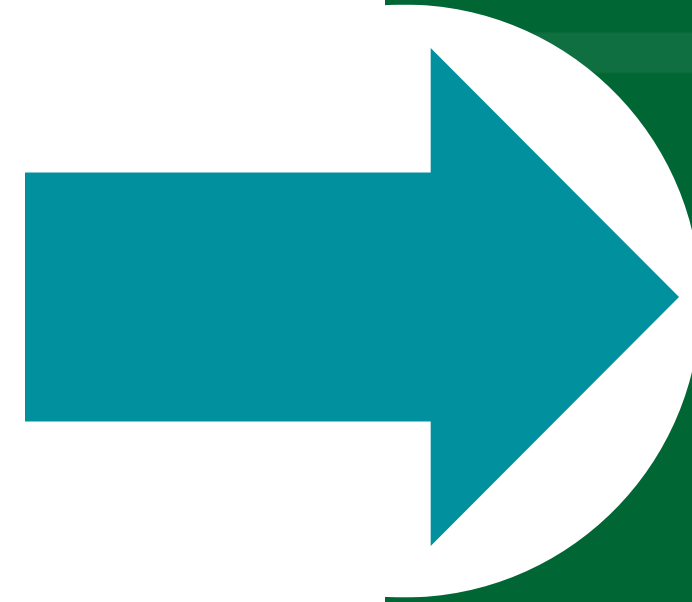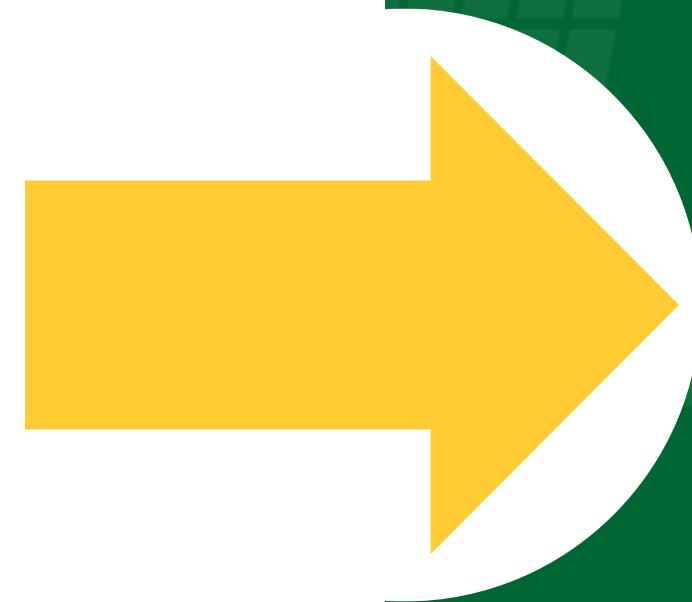# Salesforce

Undergraduate Council

March 2023

Mason is evolving Salesforce!

Salesforce is a digital Customer Relationship Management (CRM) platform for managing a university's relationships and interactions with current and potential students.

It uses data analysis about students' history with the university **to improve retention and graduation** outcomes.

It compiles data from a range of systems across Mason, allowing faculty and staff to learn more about students and how best to meet their needs.

The Evolution of Salesforce at Mason

From 2010 through 2022, multiple units from across the university including Enrollment Management, School of Business, Advancement, University Life (Orientation), Mercatus Center, and the Institute for Humane Studies, all adopted different versions of Salesforce to foster relationships and improve outcomes for students and constituents. This, however, created redundancies and inefficiencies.

2010-22
Salesforce increasingly used by units around the university; no institutional CRM strategy exists

2017
Enrollment Management selects Salesforce/ TargetX to support Admissions needs (UG and Grad)

FALL 2021
Mason launches discovery effort in partnership with Huron for Student Org analysis (UG and Grad)

SPRING 2022
Mason expands discovery for all Salesforce orgs at Mason, looking to eliminate redundancies

FALL 2022
Mason commits to being a Salesforce-first institution and announces transition to two new Salesforce tools

What Does Salesforce Do?

