



# Strategies for Using CRM Advise to Improve Retention and Communication

Presented by:

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Communications Coordinator



# Agenda

- Introductions
- CRM Advise Implementation Timeline
- Texting Integration
- Retention Communication Plans
- Student Support System / Early Alert
- Faculty Program Coordinator Access
- *Quick – CRM Advise Users Group*
- Summary and Questions



# We Are Delta College

- Located 5.5 miles southwest of Bay City, Michigan
- 8,300+ students in Fall 2024 term
- 425 Full-time & 310 Part-time Total Faculty and Staff





# We Are Delta College

- Serve the Great Lakes Bay Region (cities of Midland, Saginaw, and Bay City) with a combined population of 376,033 people.
- Locations:
  - Main Campus in Bay County
  - Downtown Midland Center
  - Downtown Saginaw Center
  - Downtown Bay City Center (feat. Planetarium)
- 14.37% of the population in this area is considered below the poverty line.

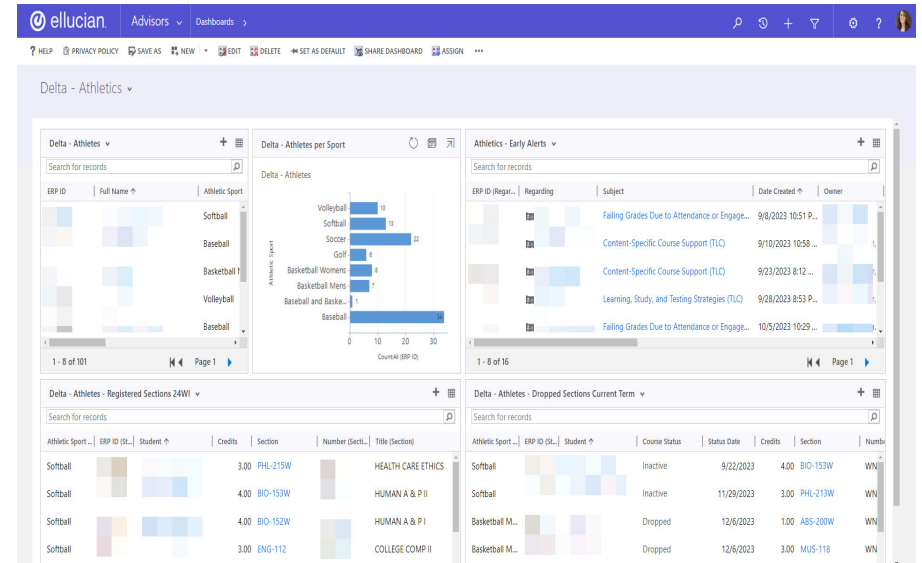




# Implementation of CRM Advise at Delta College

2015

- Colleague on premise
- CRM Advise SaaS
- Among the first colleges to implement CRM Advise.
- Customer Relationship Management (CRM) for advising and retention.
- Use registration data for a dynamic communications and dashboards.





# Texting Integration with Mongoose Cadence

- Importing of students
- Tracking of messages





# Retention by Texting

- Average contact hours per day: 225
- Average contact hours per texting day: 951

5.30.24 Planned FA24 - Text #1 ×

Created by: Rachel Merkle

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Message

Hi <FIRST NAME>, it's Delta College Advising. It looks like you left something in your student planning "shopping cart"! You haven't finished signing up for your Fall classes yet. Do you need help registering? (Please reply Yes or No)

Auto-Replies

**YES** Reply With:

Great! You can sign up for a "Registration Lab" in Experience (<https://experience.delta.edu/>) or visit D102 for support. Registration is open now.

**NO** Reply With:

No worries! Registration is open now for next school year. If you need help later, sign up for a "Registration Lab" in Experience (<https://experience.delta.edu/>) or visit D102 for support.

**CLOSE** EDIT



# Term-to-Term Retention Communication Plans

- Evolve over time.
- More data comes into play.
- Targeted outreaches arise.



