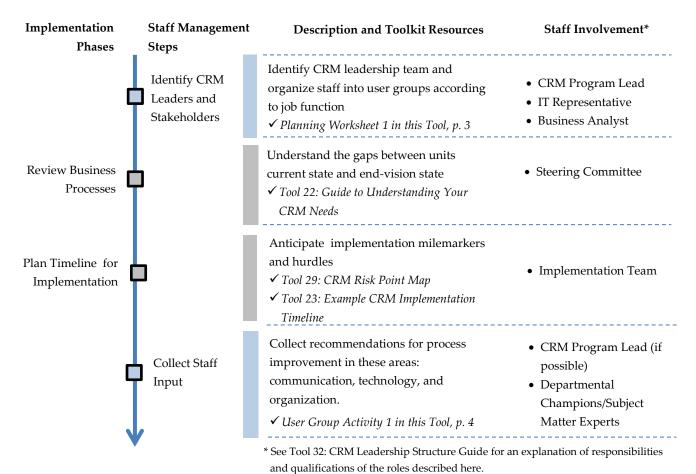
Staff left out of the CRM decision and planning processes are more likely to be disengaged with or even resistant to adoption, which can be crippling to any unit's CRM implementation. This tool highlights resources for garnering staff input, for fostering buy-in during planning and implementation, and for efficiently stewarding training resources (after assessing which staff are resistant to process or technology change).

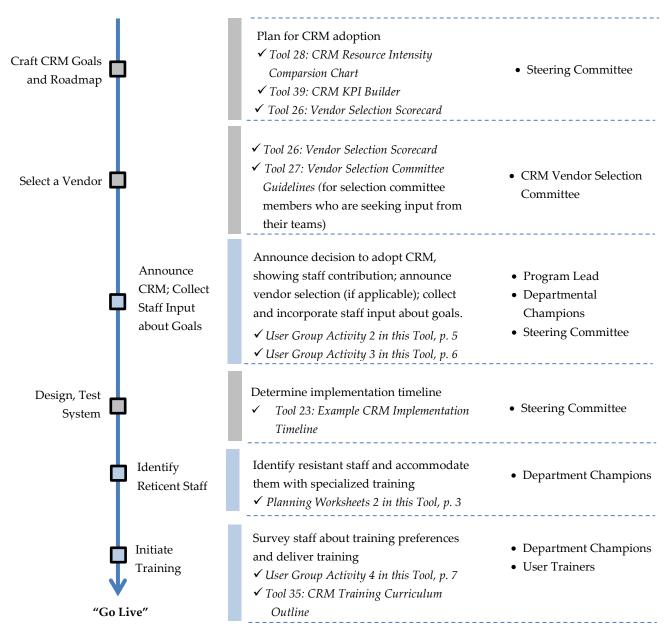
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Roadmap for Involving Staff

The timeline below shows basic implementation phases to the left of the arrow and corresponding staff management steps to the right. The ✓ directs readers to resources within this tool and within the larger toolkit. The right-most column outlines staff roles explained in Tool 32: CRM Leadership Structure Guide.





^{*} See Tool 32: CRM Leadership Structure Guide for an explanation of responsibilities and qualifications of the roles described here.

Staff Management Resources for Leaders

Use the worksheets in this section to plan user group activities and special training for staff resistant to change.

Planning Worksheet 1. Assigning Staff to User Groups

<u>Directions</u>: Select the functional areas that should be represented in each user group. Consider these job functions: marketing/recruitment staff, admissions staff, IT staff, academic and retention advisors, and faculty members, and program directors.

User Group Name	Departments Represented	Staff Names
Example: Pre-enrollment	Marketing specialists, recruitment advisors	John Mustard, Sylvia Peacock, Richard
Users	and/or admissions counselors	Green, Mildred White

Planning Worksheet 2. Training Development for Resistant Staff

<u>Directions:</u> Use the table below to outline special training for reticent staff. Consider the following when designing training:

Content

- Exercises that build empathy between the staff member and the student (e.g., role play)
- Practice time with new technology in a sandbox
- Case studies that illustrate how process and technology changes will improve staff's productivity and increase quality of work
 - o http://emaspro.com/wp-content/uploads/2011/11/SNHU-Case-Study v1 01-07-11.pdf
 - o http://www.jisc.ac.uk/media/documents/programmes/bce/teeside_casestudy.pdf

Delivery

- Contacts recommend an informational tone with little to no discussion of punitive repercussions
- One-on-one conversations allows for better professional development
- Consider pros and cons of trainers: peer, supervisors, non-departmental personnel

Staff name	
Content	Activities that meet guidelines above:
Delivery	Intended tone, format, trainer:
Frequency	
"Mission Accomplished" Indicator	

Staff Buy-In Activities

User Group Activity 1: Staff Input on Process Improvement

"Suggestions Box" Worksheet: User Group Meeting, mm/dd/yy

As we plan for the future, Example University's COE unit is in the process of evaluating its communication with prospective and current students, including staff-student interaction. We would like to hear your suggestions about how we can change the unit's communication processes and technology to help you do your job better. We know that you work hard to serve prospective and current students; by putting in place right tools and system improvements, we hope to help you and, in turn, improve communication with students. Please complete this worksheet and return it to your supervisor by mm/dd/yy.

