

Cornell's CRM Playbook

Rebecca Joffrey

Director of Digital Innovation & Strategy

Cornell University

rj283@cornell.edu

Chapter 1

The Engagement Ecosystem

(not your traditional view of IT)

CRM: The Secret Sauce for Driving Digital Transformation

*For many institutions, CRM *is* the digital transformation – because it weaves together technology into a personalized digital experience.*



Carrie Shumaker
CIO
Univ of Michigan-
Dearborn



Rebecca Joffrey
IT Innovation Officer
Cornell University



WHAT IS...

DIGITAL TRANSFORMATION?

Dx leverages technologies to create value [for students], innovate, and adapt to changing circumstances.



WHAT IS...

Constituent Relationship Management (CRM)?

CRM is a data and workflow platform.

You can build a single view of the customer, from common data sources, and make that view available for interaction and analysis.



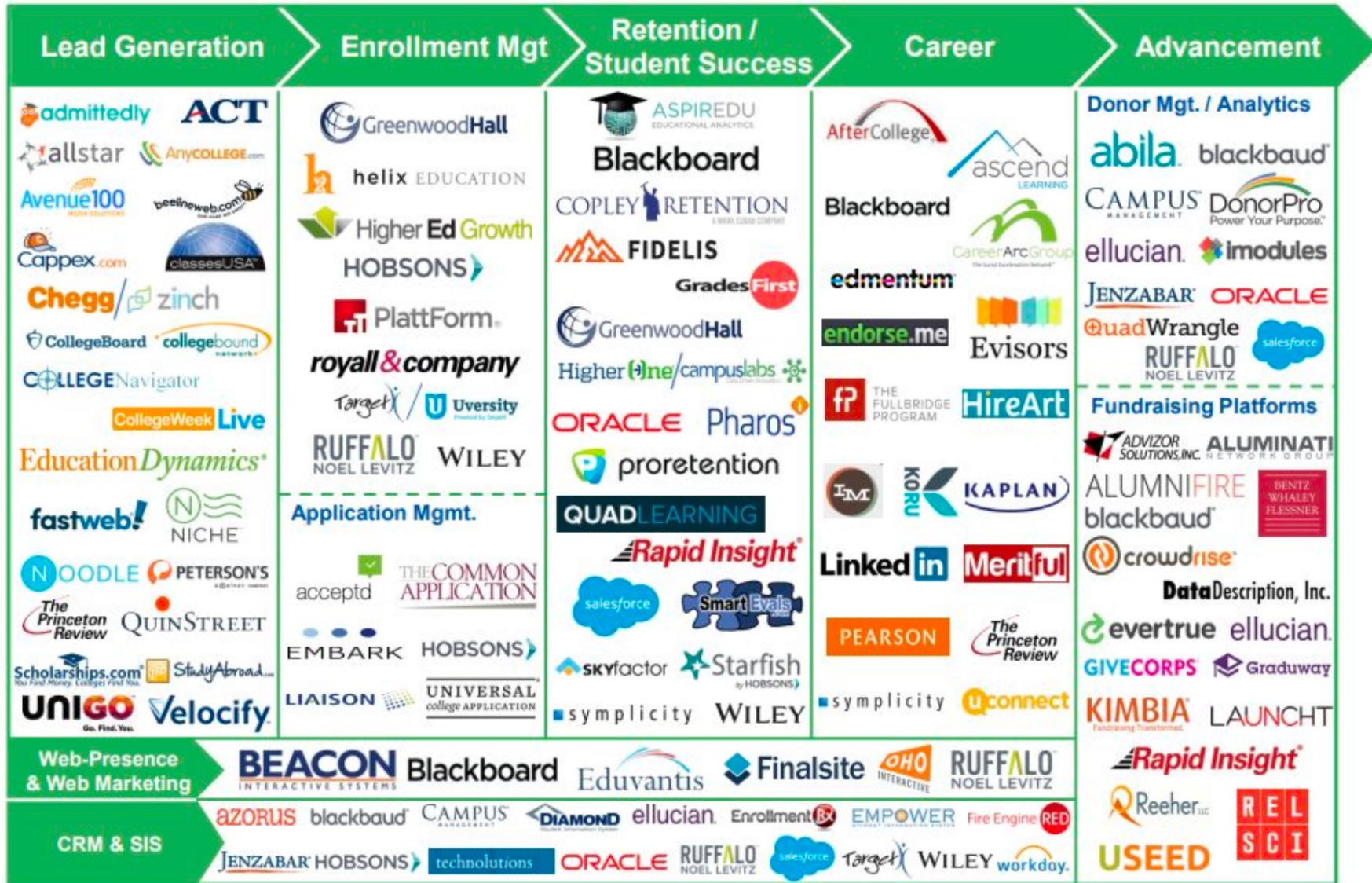
Jobs To Be Done Framework

Communication + Analytics + Workflow + Reporting

Recruitment	Admission	Streamlined Student Service	Unified Advising Experiences	Student Engagement & Success	Internship, Co-op, Career Development
Personalized communications & custom journeys	Application management and submission tracking	Consolidate student services & support – “one stop”	Design early alerts & success plans	Streamline communication with nudges, portal, journeys	Internship opportunities
Single, 360-degree view of prospects	Application review & workflow processes	Track student issues and questions	Collaborate holistically to support students	Create portals & integrate into student communication	Externship opportunities
Track yield metrics and trends	Applicant portal and customized communication journeys	Multichannel communications including live chat & chatbot	Enable students to schedule appointments	Digitize processes + calls to action + communication	Full-time career opportunities
Event and campaign management	Campaigns for deposits & orientation	Create a consistent support experience	Collaborate with students on course pathways	Create & deploy surveys, checklists, goal-setting tools	Alumni career networking

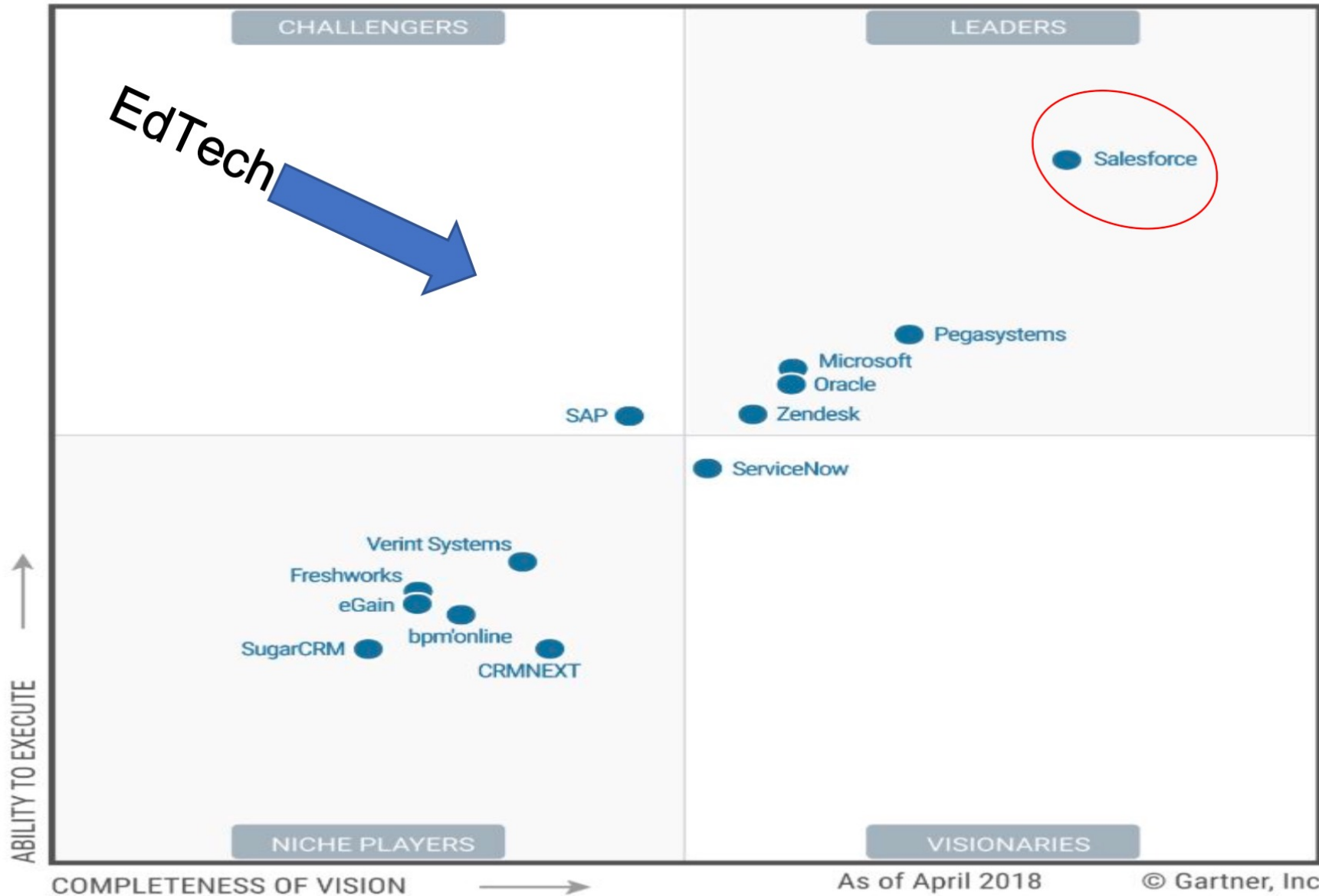
Higher Ed Student Relationship Value Chain

Landscape of Companies Focused on Managing Higher Education Student Relationships



Magic Quadrant

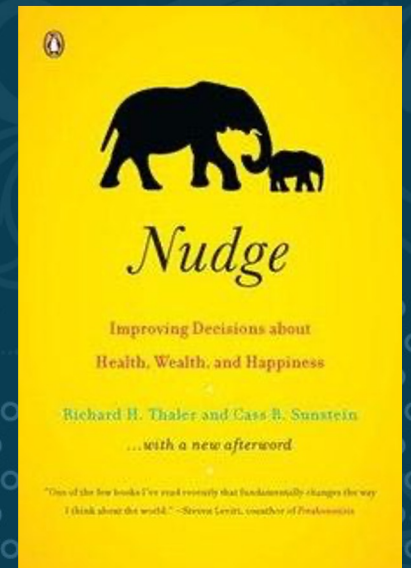
Figure 1. Magic Quadrant for the CRM Customer Engagement Center



WHY CRM?

Easier customer journeys

1. You are interacting with a human
2. You want to make it easy a human to take an action
3. Humans are really smart, sometimes...
4. You need to know: for each human, what they need to do next, when to communicate, how to communicate, and enable each human to take the first step **RIGHT NOW**
5. And remember the step has been taken
6. And record the “victory” so it can be reported



The world of “MarTech”

[Why IT Needs to Pay More Attention to Marketing Technology](#)

*Carrie Shumaker and Rebecca Joffrey
Educause Review, 2021*

Table 1. Collaborative Teams Transform Traditional Communication Tools into Digital Capabilities

Traditional Communication Tools	Traditional Communication Tools in the Hands of Collaborative Marketing and Technology Teams
Local department call center and front desk	One-stop service with a single front door for a constituent
Email newsletters	Personalized targeted content delivered at the right moment depending on what the constituent needs
Listserves	Dynamic lists that automatically update based on defined criteria
Sending email or snail mail to a purchased list	Lead nurturing to make sure no one who wants something falls through the cracks
Social media posts	Social listening and sentiment analysis
Websites	Communities for support from staff, faculty, and peers
Data visualization	Data activation
FAQs	Conversation design and chatbots
Checklists	Journeys and "nudge technology"

Chapter 2


Why CRM?

WHY CRM?

360° view of the student for advisors

Student
Suzie Student

Cornell Id: 1111111 | Primary College: Industrial and Labor Relations | Registered: | Class Year: 2020 | Suppress Information: | Inactive:

 **Suzie Student**
BS Industrial and Labor Relations
Industrial and Labor Relations
Class of 2020

Open Cases: 0 | Alerts: 0 | Meetings: 1

DETAILS | RELATED

Student Name	Suzie Student	Cornell Id	1111111
Contact	Suzie Student	Net Id	netid123
Primary College	Industrial and Labor Relations		

Student Attributes

University Matriculation Type	Registered
UG Frosh	<input type="checkbox"/>
Nontraditional	<input type="checkbox"/>
FYSA	<input type="checkbox"/>
	First Gen College Stndt Admissions
	<input checked="" type="checkbox"/>
	First Gen College Student
	1

Term GPA Trending by Student

Student Name	Academic Term	Largest Term GPA
Eric...	262...	3.6
264...	264...	3.1
265...	265...	3.7
265...	265...	2.9
267...	267...	3.5
268...	268...	4
269...	269...	0

Academic Term: 2629 (Summer 2016), 2643 (Fall 2016), 2650 (Winter 2017), 2657 (Sp...)

View Report | As of Today at 11:12 AM

Completed Credits by Term

Student Name	Academic Term	Average Credit Hours Completed
2629...	2629 (Summer 2016)	10
2643...	2643 (Fall 2016)	16
2650...	2650 (Winter 2017)	4
2657...	2657 (Spring 2017)	17
2678...	2678 (Fall 2017)	15
2685...	2685 (Winter 2018)	3
2692...	2692 (Spring 2018)	0

Meetings (3+)

M-18328
Staff Provider: [Julia Franke](#)
Appointment Type: [Study Abroad Programs](#)
Meeting Notes: Interested in programs on sustainability, needs to f...

M-18366
Staff Provider: [Laurie Gillespie](#)
Appointment Type: [Resume Review, follow up](#)
Meeting Notes:

Cases (1)

00006855
Subject:
Date/Time Opened: 9/14/2020 2:42 PM
Priority: Medium
[View All](#)

Student Actions & Alerts (1)


SAA-8392
Action/Alert: [Health Leave of Absence](#)
Created Date: 9/18/2020 1:12 PM
[View All](#)

Experience Site Applications (1)

Program	Term	Status
Cornell in Washington CIW	Spring 2021	Incomplete

[View All](#)

September • 2018 2 Years Ago

 [Transfer Credit Awarded](#) 11:36 AM | Sep 21, 2018
[Torrey Dennis](#) sent an email to ary24@cornell.edu

No more past activities to load.



WHY CRM? 360° view of the university for students

Meetings (3+)

M-18328
Staff Provider: [Julia Franke](#)
Appointment Type: [Study Abroad Programs](#)
Meeting Notes: Interested in programs on sustainability, needs to f...

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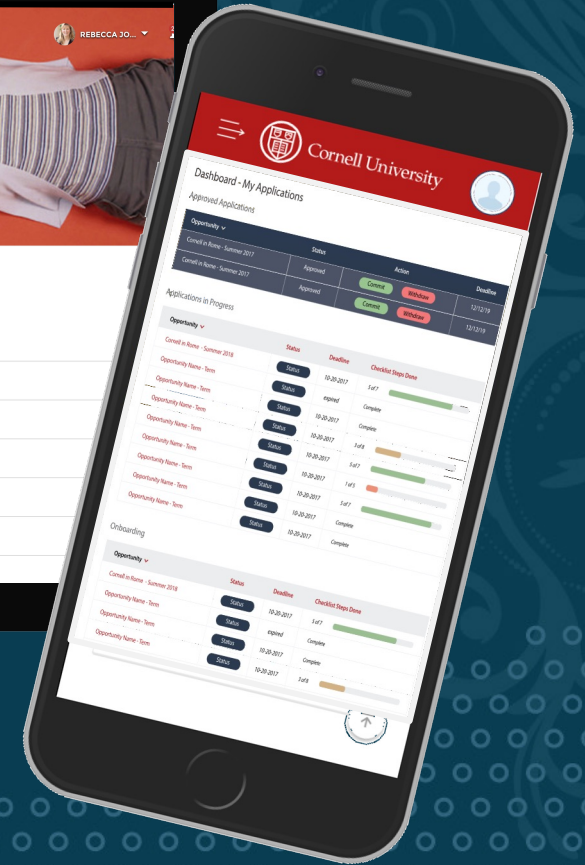
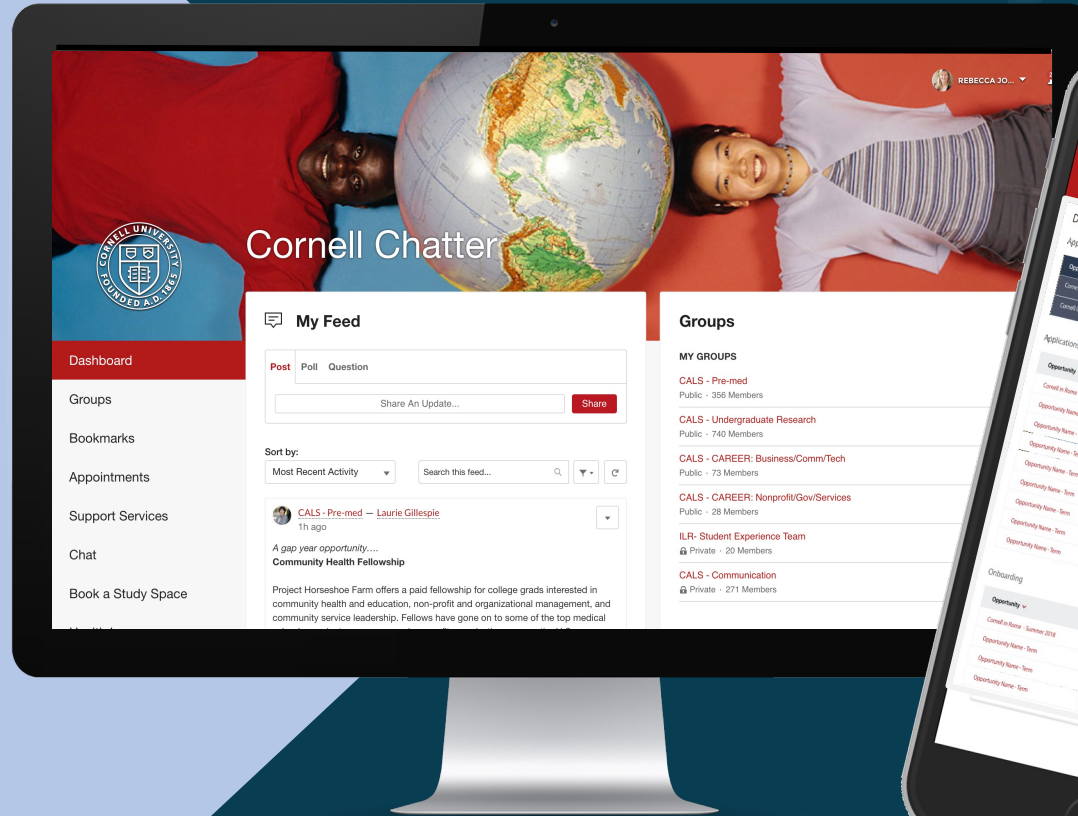
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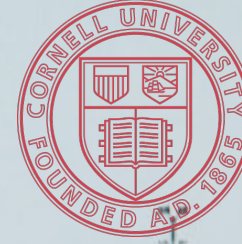
No more past activities to load.