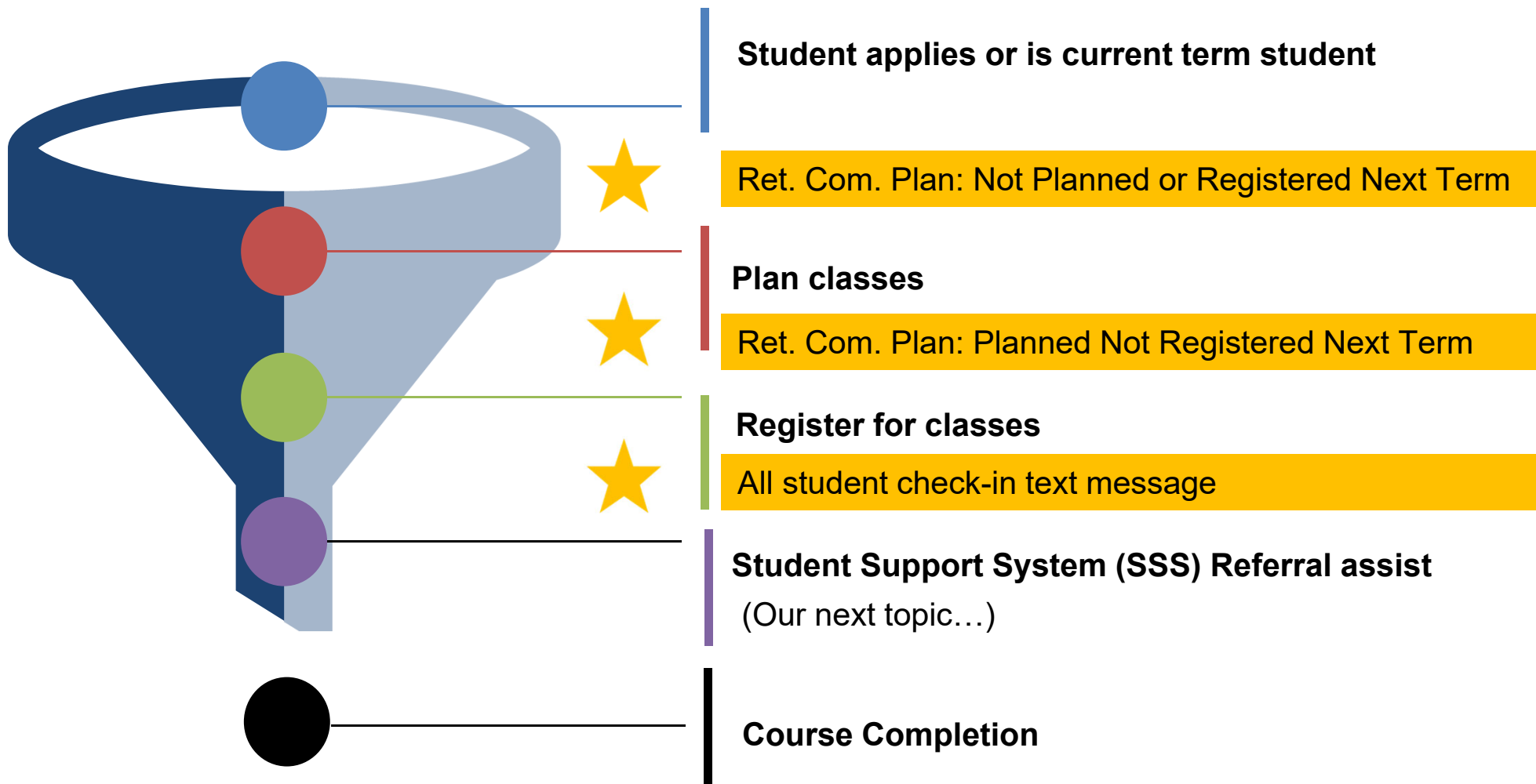


# Retention Efforts Supported by Communication

- Meeting students in their enrollment process.
- Including more steps to be more accurate and specific.
- Takes weight off Student Success Advisors.
- Build plans based on dynamic lists.



