Optimizing our CRM & Empowering the Admissions Staff

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Meet the Presenters

Dani Rollins

Assistant Vice President
for Enrollment
Management & Director
of Admissions

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15 years in admissions
and enrollment
management

Crystal Garvey

Senior Associate Director
of Admissions, Systems
and Processing

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18 years in admissions
and enrollment
management

Overview

- NIU & admissions at a glance

- Challenges

- Moving Forward

  - Organizational Structure

  - Systems

- Continuing Success

- Questions/Discussion

NIU at a Glance

- Founded in 1895

- 3rd Largest Public University in Illinois

- 230,000 Huskie Graduates

- Enrollment: 20,130

- 6 Undergraduate Colleges

Undergraduate Admissions

32 Full time staff

- 2 part time/extra help
- 3 graduate assistants
- 60 student staff

Annual averages:

- ~26,000 applications
- ~60,000 supporting documents
- Over 13,000 prospective student visitors
  - ~6 walk-in appointments per day
- ~68,000 outbound calls
- Over 350 visits to high schools and community colleges
- Over 500 colleges fairs and off campus presentations

Challenges

Morale issues

Staff turnover

Decentralization

Lack of consistent leadership

Mistrust of admissions

Information hoarding

No professional development

Challenges

- Down 2 associate directors

- Down 9 processing staff

- Down 5 admissions counselors

- Mismatched duties and personnel

- Low morale

- Decentralization

- Multiple recruitment voices

- Mistrust and loss of confidence in admissions

- Poor communication flow

- Image issues in the market
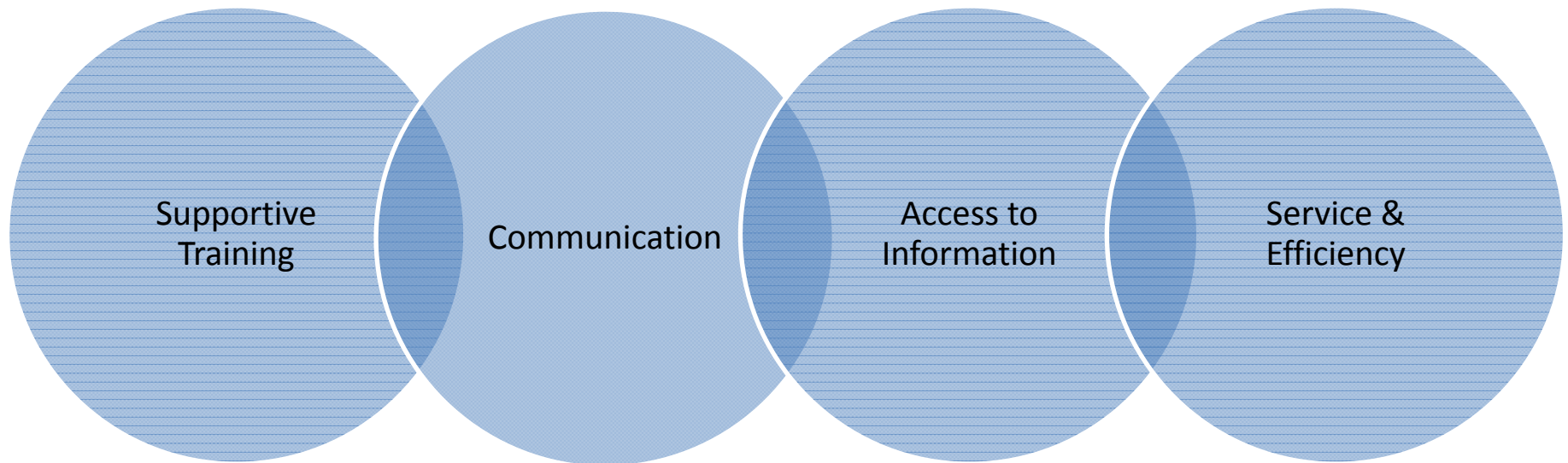
CRM Challenges

- Our CRM was a microcosm for what was going on in Admissions
  - Lack of organization and leadership
  - No oversight
  - No training or documentation
  - Messages were inconsistent, badly planned, poorly written or simply didn't exist for some segments
  - Hobsons client since 2007

