Ellucian Recruiter Training

Grad Admissions 09/11/2013

Agenda

- Training Goals
- Recruiter Overview
- Training Topics
- Wrap Up

Training Goals

1
- Develop proficiency and understanding of using and tracking emails between Outlook and Recruiter.

2
- Develop proficiency and understanding of best practices in creating and using the Advanced Find feature in Recruiter.

3
- Develop proficiency and understanding of best practices in creating and documenting Activities in Recruiter.

Websites for Today

support.corban.edu

recruit.corban.edu

Recruiter and CRM Overview

What is CRM?

Customer Relationship Management (CRM)

Recruiter is built on a **Customer Relationship Management (CRM)** philosophy.

Summary

Personalize the recruitment process

↓

Build better relationships with potential students

↓

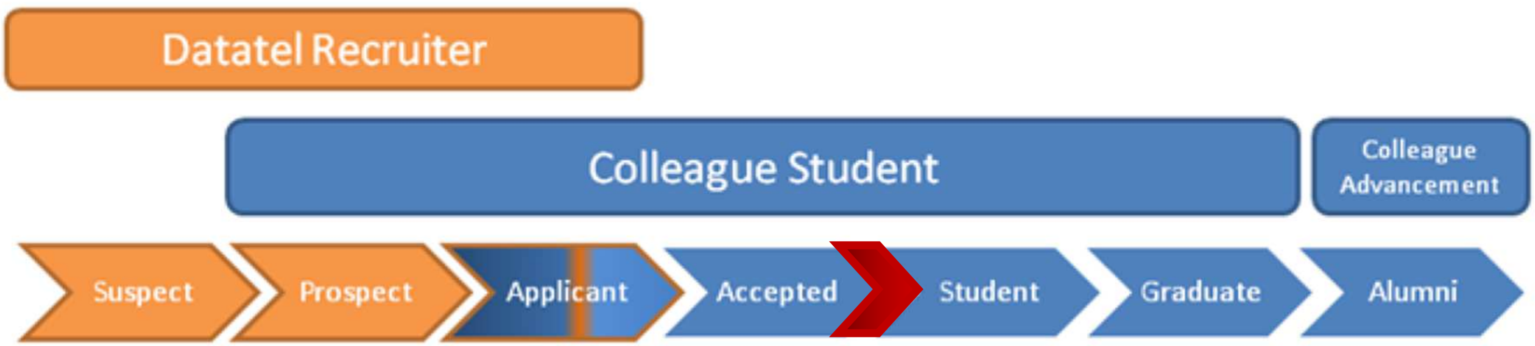
Increased applicants and future students!

Why CRM?

Track activities, emails, and correspondence with contacts.	Store detailed notes and history.	Generate reports.
Manage processes.	Manage leads (suspects) and contacts (prospects). Create marketing lists.	Access information about contact records in one place.

Track campaigns, cost, return on investment (ROI), etc.