# "Funnel" of Term Completion



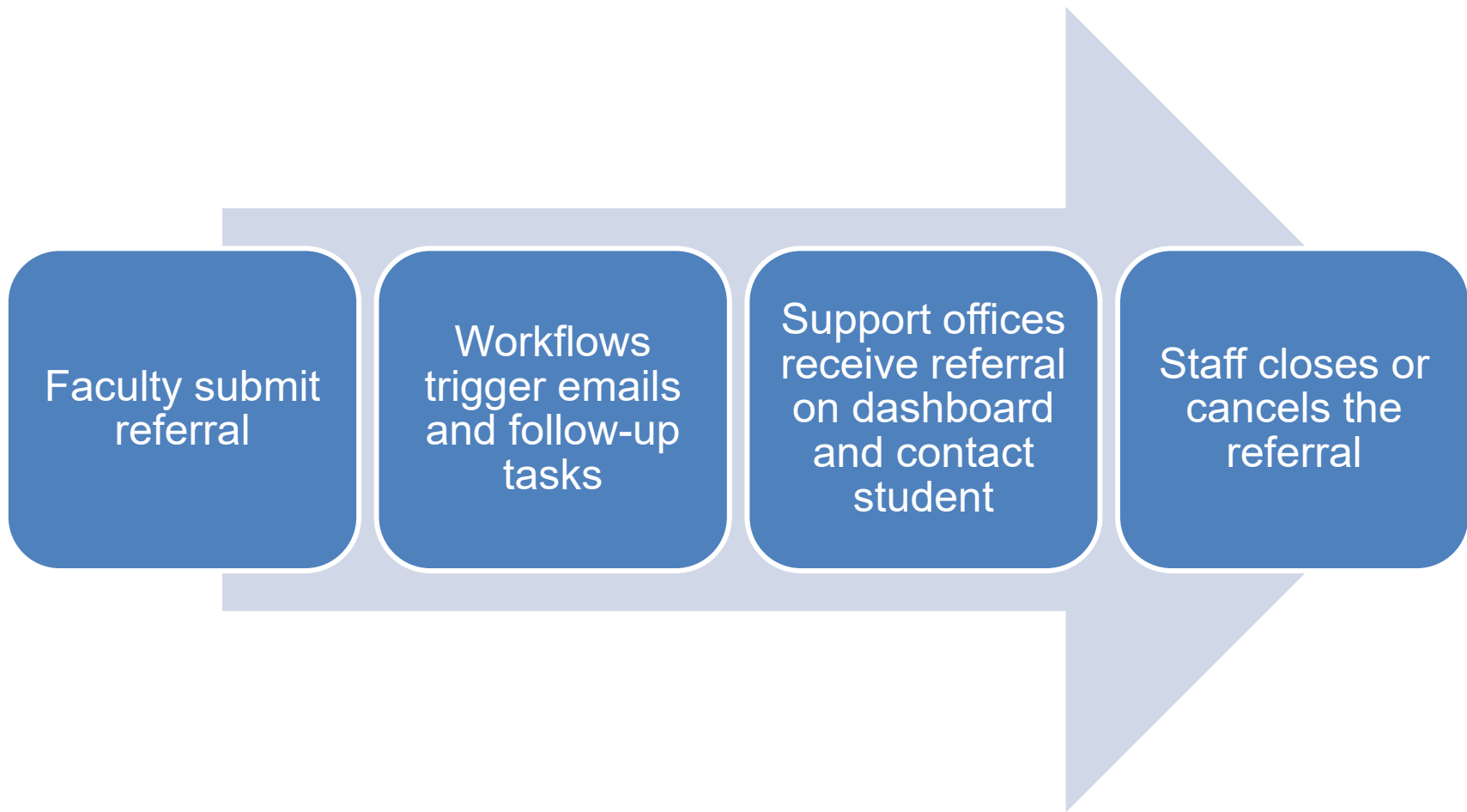


# Student Support System (aka Early Alert)

- Our goal and purpose
- Refreshed our process (Jan. 2024 and Aug. 2024)
- Benefits:
  - Allows faculty to focus on teaching and get their students in touch with the resource experts.
  - Students receive the content, resources, or mental health support they need.