•	Example for triage desk staff: To answer prospective students' questions about the application produced in the staff.
•	
	ase describe inefficiencies or technological limitations that prevent you from doing the best job po the core functions listed above:
•	Example for recruitment counselor: I call prospective students to see if they need help applying. I have scroll through a long spreadsheet to determine their program of interest and 50 percent of the time program of interest is listed, so I'm working with very little information when reaching out.
, Wh	nen, how, and why do you communicate do you have with prospective or current students? Example for program director: I meet prospective students at corporate events and conferences (all per year) and promoting our online programs for professionals
	nat do you think are the prospective and current students' main concerns or complaints about the
)	Example for program director: If a prospective student expresses interest, I pass along the student's and contact information to the recruitment team but I am never looped in about whether the stude applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I ge
e l	list any other suggestions for improved communication processes or organization.

User Group Activity 2: Email Acknowledging Suggestions

This email template offers a model for acknowledging staff suggestions and mapping them to improvements planned with the launch of CRM technology and/or consultant engagement.

From: CRM Leaders
To: All COE Unit Staff

Subject: Thank you for the suggestions! We've built an improvement plan around them.

Dear colleagues,

Thank you for completing the "Suggestion Box" Worksheet at your last user group meeting. Based on your input, Dean Humboldt has directed a team of [insert department names e.g., marketing and IT)] representatives to plan and lead a series of communication and business process improvements based on customer relationships management (CRM) philosophy. Under this philosophy, we will develop smarter processes for communicating with prospective students so that our unit better retains the attention of prospective students, better answers their questions and concerns based on each prospective student's need, and ultimately improves conversion from prospect to applicant to enrolled student.

To accomplish these improvements, we've decided to partner with a technology vendor, [insert vendor name], and an implementation consultant, [insert consultant name]. Both partners have excellent track records and have worked with our peers like [insert peer university names]. We are at the beginning of designing these process improvements with the help of our vendor partners, but we wanted to give you some examples of how your suggestions have informed our first-draft efforts.

Staff's Suggestion (From User Group Activity 1)

Process Improvement Planned

Vendor Improvements

- 1. If a prospective student expresses interest, I pass along the student's name and contact information to the recruitment team but I am never looped in about whether the student applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I generate at conferences.
- 2. I call prospective students to see if they need help applying. I have to scroll through a long spreadsheet to determine their program of interest and 50 percent of the time no program of interest is listed, so I'm working with very little information when reaching out.

Marketing staff will generate reports based on lead source and will send reports about conference-generated leads (across unit and across each program individually) to program directors. Program directors and their peers will see the fruits of good conference recruitment.

Changes to inquiry form will collect more robust prospective student information

Vendor technology will allow both program director staff and recruitment staff to access prospective student records.

Consultant will devise the best way to collect broad discipline of interest even from the undecided prospects. How can this question be incorporated into an initial or later inquiry form?

Thank you again for you again for your suggestions. We will keep you updated as we finalize our first draft of goals for CRM implementation. Stay tuned for information about your next user group session and training and resources that will help staff take advantage of CRM tools and techniques.

All the best,

Julie Furtado (marketing), Karishma Ackerman (admission), Brian Helinek (IT)

CRM Leaders Team

User Group Activity 3: Codifying Staff Contributions to CRM Goals

Your Contributions to CRM: User Group Meeting, mm/dd/yy

In this session, the meeting facilitators will review your input from the first user group session and will outline our goals for customer relationship management (CRM) philosophy-informed goals. In the middle column, explain how you can contribute to the unit's proposed goals for improved communication. In the right column, modify or make additions to the goals stated in the left-most column.

	How You Can Contribute	Goal Additions/Modifications			
Revenue Goals					
Example goal inserted by CRM leaders: reduce cost per lead	Sample comment from hypothetical recruitment advisor: I can convert more of our pay-per-click advertising leads to applicants by better tailoring phone or email outreach to prospective students' goals/motivations.	Sample suggested additions: Improve percentage of pay-per-click leads reached by phone. Improve conversion rates after initial phone conversation.			
Marketing and Operational	Excellence				
Example goal inserted by	Sample comment from hypothetical	Sample suggested additions: Complete			
<u>CRM leaders:</u> increase	information technology specialist: I can	at least one A/B test on subject lines			
email open rates	work with the marketing staff to develop an A/B test for subject lines.	per month.			
Example goal inserted by	Sample comment from hypothetical	Sample suggested additions: Develop			
<u>CRM leaders:</u> increase	marketing director: My staff and I can	at least six new pieces of alumni-			
number of repeat	develop alumni-oriented email campaigns	oriented email content for pilot			
students	that encourage alumni to re-engage with the unit.	campaign. Set goal for open rate and track improvement with each new campaign.			
Goal Category:					

User Group Activity 4: Staff Survey about Training Preferences

What Type of Training is Best for You?

<u>Directions</u>: As part of the road to CRM implementation, we'll be offering a series of trainings. Please check *only one box* that corresponds to your *most-preferred* option for each category.

Training Format

- □ In-person discussion with take-home computer assignments
- □ In-person discussion with computer demonstration in computer lab
- □ Self-paced, online module with comprehension quiz and with comments submission via e-mail

Training Audience

- ☐ Mostly unit-wide trainings
- □ Mostly department-wide trainings
- ☐ Mostly trainings based on small, job function groups

Training Schedule

- □ Intensive format (e.g., over 2-day, in-office retreat)
- □ Once per week over 6-8 weeks
- ☐ Twice per week over roughly one month

Resources for Additional Training

- □ One-on-one sessions with your department's "super user"
- □ One-on-one sessions with your supervisor
- □ Shadow days, following a peer with above-average speed of adoption