- Formal recruitment communication ceased in September of 2014

Moving Forward

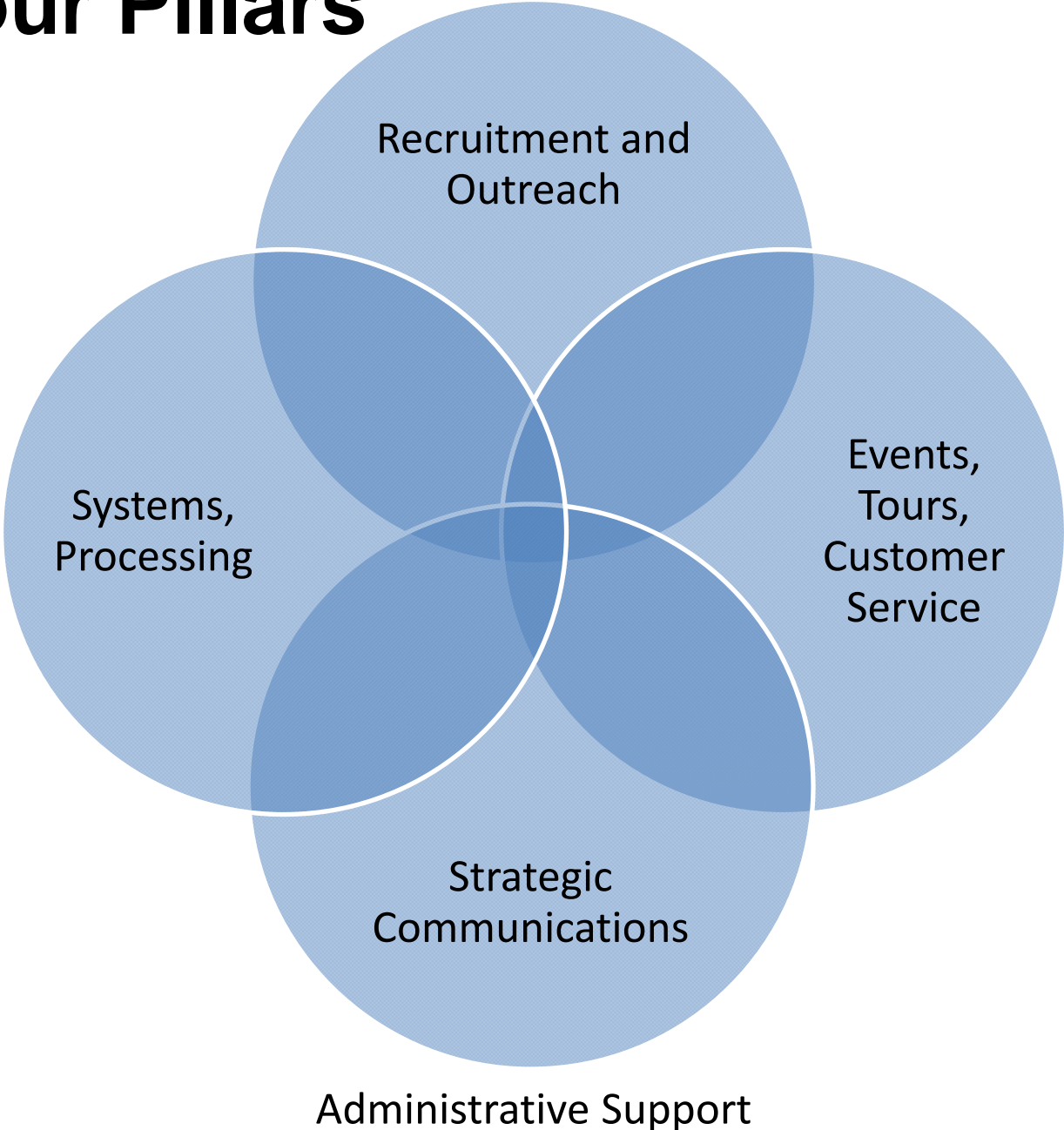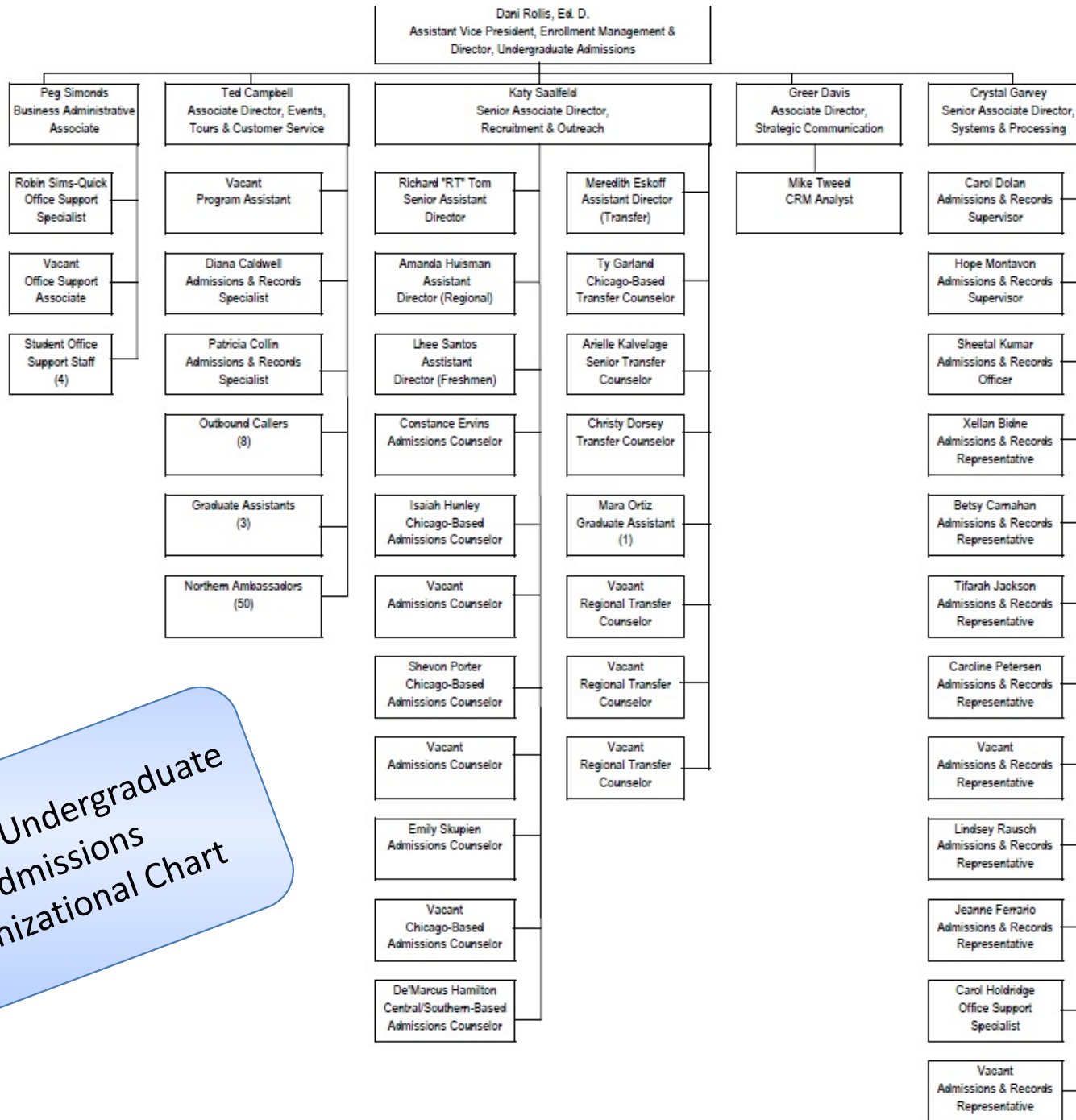# Guiding Principles

