## RFP #MWJ2020-06 – CRM - EXHIBIT B

## ISSUES BY DEPARTMENT, WHICH COULD BE MITIGATED BY A CRM SOLUTION

Prior to the RFP, CCC met with nearly every department at CCC to document student facing business processes and understand staff and student issues and pain points. They are included in the RFP to help potential vendors learn more about the specific issues CCC is trying to address with a CRM.

### Hours of Operation

* Hours of operation are confusing or not prominently posted
* Online students don't have support outside of CCCs regular hours of operation for help and support

### Overall lack of knowledge about other business units

The workflow is not transparent to staff or students within the institution I.e. early college does not understand the steps for making a student Credit or Adult Education does not understand the steps for how a student becomes Credit, etc.

### Academic Advising/Class Registration

* Qnomy queuing platform doesn’t sync notes back to GradesFirst or elsewhere
* Serving volume of students during registration
* People in other departments don't coordinate the care, e.g. hand off from department to department
* Advisors don't see full picture of student's interactions with other departments and the services and guidance they've already received.
* No photos of students in system
* Term activation causes confusion (e.g. students cannot always register for the term they want)
* Students with small amount of debt are prevented from registering
* Scheduled appointments with advisors are not honored (e.g. advisor may be finishing up with a walk in appointment that gets priority over scheduled appointment)
* Q-nomy tickets are not always transferred correctly when a student needs to visit multiple advisors/departments and student needs to reenter service queue
* Academic advice from faculty who serve as academic advisors during peak registration is not at same level of quality as advice from dedicated academic advisors

Case Load Management

* Notes about interactions with students are stored in a variety of systems and locations
* Students have to repeat information when meeting with people from various departments
* Non-private information that is known to one set of people within City Colleges of Chicago may not be shared with other departments who would benefit from knowing this information.
* The breadth and depth of information about CCC students is not used to its potential because of the scattered storage of this information, and the inefficiencies of sharing the information between departments and systems

### Academic Support Center (Tutoring)

* Inability to tailor tutoring center needs of CRM to different colleges
* Inability to track non-student facing services performed by tutors
* Inability to efficiently monitor, make decisions, and create consequences for student cancellations and no-shows in tutoring
* Not enough granular roles to prevent FERPA data from being exposed to student employees
* Number and complexity of appointment types
* The tradeoff between taking notes for "walk in" tutoring sessions vs the benefit
* Students don't always check in/out of tutoring centers; therefore numbers are not accurate
* Scheduling Tutors, e.g. needing to reassign a tutor's caseload due to illness

### Admissions

* Delay between application and provisioning of CCC credentials is an issue during peak registration
* Difficulty accessing prospect data
* Inbound communications are not centralized
* Students receive large amounts of emails that are not coordinated with delivery times and include redundant/conflicting information
* Workflow is different per college which confuses students who attend multiple CCC colleges
* Students are confused about holds (e.g. SAP warning vs SAP hold)
* Students not reading their email
* Can't create a workflow with all of the necessary tasks a student needs to complete
* Transcripts need to be sent to all of the schools if the student applies to more than one CCC but only goes to one school. District policy allows only one application per student.
* Transcripts not evaluated promptly
* Applications that are possible duplicates put in suspense - email communication and manual resolution can be slow
* Standardized test scores are submitted but not always uploaded
* Different holds need to be resolved by different departments (business office, financial aid office, registrar etc)
* Confusion about criteria for applying as an international student (e.g students without immigration documents, students with H1B visas, etc. are not considered international students
* Contacting students, maintaining documents in student records, monitoring completion of the student application process
* Students at some colleges go to one room to get a number and then go to another room to wait in line
* There is no integration of other required data such as placement exams

### Adult Education

* Lack of visibility into Marketing/Recruitment funnel
* Retention - students not motivated to work through levels
* Inability to communicate with AE students via email
* Lack of a consistent process for recruiting students
* Attendance data in silo
* Phone numbers are out of date/bad
* Registration process is inefficient
* No district standards for placement
* No district standards for promotion practices
* Testing data not used/tracked in registration/lifecycle of students
* Testing/Gateway information not linked to Student Account
* 20% of students register but never attend
* Post testing is not done for 100% of eligible students

### Alumni Relations

No centralized place to store or track contacts, interactions, outbound campaigns, or events

### Apprenticeship and Workforce Solutions

* Information is not centralized, kept on spreadsheets
* No automated way to track apprenticeships
* All reporting is manual
* No application for apprenticeships
* Some departments have their own internship process, e.g. child development

### Athletics

* No automated way to manage athletic holds
* Advisors do not always know the eligibility rules when helping student athletes change their schedule, etc.
* Different recruiting process per college
* Practice/Game Schedules created manually and stored in spreadsheets