# Student Support System (SSS) Referral Process





# Faculty Portal



ellucian 

Student Support System (SSS) Referral

- ORI-001 WN801
- ORI-001 WN802

Search ORI-001 WN801  Per Page: View All 

1 student(s) selected

<input type="checkbox"/>	Name	
<input checked="" type="checkbox"/>	One, Myiah	
<input type="checkbox"/>	Two, Deltatest	

Select Referral Type

- Academic Reading or Writing Support (TLC)
- Basic Needs (Counseling)
- Content-Specific Course Support (TLC)
- Kudos - Keep Up the Great Work (Direct to student)
- Learning, Study, or Testing Strategies (TLC)
- Mental Health (Counseling)

Cancel Next



Reason for Referral

Myiah is struggling to understand the concept of imaginary numbers and could use support in Chapter 7 homework.

Please describe interaction with student(s). Notes entered will apply to all students selected for this referral.

Back Next



Review & Submit

**Alert:** Content-Specific Course Support (TLC)

Student	Alert Owner
One, Myiah	Learning Center, Teaching

**Notes:** Myiah is struggling to understand the concept of imaginary numbers and could use support in Chapter 7 homework.

Back

Submit





# Workflows trigger emails and follow-up tasks

The image displays two browser windows from Microsoft Dynamics 365. The left window shows the configuration for a workflow named "Delta - EA - Academic Referral 2023\_Child WF". The "Information" tab is active, showing process details and a list of steps. A yellow arrow points to the step: "If Alert Category IS (Academic Referral) send student, TLC, and Faculty an email then stop workflow." Below this, two sub-steps are listed: "Send student/TLC Academic Referral email" and "Send Faculty Academic Referral email", both with "Send email: Create New Message" as the action.

The right window shows the "Send Email" configuration for the workflow. The "From" field is "Learning Center, Teaching" and the "To" field is "[Regarding(Alert)]". The "Subject" is "Academic Referral to Teaching & Learning Center for [Course(Section (Section))] - [Number(Section (Section))].". The email body contains a personalized message: "Dear [First Name(Regarding (Person))], This email has been sent to you regarding your [Course(Section (Section))] - [Number(Section (Section))] with [First Name(Created By (User))] [Last Name(Created By (User))]. The Early Alert was initiated because your instructor believes that receiving additional assistance with the following will help to improve your success in class: [Subject(Alert)]. Within two (2) business days, the Teaching & Learning Center (TLC) will attempt to contact you by phone and/or Delta Outlook Email to arrange an appointment with one of our learning consultants. Should you wish to contact the TLC directly, you are welcome to make an appointment by visiting our chvnerlink<". The "Regarding" field at the bottom is "[Regarding(Alert)]".



# Teaching/Learning Center's Dashboard

Student information redacted for privacy.