FOSTERS COLLABORATION AND TEAMWORK

Even if enrollment, academic advising, and university life are not formally aligned, their staff members can still work as partners toward student success.

CREATES COMMON VIEW OF STUDENTS

A shared platform for student data ties together academic outcomes from multiple departments, translating into shared information and, as a result, optimized services.

IMPROVES SERVICE TO STUDENTS

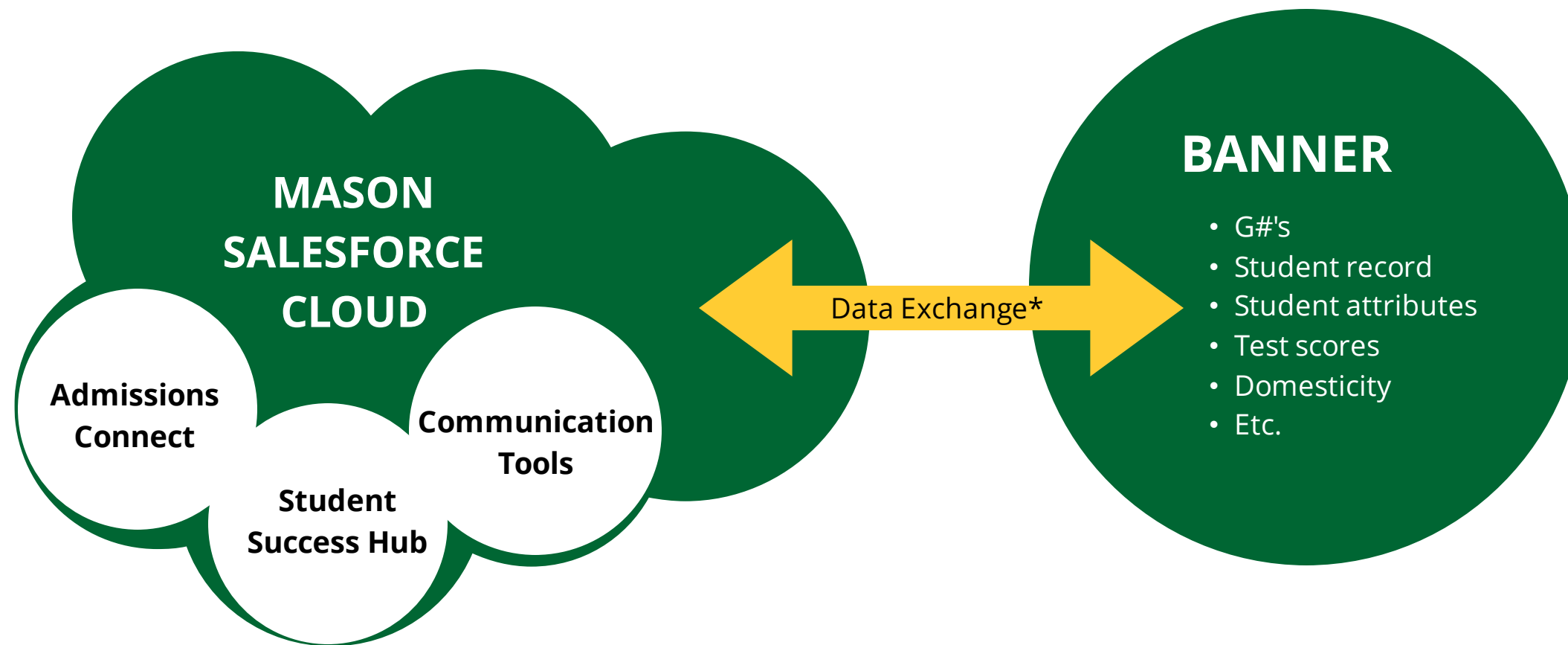Facilitates a unified approach to student services, informed by a common dataset.

