CRM Project Update and Upcoming Events

Hello esteemed stakeholders,

We are excited to share the latest Constituent Relationship Management (CRM) project updates. Your support and engagement have been instrumental in achieving several milestones in Phase 1, and we look forward to your continued participation as we move into Phase 2.

Achievements So Far

Phase 1 of the CRM project saw the successful completion of several essential tasks:

- Replacement of the previous CRM system
- Unified communication channels
- Created a portal for prospects & new student applicants
- Built events management capabilities
- Led User Acceptance Trainings for various offices including Registrar office, Financial Aid, Recruitment, and Testing Center

From the initial email shared with stakeholders on July 6th to the in-person informational sessions conducted across all campuses between July 18th-20th, we have worked tirelessly to provide all stakeholders with timely updates and training on new features.

Next Steps: Embarking on Phase 2 and Sharing Timelines

As we enter Phase 2, we're sharpening our focus on:

- Case Management: Empowering our departments by providing tools with the ability to streamline students issues, track progress efficiently, and enhance student experience.
- Appointment Booking & Scheduling: Eliminating the back-and-forth and missed communications with an intuitive scheduling system that brings transparency and ease to all our departments, enhancing internal communication.
- Apprenticeship & Partner Registration: Facilitate seamless collaborations with business partners, offering students more

collaborations with business partners, offering students more opportunities for hands-on-learning.

See graph below

Get Involved:

- **August 15th - September 15th:** We're kickstarting a pilot program "Train the Trainer, Ambassadors" initiative. **Join Us on This Journey.**
- **September 15th-October 11th** : A month of training sessions will follow, ensuring all users are comfortable with the new features, including queueing, case management, and appointment booking.
- **October 16th**: Release of features like queueing, case management, and appointment booking.

Activities

Want to get involved? Or be part of our Train the Trainer Ambassadors? Contact us at DxS.SEED@CSN.EDU.

The Bigger Picture

This isn't just a software upgrade; we're revolutionizing and transforming our institution. We're breaking down departmental silos, making things simpler for students, and focusing on what they're here for learning, growth, and future success. We aim to ensure that every student feels heard, supported, and valued.

Join us in our Upcoming August event - Mark your calendar:

- Convocation Presentation
    - August 25: 9:00 am - 10:30 am
    - Introduction to "Greymatter"
- Greymatter Monthly Stakeholder Meeting
    - August 24, 2023: 11:00 am - 12:00 pm
    - https://bit.ly/SEEDMonthlyMeeting

Visit our new Website for Project Updates and the Latest Information:

- https://www.csn.edu/seed

Testimonials from Informational Sessions

- "Thanks for having me. That was actually my first time in almost 3 years I got to sit in a meeting like that with a bunch of CSN staff."
- "Thank you all for answering my questions. I told colleagues they needed to attend these training sessions."
- "I'm trying to gain as much information as possible on greymatter since I am new to it. Thank you!"
- "I really did like seeing the preview of the new queueing system"
- "Thank you for answering all my questions. I told my coworkers they need to join your trainings".
- "Thank you all for setting up these meetings for everyone it really helps my department".
- "I enjoyed the format…the corn dogs were good".

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