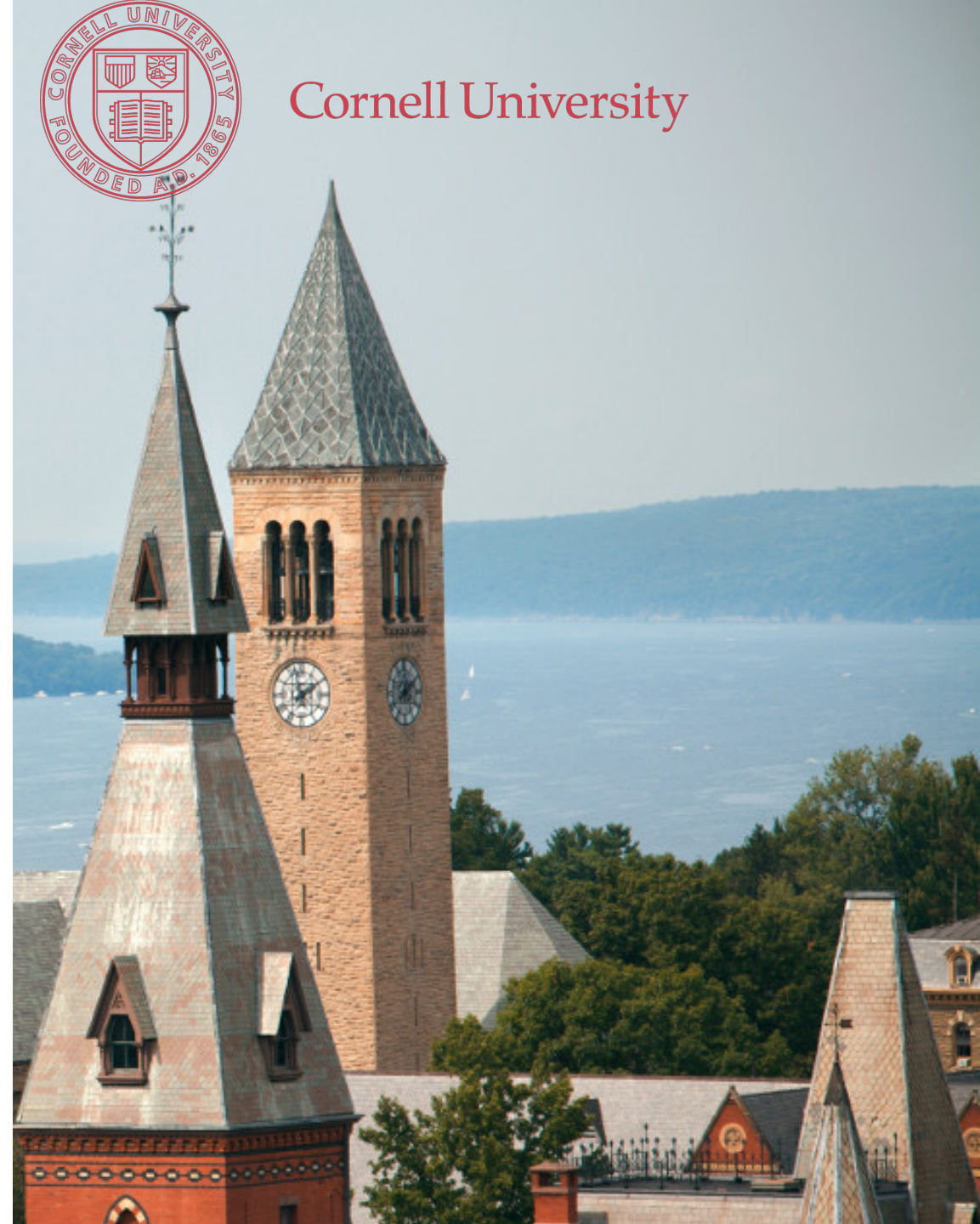
Example:

Job-to-be-done: Campus reactivation

Dx win: Use the “building blocks” to
assemble new journeys

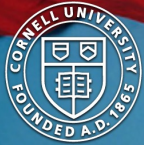


Cornell University





REBECCA JO...



Cornell Chatter


- Dashboard
- Groups
- Bookmarks
- Appointments
- Support Services
- Chat
- Book a Study Space

My Feed

Post
 Poll
 Question

Share An Update...

Sort by: Search this feed...


CALS - Pre-med — Laurie Gillespie
 1h ago

A gap year opportunity...
Community Health Fellowship

Project Horseshoe Farm offers a paid fellowship for college grads interested in community health and education, non-profit and organizational management, and community service leadership. Fellows have gone on to some of the top medical

Groups

- MY GROUPS**
- CALS - Pre-med**
Public · 356 Members
 - CALS - Undergraduate Research**
Public · 740 Members
 - CALS - CAREER: Business/Comm/Tech**
Public · 73 Members
 - CALS - CAREER: Nonprofit/Gov/Services**
Public · 28 Members
 - ILR- Student Experience Team**
Private · 20 Members
 - CALS - Communication**
Private · 271 Members



Book a Study Space

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam id turpis accumsan nisi fringilla iaculis vel id tellus. Suspendisse fermentum egestas diam eget lacinia. Vivamus mollis ante vel porttitor facilisis. Aliquam vitae tempus lectus. Vestibulum quis malesuada elit. Nulla et molestie sapien. Pellentesque id sollicitudin quam. Suspendisse quis iaculis ante. Donec dictum egestas quam, et efficitur purus vestibulum a. Aliquam commodo nisi a dolor interdum commodo. Integer luctus ultricies nisi, sit amet tincidunt orci elementum aliquam. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris venenatis et risus quis tempor.

Dashboard

Groups

Bookmarks

Appointments

Support Services

Book a Study Space

Chat

Health Leave

search Chatter



[Cornell Mission Statement](#)

Select a campus

Central campus

Select a building

choose one...

choose one...

Balch

Bradfield Hall

Clara Dickson Hall

Warren Hall

SUZIE STU...





- Dashboard
- Groups
- Bookmarks
- Appointments
- Support Services
- Book a Study Space**
- Chat
- Health Leave

search Chatter

[Cornell Mission Statement](#)

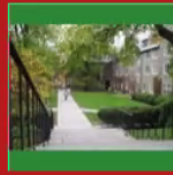
Book a Study Space

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam id turpis accumsan nisi fringilla iaculis vel id tellus. Suspendisse fermentum egestas diam eget lacinia. Vivamus mollis ante vel porttitor facilisis. Aliquam vitae tempus lectus. Vestibulum quis malesuada elit. Nulla et molestie sapien. Pellentesque id sollicitudin quam. Suspendisse quis iaculis ante. Donec dictum egestas quam, et efficitur purus vestibulum a. Aliquam commodo nisi a dolor interdum commodo. Integer luctus ultricies nisi, sit amet tincidunt orci elementum aliquam. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris venenatis et risus quis tempor.

TEST
[Search](#)

Select a campus Select a building test

Space Name	Description	Campus	Building	Click to Book
Balch Hall	North campus dorm - lounge space	North Campus	Balch Hall	Book
Clara Dickson Hall - 1st Floor	North campus dorm - lounge space	North Campus	Clara Dickson Hall	Book Book
Clara Dickson Hall - 2nd Floor	North campus dorm - lounge space	North Campus	Clara Dickson Hall	Book



Balch Hall

Room 110

Room 100
1 hour



Room 110
1 hour



Room 130
1 hour



Room 140
1 hour



August 10 with Desk 2

< > August 2020

Select staff (optional)

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Desk 2

9:00 am

9:30 am

10:00 am

10:30 am

11:00 am

1:00 pm

1:30 pm

2:00 pm



Health Leave

- Dashboard
- Groups
- Bookmarks
- Appointments
- Support Services
- Chat
- Health Leave**

A Health Leave of Absence (HLOA) is recommended when a student's medical or mental health condition is found – collaboratively with the student and their healthcare provider(s) – to significantly impair their ability to function successfully or safely as a student. It is expected that the student uses the time away from the university for treatment and recovery.

- Potential advantages of an HLOA over a Personal Leave of Absence:
- An HLOA usually qualifies a student for benefits under any tuition reimbursement plan they may have.
 - Students who think they may need to take an HLOA during the course of a coming semester can consider purchasing tuition reimbursement insurance before the semester begins.
 - Students enrolled in the Student Health Plan (SHP) may be able to purchase the insurance for an additional academic year while on an HLOA).
 - For international students, an HLOA may provide a way to remain in the US while maintaining legal status.
 - An HLOA sometimes qualifies a student to initiate a leave of absence later in the semester than might normally be permitted for a personal leave.

Speak with a Cornell Health counselor or medical clinician to see if pursuing an HLOA is right for you.

My Health Leave Request

Student Name	Status	Date/Time Opened
Suzie Calstudent	Request Approved	7/22/2020 1:59 PM

[COMMIT TO LEAVE OF ABSENCE](#) [CANCEL HLOA REQUEST](#)

Resources

[Cornell Mission Statement](#)



[Return Process Checklist](#)



[Important Deadlines](#)



[HLOA Information](#)

Cornell Id: 1111111 | Primary College: Industrial and Labor Relations | Registered: | Class Year: 2020 | Suppress Information: | Inactive:



Suzie Student

BS Industrial and Labor Relations
Industrial and Labor Relations
Class of 2020

Open Cases
0

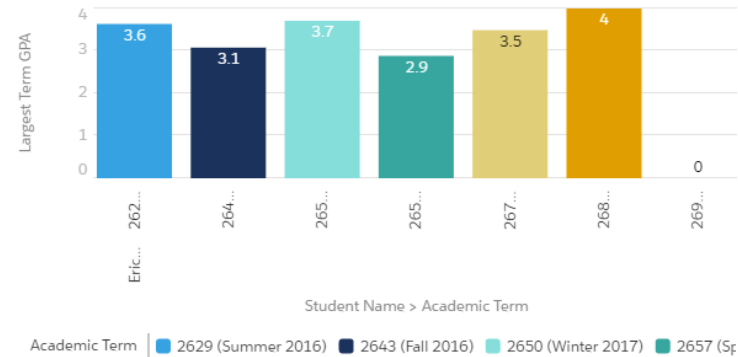
Alerts
0

Meetings
1

DETAILS RELATED

Student Name Suzie Student	Cornell Id 1111111
Contact Suzie Student	Net Id netid123
Primary College Industrial and Labor Relations	
Student Attributes	
University Matriculation Type UG Frosh	Registered <input type="checkbox"/>
Nontraditional <input type="checkbox"/>	First Gen College Stdnt Admissions <input checked="" type="checkbox"/>
FYSA	First Gen College Student 1

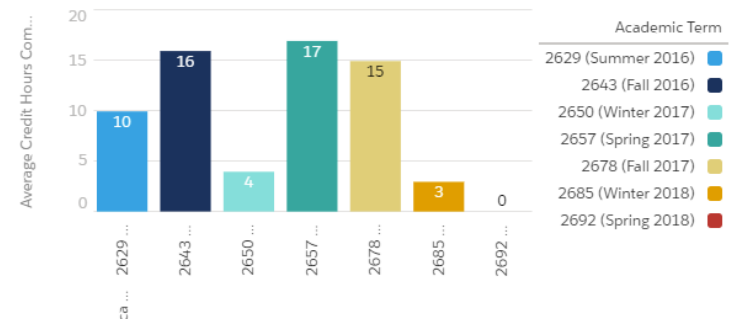
Term GPA Trending by Student



[View Report](#)

As of Today at 11:12 AM

Completed Credits by Term



Enrolled **Dropped** **Incomplete**

Spring 2018 Enrollment; Total Credits: 26; Cumulative GPA: 3.286

CLASS	CREDITS	GRADING OPTION	STATUS
ASIAN 3376	4	GRV	Enrolled
ILRIC 2370	3	GRV	Enrolled
ILRLR 2010	3	GRV	Enrolled
KOREA 1102	6	GRV	Enrolled
ILROB 4235	4	GRV	Enrolled
ILRLR 3870	4	GRV	Enrolled
ILRHR 2660	2	GRV	Enrolled