Recruiter and the Admissions Process

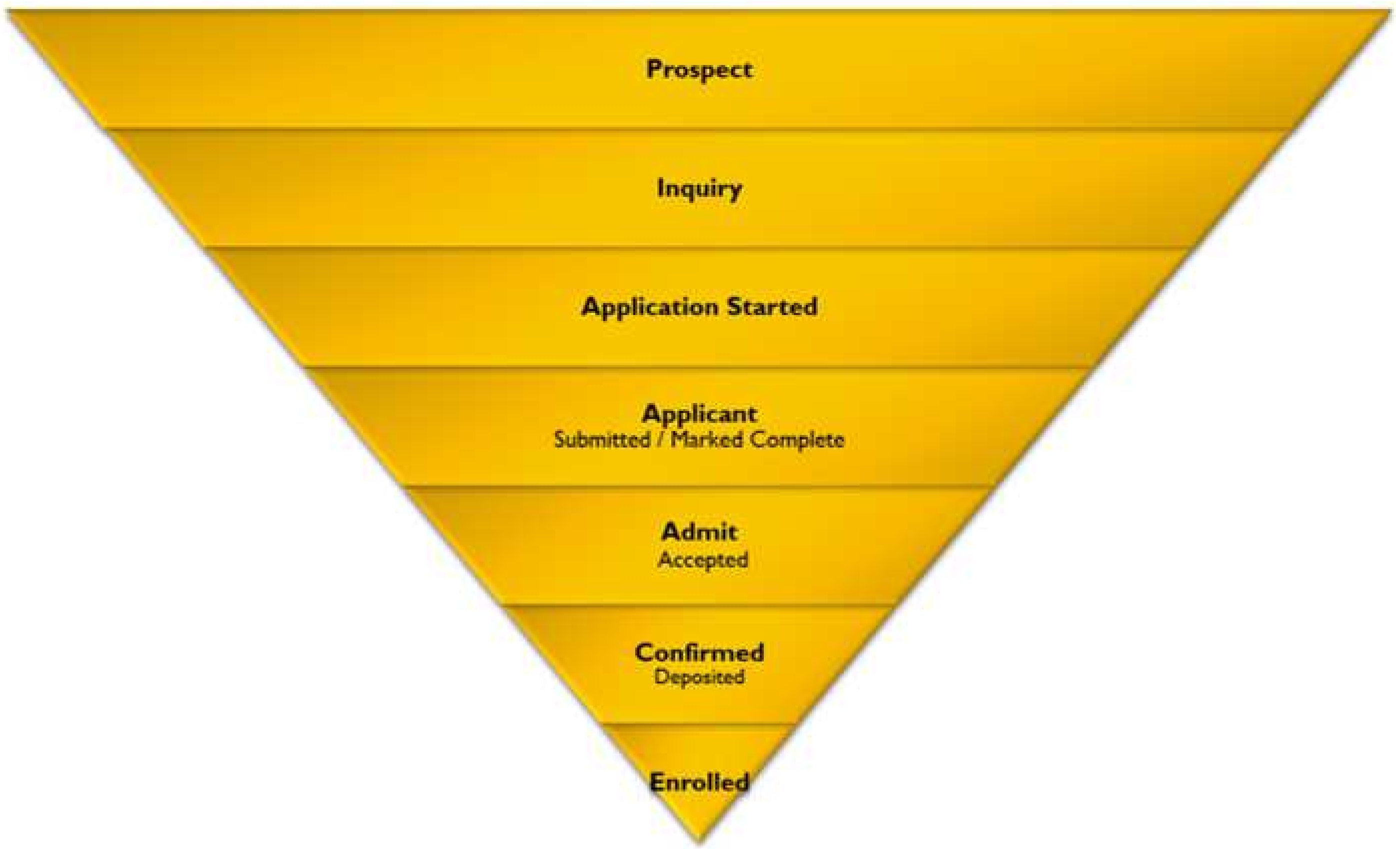


Important Terminology

Term in Recruiter	Term in CRM	Definition
Suspect	Lead	A record that has not expressed direct interest in Corban but that Corban has identified an interest in pursuing
Prospects	Contact	A record that has expressed some level of interest in Corban.
Organization	Account	A group external to the institution that is part of the recruitment process, such as a school, camp, church, etc.

Used Interchangeably

The Admissions Process and Terminology



Terminology Continued

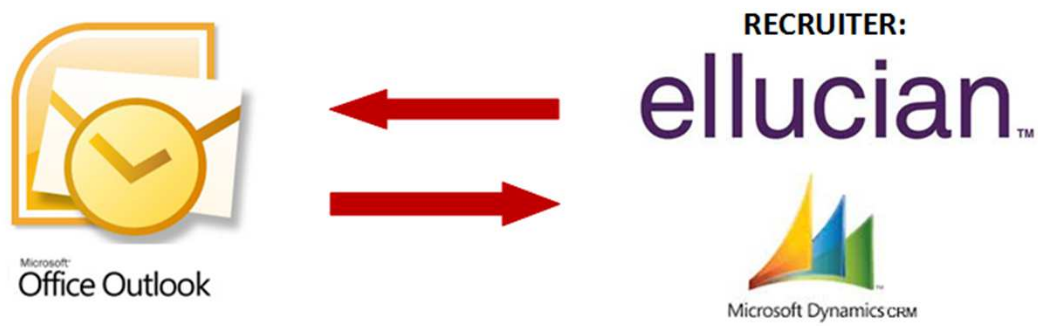
Prospect	=	A prospective student who has expressed some level of interest in Corban.
Inquiry	=	A prospect who has initiated contact with Corban
Application Started	=	A Prospect who has started but not submitted an application.
Applicant	=	A Prospect who has submitted an application.
Applicant	=	A Prospect who has completed an application. Prospect remains an applicant even after completion of application.
Admit	=	A Prospect who has been accepted to be a student at Corban.
Confirmed	=	A Prospect who has deposited. No change in the way a deposit is documented.
Enrolled	=	A student who has attended classes at Corban beyond first drop date.

