

# CRM

More than just email!

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OEM RETREAT

*May 20, 2010*



**INDIANA UNIVERSITY**



## Presenters

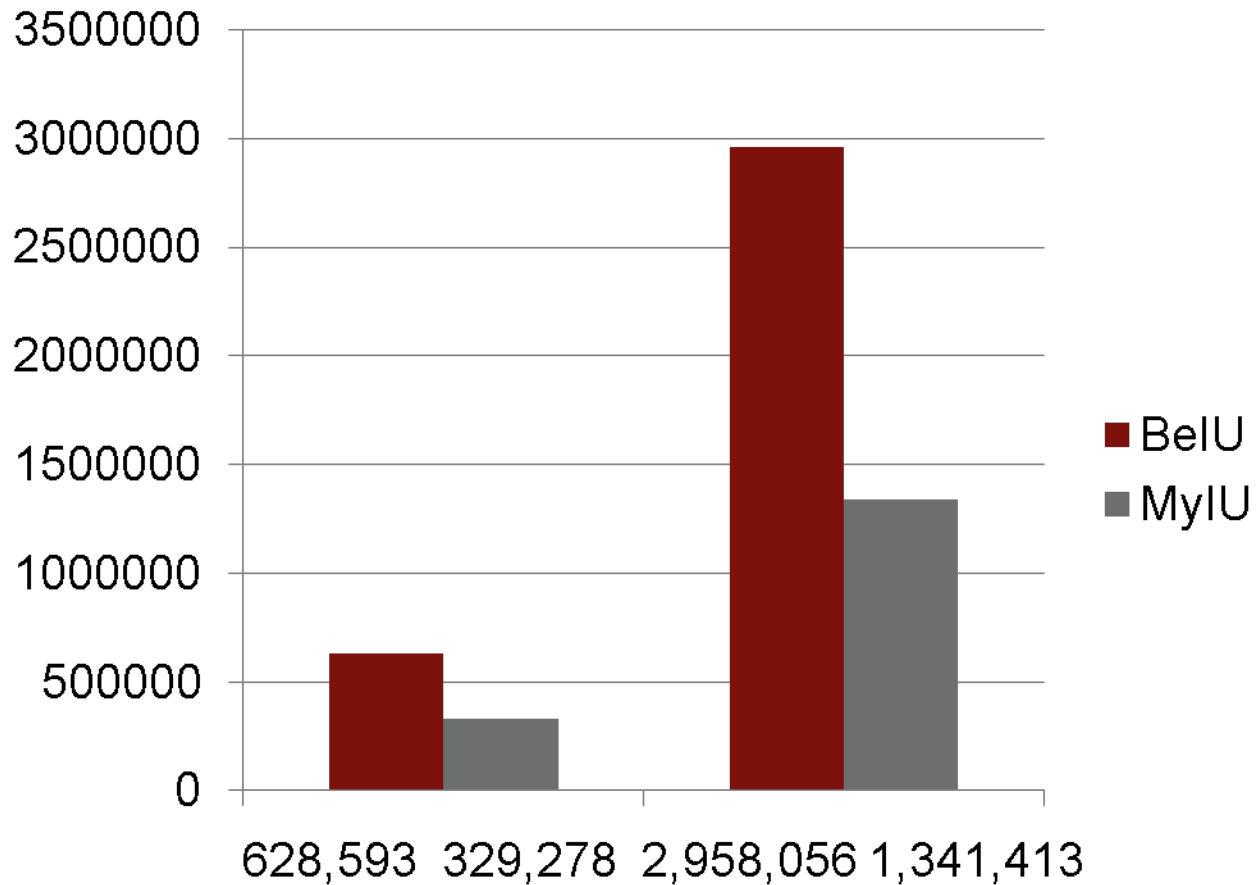
Michael Fatten	Interactive Communication
Treena Bennett	Office of Student Financial Assistance
Sarah Dvorak	Office of Admissions
Brian Piret	Office of Scholarships