### Call Center\*

* Lack of information about whether students open email, read email, or click on Links
* Inability to assign tickets to everyone

\*Call Center has an existing system so not all requirements will show up as pain points

### Career Services

* Services provided too late in the student life-cycle
* Not available to community members without a CCC ID
* Entering a career opportunity in Career Network is cumbersome
* Jobs are not posted equally and in the same manner at all colleges

### Communications

* Centralized communications overlap with college communications
* Inability to track whether students read or respond to emails
* Do Not Call issues / inability to unsubscribe from emails
* Student communications emanating from multiple systems

Continuing Education

* Lack of Continuing Education registration tool that mirrors the ecommerce experience that CE students expect.
  + These students don’t expect to interact with us the same way credit does
  + Lack of a CE registration tool is crippling our ability to expand our CE program
* Lack of marketing hinders visibility of the CE program and recruitment of new students
* Difficulty with the CE online registration process
* Difficult to navigate the websites to find CE information and class schedules
  + Inability to locate a direct link to the CE webpage on the college website

### Early College

Inability to share data with CPS

### Enrollment

* Managing high school partnerships
* ID provisioning
* Different workflows for enrollment/registration per college
* Contact management
* Students have to come to campus multiple times during the registration process, e.g. to get their placement test results
* Managing New Student Orientation sessions
* Special processes, e.g. selective enrollment, TBLC, athletes, International, managed manually

### Facilities

Room Reservations

### Financial Aid

* Staff don’t answer the phones during busy times
* Students wait in line for long periods of time to get things they could have gotten online
* Students have to return multiple times to complete the financial aid process
* SAP holds
* Time limit for grade appeals ends after 30 days and students may not see SAP hold until after appeal deadline passed
* Rules for international students are different than regular students (e.g. students can't take more than one online class per term)
* Athletes need to check with advisors before dropping classes in case eligibility is impacted
* Students don't understand which courses and items are paid for/delayed/excluded when applying vouchers, waivers, payments, etc.

### International Students

* Manual tracking of applicants
* Government compliance

### Communications

* Inability to track applicant from prospect to alumni
* Inability to track engagement with email
* Inability to track engagement with links on website(s)
* Inability to track the effectiveness of an advertising campaign
* No way to create responsive A/B tested email templates
* No way to send current volume of emails
* Difficult to manage opt-outs/in
* Not enough data to support flexible segmentation envisioned by Marketing team
* Inability to send automated, customized communications to prospective and current students
* reminding students of important deadlines

Disability Access Center (DAC) (out of scope)

Due to privacy needs, the DAC needs their own system, both to serve CCC students with disabilities and to coordinate the varying aspects of the DAC.

### Marketing

* Inability to track applicant from prospect to alumni
* Inability to track engagement with email
* Inability to track engagement with links on website(s)
* Inability to track the effectiveness of an advertising campaign
* No way to create responsive A/B tested email templates
* Difficult to manage opt-outs/in
* Not enough data to support flexible segmentation envisioned by Marketing team
* Inability to send automated, customized communications to prospective and current students

### Recruitment

* Events are not integrated or managed, e.g. high school visits, college fairs
* Inability to link recruitment activity to enrollment
* Difficulty accessing prospect data
* Difficulty recruiting prospects
* Inability to link marketing campaigns with outcomes
* Lack of a set communications plan from the point of inquiry to enrollment: there should be both a transactional communication plan and nurturing communication plan.
* Lack of an integrated plan from that engages all platforms from print, phone, digital to social media.
* Lack of informed analytics that inform us about the best time of day to reach students and deploy email campaigns.
* Lack of centralized calendar for staff/students to see all events in one place to boost attendance and to ensure events don't overlap when planning

### Security

Persons of Concern not available at security desks in a centralized fashion

### Self-Service

* Delay in application process while ID is being provisioned
* Long delays (greater than 24 hours) can be caused when reconciling ID suspense files to determine whether a student has applied multiple times
* Frustration with self-serve capabilities such as finding a course based on location/day of week/time, finding program requirements, determining which application to submit, etc.
* Adult Education/Continuing students who are trying to transition into Credit and want to prep for Placement exams do not understand that they have to re-apply to the college as credit students in order to be given access to Placement in their portal.

### Star Scholars

* Unable to enforce mandatory advising
* Difficulty of tracking >58,000 rows of data in SharePoint
* Inability to track scholars by test scores, GPA, high school grad date, CCC grad date, who is in compliance w/ the criteria

### Teaching and Learning Scholarship (CEWLS)

* Manually tracking large volumes of students through the enrollment process
* Difficulty with the Continuing Education enrollment process
* Unable to enforce mandatory advising
* Difficulty of tracking large number of rows of data in SharePoint
* Inability to track scholars by test scores, GPA, high school grad date, CCC grad date, who is in compliance w/ the criteria