TRAINING GOAL 1: OUTLOOK

Develop Proficiency and Understanding of Using and Tracking Emails Between Outlook and Recruiter.

- You will be able to:
  - Create and track Outlook emails in Recruiter using standard tracking guidelines.
  - Explain the email tracking relationship between Outlook and Recruiter.
  - Set the correct Outlook email system settings in Recruiter and adjust settings as needed.
  - Troubleshoot common tracking errors.

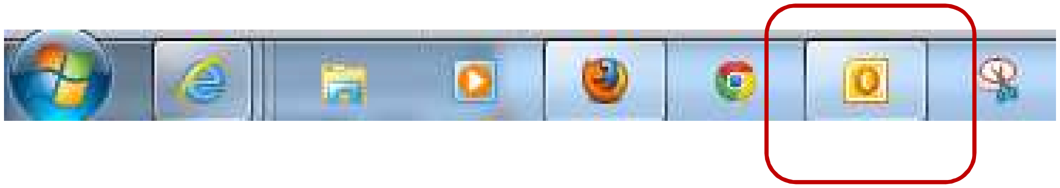
Outlook and Recruiter



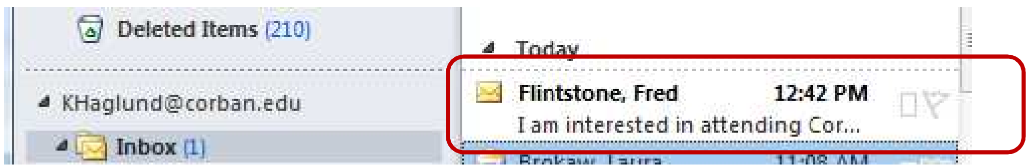
A Quick Review

The Basics of Tracking Emails in CRM for Outlook . . .

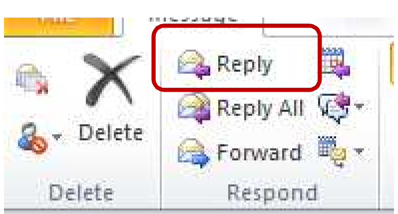
1. Open your Outlook

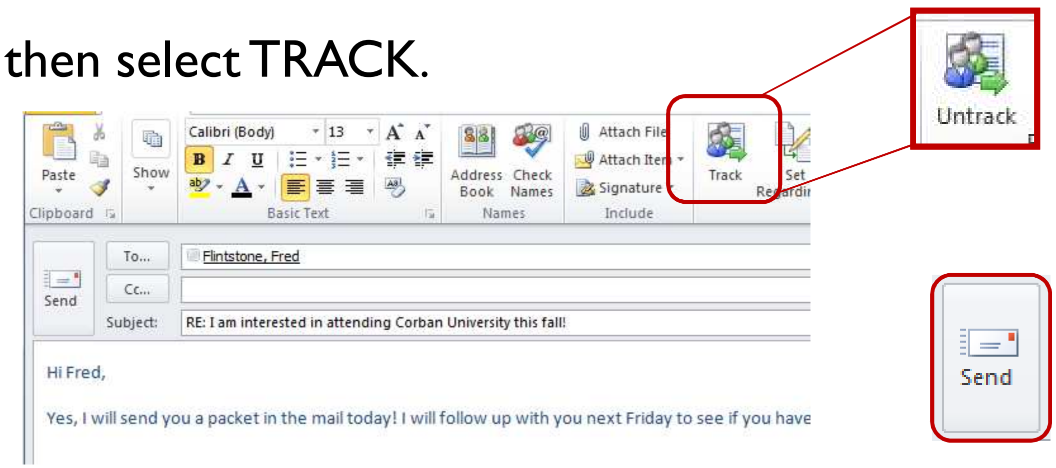


2. Identify your email that needs to be tracked.

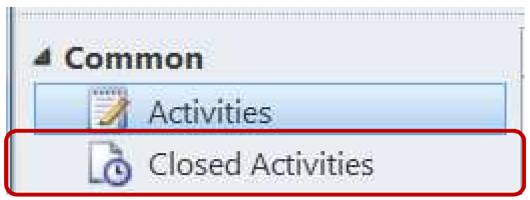


3. Open, type your reply, then select TRACK.



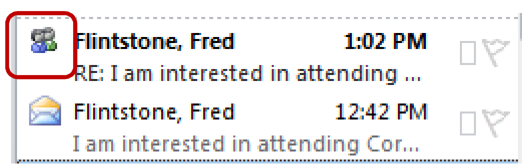


4. Email will now track in Recruiter. Verify in the Prospect Record under Closed Activities.



- You should see the email as a completed activity*

- When prospect responds you will now see a CRM icon next to their name.