Notes (0) ▼

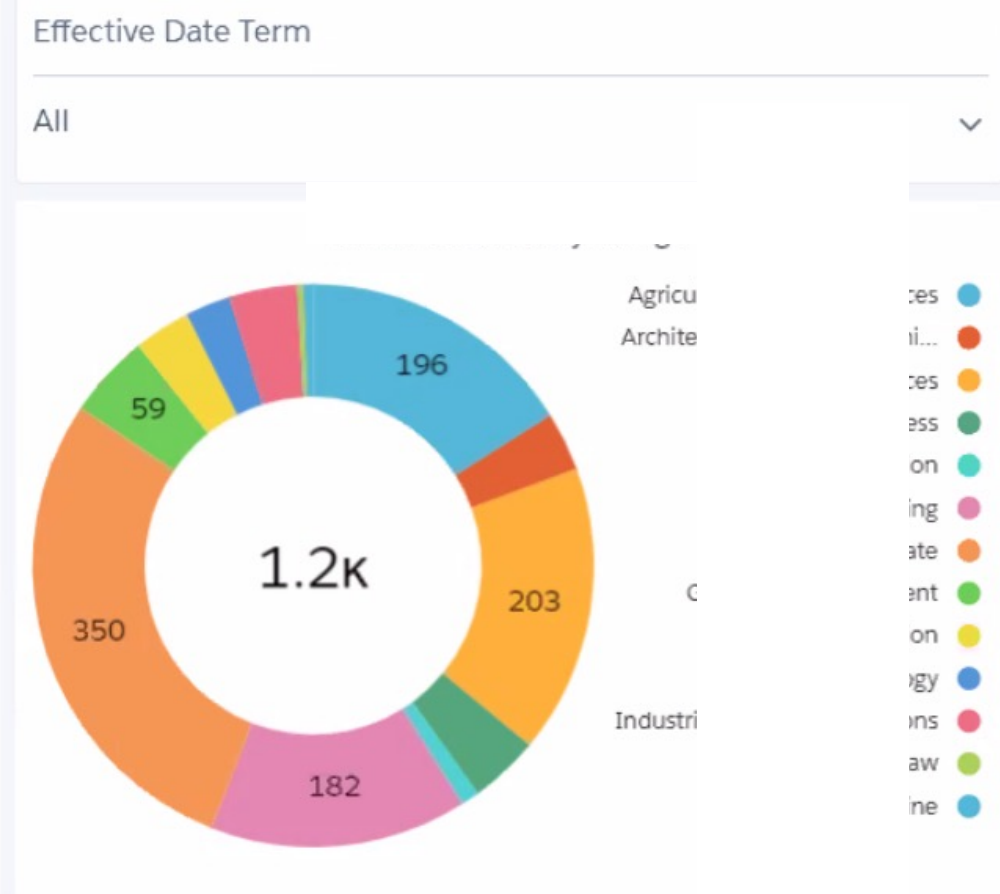
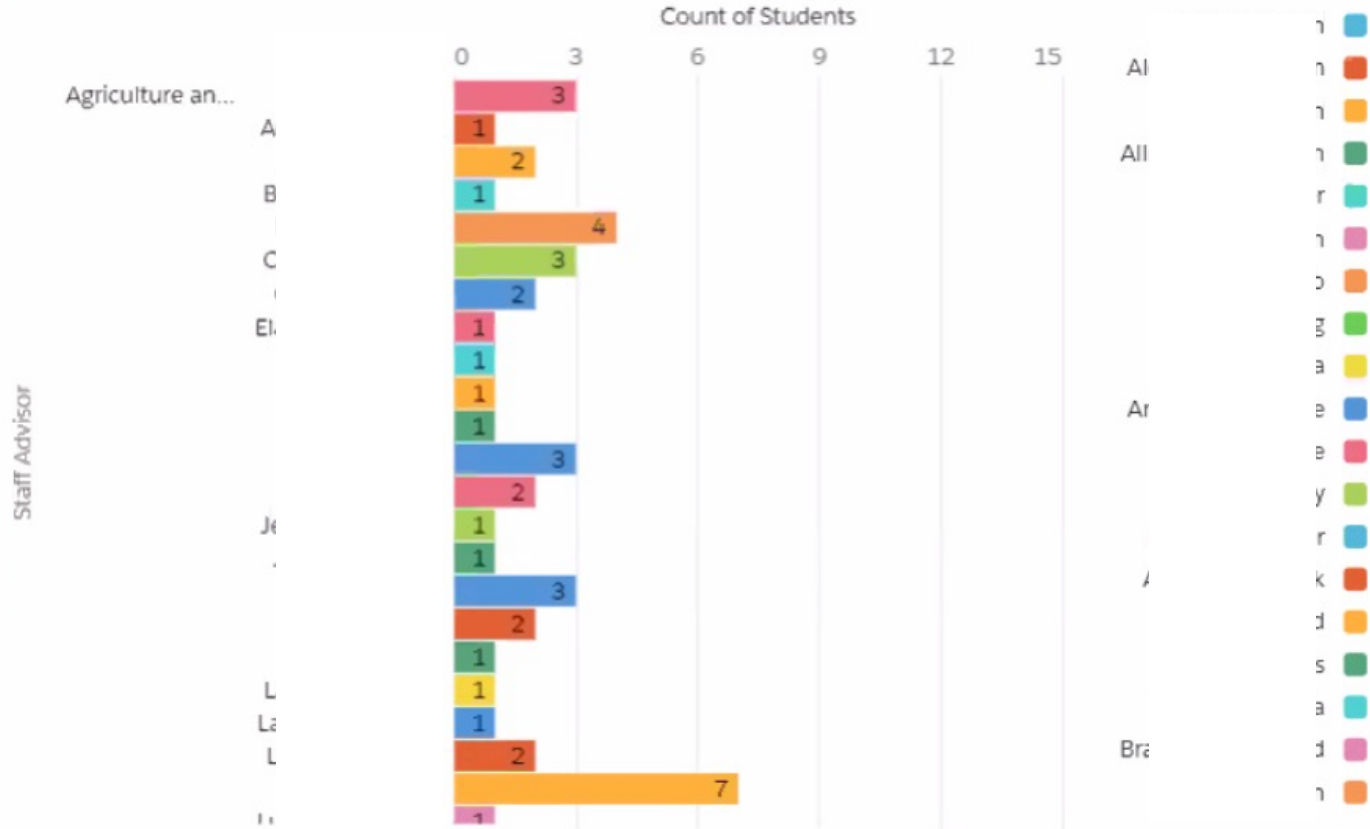
Student Actions & Alerts (0) ▼

Meetings (1) ▼

[M-0113](#)
Staff Member: Jennifer Weidner
Appointment Type: Resume Review, initial
Meeting Notes:

[View All](#)

Cases (0) ▼



#	Student__c.Name	Student__c.Primary_College__c	Admt_Term__c.Na...	Major	Effective Da...	Status	Employee__c.Na...	Employee__c.Contact__c.Primary_Affilia
1	Se	Graduate						
2	Se	Graduate						
3	Se	Graduate						
4	Se	Graduate	Fall 1994	Biological Engineering	1996-02-05	LOA	Mag	Staff
5	Ki	Agriculture and Life Sciences	Fall 2005	Communication	2018-05-23	LOA	Katt	Faculty

TIPS

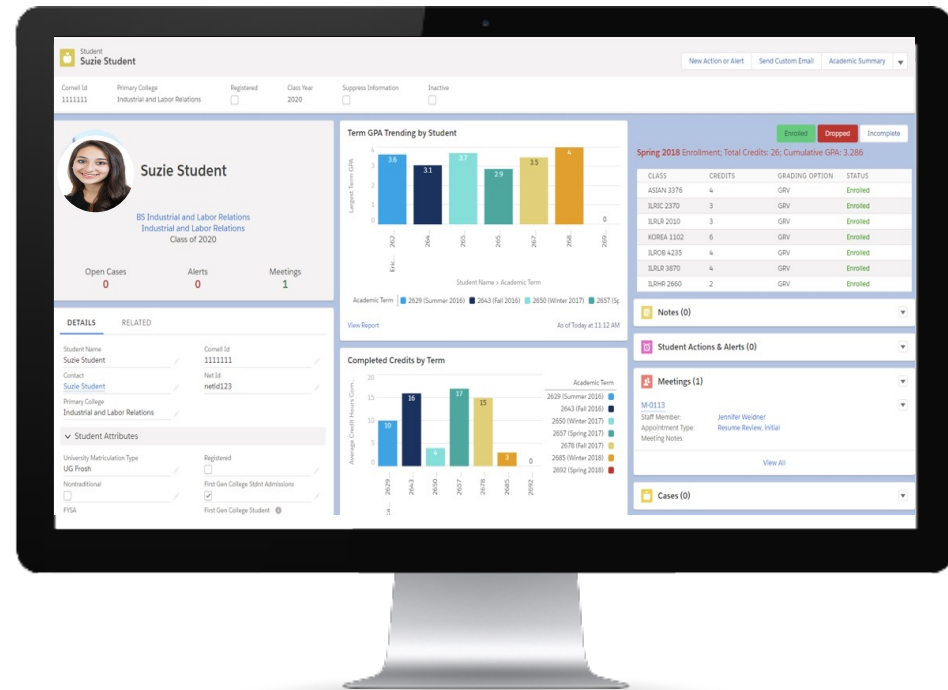
Use CRM to enable digital transformation

- Transformations are hard, and digital ones are harder
- The path to modernization begins with making information more accessible across the organization
- First, you need a data platform
- Second, you need to set up your channels for engagement (“building blocks”)
- Finally, you have to get started – it’s okay to start small and iterate

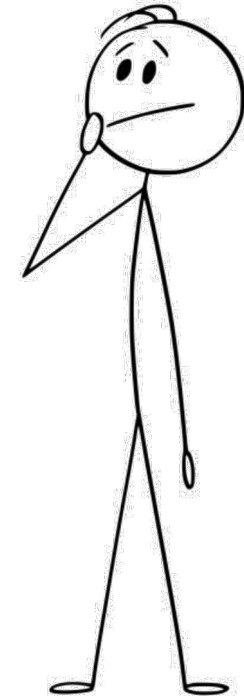


Chapter 3

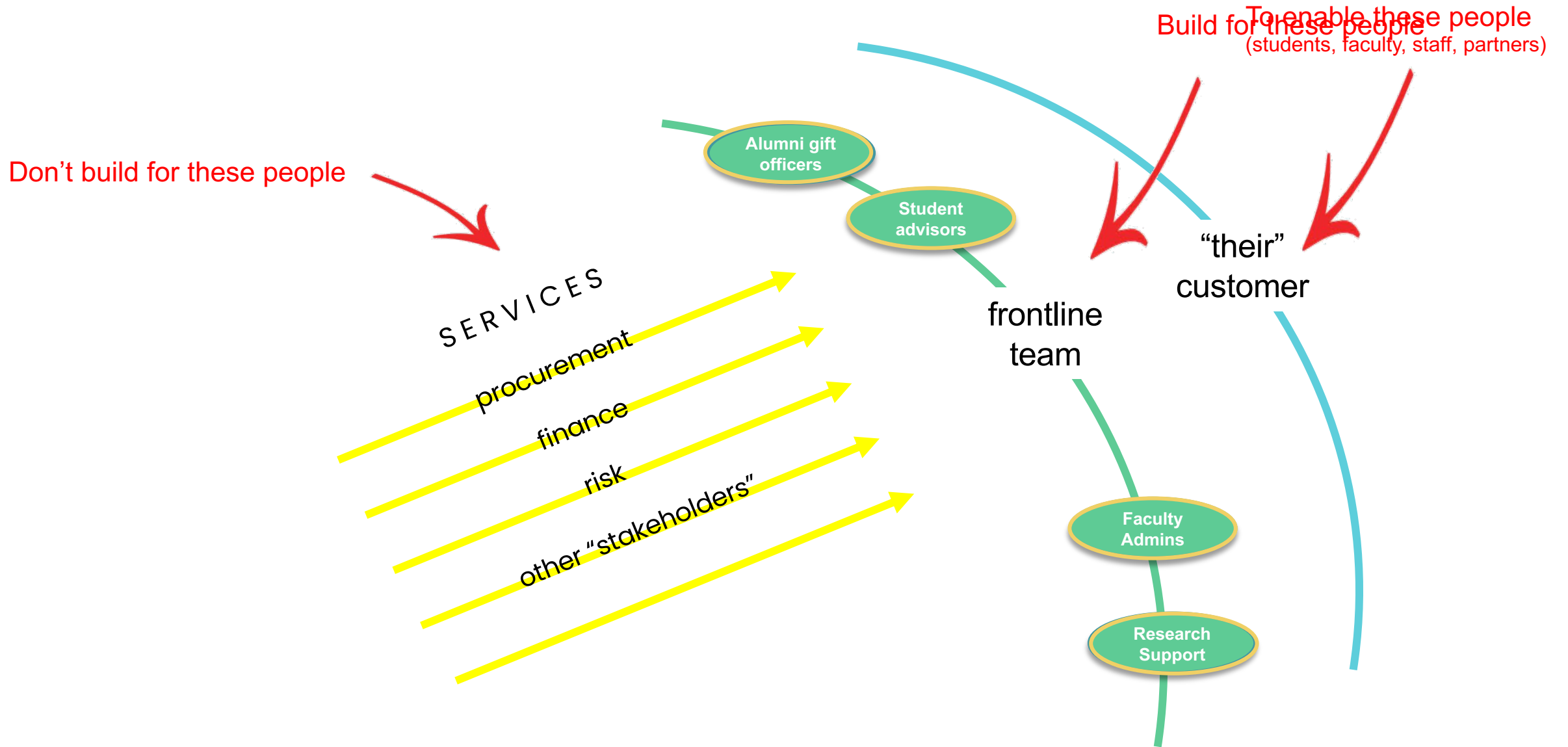
What is Salesforce? (no really, what is it?)



Current state



Who is the customer?



Salesforce Products (aka "Clouds")



Sales

Service

Marketing

Community

Analytics

Apps

Tools



Account
Contact
Leads
Opportunities
Case

Sales Cloud +
Knowledge
Live Agent
Web to Case

Marketing Cloud
Pardot
Social Studio

*Data visibility to
the outside
world, enabling
collaboration
around business
processes*

*The ability to take
action on insights
is what makes
Salesforce unique*

via the App Exchange

Conga Composer
Form Assembly
Qualtrics Connector
DocuSign

Einstein
Prediction Builder

Chatter
Mobile Publisher
Groups
Topics
Custom
Lightning
Components

Salesforce Products (aka "Clouds")



Sales

Service

Marketing

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Analytics

Apps

Account
Contact
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Case

Sales Cloud +
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Form Assembly
Qualtrics Connector
DocuSign

Einstein
Prediction Builder

Chatter
Groups
Topics
Custom
Lightning
Components

Mobile Publisher
Trailhead

Tools we
have





All Search Students and more...



Student

Student Academic Summary

Send Custom Email

New A

Cornell Id
2464191

Primary College
Graduate

Expected Graduation Term
Fall 2022

Registered

Suppress Information

Inactive



PHD Horticultural Biology
Graduate
Class of 2022

Open Cases
0

Alerts
0

Meetings
0

Relationship Managers (3)

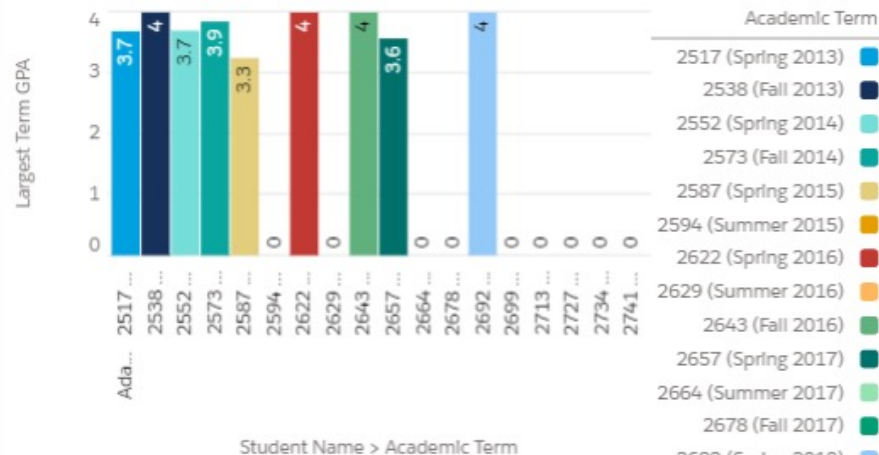
R-70882
Employee: Gregory Peck
Role: Chairperson
Academic Plan: HCMS-CON

R-67136
Employee: Anna Mansfield
Role: Minor Member
Academic Plan: ENOL-CON

R-70735
Employee: Lailiang Cheng
Role: Minor Member
Academic Plan: PEHC-CON

[View All](#)

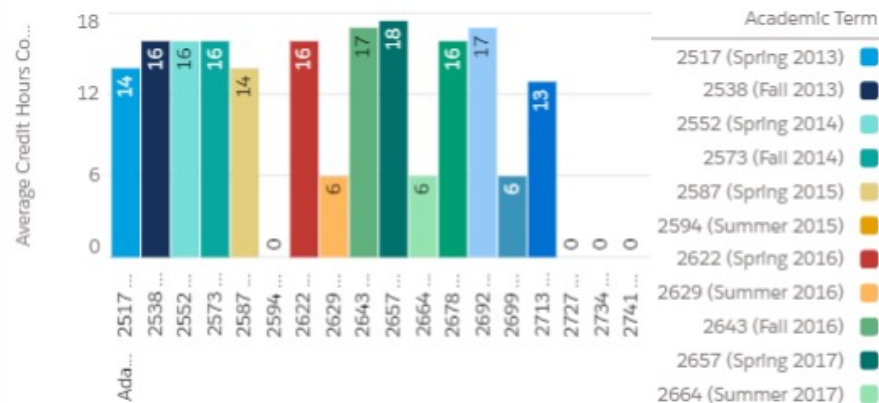
Term GPA Trending by Student



[View Report](#)

As of Today at 5:08 AM

Enrolled Creds by Student



Enrolled Dropped

no enrollment found Enrollment; Total Credits: 0; Cumulative n/a

No Enrolled classes found!

