TOPICS

• Salesforce As A Platform
• Consultants
• Software
• Data Processes
• Reporting
• Communication
Salesforce as a Platform
Salesforce as Platform

- Salesforce is our cloud-based driven CRM.
- CRM (Customer Relationship Management) – Used to manage our students, create reports, and send email campaigns.
- Automated processes
- Form creation and reporting
- Data cleansing tools
Consultants
Consultants - TargetX

- Perfect For Beginners
- Training For Admins and Users
- Pre-built Package For Our Needs
- Email Campaigns
- Events System
- Complementing Software Added On The Package
Software
Software

- Demandtools – Used For Data Maintenance
- Informatica – Used For Uploading Data
- FormAssembly – Forms (Inquiry/Survey/Check In-out)
- Pardot – Used For Email Campaigns
Data Processes

- Recruitment
- Admissions
- Student Success
Recruitment: Forms Capture Data Into Salesforce

- Student Inquiry Form – First Name, Last Name, Email, Program of Interest

- We Receive Information From Events:
  - Recruiters Attending Fairs
  - Students Walking In
  - Web Meetings

- The Information Is Then Automatically Added To Salesforce
**Admissions: Applications and Forms Data into Salesforce**

- Student Fill Out Application Online: Decision Desk (Data Goes To Banner and Salesforce)
- Faculty Get To Nominate VIP Candidates On Form (Data Goes To Salesforce)
- Admissions Team Help Students Through The Process: Each College Has Different Requirements And Prerequisites (Data Updated On DD & Salesforce)
- Decisions Are Made In The Colleges (Data Updated On DD & Salesforce)
Student Success: Data of Student Tracker and Events are Recorded in Salesforce

- Email Campaigns On Current Students About Our Professional Development Center
- Workshops
- Events On Campus
- Computer Lab
Reporting
Reports

- Reports For Recruitment, Student Engagement, Admissions, And Supervisors (Dean).

- Email Campaigns Driven By Reports.
Communication
Communication
Trailhead for Salesforce

- Training for Admins, Developers
- https://trailhead.salesforce.com/
Our System Demo

Salesforce
https://login.salesforce.com/

Student Tracker
http://graduateschool.utsa.edu/landing-page/student-center-check-in-out/

Inquiry Forms