Supportive Training

Communication

Access to Information

Service & Efficiency

The Four Pillars

Recruitment and Outreach

Systems, Processing

Events, Tours, Customer Service

Strategic Communications

Administrative Support

Dani Rollis, Ed. D.
Assistant Vice President, Enrollment Management &
Director, Undergraduate Admissions

Peg Simonds
Business Administrative
Associate

Ted Campbell
Associate Director, Events,
Tours & Customer Service

Katy Saalfeld
Senior Associate Director,
Recruitment & Outreach

Greer Davis
Associate Director,
Strategic Communication

Crystal Garvey
Senior Associate Director,
Systems & Processing

Robin Sims-Quick
Office Support
Specialist

Vacant
Program Assistant

Richard "RT" Tom
Senior Assistant
Director

Meredith Eskoff
Assistant Director
(Transfer)

Mike Tweed
CRM Analyst

Carol Dolan
Admissions & Records
Supervisor

Vacant
Office Support
Associate

Diana Caldwell
Admissions & Records
Specialist

Amanda Huisman
Assistant
Director (Regional)

Ty Garland
Chicago-Based
Transfer Counselor

Hope Montavon
Admissions & Records
Supervisor

**Student Office
Support Staff
(4)**

Patricia Collin
Admissions & Records
Specialist

Lhee Santos
Asstistant
Director (Freshmen)