Notes (0)

[View All Notes](#)

Notes & Attachments (0)

[Upload Files](#)

Or drop files

Meetings (0)

Student Actions & Alerts (0)

Files (0)

[Upload Files](#)

Or drop files

[New Task](#)


[Log a Call](#)


[Email](#)


App Launcher


[Visit AppExchange](#)


▼ All Apps


 **Service**
Manage customer service with accounts, contacts, cases, and more


 **Marketing**
Best-in-class on-demand marketing automation


 **Salesforce Chatter**
The Salesforce Chatter social network, including profil...


 **Community**
Salesforce CRM Communities


 **Power of Us Hub**
The Power of Us Hub from the Salesforce Foundation is t...


 **Sales Console**
(Lightning Experience) Lets sales reps work with multip...


 **Service Console**
(Lightning Experience) Lets support agents work with mu...


 **Employee**


 **Cornell University**


 **Application Management**


 **Cornell Opportunity Marketpla**


 **Sales**
Manage your sales process with accounts, leads, opportu...

 **Student Services**
An app for ILR and CALS to manage student interactions.


 **Appointment & Front Desk Ma**
Tools and objects relating to the front desk management and a...


 **Student CheckIn**


 **Actions and Alerts**
Configure and access student actions & alerts


 **CALS and ILR Student Onboard**


 **Cornell Chatter**


 **Campus Engagement Platform**


 **Application Management**


 **Drupal Identity Provider**

 **Analytics Studio**
Build Einstein Analytics dashboards and apps


 **Shared Data Committee**

 **Adobe Sign for Salesforce**
Adobe Sign application for Lightning Experience.

 **Graduate School**

 Student Services

Student
Cornell Id 2464191 Primary Graduate



Open Cases 0

Relationship Manager
R-70882 Employee: Gr Role: Ch Academic Plan: HC
R-67136 Employee: An Role: Mi Academic Plan: EN
R-70735 Employee: La Role: Mi Academic Plan: PE

Academic Programs

Send Custom Email New Ad

Enrolled Dropped

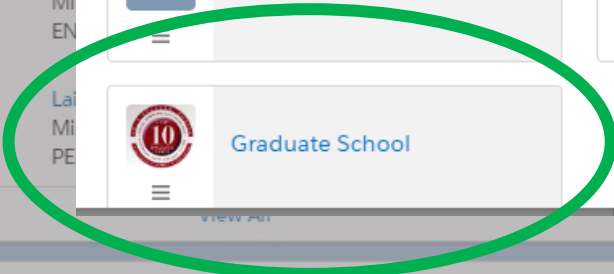
Total Credits: 0; Cumulati

Upload Files Or drop files

Upload Files Or drop files

2643 (Fall 2016) 2657 (Spring 2017) 2664 (Summer 2017)


New Task Log a Call Email





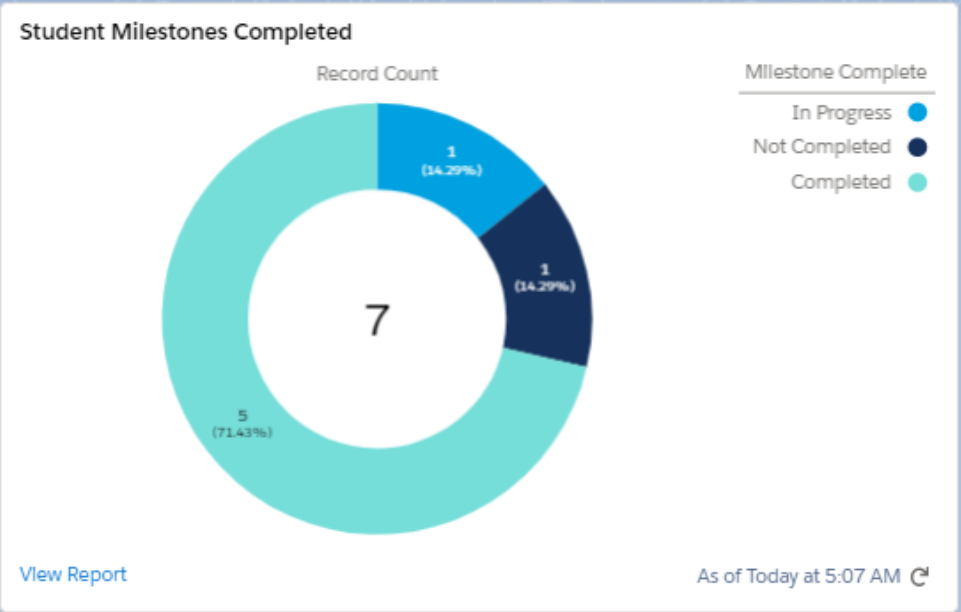
Student Academic Summary Send Custom Email

Cornell Id: 2464191 Primary College: Graduate Expected Graduation Term: [Fall 2022](#) Registered: Suppress Information: Inactive:



Horticultural Biology Graduate Class of 2022

Open Cases: 0 Alerts: 0 Meetings: 0



Graduate Field Enrollments (1)

[GFN-63010](#)

Is Current:
 Graduate Field: [Horticulture](#)
 School Enrollment: [S-9885](#)

[View All](#)

Notes (0)

Meetings (0)

Files (0)

[Upload Files](#)

Or drop files

Relationship Managers (3)

[R-70882](#)
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 Role: Chairperson
 Academic Plan: HCMS-CON

[R-67136](#)
 Employee: [Anna Mansfield](#)
 Role: Minor Member
 Academic Plan: ENOL-CON

[R-70735](#)
 Employee: [Lailiang Cheng](#)
 Role: Minor Member
 Academic Plan: PEHC-CON

[View All](#)

Student Milestones (3+)

[SM-11268](#)
 Formal Description: Master's Exam
 Milestone Code: MEXAM
 Milestone Complete: Completed

[SM-13010](#)
 Formal Description: Admission to Candidacy Exam
 Milestone Code: AEXAM
 Milestone Complete: Completed

[SM-17980](#)
 Formal Description: Responsible Conduct of Research Training
 Milestone Code: GRRCR
 Milestone Complete: Completed

New Task Log a Call Email

Create a task...

Filters: All time

Next Steps [More Steps](#)


























No next steps. To get things moving, add a task or set up a me...

App Launcher

Search apps or items...

Visit AppExchange

▼ All Apps


-  **Service**
Manage customer service with accounts, contacts, cases, and more
-  **Marketing**
Best-in-class on-demand marketing automation
-  **Salesforce Chatter**
The Salesforce Chatter social network, including profil...
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(Lightning Experience) Lets support agents work with mu...
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-  **Cornell University**
-  **Application Management**
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An app for ILR and CALS to manage student interactions.
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Build Einstein Analytics dashboards and apps
-  **Shared Data Committee**
-  **Adobe Sign for Salesforce**
Adobe Sign application for Lightning Experience.
-  **Graduate School**

Student Services

Student

Cornell Id 2464191

Primary C Graduat



Open Cases 0

Relationship Manage

R-70882

Employee: Gr

Role: Ch

Academic Plan: HC

R-67136

Employee: An

Role: Mi

Academic Plan: EN

R-70735

Employee: Lai

Role: Mi

Academic Plan: PE

Academic Programs

Send Custom Email

New Ad

Enrolled

Dropped

Total Credits: 0; Cumulati

Upload Files

Or drop files

Upload Files

Or drop files

New Task

Log a Call

Email



All Search Front Desk Queue and more...

Front Desk Queue CALS Student Services Checked-In

50+ Items • Sorted by Check-In Time • Filtered by all front desk queue - Office, Status • Updated a few seconds ago

	<input type="checkbox"/> FRONT DESK QUE...	<input type="checkbox"/> STUDENT	<input type="checkbox"/> REASON	<input type="checkbox"/> APPOINTMENT TYPE	<input type="checkbox"/> CHECK-IN TIME ↓
1	<input type="checkbox"/> FD-2972	Stevie Student	Scheduled Appointment	Academic Advising	7/9/2019 10:25 AM
2	<input type="checkbox"/> FD-2969	Stevie Student	Scheduled Appointment	Academic Advising	7/8/2019 3:08 PM
3	<input type="checkbox"/> FD-2968	Stevie Student	Scheduled Appointment	Academic Advising	7/8/2019 9:55 AM
4	<input type="checkbox"/> FD-2931	Sue Irvine	Drop-In	Resume Review, initial	2/25/2019 1:51 PM
5	<input type="checkbox"/> FD-2929	Sue Irvine	Scheduled Appointment	Career Advising	2/13/2019 10:21 AM
6	<input type="checkbox"/> FD-2928	Sue Irvine	Drop-In	Resume Review, initial	2/13/2019 10:11 AM
7	<input type="checkbox"/> FD-2925	Sue Irvine	Drop-In	Resume Review, initial	2/6/2019 9:43 AM
8	<input type="checkbox"/> FD-2911	Ju	Drop-In	Graduate & Prof School Advising	10/26/2018 2:30 PM
9	<input type="checkbox"/> FD-2910	Jo	Drop-In	Academic Advising	10/26/2018 2:27 PM
10	<input type="checkbox"/> FD-2909	Ta	Drop-In	Academic Advising	10/26/2018 2:23 PM
11	<input type="checkbox"/> FD-2907	Al	Drop-In	Resume Review, initial	10/26/2018 2:07 PM
12	<input type="checkbox"/> FD-2906	M	Drop-In	Academic Advising	10/26/2018 2:05 PM
13	<input type="checkbox"/> FD-2905	Di	Drop-In	Resume Review, initial	10/26/2018 2:05 PM
14	<input type="checkbox"/> FD-2904	M	Drop-In	Academic Advising	10/26/2018 2:03 PM
15	<input type="checkbox"/> FD-2902	Pl	Scheduled Appointment	Academic Advising	10/26/2018 1:54 PM
16	<input type="checkbox"/> FD-2901	Al	Drop-In	Cover Letter Review	10/26/2018 1:39 PM
17	<input type="checkbox"/> FD-2900	Di	Drop-In	Academic Advising	10/26/2018 1:38 PM
18	<input type="checkbox"/> FD-2899	H	Drop-In	Academic Advising	10/26/2018 1:34 PM

Re-define "Student Success"



DATA WE HAVE:

- 1) ACADEMIC
- 2) CAREER
- 3) DEMOGRAPHIC

WELL BEING:

- 1) FINANCIAL SECURITY
- 2) SOCIAL AND COMMUNITY SUPPORT
- 3) PURPOSE AND ENGAGEMENT

Welcome to the Cornell
Student Success homepage!



Pre-College

What pre-college factors affect student success?



[Pre-College Dashboard](#)

Post-College

What are students pursuing after college?



[Post-Graduate Dashboard](#)

Transfer Students

How do transfer students perform?



[Transfer Student Dashboard](#)

Non-Graduates

What is the makeup of students who are not graduating?



[Non-Graduate Dashboard](#)

Coursework

Are PreMed and PreVet students on track with required classes?



[Coursework Dashboard](#)

Dashboards

Students who took MATH 120 with or without AP Math credit

Average grade in Math 120

Average Grade in MATH 120 by AP Test Score

AP Math & MATH 120
Sue Irvine
Jan 3, 2017 at 3:39 PM

Student Services Cases
Sue Irvine
Jan 6, 2017 at 8:04 AM

Employer Snapshot
Sue Irvine
Sep 16, 2016 at 9:24 AM

POST-COLLEGE

Where are students looking for jobs?

1,436

Post-College Dashboard: Geographical
Sue Irvine
Jun 21, 2016 at 3:51 PM

POST-COLLEGE

How is employment (and) trending?

Post-College Dashboard: Industry
Sue Irvine
Jun 21, 2016 at 3:51 PM

POST-COLLEGE

What are students pursuing after college?

3.4

Post-College Dashboard: Home
Sue Irvine
Jun 21, 2016 at 3:51 PM

PRE-COLLEGE

What is the overall GPA of students?

3.3

7,736

Pre-College Dashboard
Sue Irvine
Jun 21, 2016 at 3:51 PM

Coursework D
Focus on Pre-Med

What is the course taken most frequently?

Coursework Dashboard
Rachel Ing
Sep 23, 2016 at 12:46 PM



Lens table view for action

Datasets
Converted Leads Fields

DATA FILTERS 1

Filters

Age Group
21-30

+

What do you want to see? Just start typing...

#	Full Name	Age Group	Owner	City
1	Yorker Temprell			s City
2	Idalina Mathou			ayne
3	Christabel Tomczykowski			ee Mission
4	Amye Swalough			
5	Marsh Maylott			sboro
6	Lora Shipway			
7	Maurizia Wilkins			ston
8	Josiah Dreus			on City
9	Steffi Edmans			r
10	Thorpe Plampin			a
11	Sayre Lisett			
12	Hildegarde Grenfell			s City
13	Michelina Standingford			sonville
14	Heida MacGregor	21-30	Clive Lloyd	Columbia

- Open Record
- Log a Call
- New Task
- Post
- File
- New Case
- New Note
- New Event
- Link
- Poll
- Question

Analytics Studio MockU Student Success Lens table view for act...

Lens table view for action

Datasets

Converted Leads Fields

DATA FILTERS 1

Filters

Age Group 21-30

+

* What do you want to

#	Full Name
1	Yorker Temprell
2	Idalina Mathew
3	Christabel Thomas
4	Amye Swallow
5	Marsh Maylor
6	Lora Shipway
7	Maurizia Wilk
8	Josiah Dreus
9	Steffi Edman
10	Thorpe Plam
11	Sayre Lisett
12	Hildegard Grenfell

New Case for Yorker Temprell

Contact Name

Status

Subject

Description

Cancel OK

Analytics Studio MockU Student Success Lens table view for act...

Lens table view for action

Datasets
Converted Leads Fields

DATA FILTERS 1



Filters
Age Group
21-30

What do you want to see? Just start typing...

#	Full Name					
1	Yorker Temp					
2	Idalina Math					
3	Christabel To					
4	Amye Swalou					
5	Marsh Maylo					
6	Lora Shipway					
7	Maurizia Wilk					
8	Josiah Dreus					
9	Steffi Edman					
10	Thorpe Plampin	21-30	Viv Richards	Atlanta	50.9	13,4... Phone

Post for Yorker Temprell

@[Mark Tossell] Please follow up on Yorker - note his borderline avg GPA.

B I U S Ix  

Cancel OK



Persistence

At Risk

Dependence

Action List

AI

Select the appropriate pre-determined risk factors on the left, and your "at risk" student list will update accordingly.

Select Risk Factor/s

Admissions Program

All

Low GPA

All

Low Current Credits

All

Excessive Time Taken (%)

All

High Service Cases

All

Major

Criminology/Criminal Justice

Segment

All

ID	Major	GPA	Pace	Program Length	Course Age	Current Credits	Service Cases
0855416	Criminology/Criminal Justice	0	0	6	2	0	0
0855417	Criminology/Criminal Justice	0	0	6	2	0	0
0814667	Criminology/Criminal Justice	0	0	6	1	9	0
0759892	Criminology/Criminal Justice	0	0	0	4	0	0
0798305	Criminology/Criminal Justice	0	0	2	2	0	6
0828525	Criminology/Criminal Justice	0	0	2	2	3	0
0782601	Criminology/Criminal Justice	0	0	3	3	0	12
0726650	Criminology/Criminal Justice	0	0	4	4	0	4
0767392	Criminology/Criminal Justice	2	0	6	3	10	9
0792644	Criminology/Criminal Justice	3	0	6	3	12	5
0782071	Criminology/Criminal Justice	2	0	6	3	0	3
0826931	Criminology/Criminal Justice	2	0	6	2	0	5
0772421	Criminology/Criminal Justice	1	0	6	3	0	9
0825683	Criminology/Criminal Justice	3	0	6	2	0	4
0736668	Criminology/Criminal Justice	3	0	0	4	13	9
0794120	Criminology/Criminal Justice	0	0	6	0	0	27
0708510	Criminology/Criminal Justice	3	0	0	5	0	5
0684719	Criminology/Criminal Justice	3	0	0	6	9	5
0780466	Criminology/Criminal Justice	3	0	0	4	15	4
0652078	Criminology/Criminal Justice	3	0	6	1	12	0
0788263	Criminology/Criminal Justice	3	0	6	3	15	17
0756579	Criminology/Criminal Justice	3	0	6	3	9	18

Global Actions are added to the picklist here:

- Set Notification
- Annotate
- Explore

Select the appropriate pre-determined risk factors on the left, and your "at risk" student list will update accordingly.

Select Risk Factor/s

- Admissions Program
All
- Low GPA
All
- Low Current Credits
All
- Excessive Time Taken (%)
All
- High Service Cases
All
- Major
Criminology/Criminal Justice

ID	Major	GPA	Pace	Program Length	Course Age	Current Cr
						2
						2
						1
						4
						2
						2
						3
						4
						3
						3
						3
						2
						3
						2
						4
						0
						5
0684719	Criminology/Criminal Justice	3	0	0		6

Student Success ✕


[GIVE ACCESS](#)
[POST TO FEED](#)
[GET URL](#)
[DOWNLOAD](#)

Post the image and link to this Dashboard on a User or Group Feed:

User

Type a name...

Write a comment...



Student Success

i All shared images are public.