ellucian | Advisors | Dashboards

HELP | PRIVACY POLICY | SAVE AS | NEW | EDIT | DELETE | SET AS DEFAULT | SHARE DASHBOARD | ASSIGN

1 Early Alert - TLC

2 TLC Open Alerts - Early Alert

ERP ID (Regar...)	Start Date (Sec...)	End Date (Sec...)	Regarding	Subject	Submitter's Comments	Section	Number (Sect...)	Date Created	Activity Status	Source	Cumulative GP...	Alert Rule
[Redacted]	1/8/2024	2/26/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	The student shared that they struggle with ti...	ECN-222W	WN848	1/30/2024 9:51 ...	Open	Faculty Expe...		Learning, St...
[Redacted]	1/8/2024	4/25/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	[Redacted] stayed after class today and requested ...	BIO-140W	WN210	1/29/2024 9:03 P...	Open	Faculty Expe...	3.30	Learning, St...
[Redacted]	1/8/2024	4/25/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	[Redacted] is dedicated in doing the homework a...	BIO-140W	WN210	1/29/2024 8:55 P...	Open	Faculty Expe...		Learning, St...
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	Student failed exam 1 in third semester in full...	NUR-240W	WN575	1/29/2024 4:13 P...	Open	Faculty Expe...	3.01	Learning, St...
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	Student failed exam 1 in third semester of full...	NUR-240W	WN575	1/29/2024 4:10 P...	Open	Faculty Expe...	3.36	Learning, St...
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	Student failed Exam 1 in NUR 240 (third sem...	NUR-240W	WN575	1/29/2024 4:09 P...	Open	Faculty Expe...	3.24	Learning, St...
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Learning, Study, or Testing Strategies (TLC)	Failed Exam 1 in third semester full time nursi...	NUR-240W	WN575	1/29/2024 4:07 P...	Open	Faculty Expe...	3.37	Learning, St...

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3 TLC Completed Alerts - Early Alert

ERP ID (Regar...)	Start Date (Sec...)	End Date (Sec...)	Regarding	Subject
[Redacted]	1/10/2024	4/24/2024	[Redacted]	Academic Reading or Writing
[Redacted]	1/8/2024	4/26/2024	[Redacted]	Content-Specific Course Supp
[Redacted]	1/8/2024	4/26/2024	[Redacted]	Content-Specific Course Supp
[Redacted]	1/8/2024	2/26/2024	[Redacted]	Learning, Study, or Testing Str
[Redacted]	1/8/2024	2/26/2024	[Redacted]	Learning, Study, or Testing Str
[Redacted]	1/9/2024	4/24/2024	[Redacted]	Learning, Study, or Testing Str
[Redacted]	1/9/2024	4/24/2024	[Redacted]	Learning, Study, or Testing Str

4 TLC Canceled Alerts - Early Alert

ERP ID (Regar...)	Start Date (Sec...)	End Date (Sec...)	Regarding	Subject
[Redacted]	1/6/2024	2/24/2024	[Redacted]	Academic Reading or Writing
[Redacted]	1/6/2024	4/26/2024	[Redacted]	Content-Specific Course Supp
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Content-Specific Course Supp
[Redacted]	1/8/2024	4/22/2024	[Redacted]	Content-Specific Course Supp
[Redacted]	1/9/2024	4/24/2024	[Redacted]	Learning, Study, or Testing Str
[Redacted]	1/8/2024	2/26/2024	[Redacted]	Learning, Study, or Testing Str
[Redacted]	1/9/2024	4/24/2024	[Redacted]	Learning, Study, or Testing Str

5 Alert Category Count of All Early Alerts Submitted

Early Alert Overview - All Alerts Current Term

Category	Count
Academic Referral	140
Counseling Referral	37
Kudos Referral	8





# Staff closes or cancels the referral

Student and faculty information redacted for privacy.

The screenshot shows the ellucian interface. At the top, there is a navigation bar with 'ellucian.' and 'Advisors' dropdown. Below it, a breadcrumb trail reads 'Alerts > Learning, Study, or T...'. A toolbar contains several icons: a question mark for help, a document for privacy policy, a floppy disk for save, a checkmark for 'MARK COMPLETE', a floppy disk for 'SAVE & CLOSE', another floppy disk for 'SAVE & NEW', a yellow button with a red 'X' labeled 'CLOSE ALERT' (highlighted with a yellow callout '1'), and a button for 'TO OPPORTUNITY'. The main content area is titled 'ALERT : INFORMATION' and 'Learning, Study, or Testing Strategies (TLC)'. It displays a list of fields: Subject (Learning, Study, or Testing Strategies (TLC)), Message (redacted), Regarding (redacted), Severity (Medium), Category (Academic Referral), Source (Faculty Experience), Alert Rule (Learning, Study, or Testing Strategies (TLC)), Section (ECN-222W), Owner (Learning Center, Teaching), and Created By (redacted). A 'Close Alert' dialog box is open in the foreground, asking 'Do you want to close the selected 1 Alert?' and 'Select the status of the closing Alert.' The 'State' dropdown menu is open, showing 'Completed' (highlighted with a yellow callout '2') and 'Canceled'. At the bottom of the dialog are 'Close' and 'Cancel' buttons (highlighted with a yellow callout '3'). Below the alert information is a 'NOTES' section with an input field labeled 'Enter a note'.