# Overview - Email

**2008-2009 totals**

**2009-2010 totals**

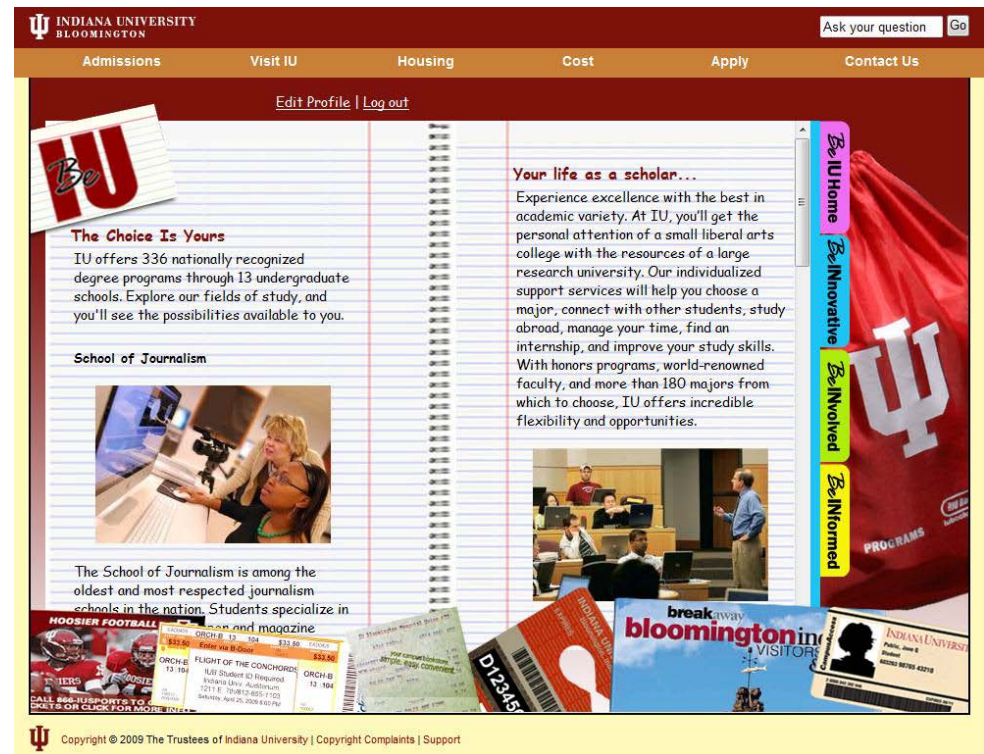




# Overview – BeU page

Sent to 96,091 prospective students

- 14,585 Visits
- 6330 Active
- 1656 Engaged





# Overview – Automated Campaigns

## Campaigns sent

- 314 in MyIU
- 479 in BeIU
- Dynamic
- Recurring

The screenshot shows the EMT web interface in a Mozilla Firefox browser. The page title is "Hobsons-Emtng - Mozilla Firefox" and the URL is "http://connect.indiana.edu/myiu/Communications/EmailSent.aspx". The interface includes a navigation menu with options like Home, Contacts, Communications, Content, Reports, Answer, Telecenter, and Admin. The main content area is titled "COMMUNICATIONS" and "Overview". It displays "E-mail Navigator: Sent E-mails" with a status of "Out of date" and a "Refresh Now" button. The last refresh was on 5/18/2010 at 12:00:16 AM. Below this, there is a table of sent e-mails with columns for Action, Name, and Description. The table shows various e-mails, including "ResultsRegistrar Grade Mailer for Summer (Copy)", "ResultsOrientation", "ResultsRegistrar Grade Mailer for Summer (Copy)", "ResultsRegistrar Grade Mailer for Summer (Copy)", "ResultsRegistrar Grade Mailer for Summer (Copy)", "ResultsEmail sent to Laura", "ResultsRegistrar Grade Mailer for Summer (Copy)", "ResultsRegistrar Final Grade Mailer for Fall", "ResultsLAST USED: 1/12/09 OSFA PRIVATE LOAN NO ENROLL", "ResultsLAST USED: 1/12/09 OSFA PRIVATE LOAN NO ENROLL", and "ResultsOSFA Pilot Mailer (Copy)".