Post

Chapter 4

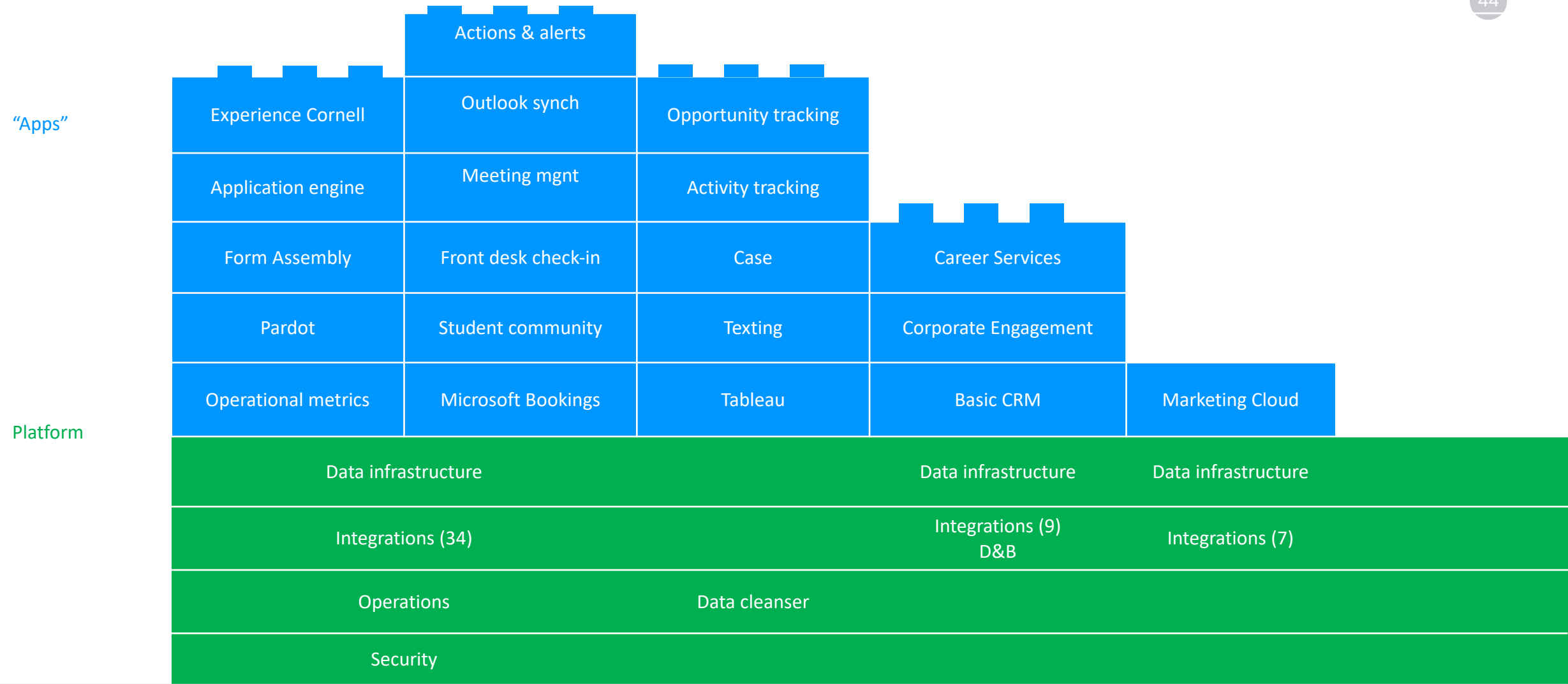
How to Think About Implementation

IT perspective

When a business unit needs technology, what are the options?

Option	Pros	Cons
No solution	No IT cost	Indirect costs; lack of reporting capabilities
Stand-alone solution(s)*	One unit/one purpose	Need multiple systems; data becomes silo'd
Platform solution	Leveraged spend via common “apps” and common data retrieval for multiple units	Takes more time; requires compromise and adoption; added apps can mean added cost

**can be custom app development, 3rd party application or independent implementation of Salesforce*



**The Marketing Cloud implementation benefited from the \$ spent under the Corporate and Covid projects to install data cleansing tools; and from the integrations built in the student project.*

Value proposition of a shared platform

1. “Repeatable technology” equals reduced development costs
2. Speed of implementation once the platform is in place
3. Growing repository of actionable data
 - System of record integrations (build them once!)
 - Engagement data
 - Process data

Chapter 4

How to Think About Implementation

Project perspective

“The student experience”

ONBOARDING

FINANCE

LEARNING

ACTIVITIES

ADVISING

CAREER

COMMUNITY

GRADUATION



"The student experience"



Campus Engagement Platform

Student Activities (co-curricular lens)

Give students the tools to find and participate in university programs. Give program managers the tools they need to run those programs.

Student Advising (curricular lens)

Give advisors the tools they need to strengthen student engagement, understand student needs more deeply, collaborate efficiently, and build stronger paths through graduation.

Student Community

Give students the tools they need to feel connected to the institution.

Analytics

Give senior leaders access to important trends and information that can be used for decision-making.

Goal

**Unified
customer
experience**

Delivering a seamless customer experience built around a 360-degree view of the customer that is shared companywide so that customers experience coordinated digital and human interactions that are useful, enjoyable, and efficient in immersive, engaging environments.

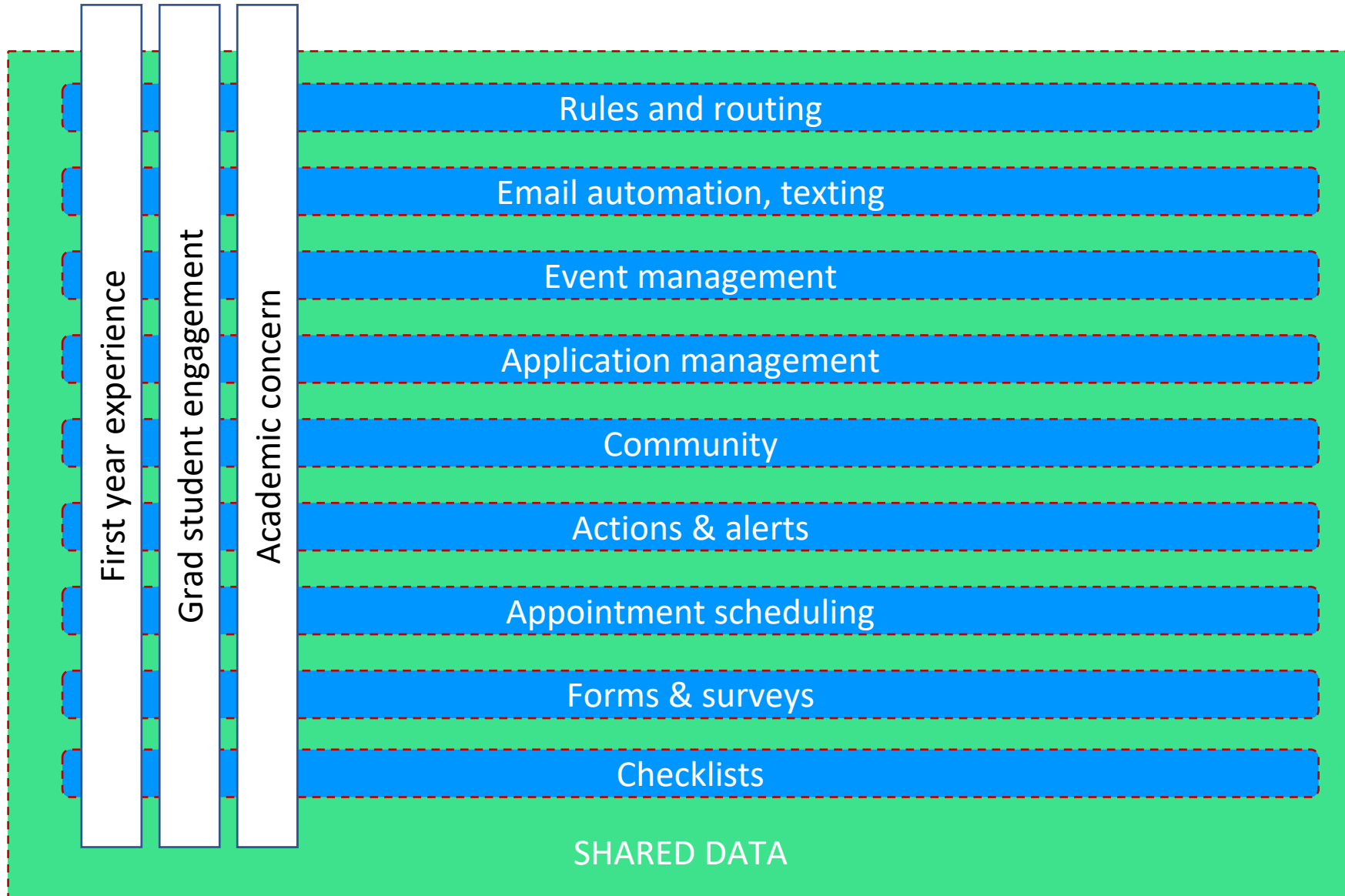
Cornell Strategy

1. Enable the advising community with shared data and engagement tools to support students at Cornell – not just their overall journey but all their micro-journeys
2. Create a real-time profile of student engagement, preferences, and activity (e.g, preference center, progressive profiling, check-in system, interventions) and establish a ‘sensor network’ to provide key signals that students are getting what they need
3. Make insights widely available to people and processes across the University so those on the front lines can take action

Chapter 5

Thinking in Terms of Capabilities

Capability Stack



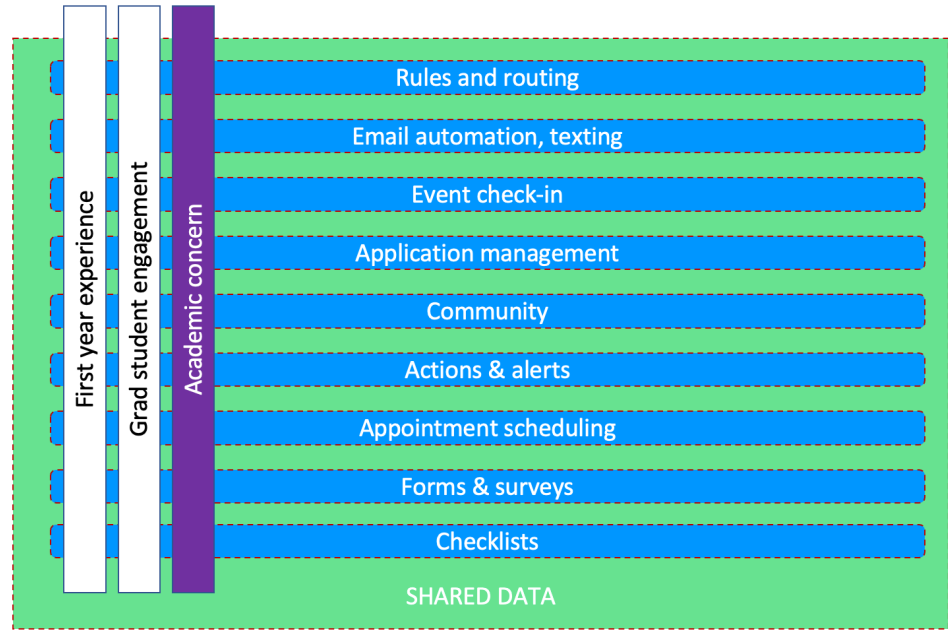
As these technologies and data combine, they become greater than the sum of their parts to bring new capabilities & greater value

Custom develop



Academic concern

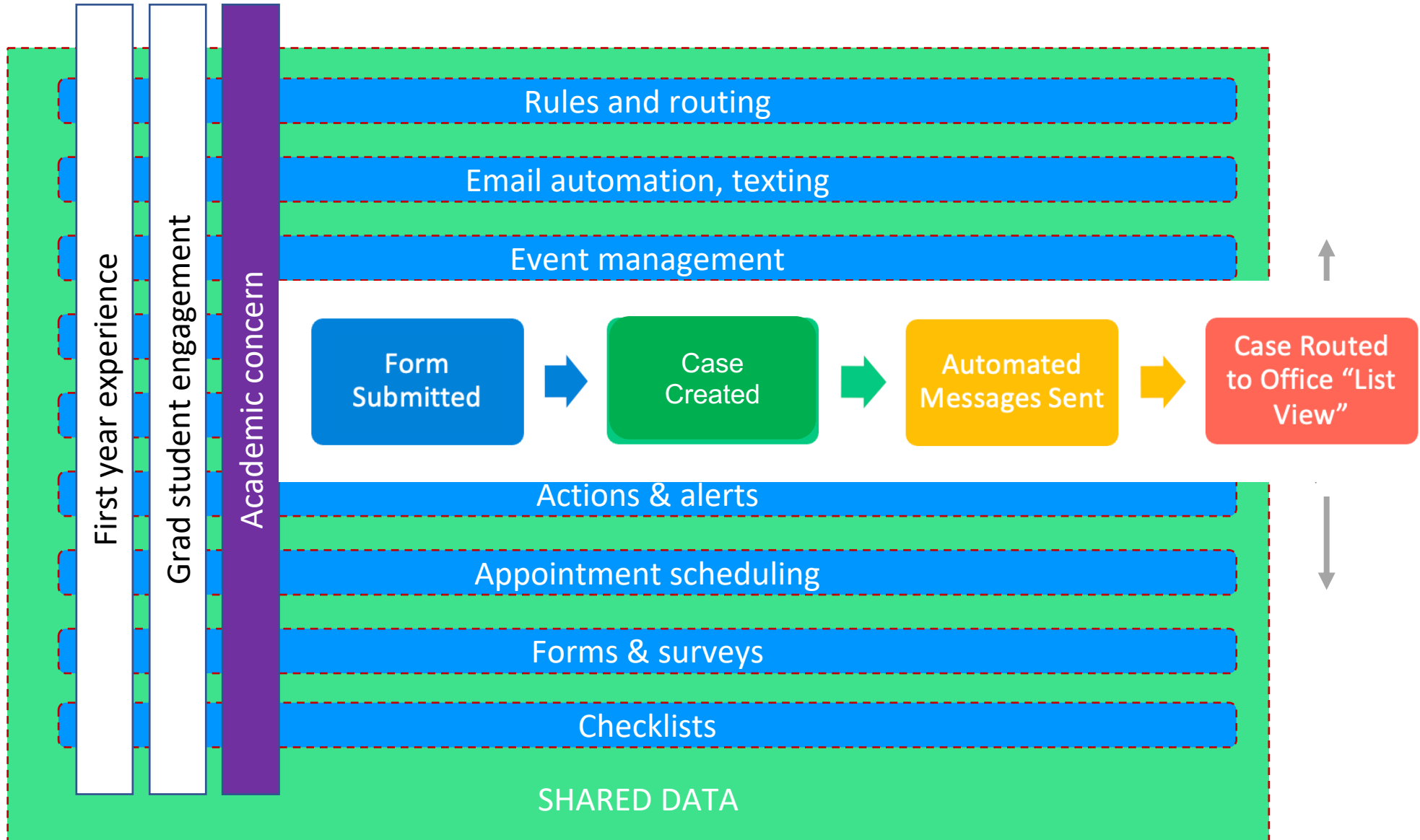
Leverage capability stack



Buy stand-alone system



Capability Stack



ologies and
ey become
sum of
ng new
ater value

Cornell Student Experience Initiative

Student Activities

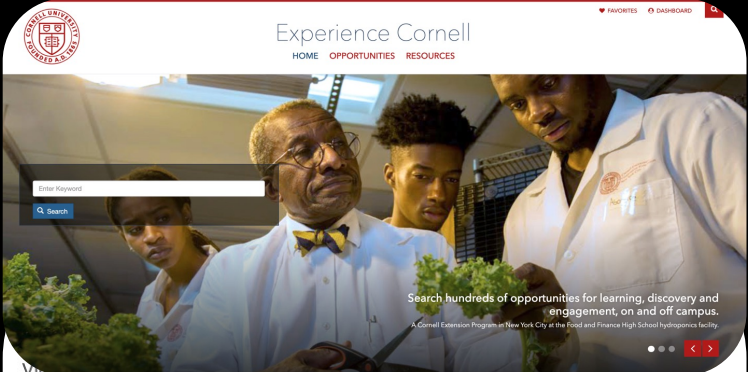
Give students the tools to find and participate in university programs. Give program managers the tools they need to run those programs.



Includes:
opportunity marketplace,
application engine,
administrator dashboards,
student dashboards.



Roadmap:
leverage data for advising,
program planning and
investment, travel registry
needs, housing projections,
donor reporting, and
measuring student outcomes.



Explore [Browse All Opportunities](#)

- Research
- Service & Community-Engaged Learning
- Career Development
- Fellowships & Funding
- Global
- Special Interest

Discover
What appears on this site is just the beginning! Over time, it will grow into a comprehensive gateway to amazing experiences on and off campus.

Opportunities

Search
Enter Keywords
Keyword City/Country
Search Reset

Category
Eligibility
Class Year
College/School
Subject
Term
Feature
Primary Language of Instruction
Location

Pandemic Update: For updates on the current status of each opportunity, please contact the Advisor listed, or for courses, check the linked Class Roster page.

Displaying 1 - 24 of 655 opportunities

- Tsinghua University - Study Away
- Shanghai Jiao Tong University-UM Joint Institute - Study Away
- Peking University - Study Away
- University of Ghana/CIEE Study Away
- Yonsei University - Study Away
- City University of Hong Kong - Study Away
- Cornell-Cologne Humanities Graduate Student Exchange Fellowship
- Cornell-Heidelberg Exchange Fellowships
- Humboldt Exchange Fellowship
- CALS Research Honors
- Cornell Global Program | Berlin Consortium (BCGS)
- Cornell Global Program | EDUCO Consortium

Application Engine

Collect, manage and review applications to programs and run reports on program participation.

Cornell University Opportunities Dashboard

Program

Off-Campus Opportunity Fund (OCOF)

Application Information

- Academic Background
- Funding and Financial Aid
- Off-Campus Program Information

Application Checklist

- Engaged Cornell: Community-Engaged Student Travel Grant Program
- Global Learning: Student Travel Grants**
- Office of Academic Diversity Initiatives (OADI)
- Off Campus Program and Partner Information
- Personal Statement
- Budget Estimate
- Resume
- Letter of Support
- Pre-Departure Workshop

Application Checklist

Global Learning: Student Travel Grants

The Office of Global Learning provides sponsorship to undergraduate and graduate students to support international travel associated with the student's course of study. The goal of the grant is to make international experiences financially accessible to all students across the University.