# Retention Supported by SSS Referrals

Term	Canceled	Completed	Grand Total	% Contacted
Fall 2022	1282	525	1807	29%
Winter 2023	784	589	1373	43%
Spring 2023	136	95	231	41%
Fall 2023	685	513	1198	43%
Winter 2024*	395	152	547	28%
Spring 2024*	90	85	175	49%

\* Start of Automated Attendance Indicators



# Automated Attendance Indicators

- Use “unexcused” attendance data from Faculty Self-Service.
- Associate with the Student Section record.
- Correlate with the length in weeks of the course via workflow.
- Send 3 emails total, text, and optional phone call.



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1<sup>st</sup> absence  
accelerated or  
2<sup>nd</sup> absence  
full-term course



2<sup>nd</sup> absence  
accelerated or  
3<sup>rd</sup> absence  
full-term course



3<sup>rd</sup> absence  
accelerated or  
5<sup>th</sup> absence  
full-term course



Text message  
with 5 options



Phone call task  
to advisor if  
option 1 was  
chosen in text



# Faculty Program Coordinators

- Program coordinators are faculty that oversee their program development.
- To assess the students in their programs, they need access to see student data.



# Prior to Program Coordinator Access

- Faculty who oversee programs but could not see individual records.
- Limited access to reports.
- Reports from their division or registration office



# Which tools would be the most helpful?

**Self-  
Service  
Advising**

**+**

**CRM  
Advise**



# Advantages of Faculty in Self-Service and CRM Advise

## Self-Service

- Zooming into the student's record in Self-Service Advising module for details on planning courses and advising notes.

## CRM Advise

- Use dashboards to see their student lists.
- See all students in their program(s)
- Know which students are registered or not for upcoming term using alerts.



# How do we start?

We have 5 Academic Divisions & ~60 Discipline and Program Coordinators

*Arts & Letters, Business & Technology, Health & Wellness, Science & Mathematics, Social Sciences*

*Examples: Automotive, Child Development, Criminal Justice, Computer Science, Welding  
There wasn't a specified coordinator over Associate in Arts, Associate in Science, or Associate in General Studies degrees until just recently.*

Choose different occupational programs from separate divisions:







# Granting Access - Flows from Colleague to CRM Advise.

## Colleague

- Roles & Permissions set-up by OIT (ORGR, MRPR, AROR)
- Advisor status set to 'yes' in FCTY
- Batch assign students in ADAS or individually in FDAT
- Assign as a “Major” advisor type
- Grants access to Self-Service to assigned students only
- Manual updating at present via:
- Weekly reports of newly admitted/returning students
- Program Change forms
- Semester bulk closure of programs

## CRM Advise

### Security roles:

- Advisor Only
- Faculty Only
- Created a new Advisor Type
- “Program Coordinator”
- Syncs in nightly sync



# Universal Dashboards

ellucian. Advisors Dashboards

HELP PRIVACY POLICY SAVE AS NEW EDIT DELETE SET AS DEFAULT SHARE DASHBOARD ASSIGN

AUTO - NEW - Students not registre...

My Current Term Advisees

Search for records

ERP ID	Full Name ↑	Email Address...
No People found for this Person. Select Add (+).		

Program Coordinators - Not Planned or Registered

Search for records

ERP ID	Full Name ↑	Email Address...
No People found for this Person. Select Add (+).		