SAVES RESOURCES (MONEY AND TIME)

Offers greater scale than unit-based purchasing and reduces the need for integration of multiple, discrete CRM datasets.

How will it work?

The Mason Salesforce cloud will be the primary **System of Student Engagement.**

MASON SALESFORCE CLOUD

Admissions Connect

Student Success Hub

Communication Tools

Data Exchange*

BANNER

- G#'s
- Student record
- Student attributes
- Test scores
- Domesticity
- Etc.

Banner will remain the System of Record and will integrate with Salesforce cloud for updates.

Other critical systems will be evaluated for integration/ replacement with the Salesforce platform.

NOTE: The data system and integrations have not yet been architected. It is currently unclear which data attributes will be shared and how other existing systems will integrate. More information will be available once Mason secures an implementation partner.

Our Students Want

- **Easily accessible information** and resources – reduce the Mason shuffle
- **Simple, streamlined student services** with a single point of access
- **Information sharing** between support staff – reduce time retelling the same story
- **Mobile-friendly** portal where everything is connected
- **Insight** into their support and success communities
- **Face time** with staff

And Salesforce tools help us get there...

What this means in the near term

TWO NEW SALESFORCE TOOLS

STUDENT SUCCESS HUB

ADMISSIONS CONNECT

<u>Also coming soon</u>: A multi-channel marketing tool, such as Marketing Cloud, to help consolidate marketing efforts across campus, strengthen communication to students, and bring enhanced reporting functionality.

What does Salesforce at Mason mean for Academic Affairs?

1 Salesforce-First Selections

Where possible, Salesforce products and those that integrate with Salesforce will be preferred technical solutions.*

2 Sunset Navigate and Target X

With the implementation of Student Success Hub (SSH), Mason will sunset our use of EAB Navigate and TargetX.

3 Launch Two New Tools

Mason will launch Student Success Hub and Admissions Connect to support student success and facilitate personalized communications.

*This does NOT mean that all products currently in use will be sunset in favor of Salesforce products.

What is Student Success Hub?

SSH is a collection of software applications managed in Salesforce.

FEATURES

Mobile Student Portal
One place to manage appointments, view details on success plans, and see upcoming tasks.

Appointment Scheduling Wizard
Connects students to the right staff by providing real-time appointment scheduling with their support network.

Proactive Texting
Helps students stay on track by proactively sending SMS messages reminding them to complete important tasks.

Academic & Degree Planning
Other critical systems such as the degree auditing tool will be evaluated for integration within the Salesforce platform.

Student Success Hub

What's different?

- **More robust case management** and referral network
- **Accessible student data** that is not moved from system to system
- **Mobile app** and enhanced student user experience
- **Unified student record** – Banner remains the system of record; Salesforce becomes the system of engagement for service delivery
- **A 360-degree view of every student** with insights from entire support network and integrated systems (LMS/Blackboard, course scheduling, survey data, etc.)

NOTE: Current Navigate functionality will be built into Student Success Hub

What About Navigate?

- Navigate contract officially expires **August 2025**; full transition to Student Success Hub is planned no later than this date
- All primary functionality will remain in Navigate through **Spring 2024**
- We are adopting a phased transition approach:
  - Initial pilot with small group
  - Beta testing with phase one users
  - Transition remaining users
  - Build in new user groups