Eligibility:

- ***This funding is eligible for Winter, Spring (starting in 2020) and Summer programs***
- This opportunity is available to full-time, registered undergraduates from all of Cornell's colleges OR full-time, registered graduate students pursuing the following degrees: Professional degrees, business, law, medicine, and veterinary medicine
- Demonstrated financial need;
- Participation on a formal curricular, for-credit, international experience that is managed by the Office of Global Learning during winter break, spring break (starting in 2020), or summer. See below for a current list of eligible programs:
 - **Summer 2019** - Global Health Summer Program in Dominican Republic, Global Health Summer Program in Tanzania, Global Health Summer Program in Zambia
 - **Winter Break 2020** - To be announced
 - **Spring Break 2020** - To be announced

Enter Keyword Search

345 Results Off-Campus

Sort By: Application Deadline

Filter Results By

- Category
- Research
 - Formal Study
 - Employment & Professional
 - Leadership & Service
 - Abroad & Off Campus
 - Social & Special Interests

Curricular Highlights

Program Components

Available To

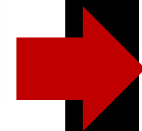
Class Year

Term

Location

How to Use:

Description of this site, what you can find here, what it will grow to be. Description of this you can find here, what it will grow to be. Description of this site, what can find here, what it will grow to be. Description of this site, what can find here.



Program Application in Salesforce



Welcome Back Basant Verma

Search Programs My Applications

APPLICATION A-0104 Submit Application

Program Name	Applicant Name	Application Status	Review Status	Progress Status
DEV TEST ONLY - DO NOT DELETE	Basant Verma	Started		Started

Application Form

Section 1

Test

Emergency Contact

Statement of Purpose

Resume

QUESTION	ANSWER
tes	--None--
Please list the amount that you or your family will contribute towards the costs of this experience:	<input type="text"/>
Please enter your estimated visa fees and Immunization costs (if applicable): (*)	<input type="text"/>
City	<input type="text"/>



Applicant **Basant Verma**

Email: basantverma1990@gmail.com
NetId:

Applications (3)

- A-0109**
Program: Off-Campus Opportunity Fund (OCOF)
Application Status: Started
Review Status:
- A-0220**
Program: Cornell-CALS Exchange: Universitat Autònoma de Barcelona
Application Status: Started
Review Status:
- A-0221**
Program: Alliance for Global Education: Shanghai, 21st Century City
Application Status: Started
Review Status:

[View All](#)

Recommendations (1)

R-0060
Type: Academic
First Name: Rebecca
Last Name: Joffrey

[View All](#)

Educational History (1)

E-0005
Institution: Cornell University
Major:

[View All](#)

Employment History (0)

Applications (3)

APPLICATION NAME	PROGRAM	APPLICATION STATUS
A-0109	Off-Campus Opportunity Fund (OCOF)	Started
A-0220	Cornell-CALS Exchange: Universitat Autònoma d...	Started
A-0221	Alliance for Global Education: Shanghai, 21st Ce...	Started

[View All](#)

Cases (3)

CASE NAME	DESCRIPTION	STATUS
A-0109	Add/Drop Petition	Started
A-0220	Concussion	Started
A-0221	Death in the Family	Started

[View All](#)



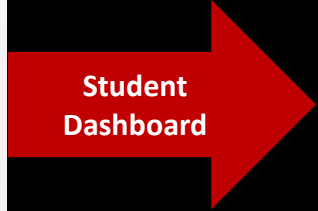
New

REVIEW STATUS



New

RESOLUTION DATE



Student Dashboard

Dashboard - My Applications

Approved Applications

Opportunity	Status	Action	Deadline
Cornell in Rome - Summer 2017	Approved	Commit Withdraw	12/12/19
Cornell in Rome - Summer 2017	Approved	Commit Withdraw	12/12/19

Applications in Progress

Opportunity	Status	Deadline	Checklist Steps Done
Cornell in Rome - Summer 2018	Status	10-20-2017	5 of 7
Opportunity Name - Term	Status	expired	Complete
Opportunity Name - Term	Status	10-20-2017	Complete
Opportunity Name - Term	Status	10-20-2017	3 of 8
Opportunity Name - Term	Status	10-20-2017	5 of 7
Opportunity Name - Term	Status	10-20-2017	1 of 5
Opportunity Name - Term	Status	10-20-2017	5 of 7
Opportunity Name - Term	Status	10-20-2017	Complete
Opportunity Name - Term	Status	10-20-2017	Complete

Onboarding






Opportunity	Status	Deadline	Checklist Steps Done
Cornell in Rome - Summer 2018	Status	10-20-2017	5 of 7
Opportunity Name - Term	Status	expired	Complete
Opportunity Name - Term	Status	10-20-2017	Complete
Opportunity Name - Term	Status	10-20-2017	3 of 8



Resource Library

Resources

Enter a Keyword
 Resource Type
 Category

Type	Resource Name	Category	CU Affiliate
	CALs Student Petitions Students with extraordinary or extenuating circumstances that prevent meeting college standards (enrollment requirements, CALS distribution requirements, etc.) may be eligible to submit a petition to the Committee on Academic Achieveme	Academics	Agriculture and Life Sciences
	CALs Application to update Degree Standing Request for early graduation, delayed graduation, or dual enrollment in another degree program at Cornell.	Academics	Agriculture and Life Sciences
	CALs DUST Degree Progress and Course Enrollment Forms and Tools Academic tools&course enrollment forms.	Academics	Agriculture and Life Sciences
	Career Profiles: AgCareers.com The AgCareers.com Career Profiles were created as a resource to increase learning and understanding around the great variety of opportunities in agriculture and food.	Career	Agriculture and Life Sciences
	Pre-vet Planning Blackboard Site The CALS Career Team and Animal Science faculty have collaborated to develop a new planning site for students who are applying to vet school. This site will help students organize information and begin reflection on experiences.<	Career	Agriculture and Life Sciences



Analytics OEI Programs

Run App [Grid icon] [Share icon]

Search OEI Programs then press Enter

ALL ITEMS DASHBOARDS LENSES DATASETS DETAILS

Dashboards

Title	Created By	Last Modified By	Last Modified	Data Refreshed
Community Engagement Dashboard	Andrew Jenkins	Andrew Jenkins	08/26/21, 9:43 AM	07/27/21, 9:29 AM
EC Program Dashboard	Andrew Jenkins	Andrew Jenkins	09/16/21, 9:24 AM	09/21/21, 1:19 PM

Datasets

Title	Type	Created By	Last Modified By	Last Modified	Data Refreshed
OEI Program Data	Standard	Andrew Jenkins	Integration User	09/16/21, 8:38 AM	09/16/21, 8:38 AM



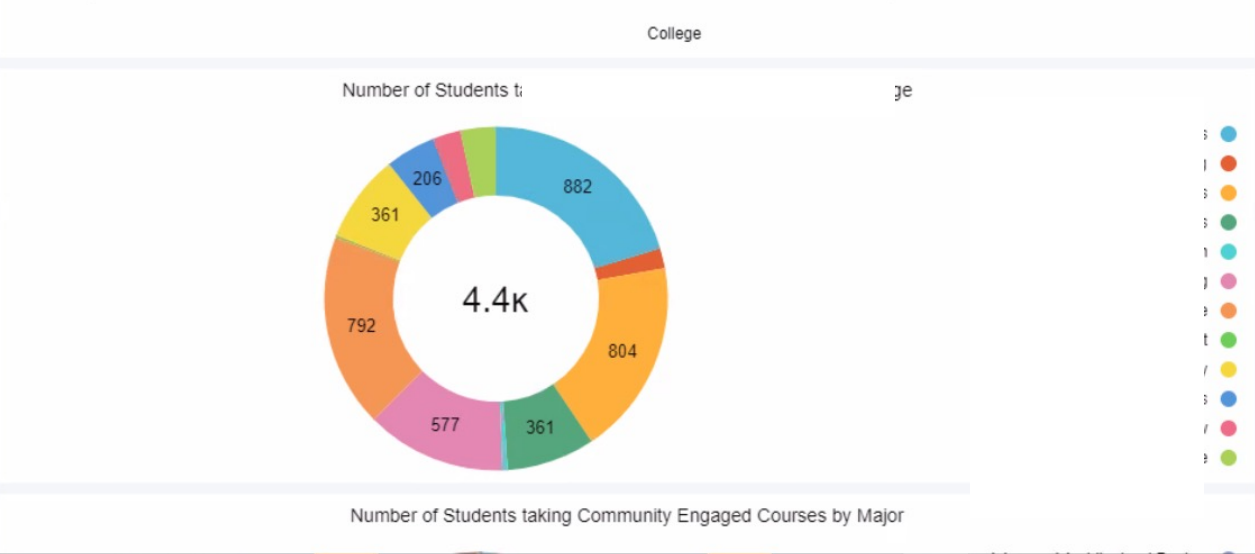
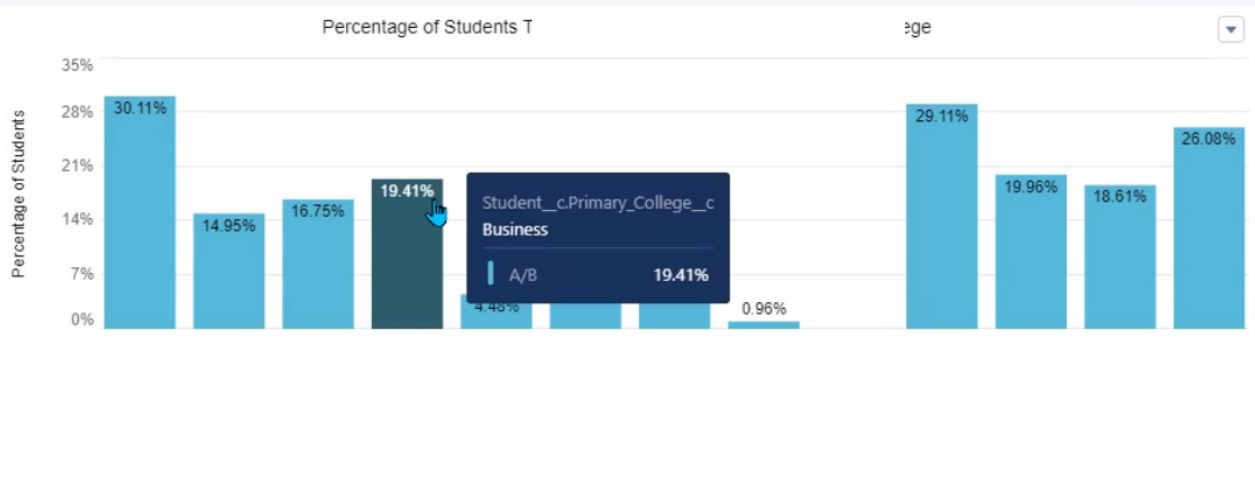
Community Engagement Dashboard

Data updated: Jul 27, 2021 at 9:29 AM

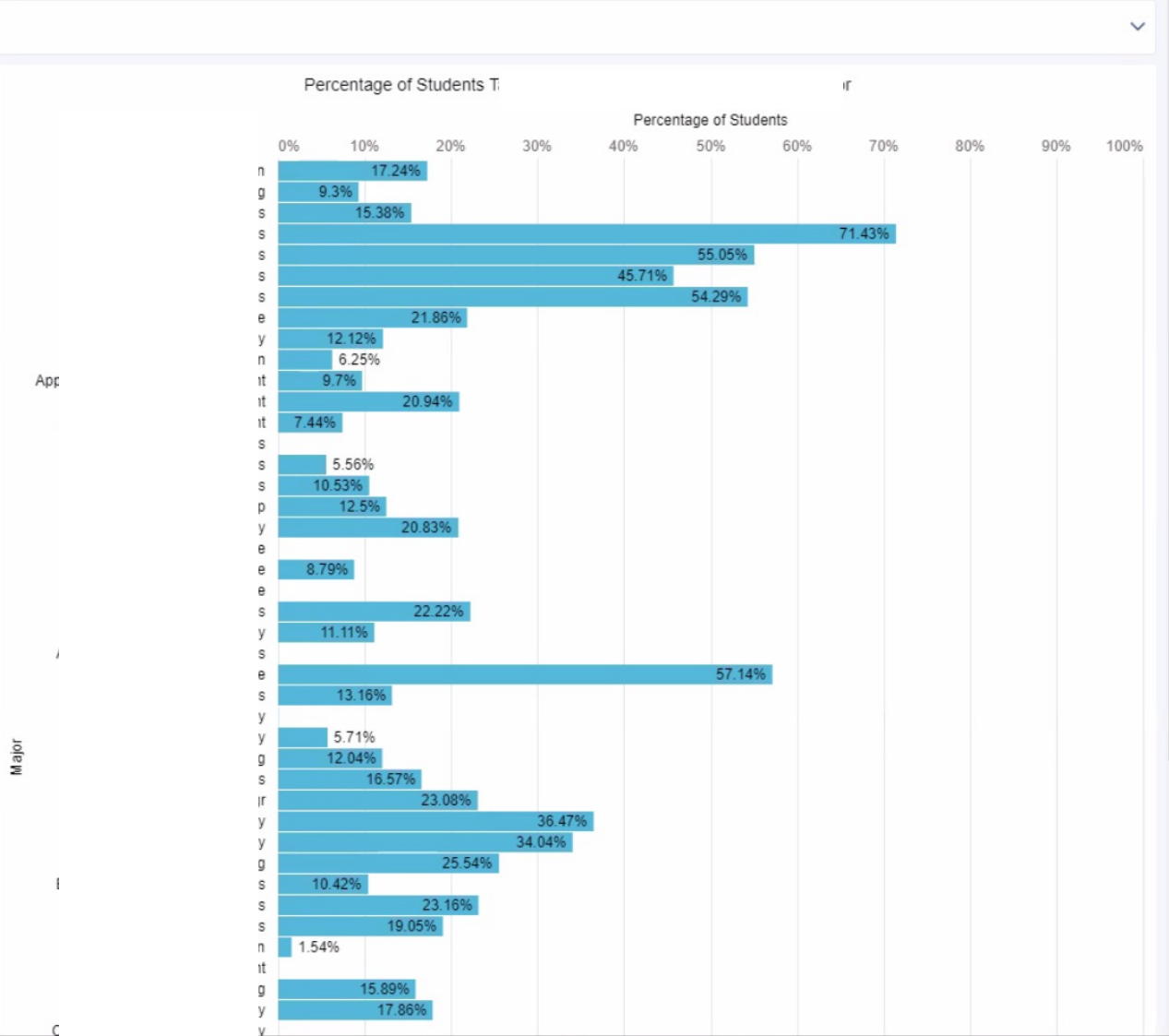


Overall Metrics

Term
Fall 2015, Fall 2016, Fall 2017, Fall 2018, Fall 2019, Fall 2020, Fall 2021, Spring 2015, Spring 2016, Spring 2017, Spring 2018, Spring 2019, Spring 2020, Spring 2021



Metrics over Time



Student Advising

Give advisors the tools they need to strengthen student engagement, understand student needs more deeply, collaborate efficiently, and build stronger paths through graduation.



Includes:
appointment management,
case management, advising
record, actions and alerts, pre-
built analytics



Roadmap:
success teams, success plans,
predictive analytics

Student Record

Manage your day-to-day interactions with students over time from a single screen. You can take notes, track activities and appointments, set up alerts, and collaborate with other Student Services teams.

Suzie Student

BS Industrial and Labor Relations
Industrial and Labor Relations
Class of 2020

New Action or Alert Send Custom Email Academic Summary

Cornell Id
1111111

Primary College
Industrial and Labor Relations

Registered

Class Year
2020

Suppress Information

Inactive

Open Cases

0

Alerts

0

Meetings

1

DETAILS RELATED

Student Name
Suzie Student

Contact
[Suzie Student](#)

Primary College
Industrial and Labor Relations

Cornell Id
1111111

Net Id
netid123

Student Attributes

University Matriculation Type
UG Frosh

Nontraditional

Registered

First Gen College Stndt Admissions

First Gen College Student

Term GPA Trending by Student

Student Name > Academic Term

Academic Term: 2629 (Summer 2016) 2643 (Fall 2016) 2650 (Winter 2017) 2657 (Sp...

As of Today at 11:12 AM

Enrolled
Dropped
Incomplete

Spring 2018 Enrollment; Total Credits: 26; Cumulative GPA: 3.286

CLASS	CREDITS	GRADING OPTION	STATUS
ASIAN 3376	4	GRV	Enrolled
ILRIC 2370	3	GRV	Enrolled
ILRLR 2010	3	GRV	Enrolled
KOREA 1102	6	GRV	Enrolled
ILROB 4235	4	GRV	Enrolled
ILRLR 3870	4	GRV	Enrolled
ILRHR 2660	2	GRV	Enrolled

Notes (0)

Student Actions & Alerts (0)

Meetings (1)

[M-0113](#)

Staff Member: Jennifer Weidner

Appointment Type: Resume Review, initial

Meeting Notes:

[View All](#)

Cases (0)

Completed Credits by Term

Academic Term

- 2629 (Summer 2016)
- 2643 (Fall 2016)
- 2650 (Winter 2017)
- 2657 (Spring 2017)
- 2678 (Fall 2017)
- 2685 (Winter 2018)
- 2692 (Spring 2018)

Appointment Scheduling

Schedule meetings without the back and forth of email. You can set your availability. Students then pick from a list of services and team members and the event is added to your calendar.

