Ellucian Recruiter

Undergraduate Admissions
Counselor Training
June 3rd 2013

Agenda

- Training Goals
- Recruiter Overview
- Training:
    - Outlook/CRM
    - Best Practices - Advanced Finds
    - Best Practices - Activities
    - Questions
- 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.**

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.

Why CRM?

Track activities, emails, and correspondence with contacts.

Store detailed notes and history.

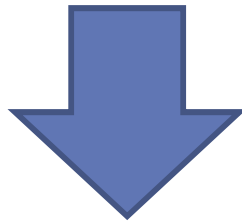Generate reports.

Manage processes.

Manage leads (suspects) and contacts (prospects). Create marketing lists.

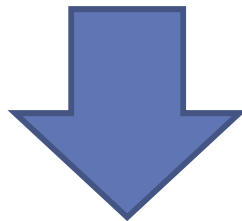Access information about contact records in one place.

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

Summary

Personalize the recruitment process

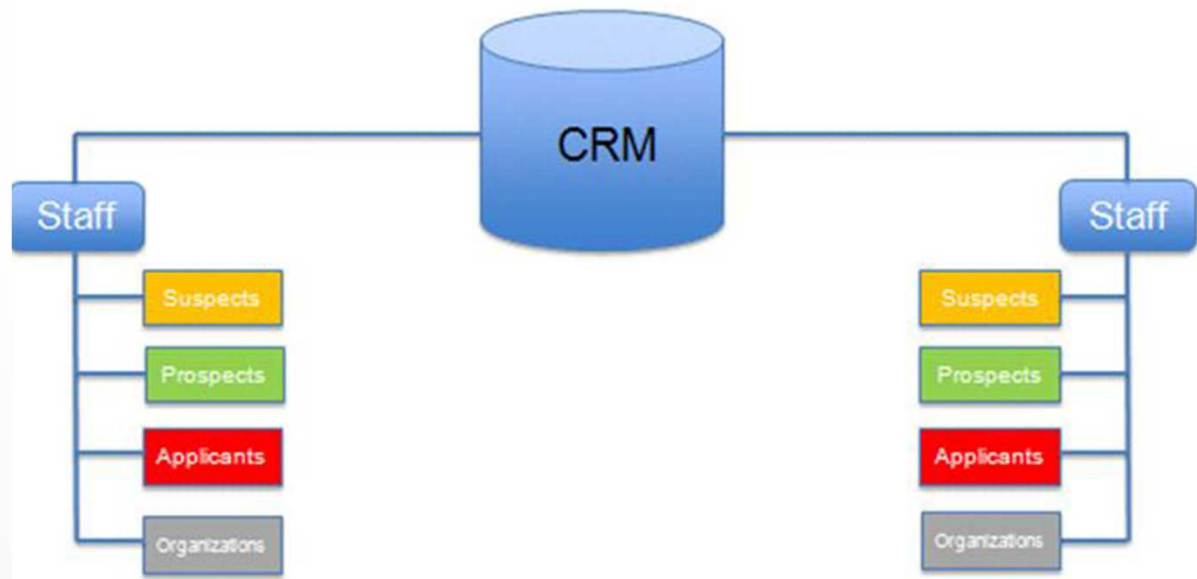**Build better relationships with potential students**
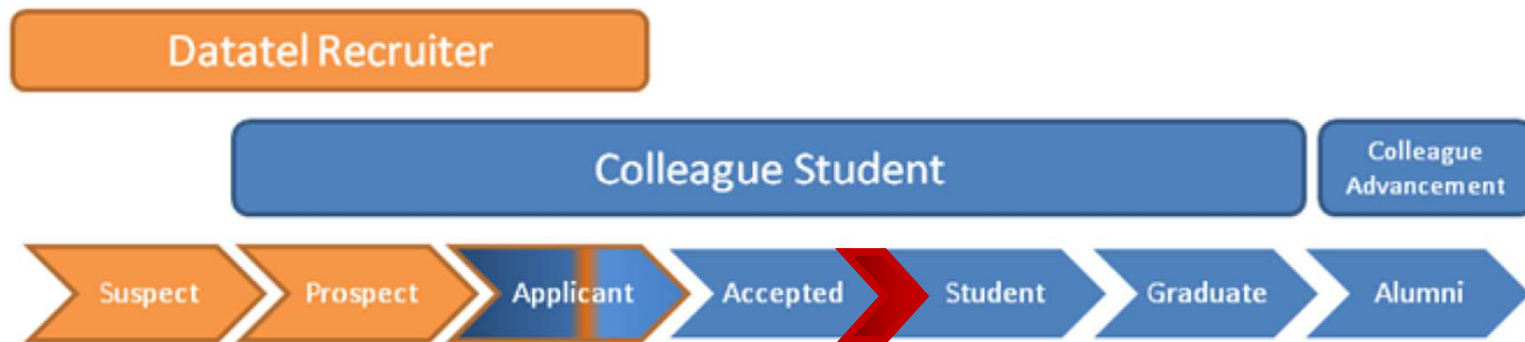
Increased applicants and future students!