NOTE: Transition will occur on a timeline agreed upon by Mason and our implementation partner; careful consideration of timing is being taken into account (e.g. during a semester/summer).
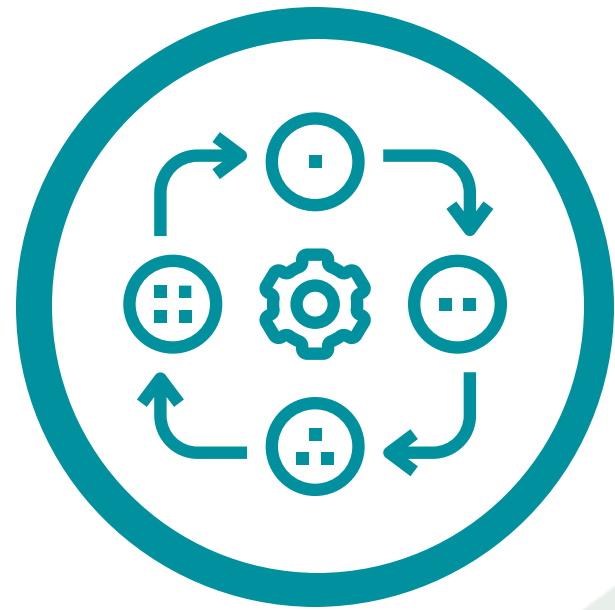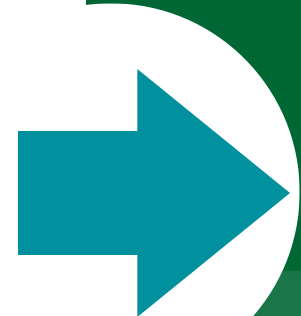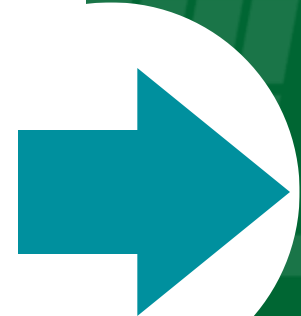
Updating Process Maps

We will be working with a business analyst in ITS to map the process of how you complete your work and how students interact with your office.
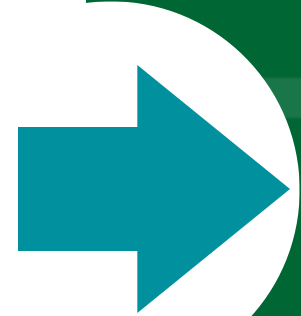
→ Teams should expect several sessions (1-2 hours each) with the BA, depending on scope.
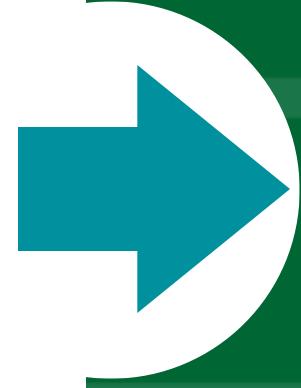
→ Business Analyst is joining in March

→ To prepare, create a list of all the staff members in your office that you would like to include in this process.

Who is representing Academic Affairs?

Academic Advising Liaison Committee

Sylvia Lee – Undergraduate Education

Jason McKnight – Graduate Division

Carter	Jane Walker
CEC	Alison Bartnek
CEHD	Stormi Ryan
CHSS	Andrea Barabach
COS	Wendy Lewis
CPH	Maria Perez
CVPA	Sara Simanski
SBUS	Jason King
Schar	Matt Green
Honors	Jan Allbeck
UE	Sylvia Lee
GEO	Marie Alice Arnold
INTO	Mev Khan
MKorea	Seunga Seo
Comm Lab	Courtney Massie
Athletics	Michael Oullette