Action	Name	Description
Results	Registrar Grade Mailer for Summer (Copy)	
Results	Orientation	
Results	Registrar Grade Mailer for Summer (Copy)	
Results	Registrar Grade Mailer for Summer (Copy)	
Results	Registrar Grade Mailer for Summer (Copy)	
Results	Email sent to Laura	Test email sent to Laura
Results	Registrar Grade Mailer for Summer (Copy)	
Results	Registrar Final Grade Mailer for Fall	Final grades e-mail to students receiving grade mailers for fall semesters.
Results	LAST USED: 1/12/09 OSFA PRIVATE LOAN NO ENROLL	private loan, but no spring enrollment.
Results	LAST USED: 1/12/09 OSFA PRIVATE LOAN NO ENROLL	private loan, but no spring enrollment.
Results	OSFA Pilot Mailer (Copy)	E-Mail sent to students who haven't signed their MPN.



# Overview – Personalized Video

- Sent to 19,900 admitted students
- 8581 Viewed
- 3177 Clicked link



# Overview – Video Chats

Scholarship eligible admitted students

- In state
- Out of state
- Scholarship reception attendees



# Orientation

- Birthday greetings
- Bi-monthly FYE newsletter
- Pre and Post orientation emails



# Registrar

- Immunization requirement reminders
- Residency Audit (IUBLA only)
- E-Bulletin



## Office of Student Financial Assistance

- Email Communication
- Extending business processes with targeted communication
- Import process to identify students rather than loading sensitive data
- Track and use of results



# Office of Admissions

- Virtual Advisor
- Call-a-thons/Telecenter
- Interest Page/BeIU Page
- Automated Communication Plans



# Telecenter

- Allows admissions to call selected populations and track the success of the calls

The screenshot displays the Telecenter web application interface. At the top, there is a navigation menu with tabs for Home, Contacts, Communications, Content, Reports, Answer, Telecenter, Chat, and Admin. The 'Telecenter' tab is selected. Below the navigation, there is a breadcrumb trail 'Home > Admin' and a sidebar menu with sections for Overview, Admin (with sub-links like New Call Job, Manage Call Jobs, etc.), Manager, and Calls. The main content area is titled 'Enter Call Results' and features a table of call details. Below this is a 'Call Results' section with radio buttons for 'None', 'Follow-up req', and 'Do not call', and a dropdown menu for 'Call result type\*'. The dropdown menu is open, showing options like 'None', 'Success', 'Talked to Parent', 'Busy', 'Got Phone Slammed in my ear', 'Left Message on Machine', 'Left Message with Person', 'Not Available', 'Number Disconnected', 'Phone Problem', and 'Wrong Number'. To the right of the dropdown is a time selection field showing '01 : 00 AM'. Below the dropdown is a 'Call Notes' section with a text input area.

Call Job	ADMS MORE 2009-2010
Calling	May, Isabelle (ID: 1122521)
Created	11/9/2009
Last Called	None
Follow-up Call	None
Last Call Status and Reason	None
Created Source Code	100 (DSS Import)
Current Source Code	100 (DSS Import)

**Call Results**

Call result type\* - Not Available

None

Follow-up req

Do not call

Select One

- + Success
- + Talked to Parent
- Busy
- Got Phone Slammed in my ear
- Left Message on Machine
- Left Message with Person
- Not Available
- Number Disconnected
- Phone Problem
- Wrong Number

01 : 00 AM

**Call Notes**



# Telecenter

- Scripts can be entered and automatically populated with each student's information.