- This means this email thread will now be tracked in the Prospect Record in Recruiter. You do not need to track emails in this thread again. **

Troubleshooting Tracking Problems

- New Troubleshooting Documentation on the Support Site!
  - Manually Synchronize
    - Manually synchronize information between Outlook and CRM
  - Check Personal Email Settings
  - Delete Temporary Files, Enable Plugin
- If none of the items on this list work, you will need IT support.

Mass Email Style Guide

- Mass Emails in Exact Target
  - Groups of 200 or above.

  OR
  - When you want something formatted
  - Smart Phone Considerations
  - Keep It Simple:
  - Provide Multiple ways to Respond.
  - Considerations for Attachments (size limits, static documents)

- Support Site Document

TRAINING GOAL 2: ADVANCED FINDS

Develop proficiency and understanding of best practices in creating and using the Advanced Find feature in Recruiter.

Advanced Finds

- Assists in using Recruiter most effectively.

- Allows you to:
  - Look for prospects based on specific information
  - Accessible from multiple locations
  - Manage your prospects more efficiently
  - Create customized reports
  - Create marketing lists for campaigns
  - Process activities

Accessing Advanced Finds

- Open the Advanced Find window by clicking the button in the toolbar.
  - It's found either by itself or under a sub-heading of data:

Official document on support site

Advanced Finds

- **Best Practices**
- Choose your Entity.
  - **Will almost always be "contacts"**
  - **Open from the module you want to search from**
- Standard Search Criteria
  - **Status Equals Active:**
  - **Relationship Type Equals Prospective Student**
  - **Recruiting Territory Contains Data**
  - **Academic level of Interest equals [Choose Level]**
  - **Anticipated Entry Term Equals [Choose Term]:**
  - **Test Record Does Not Equal Yes**
- Communication Standards (Support Site)
- General to Specific (Funnel)

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Activity #1

Advanced Find Scenarios

What to Do . . .

1. Read the **Advanced Finds – Best Practices** Article
2. Find a partner that has a matching scenario card
3. Under "Advanced Finds" → System Views, open the "Standard Five Search Criteria" view
4. Follow the instructions on you scenario card

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Scenario: Emails

Using the" Standard 5 Search Criteria" Advanced Find as a starting point, create the following find:

Purpose: You want to send an **email** to all TUG prospects who are interested in attending Corban in the fall of 2014.

1. First create this find **without** filtering your criteria to reflect communication standards. Make a notation of the search results you find.
2. Next, run the same search adjusting your advanced find to reflect the communication standard for Advanced Finds best practices for emails and bulk emails. Make a notation of the search results.
3. Was it different than the first search you ran? Why do you think it would be important to filter this information when emailing to students? Discuss with your partner.

- **Extra**: What if you wanted to make phone calls to these prospects. How do the numbers change?

Activities - Best Practices

- Official documentation on support site
  - What Information Should I Record for an Activity?
  - Other Important Information for Activities
  - Creating an Activity
  - Creating Bulk Activities (Quick Campaigns)
  - Saving and Closing an Activity

Activity #2

Activities Disucssion

What to Do . . .

1. Read the **Activities – Best Practices** Article
2. Find a partner
3. Discuss the questions on the slip
4. Note important findings, information or questions to share with the group.

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Q2:

- Under "What Information Should I Record for an Activity?" several recommended fields were listed.
  - Which fields do you already fill out?
  - Is there a field or fields that you have not been filling out that you will start using?

Q3:

- After reading "When to Create a New Activity," discuss the process you have been using to document activities and how this will change your process in the future.
  - Does this raise any questions or concerns?

Q4:

- What confusions might occur if you save and close an activity that has been completed but have not "Marked it Complete." How might it affect your activity list?

Notes

- How do you use notes? Or do you use them?

Marketing Lists

- Will begin training on creating these
- Used when:
  - Creating and sending activities attached to Campaigns
  - Sending mass emails through Exact Target
- Why
  - Increasing use of Campaigns in Recruiter
    - Track recruitment efforts
    - Easily search for specific communications sent to certain groups of people
  - Can be created by You and easily accessed by IT.

Questions?

Training Follow Up

- Current Support Needs? Feedback?
- Training evaluation via email