Program Coordinators - Planned Not Registered

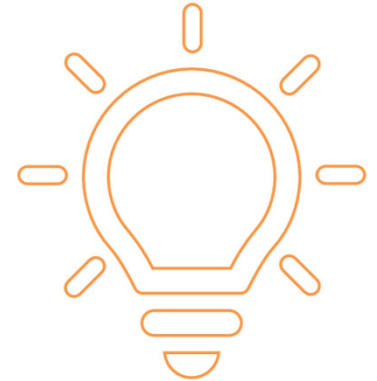
Search for records

ERP ID	Full Name ↑	Email Address...
No People found for this Person. Select Add (+).		



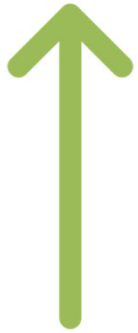
# Pro Tips!

- Self-Service – if you have the “Plan Review Requested” emails turned on, the system will notify anyone in the list of advisors for that student – **including the program coordinators.**
- CRM Advise – Create universal dashboards to promote scalability.





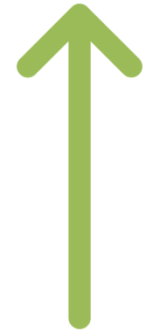
# Retention Supported by Faculty Program Coordinator Access



Visibility = Knowledge



Meaningful interactions between  
students/faculty to encourage  
registration from a trusted source.



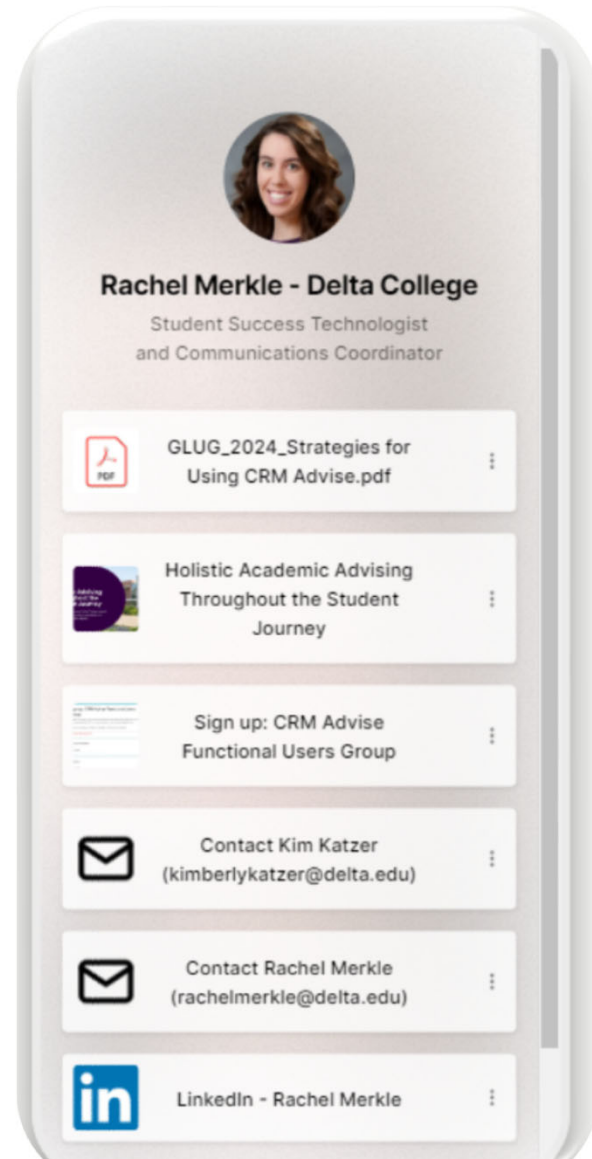
Increases in motivation,  
connection, graduation.



# Want to learn more about our journey?



<https://linktr.ee/rachelmerkle>





# CRM Advise Users Group

- CRM Advise functional, college/university users
- Topic for each meet
- Meet the third Monday of each month via Zoom
- 3 PM EST for one hour
- Recordings sent after each meeting



<https://linktr.ee/rachelmerkle>



# Summary and Questions

1. Texting Integration
2. Retention Communication Plans
3. Student Support System / Early Alert
4. Faculty Program Coordinator Access
5. CRM Advise Functional Users Group



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