The screenshot shows the Telecenter web application interface. At the top, there are navigation tabs: Home, Contacts, Communications, Content, Reports, Answer, Telecenter, Chat, and Admin. The 'Telecenter' tab is selected. On the left, there is a sidebar menu with sections: Overview, Admin (with links for New Call Job, Manage Call Jobs, Manage Call Results List, and Manage Idle Timeouts), Manager (with links for Call Job Reports, Caller Reports, and Message), and Calls. The main content area shows a call management screen for a call with ID 1122521. It includes a phone icon, the phone number 317/877-0063, and an 'End Call' button. Below this is a table of call details:

Call Job	ADMS MORE 2009-2010
Calling	May, Isabelle (ID: 1122521)
Created	11/9/2009
Last Called	None
Follow-up Call	None
Last Call Status and Reason	None
Created Source Code	100 (DSS Import)
Current Source Code	DSS Import (100)

Below the table is a section titled '2009-10 MORE Call-a-thon' with a yellow background. It contains a script for a greeting:

**--GREETING--**

**Ask for student:**  
Hi, may I speak to Isabelle?

**If NOT there:**  
Can I leave a message? This is \_\_\_\_\_ and I am calling from the Indiana University Office of Admissions to talk to Isabelle about IU and answer any questions. We will try to call back at another time.

**If there:**  
Hi Isabelle, my name is \_\_\_\_\_ and I am a \_\_\_\_\_ at IU. I am calling from the Office of Admissions. How are you today?  
  
I'm calling to congratulate you on being admitted to Indiana University.  
  
We know that you'll soon be making your final college choice and wanted to give you the opportunity to ask questions and get answers from a current IU student – to give you a student's perspective.

*\*Be sure to mention if you are from the same area or if you are also an out-of-state student.\**



## Telecenter

- In 2009-2010, admissions made 2,647 calls using Telecenter during 12 different calling events.
- Reached out to admitted students - minority and 11 out-of-state geo. Markets  
LA, San Diego, Chicago, Cincinnati, St. Louis, New Jersey, New York, Maryland, Dallas, DC metro, and South Florida



# Virtual Advisor

- Allows student and parents to type in key words and find answers to frequently asked questions

OFFICE OF admissions

Admitted Students Graduate A

Academics Costs & Financial Aid Student Life

Home » Ask a Question

## Ask a Question

### Get Answers to Your IU Questions

Choosing a college is a complicated process, and there are probably hundreds of questions floating around in your head. So we propose a simple solution: ask us.

Just type a question below in plain English—it's better to ask "How much is tuition?" than to just type the keyword "tuition"—and you'll see the most relevant answers.

Type your question here:

Want additional information or to hear directly from an admissions counselor? Write to us at [iuadmit@indiana.edu](mailto:iuadmit@indiana.edu), or contact us in another way. If you e-mail us, give us a couple days to respond—as you might expect, we get lots of messages from students who are interested in IU.



# Virtual Advisor

- 92 key word “questions” generate the different responses

OFFICE OF admissions

Admitted Students Graduate Applicants Parents Co

Academics Costs & Financial Aid Student Life How to Apply

Home » Ask a Question

### Virtual Advisor

Ask a Question:

Quick Links:

You Asked:  
what is the cost of tuition

**Quick Answer**  
The official cost of tuition and fees for 2009–2010 is \$8,613 for Indiana residents and \$26,160 for nonresidents. Go to [Tuition and Fees](#) to view the ranges of what it can cost a student for books, supplies, travel, and miscellaneous expenses.

The estimated cost of room and board for 2008–2009 is between \$7,646–\$9,640. This is based on a double room with a full meal plan. For more information, see [Tuition and Fees](#).

With all it offers, an IU education is a great value. Full-time students pay a flat tuition fee that covers 12 to 17 credit hours per semester. This is the only fixed cost. Discretionary costs, those over which you have some control, include room and board, books and supplies, personal and transportation expenses, and course-related fees for select programs. These costs can vary, depending on your individual circumstances and spending habits.

- For detailed information regarding residency classifications, visit the [IU Bulletin](#).
- For detailed tuition and fee information, visit the [Office of the Bursar](#).
- For housing and dining expenses, visit [Residential Programs and Services](#).
- For international student costs and expenses, visit [International Admissions](#).

How would you rate this Quick Answer? (5 is highest)

1  2  3  4  5

Add your comments.