Arielle Kalvelage
Senior Transfer
Counselor

Sheetal Kumar
Admissions & Records
Officer

**Outbound Callers
(8)**

Constance Ervins
Admissions Counselor

Christy Dorsey
Transfer Counselor

Xellan Bidne
Admissions & Records
Representative

**Graduate Assistants
(3)**

Isaiah Hunley
Chicago-Based
Admissions Counselor

Mara Ortiz
Graduate Assistant
(1)

Betsy Carnahan
Admissions & Records
Representative

**Northern Ambassadors
(50)**

Vacant
Admissions Counselor

Vacant
Regional Transfer
Counselor

Tifarah Jackson
Admissions & Records
Representative

Shevon Porter
Chicago-Based
Admissions Counselor

Vacant
Regional Transfer
Counselor

Caroline Petersen
Admissions & Records
Representative

Vacant
Admissions Counselor

Vacant
Regional Transfer
Counselor

Vacant
Admissions & Records
Representative

Emily Skupien
Admissions Counselor

Lindsey Rausch
Admissions & Records
Representative

Vacant
Chicago-Based
Admissions Counselor

Jeanne Ferrario
Admissions & Records
Representative

De'Marcus Hamilton
Central/Southern-Based
Admissions Counselor

Carol Holdridge
Office Support
Specialist

Vacant
Admissions & Records
Representative

Office of Undergraduate Admissions Organizational Chart

Systems in use

Hobsons Connect (CRM) → Application → OnBase → PeopleSoft (MyNIU)

CRM Optimization Details

- Massive system clean-up
  - There were over 12,000 filters
  - Catalogued the most useful filters in one place

- All contacts are now flowing through a "Stage Funnel"
  - Suspect
  - Inquiry
  - Applied
  - Decision
  - Confirmed
    - Enrolled term will be passed via nightly interface

- Territories
  - Defined, assigned nightly via bulk edits

ETO Optimization Details

- Organizations
  - Students assigned to their high schools or community colleges

- Rebuilt multiple online interest pages
  - Removed fields
  - Updated branding

- All admissions senior staff trained

Overall Processing Changes

- The processing unit of the Admissions Office consisted of 4 processors
  - Several new hires (8 processors & 2 supervisors)
    - New training materials & process
    - Cross-training
    - Expectations & team building

  - Automating remaining paper/manual processes
    - Holistic review

  - Eliminated inefficient data entry practices

  - Participation in & contribution to all-staff training

Application for Admission

- Online application improvements, including:

  – Provide custom link for students to request HS transcripts. If students use this link when their transcripts arrive they are already indexed and drop directly into the student file

  – Removed all links to paper .pdf applications, driving all traffic to online application

  – Added the ability to waive application fees from schools/districts which provide free/reduced lunch to all students in the school/district

  – Better identification and data collection for students in off-campus, online and blended programs

Application for Admission (cont.)

- Collection of parent first and last name

- DOB field now requires that year of birth must be at least 10 years ago

- We have changed the field labels for from/to dates on the high school and college pages to be more plain spoken (i.e. when did you or will you finish high school?, etc.)

- We rolled up the former name fields. Students with former names will have to select a checkbox for the former name fields to be displayed.

- Addition of question to ask the college affiliation for visiting students

OnBase

- Improvements to OnBase, include:

  - Empowered admissions counselors to print documents (fee waivers, major changes, etc.) to the document imaging system

  - Reworked and streamlined workflow in document imaging system for holistic review processes

  - College review reports/emails

  - Provide custom link for students to request HS transcripts. If students use this link when their transcripts arrive they are already indexed and drop directly into the student file

PeopleSoft (MyNIU)

- Improvements made in PeopleSoft, include:

    – Scholarship offers in the admission letter

    – Elimination of our transfer waitlist policy

    – Elimination of holistic review for most homeschooled students

    – Query viewer access and training for all staff

    – Adding student groups in PS as a result of new application questions for off-campus, online and blended programs.

Websites, presentations, misc.

- Campus wide centralized Marketing and Communications
  - Handles Admissions social media/web
  - Print publications

- New associate director and CRM analyst positions created

- Updated website
  - More accessible, friendly feel

- Market survey completed

- New daily visit presentation

Continuing the success…

- CRM
  - Centralizing prospective student communication
    - Pilot with College of Liberal Arts & Sciences
    - Continue to refine procedures and communications: ants vs elephants
  - Develop reports and dashboards to maximize stage, territory, and organizational assignment work
  - Annual CRM tune-up and training

- Standardizing and centralizing admissions decisions
  - Refining college reports, training, collaboration with other units

- Further automation when possible

Thank you!