Moving Forward: Implementation
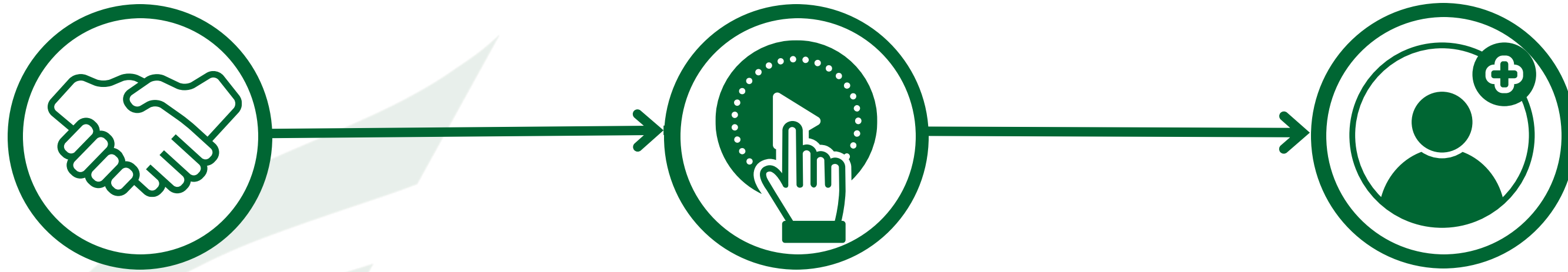
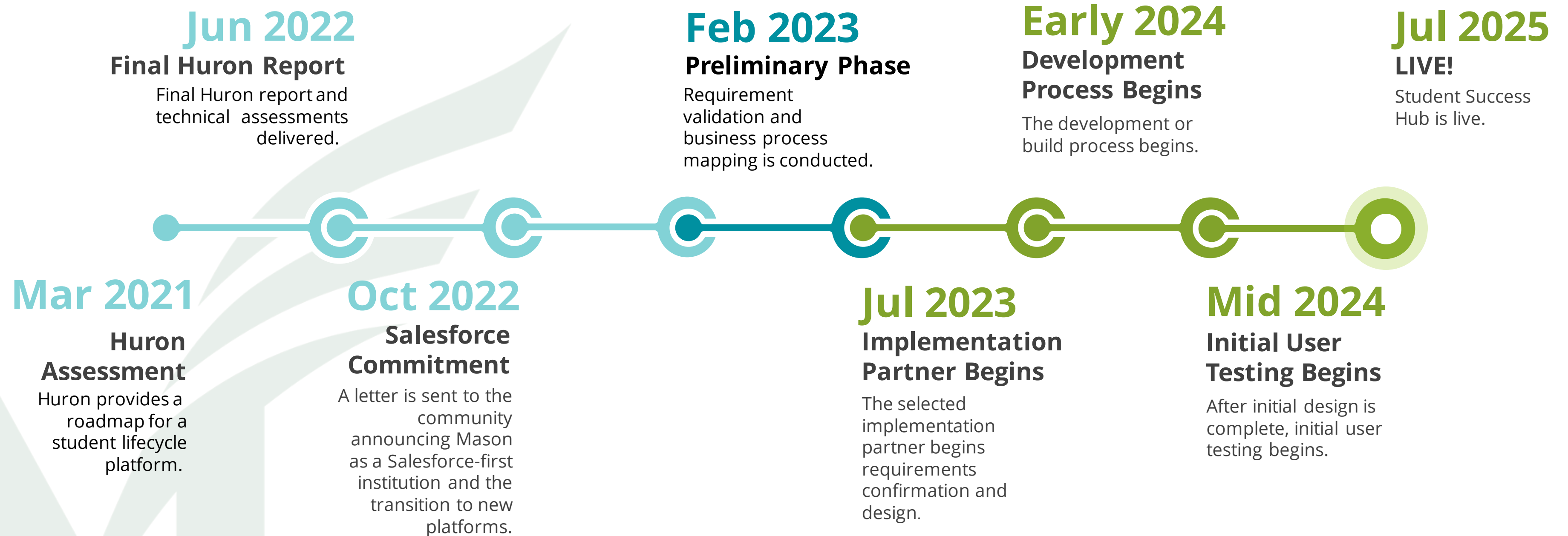**Secure implementation partner** to validate requirements and gather additional feedback.

Build functionality in Student Success Hub that supports the work of our current Navigate and Salesforce users.

Eventually, units will **join the Student Success Hub network**.

As you learn more about the tool(s), start thinking about how they might apply in your functional context to enhance the student experience.

Projected Timeline to SSH Launch*

Jun 2022
Final Huron Report
Final Huron report and technical assessments delivered.