The screenshot shows the CALS Student Services appointment scheduling interface. At the top, the Cornell University logo is displayed, followed by the text "CALS Student Services". Below this, the "Academic Advising" section is highlighted. The interface lists four services, each with a 30-minute duration and an information icon:

- Abroad/Exchange Advising (30 minutes)
- Academic Advising (30 minutes) - This service is highlighted with a red background.
- Degree Audit (30 minutes)
- Resume Critique (30 minutes)

Below the services list, the date "September 07" is displayed. A calendar view for September 2018 is shown, with the 7th of September highlighted in red. To the right of the calendar, there is a "Select staff (optional)" dropdown menu currently set to "Anyone". Below the calendar, a grid of time slots is displayed for the selected date:

Time Slot	8:30 am	9:00 am	9:30 am
10:00 am	10:00 am	10:30 am	11:00 am
11:30 am	11:30 am	12:00 pm	12:30 pm
1:00 pm	1:00 pm	1:30 pm	2:00 pm

At the bottom of the interface, a note states: "All times are in (UTC-05:00) Eastern Time (US & Canada)".

Front Desk Check-In

Track student visitors – appointments, drop-ins, and no-shows – and alert team members when someone arrives.



Actions & Alerts

Automate student outreach for issues such as academic probation or milestone reminders. Minimize the need on your part for manual followup, and ensure all the right people are in the loop.

Alert Configure

Do you want to send a follow-up email to the student?

* Number of Days Later to Send Follow-Up

3

Please select the email template to use:

SIT: Followup

Copy the faculty advisor(s) on follow-up email?

If student is an athlete, copy athletics on the follow-up?

If student is exchange, copy exchange advisor on follow-up?

Copy current instructors on follow-up?

If there is an additional email address to include on the follow-up email, please enter it below (single email address only!)

Additional Email

[Previous](#) [Next](#)

Case Management

Manage a student issue, inquiry or incident until it is resolved – collect record details, collaborate with other members of the case team, correspond with the student, and track the progress of work.

The screenshot displays a case management interface for a specific case. At the top, the case title is "Meeting with Advisor to Plan Schedule, IB HL Lang and Lit Credit for URS, and In Person and Transition to Online for Econ 1100". The case status is "Closed" and the priority is "Medium".

Case Details:

- Case Number: 00002733
- Case Owner: AAP Cases
- Case Record Type: Student Request
- Contact Email: [redacted]@cornell.edu
- Case Unit: AAP
- Category: Course Advising
- Case Reason: Academic
- Chat Topic: [redacted]
- Brief Message: Hello! I have a few questions that pertains to the three subjects above.

Additional Information:

- Status: Closed
- Priority: Medium
- Case Origin: Chat-Offline
- Subject: Meeting with Advisor to Plan Schedule, IB HL Lang and Lit Credit for URS, and In Person and Transition to Online for Econ 1100
- Description: Wants to meet with someone to plan schedule - discuss transfer/test credits & transition to online classes Scheduled meeting on Bookings for 8/14
- Notes: Student met with Andrew Meis--refer to meeting notes

Right Panel:

- Start Zoom Meeting (2 buttons)
- Close Case
- Emails (0)
- Notes (0)
- Student Details:
 - Student Name: [redacted]
 - Cornell Id: 5189739
 - Expected Graduation Term: Spring 2024
 - Suppress Information:
- Student Program/Plan:
 - Academic Plan: BS Urban & Regional Studies
 - Plan Code: URGN-BS_AR
 - Program: AR
 - Status: Active
- Attachments (0)
- Upload Files button
- Or drop files

Outlook Synch

See background details about the student you are emailing right in Outlook and synch communications so you don't have to cut and paste to save interactions in the Student Record.

The screenshot displays the Outlook interface with a blue header bar. The ribbon includes 'Quick Steps', 'Move', 'Tags', 'Find', 'Adobe Send...', and 'Salesforce'. An email is open, showing a reply from Sue Irvine to Rebecca Joffrey. The email body contains text about writing a script and a screenshot. Below the email is a Salesforce sidebar showing the contact details for Rebecca Joffrey, including her name, contact owner (Sue Irvine), account name (Cornell University), and email address (rj283@cornell.edu).

Outlook Email:

Reply | Reply All | Forward
Mon 10/22/2018 7:03 PM
Rebecca Joffrey
Re: CALS Meeting
To: Sue Irvine

This gives me what I need for now (I'm writing a script for a video and need to describe it). If it's not too much trouble, I guess I'd like to use the desktop screenshot for my slides – because it will look consistent with other screenshots. I don't understand why I can't get mine to work. 😞

From: Sue Irvine <sti1@cornell.edu>
Date: Monday, October 22, 2018 at 6:41 PM
To: Rebecca Joffrey <rj283@cornell.edu>
Subject: Re: CALS Meeting

Hi - is the web app okay? I'm on my Chromebook at the moment so I don't have Outlook on this. If this won't work, I can send another one once I'm at my computer.

Salesforce Record Detail:

Sandbox: UAT
Record Detail
Rebecca Joffrey
· Cornell University · +1 (607) 255-5064
· rj283@cornell.edu · Sue Irvine

DETAILS | CHATTER | ACTIVITY | RELATED

Name	Rebecca Joffrey
Contact Owner	Sue Irvine
Account Name	Cornell University
Email	rj283@cornell.edu
Title	
Cornell Email Address	rj283@cornell.edu

Live Chat

Communicate in real-time with students for office hours, first point of contact, and website interactions and inquiries. You can set up a chatbot customized for your team, manage numerous simultaneous customer interactions from just the one screen, access case history upon incoming interactions, and store the transcripts for future reference.

The screenshot shows the Service Console interface. At the top, there's a navigation bar with 'Service Console', 'Cases', and 'Chatter Home'. Below that, the 'Agent Summary' section is active, displaying a table of agents. The table has the following columns: AGENT, STATUS, FLAG, ACTION, WORK SUMMARY, STATE, LOGIN, ACCEPT, CAPACITY, WORKLOAD, CHANNELS, and ASSIGNED QUEUES. The data rows are as follows:

AGENT	STATUS	FLAG	ACTION	WORK SUMMARY	STATE	LOGIN	ACCEPT	CAPACITY	WORKLOAD	CHANNELS	ASSIGNED QUEUES
Aubrey Holbrook	Available - Chat since Oct 6, 2020 2:02:05 PM		Change Status		1 min 23 s	1 min 23 s	--	0%	0 / 5		CALS Chat
Erica Ostermann	Available - Chat since Oct 6, 2020 2:00:01 PM		Change Status		3 min 27 s	3 min 27 s	--	0%	0 / 5		CALS Chat
Lauren Brown	Busy since Oct 6, 2020 12:03:01 PM		Change Status		2 h 0 min 27 s	4 h 48 min 5 s	--	0%	0 / 5		AAP Chat
Mary Beth Mahaney	Available - Chat since Oct 6, 2020 10:14:57 AM		Change Status		3 h 48 min 31 s	3 h 48 min 31 s	--	0%	0 / 2		CVM Chat
Rebecca Schimenti	Available - Chat since Oct 6, 2020 1:17:35 PM		Change Status		45 min	45 min	31 min	0%	0 / 15		ILR Chat

At the bottom of the table, there's a pagination control: '1 - 6 of 6 Display 10 records per page Previous Next Page 1'. Below the table, there's a status bar with 'Notes' and 'Omni-Channel (Online)'.

The screenshot shows the Omni-Channel interface. At the top, there's a navigation bar with 'Omni-Channel'. Below that, there's a status bar with 'Available - Chat' and a message 'You have no active requests.'. Below that, there are sections for 'New (0)' and 'My work (0)'. At the bottom, there's a status bar with 'History', 'Notes', and 'Omni-Channel (Online)'.

Pardot

Set up email campaigns that can be automatically triggered based on timing or changes in student status

Reports / Emails

Global-Fellows-Teaser1

[View email](#)

[Report](#) [Click-Through Rate Report](#) [Interaction](#) [Email Clients](#)

57%
Read Rate

23%
Skim Rate

3
Forwards

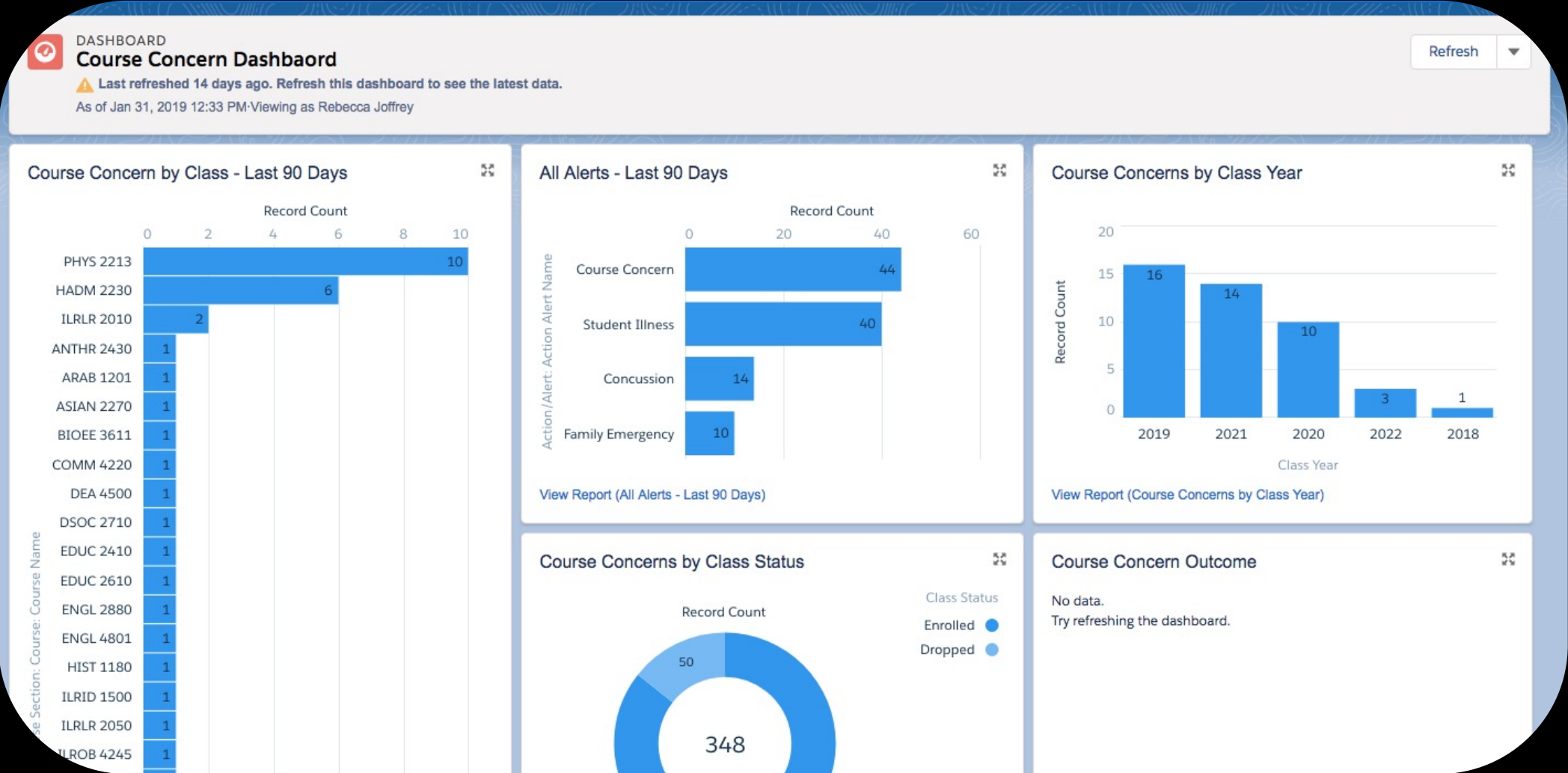
Engagement & Activity

Glanced Or Unread Percentage	20%
Skimmed Percentage	23%
Read Percentage	57%
Print Count	0
Forward Count	3

A pie chart illustrating the distribution of email engagement and activity. The chart is divided into three segments: a large orange segment representing 'Read' at 57%, a green segment representing 'Skimmed' at 23.4%, and a blue segment representing 'Glanced or Unread' at 19.6%. A legend to the right of the chart identifies the colors: blue for 'Glanced or Unread', green for 'Skimmed', and orange for 'Read'.

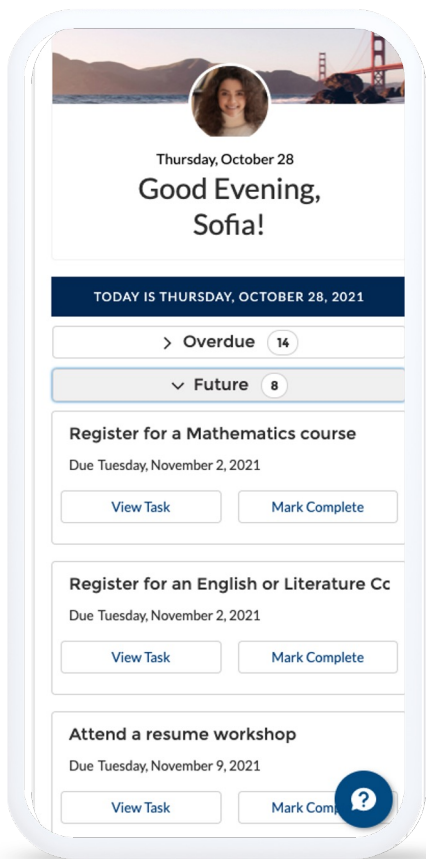
Operational Metrics

Choose from a set of pre-defined Student Services and Student Activities reports and set up a view for yourself or your team. You can also run your own reports.

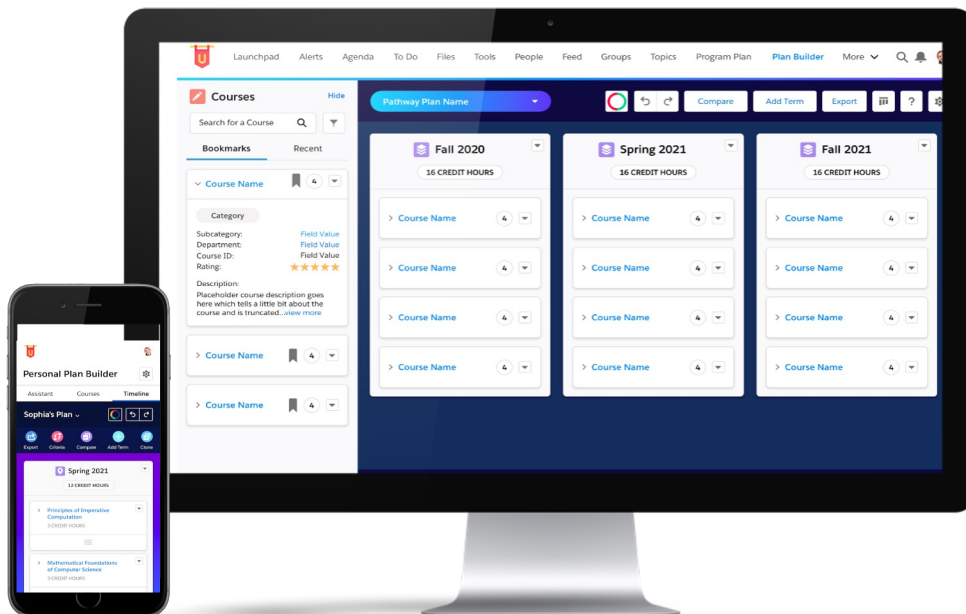


Roadmap

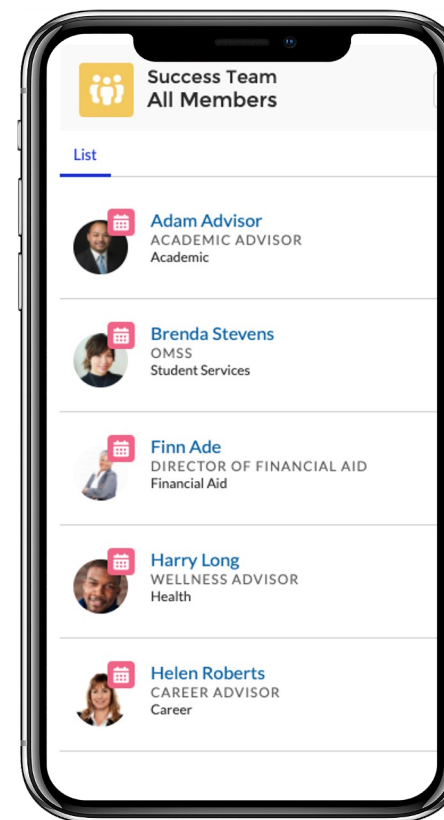
Next Best Actions



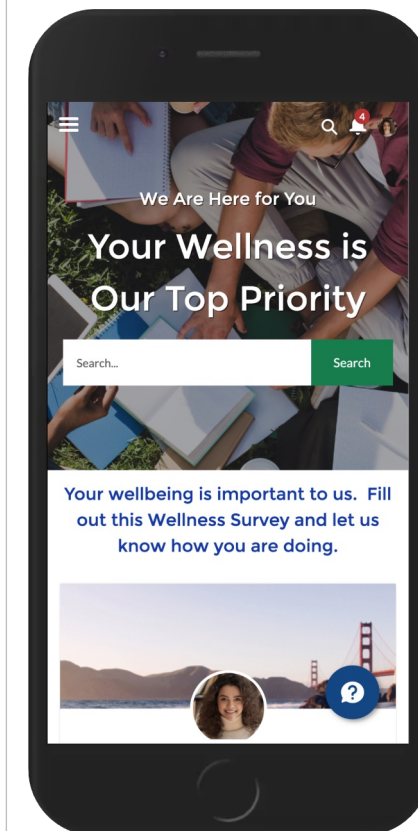
Success Plans



Success Teams



Sentiment Surveys





Education Cloud Product Roadmap Themes



Connected Student Experience

a personalized journey from recruitment through graduation



Admissions Connect
Student Success Hub



Institutional Success

connected solutions for insight and action across institutional ops



Accounting Subledger
Tableau: Higher Ed Edition



Conversation First

communicate with stakeholders where, when & how they want



Pre-Built, Integrated Einstein Bots
Slack for Digital Campus



Education to Employment

extend and accelerate pathways to career success



EDA: Learner-Centric, Standards-Aligned
Portable Learner Records & Credentials
Professional Learning Suite



Salesforce Easy

simplify and accelerate integrations and implementation



Data Mover
In-App Guidance, Starter Content
Content Libraries for SSH



Student Community

Give students the tools they need to feel connected to the institution.



