Increasing Retention Efforts with CRM Advise

Presenters: Jamie Carman, Ryan Wilborn

Outline

What is CRM Advise?

How does CRM Advise support students?

How does CRM Advise support me?

Conclusion (Q & A)

What is CRM Advise?

CRM Advise is a bridge-builder.

- "CRM" stands for "Customer Relationship Management".
- The platform powers connections between new/continuing students and our institution.

CRM Advise

- First, CRM Advise isn't meant to replace Banner but rather add context to data in Banner.

- CRM Advise is a data-driven tool to provide individualized support between students and student success staff.

- CRM Advise allows us to provide an early alert system that will be more effective as the process is simplified.

- It will standardize our communications across campuses with texting and automated email options.

- It will allow us to track academic engagement with the ability to integrate Canvas data.

Practical facts about CRM Advise

- The data in CRM Advise is largely sourced from Banner.

- Communication plans can be built that email/text students based on a multitude of criteria.

- The platform can facilitate event planning and event registration.

- Though "Advise" is in the name, CRM Advise offers features that can be leveraged by other business units.

  - For example, electronic statement notifications will be sent through a communication plan in Advise. This is a business office function.

How does CRM Advise support students?

CRM Advise highlights students' blind spots and relays requests for help.

- Student data in Banner can be used to evaluate retention risks.

- Students can submit a request for assistance, which is routed to staff.
  - Request Assistance
  - Basic Needs
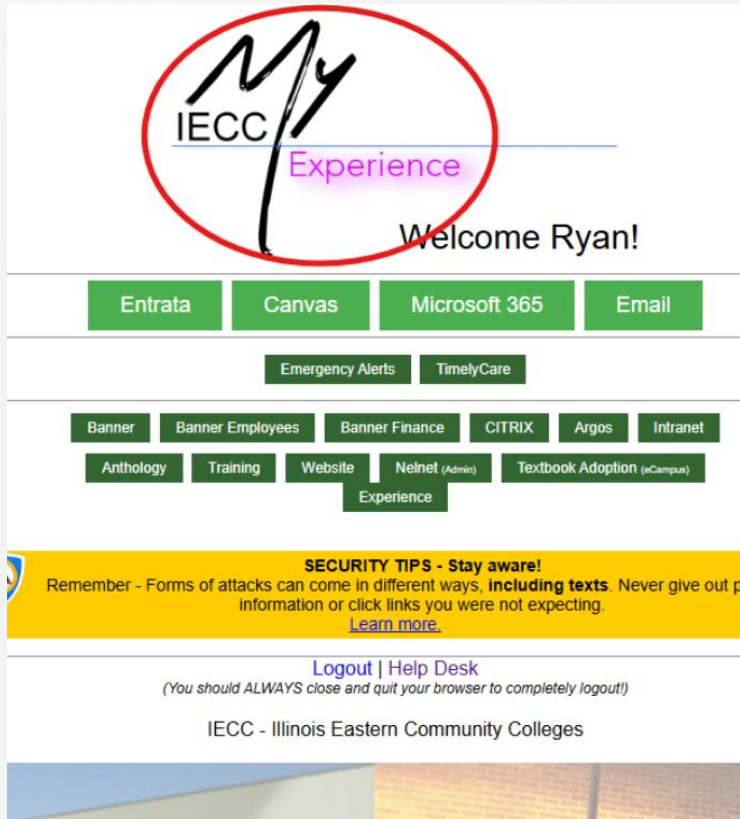
How does CRM Advise support me?
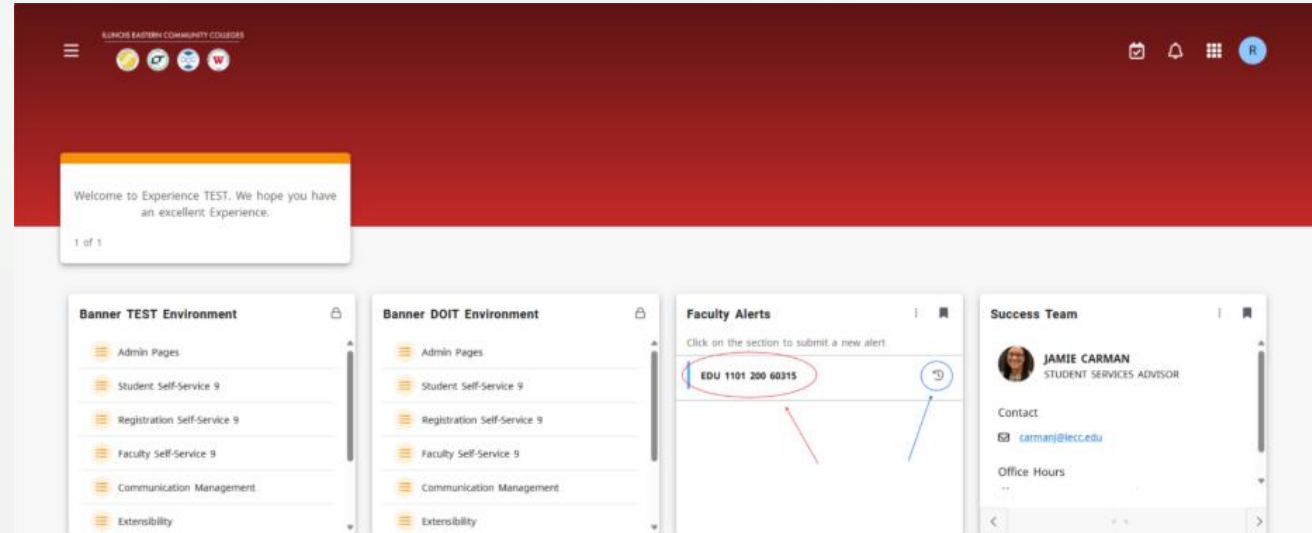
CRM Advise gives you a seat at the table.