Feb 2023
Preliminary Phase
Requirement validation and business process mapping is conducted.

Early 2024
Development Process Begins
The development or build process begins.

Jul 2025
LIVE!
Student Success Hub is live.

Mar 2021
Huron Assessment
Huron provides a roadmap for a student lifecycle platform.

Oct 2022
Salesforce Commitment
A letter is sent to the community announcing Mason as a Salesforce-first institution and the transition to new platforms.

Jul 2023
Implementation Partner Begins
The selected implementation partner begins requirements confirmation and design.

Mid 2024
Initial User Testing Begins
After initial design is complete, initial user testing begins.

*Timeline likely to change

Questions?

Ideas, Comments, Concerns

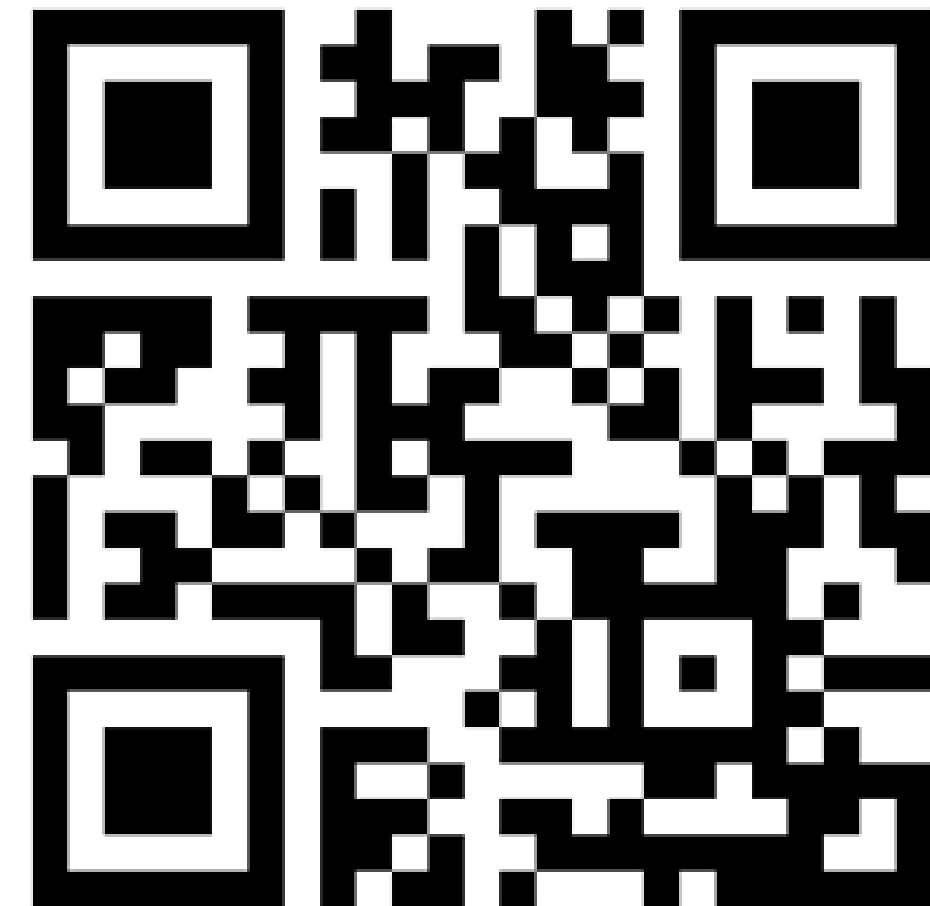We welcome ideas, questions, comments, and concerns about Student Success Hub or the Salesforce transition

Stay Informed

Stay informed through our Salesforce Stakeholder Engagement Form

Navigate Questions

Questions about Undergraduate Academic Affairs can be directed to Sylvia Lee sleh@gmu.edu

https://provost.gmu.edu/initiatives/salesforce