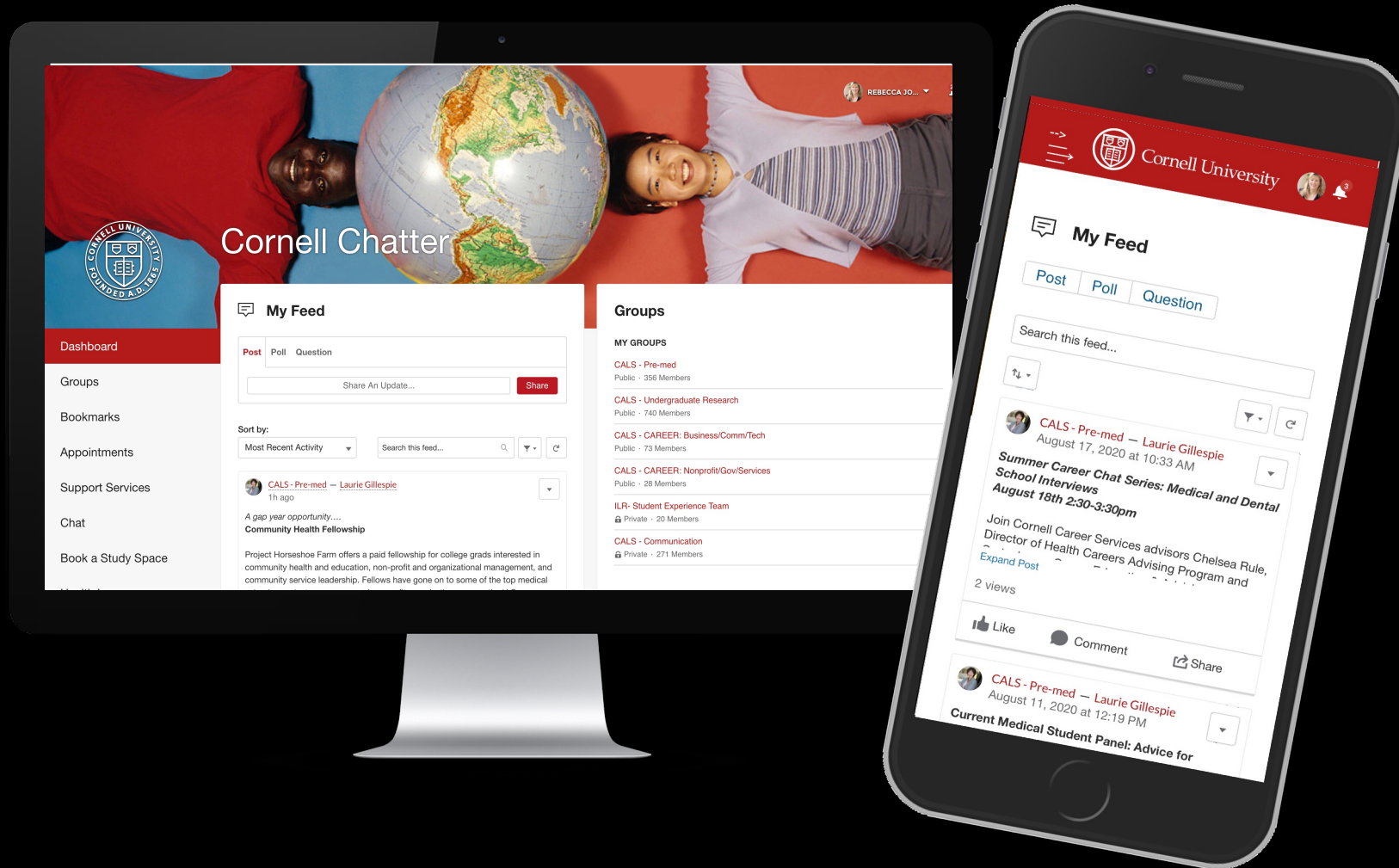
Includes:
mobile app, appointment
scheduling, quick-links, college
feeds, forms



Roadmap:
links to new services as they
are digitalized, student
analytics

Student Community

Empower students with a self-service app so they can ask questions, find resources, and make appointments. Use the app to support initiatives like new student onboarding, transfer student support, publicizing new courses, and connecting students to interest groups.



Covid Workflows

Use the “building blocks” of CRM to assemble new journeys – this is key to Cornell’s digital transformation efforts.

Update Travel Plan

If the dates of your travel have changed, use this form to update your travel record. If your travel location has changed, please cancel this submission and complete a new form.

Travel Type	Within the US	Travel Start Date	Sep 18, 2020
Travel State	Iowa	Travel End Date	Oct 23, 2020
Status	Approved		

[Update Travel Dates](#) [Cancel Travel](#)

[← Back to My Travel Plans](#)

search Chatter

[Mission Statement](#)

Covid Workflows

Use the “building blocks” of CRM to assemble new journeys – this is key to Cornell’s digital transformation efforts.

Book a Study Space

TEST
Search

Select a campus: North Campus
Select a building: choose one...

Space Name	Description	Campus	Building	Click to Book
Balch Hall	North campus dorm - lounge space	North Campus	Balch Hall	Book
Clara Dickson Hall - 1st Floor	North campus dorm - lounge space	North Campus	Clara Dickson Hall	Book
Clara Dickson Hall - 2nd Floor	North campus dorm - lounge space	North Campus	Clara Dickson Hall	Book

search Chatter

[Cornell Mission Statement](#)

Covid Workflows

Use the “building blocks” of CRM to assemble new journeys – this is key to Cornell’s digital transformation efforts.

The screenshot shows a web application for Cornell University's Health Leave system. At the top, there is a banner image featuring a globe and two smiling individuals. The main content area is titled "Health Leave" and includes a Cornell University logo. A sidebar on the left contains navigation links: Dashboard, Groups, Bookmarks, Appointments, Support Services, Chat, and Health Leave (which is highlighted in red). The main content area is divided into two columns. The left column contains a definition of a Health Leave of Absence (HLOA), a list of potential advantages over a Personal Leave of Absence, and a note to speak with a Cornell Health counselor. The right column is titled "My Health Leave Request" and displays a table with one row of data: Student Name (Suzie Calstudent), Status (Request Approved), and Date/Time Opened (7/22/2020 1:59 PM). Below the table are two buttons: a green "COMMIT TO LEAVE OF ABSENCE" button and a red "CANCEL HLOA REQUEST" button. At the bottom, there is a "Resources" section with links to "Return Process Checklist", "Important Deadlines", and "HLOA Information", each accompanied by a small icon.

Health Leave

A Health Leave of Absence (HLOA) is recommended when a student's medical or mental health condition is found – collaboratively with the student and their healthcare provider(s) – to significantly impair their ability to function successfully or safely as a student. It is expected that the student uses the time away from the university for treatment and recovery.

Potential advantages of an HLOA over a Personal Leave of Absence:

- An HLOA usually qualifies a student for benefits under any tuition reimbursement plan they may have.
- Students who think they may need to take an HLOA during the course of a coming semester can consider purchasing tuition reimbursement insurance before the semester begins.
- Students enrolled in the Student Health Plan (SHP) may be able to purchase the insurance for an additional academic year while on an HLOA.
- For international students, an HLOA may provide a way to remain in the US while maintaining legal status.
- An HLOA sometimes qualifies a student to initiate a leave of absence later in the semester than might normally be permitted for a personal leave.

Speak with a Cornell Health counselor or medical clinician to see if pursuing an HLOA is right for you.

My Health Leave Request

Student Name	Status	Date/Time Opened
Suzie Calstudent	Request Approved	7/22/2020 1:59 PM

COMMIT TO LEAVE OF ABSENCE **CANCEL HLOA REQUEST**

Resources

- [Return Process Checklist](#)
- [Important Deadlines](#)
- [HLOA Information](#)

Students take action in the “app”

Advisors work with students in the “console”

Leaders monitor activity and take action in the “dashboard”

Analytics

Give senior leaders access to important trends and information.



Includes:
operational metrics for users



Roadmap:
predictive analytics, business intelligence to support things like personalization of communications, internal planning, and external reporting

Re-define "Student Success"



DATA WE HAVE:

- 1) ACADEMIC
- 2) CAREER
- 3) DEMOGRAPHIC

WELL BEING:

- 1) FINANCIAL SECURITY
- 2) SOCIAL AND COMMUNITY SUPPORT
- 3) PURPOSE AND ENGAGEMENT

Welcome to the Cornell
Student Success homepage!



Pre-College

What pre-college factors affect student success?



[Pre-College Dashboard](#)

Post-College

What are students pursuing after college?



[Post-Graduate Dashboard](#)

Transfer Students

How do transfer students perform?



[Transfer Student Dashboard](#)

Non-Graduates

What is the makeup of students who are not graduating?



[Non-Graduate Dashboard](#)

Coursework

Are PreMed and PreVet students on track with required classes?



[Coursework Dashboard](#)

Dashboards

Students who took MATH 120 with or without AP Math credit

Average grade in Math 120

Average Grade in MATH 120 by AP Test Score

AP Math & MATH 120
Sue Irvine
Jan 3, 2017 at 3:39 PM

Student Services Cases
Sue Irvine
Jan 6, 2017 at 8:04 AM

Employer Snapshot
Sue Irvine
Sep 16, 2016 at 9:24 AM

POST-COLLEGE

Where are students looking for jobs?

1,436

Post-College Dashboard: Geographical
Sue Irvine
Jun 21, 2016 at 3:51 PM

POST-COLLEGE

How is employment (and) trending?

Post-College Dashboard: Industry
Sue Irvine
Jun 21, 2016 at 3:51 PM

POST-COLLEGE

What are students pursuing after college?

3.4

Post-College Dashboard: Home
Sue Irvine
Jun 21, 2016 at 3:51 PM

PRE-COLLEGE

What is the overall GPA for students?

3.3

7,736

Pre-College Dashboard
Sue Irvine
Jun 21, 2016 at 3:51 PM

Coursework D
Focus on Pre-Med

What is the course taken most frequently?

Coursework Dashboard
Rachel Ing
Sep 23, 2016 at 12:46 PM



Lens table view for action

Datasets
Converted Leads Fields

DATA FILTERS 1

Filters

Age Group
21-30

+

What do you want to see? Just start typing...

#	Full Name	Age Group	Owner	City
1	Yorker Temprell			s City
2	Idalina Mathou			ayne
3	Christabel Tomczykowski			ee Mission
4	Amye Swalough			
5	Marsh Maylott			sboro
6	Lora Shipway			
7	Maurizia Wilkins			ston
8	Josiah Dreus			on City
9	Steffi Edmans			r
10	Thorpe Plampin			a
11	Sayre Lisett			
12	Hildegarde Grenfell			s City
13	Michelina Standingford			sonville
14	Heida MacGregor	21-30	Clive Lloyd	Columbia

- Open Record
- Log a Call
- New Task
- Post
- File
- New Case
- New Note
- New Event
- Link
- Poll
- Question

Analytics Studio MockU Student Success Lens table view for act...

Lens table view for action

Datasets

Converted Leads Fields

DATA FILTERS 1

Filters

Age Group 21-30

+

* What do you want to

#	Full Name
1	Yorker Temprell
2	Idalina Math...
3	Christabel To...
4	Amye Swalou...
5	Marsh Maylo...
6	Lora Shipway...
7	Maurizia Wilk...
8	Josiah Dreus...
9	Steffi Edman...
10	Thorpe Plam...
11	Sayre Lisett...
12	Hildegard Grenfell

New Case for Yorker Temprell

Contact Name

Status

Subject

Description

Cancel OK

Analytics Studio MockU Student Success Lens table view for act...

Lens table view for action

Datasets
Converted Leads Fields

DATA FILTERS 1



Filters
Age Group
21-30

What do you want to see? Just start typing...

#	Full Name					
1	Yorker Temp					
2	Idalina Math					
3	Christabel To					
4	Amye Swalou					
5	Marsh Maylo					
6	Lora Shipway					
7	Maurizia Wilk					
8	Josiah Dreus					
9	Steffi Edman					
10	Thorpe Plampin	21-30	Viv Richards	Atlanta	50.9	13,4... Phone

Post for Yorker Temprell

@[Mark Tossell] Please follow up on Yorker - note his borderline avg GPA.

B I U S Ix  

Cancel OK



Persistence

At Risk

Dependence

Action List

AI

Select the appropriate pre-determined risk factors on the left, and your "at risk" student list will update accordingly.

Select Risk Factor/s

Admissions Program

All

Low GPA

All

Low Current Credits

All

Excessive Time Taken (%)

All

High Service Cases

All

Major

Criminology/Criminal Justice

Segment

All

ID	Major	GPA	Pace	Program Length	Course Age	Current Credits	Service Cases
0855416	Criminology/Criminal Justice	0	0	6	2	0	0
0855417	Criminology/Criminal Justice	0	0	6	2	0	0
0814667	Criminology/Criminal Justice	0	0	6	1	9	0
0759892	Criminology/Criminal Justice	0	0	0	4	0	0
0798305	Criminology/Criminal Justice	0	0	2	2	0	6
0828525	Criminology/Criminal Justice	0	0	2	2	3	0
0782601	Criminology/Criminal Justice	0	0	3	3	0	12
0726650	Criminology/Criminal Justice	0	0	4	4	0	4
0767392	Criminology/Criminal Justice	2	0	6	3	10	9
0792644	Criminology/Criminal Justice	3	0	6	3	12	5
0782071	Criminology/Criminal Justice	2	0	6	3	0	3
0826931	Criminology/Criminal Justice	2	0	6	2	0	5
0772421	Criminology/Criminal Justice	1	0	6	3	0	9
0825683	Criminology/Criminal Justice	3	0	6	2	0	4
0736668	Criminology/Criminal Justice	3	0	0	4	13	9
0794120	Criminology/Criminal Justice	0	0	6	0	0	27
0708510	Criminology/Criminal Justice	3	0	0	5	0	5
0684719	Criminology/Criminal Justice	3	0	0	6	9	5
0780466	Criminology/Criminal Justice	3	0	0	4	15	4
0652078	Criminology/Criminal Justice	3	0	6	1	12	0
0788263	Criminology/Criminal Justice	3	0	6	3	15	17
0756579	Criminology/Criminal Justice	3	0	6	3	9	18

Global Actions are added to the picklist here:

- Set Notification
- Annotate
- Explore

Select the appropriate pre-determined risk factors on the left, and your "at risk" student list will update accordingly.

Select Risk Factor/s

- Admissions Program
All
- Low GPA
All
- Low Current Credits
All
- Excessive Time Taken (%)
All
- High Service Cases
All
- Major
Criminology/Criminal Justice

ID	Major	GPA	Pace	Program Length	Course Age	Current Cr
						2
						2
						1
						4
						2
						2
						3
						4
						3
						3
						3
						2
						3
						2
						4
						0
						5
0684719	Criminology/Criminal Justice	3	0	0		6

Student Success ✕


[GIVE ACCESS](#)
[POST TO FEED](#)
[GET URL](#)
[DOWNLOAD](#)

Post the image and link to this Dashboard on a User or Group Feed:

User

Type a name...

Write a comment...



Student Success

i All shared images are public.

Post