- Beginning this fall term, faculty can raise an "early alert" on students in their sections.

- Staff actions taken to address early alerts will automatically be emailed to faculty.

Submitting an Early Alert

- From MyIECC, open "MyIECC Experience"

Submitting an Early Alert

- Within Experience, locate the "Faculty Alerts" card

  - This card will display a list of sections that you've been assigned to

  - Click the section that you would like to submit an alert in (see red circle)

  - Alternatively, if you would like to view the alerts that you've previously submitted, click the rewind button (see blue circle)

Submitting an Early Alert

- Check the box next to the student that you would like to raise the alert for (see yellow circle)
  - NOTE – you can select multiple students, so long as the alert type for all of them is the same
- Click "Create Alert" (see green circle)
- Select the alert type from the dropdown (see red circle)
- Add any comments that you would like the early alerts team to see (also circled in red)
  - NOTE – when selecting multiple students, it's advised that you do not add a note

Submitting an Early Alert

That's all there is to it!

At 10:00am or 3:00pm (depending on when the alert is submitted), the student will receive an email notifying them that an alert has been raised in that section

Early Alert Submission Email Example

Submitting a Kudos Alert

IECC Kudos Awarded!

advisenoreply
To ☑ Wilborn, Ryan

Tracked To Dynamics 365

██████████

Your instructor has submitted positive feedback on your performance in class.

Instructor's Comment:

"Encouraging message goes here." - from ████████████ (████████)

Thank you,

IECC Early Alerts

Early Alert Comment Added

IECC Early Alert Submission - Comment Added

A advisenoreply
To ✓ Wilborn, Ryan

Tracked To Dynamics 365

████████████

A member of the Early Alert team has posted an update on "Missing Assignments/Test" for ███████████ (███████) in CRM Advise.

Comment from Early Alert:

Called the student, advised them to stay on top of classwork. (from ████████████).

Thank you,

IECC Early Alerts

Early Alert Closed

IECC Early Alert Closed

A   advisenoreply
To   ● Wilborn, Ryan

Tracked To Dynamics 365

███████████████,

The following early alert has been closed by RYAN WILBORN:

- Missing Assignments/Test in ████████ for ████████████████

Please submit a new early alert if the concern persists.

Thank you,
IECC Early Alerts

Conclusion

Final Notes

- CRM Advise offers features a diverse feature set that promotes engagement with students, especially in a retention capacity.

- Conditions in students' Banner data that indicates retention challenges can be easily identified within CRM Advise.

- Students submit a request for assistance through CRM Advise.

- Faculty-driven early alert submission has built-in feedback mechanisms, keeping submitters in the loop on the progress of an early alert.

  - Procedural documentation and open office hours for training will be communicated to faculty by the 3rd week of the Fall 2025 term.

Thank you

Q & A may begin

Jamie Carman

Ryan Wilborn