## Virtual Advisor

- Since January 2009, students and parents have asked 39,693 questions.
- Fall 2009 was most popular.
  - 4,357 questions asked in Oct 2009
  - 3,839 questions asked in September 2009
  - 3,033 questions asked in November 2009
    - These three months make up 29% of the questions asked since January 2009.



# Virtual Advisor

- Most popular key word questions:
  - Tuition (3174 questions asked)
  - Majors (2510 questions asked)
  - Admission requirements (2401 questions asked)
  - Application Timeline (1925 questions asked)
  - Application status (1697 questions asked)



# BeIU / Interest page

- Students tell us about themselves and their interests and we build a personalized web page just for them.

**Enrollment Information**

Entry Term\*

What academic major are you interested in?\*

What is your level of interest in IU?

How did you learn about IU?

**High School Information**

Select Your High School. If you cannot find your high school, [click here](#) to type in your information.

High School Name\*

High School City\*

High School State\*

High School Graduation Year \*

High School GPA

Note: Enter your GPA on a 4.0 scale.

**Test Score Information**

SAT Composite Score (CR+M)

ACT Composite

**I would like to learn more about:**

<input type="checkbox"/> Community Service	<input type="checkbox"/> ROTC
<input type="checkbox"/> Athletics	<input type="checkbox"/> Campus Diversity
<input type="checkbox"/> Multicultural Clubs and Activities	<input type="checkbox"/> Performing Arts



# BeIU / Interest page

- 14,585 visits to the page
- Students spend an average of 14 min. 33 sec. on the page

The screenshot displays the BeIU website interface. At the top, there is a navigation bar with links for Admissions, Visit IU, Housing, Cost, Apply, and Contact Us. A search box labeled 'Ask your question' with a 'Go' button is also present. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with a vertical menu containing 'BeIU Home', 'BeInnovative', 'BeInvolved', and 'BeInformed'. The main content area features a large 'BeIU' logo, a section titled 'The Choice Is Yours' with text about 336 nationally recognized degree programs, and a section titled 'Your life as a scholar...' with text about academic excellence and support services. There are also images of students in a classroom and a student working on a computer. At the bottom of the page, there are various promotional banners and a footer with copyright information.



## BeIU / Interest page

- Links most frequently clicked on:
  - Application status check (276 students have clicked)
  - Athletics (273 students have clicked)
  - Admission standards (264 students have clicked)
  - Meet your admissions counselor (232 students have clicked)
  - Scholarships and financial aid (213 students have clicked)



# Surveys on BeIU page

Be IU: Indiana University Bloomington - Windows Internet Explorer  
http://beiu.indiana.edu/beiu/Vip/Vip.aspx

INDIANA UNIVERSITY BLOOMINGTON

Admissions Visit IU Housing Cost Apply Contact Us

Edit Profile | Log out

**Check Out IU!**

**Welcome**  
Sarah, welcome to *BeIU*, your personalized page for Indiana University Bloomington. Your *BeIU* page will allow us to communicate with you about your areas of academic and extracurricular interest, as well as provide updates on the admission process. We look forward to helping you discover what it means to *BeIU*.

**Tell us what you think!**  
[...and help this site better help you!](#)

**B-town loves sports.**  
Sports Illustrated on Campus called Bloomington one of the nation's top 10 college sports towns.

**What's a Hoosier Anyway?**  
Hoosier pride is felt all through the IU community ... but what exactly is a "Hoosier"?

BeIU Home  
Be Innovative  
Be Involved  
Be Informed

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# Office of Scholarships

- E-mail Templates
  - Near 100 new email templates in support of multiple events
- Exports – Renewal Letter & General Info
- Consolidated Award Letter
- Herbert Presidential Preview Survey
  - Leverages BEIU Page Format
- MIRA – Event Management



## Office of Scholarships

- Dynamic E-Mail Communication Plan for the Selective Scholarship Application
- National Merit Letters
- National Hispanic Scholar Letters
- Scheduled Exports
  - PAID data for individual scholarship programs automatically e-mailed to interested parties
- Prototype Dashboard



INDIANA UNIVERSITY

# Your Questions?