What is the Relationship Between Recruiter and CRM?

CRM Technology→ Admissions Counselors

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

TRAINING GOAL 1: OUTLOOK
Develop Proficiency and Understanding of Using and Tracking Emails Between Outlook and Recruiter.

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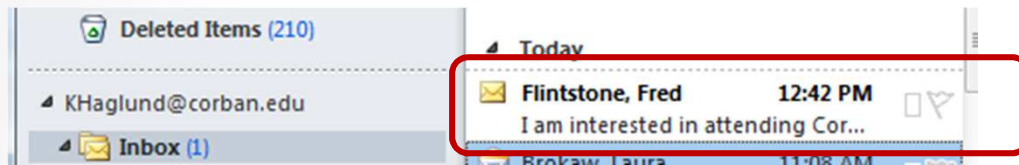 - o Troubleshoot common tracking errors.

Outlook and Recruiter

A Quick Review

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

1. Open your Outlook

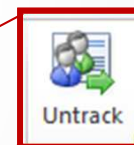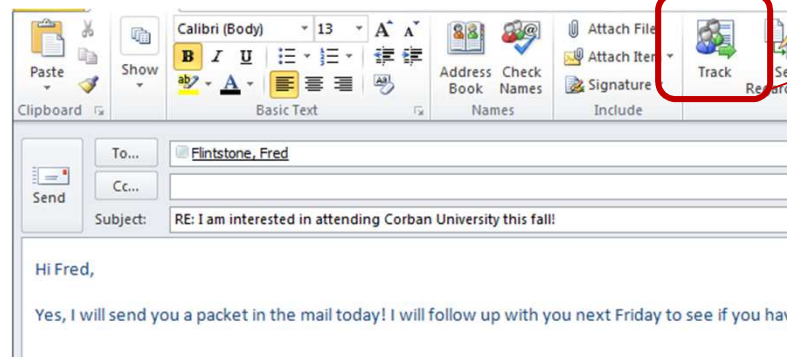# 2. Identify your email that needs to be tracked.

Deleted Items (210)

Today

KHaglund@corban.edu

Flintstone, Fred   12:42 PM
I am interested in attending Cor...

Inbox (1)

Brokaw, Laura   11:08 AM

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

Untrack

Reply

Reply All

Delete

Forward

Delete

Respond

Calibri (Body) 13

Paste

Show

Clipboard

Basic Text

Attach File

Attach Item

Address Check
Book Names

Signature

Track

Set
Regardin

Names

Include

Send

To... Flintstone, Fred

Cc...

Subject: RE: I am interested in attending Corban University this fall!

Hi Fred,

Yes, I will send you a packet in the mail today! I will follow up with you next Friday to see if you have

Send

4. Email will now track in Recruiter. Verify in the Prospect Record under Closed Activities.
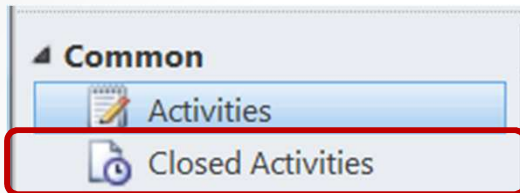
o You should see the email as a completed activity*

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

o 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!

  - o Manually Synchronize
    - Manually synchronize information between Outlook and CRM
  - o Check Personal Email Settings
  - o Delete Temporary Files, Enable Plugin

- If none of the items on this list work, you will need IT support.

Questions?

TRAINING GOAL 2: ADVANCED FINDS

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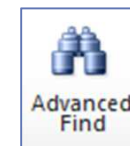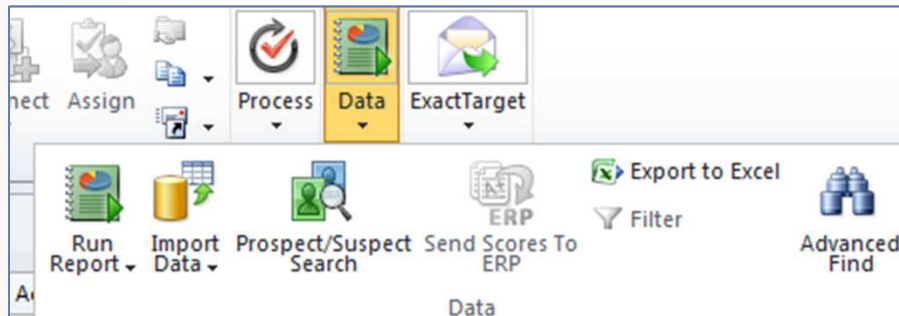
Advanced Finds

- 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

Advanced Finds

Review

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

  - o 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 5 - 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]:**

- Communication Standards

- General to Specific (Upside Down Pyramid)

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

10-15 m

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 <u>emails and bulk emails</u>. 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 Discussion

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.
  - o 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?

Any Questions?

Training Follow Up

- Ongoing bi-weekly trainings and support
- Training evaluation via email
- Suggestions are always welcome!