



# Webinar Registration Form

## More Than Just A Recruiting Tool: Using A CRM To Increase Efficiencies, Improve Effectiveness & Enhance Student Success

Thursday, December 6 ~ 1:00-2:30pm (Eastern)

Once the live date has passed, this training will be available on demand.

## Overview

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Customer Relationship Management (CRM) is both a business strategy and a set of software tools and technology designed to increase efficiencies and build customer satisfaction. CRM has been used extensively in the commercial sector and has been adopted by many admissions offices for recruiting, event planning, and relationship building. However, it has not been leveraged much in other student services offices in higher education.

CRM has great potential to be used across the institutional enterprise, and specifically in the offices providing student services information, support, and counseling. CRM strategies and tools can provide a more holistic student services experience by allowing a 360-degree view of information, thereby increasing efficiencies, improving effectiveness, and providing an environment for student success.

### Objectives:

- Define and describe what Customer Relationship Management is (including CRM strategy, processes, and technology)
- Understand how CRM systems are being used for managing, recording, evaluating, forecasting, and reporting
- Learn about the various components of CRM including contact and case management, knowledge base, workflow automation, reporting and analytics
- Identify ways higher education student services organizations can leverage CRM technology to assist with student support goals and student success measures
- Examine the vision, goals, and objectives of the University of Minnesota's CRM initiative
- Explore the opportunities that CRM can provide your student services organization

## Who Should Attend?

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- 2-year & 4-year institutions
- Student Services/Affairs
- Registrars & Student Records Staff
- Bursars & Business Office Staff
- Integrated Student Services/One Stop Student Services Staff
- Outreach & Recruitment Staff
- Advising & Counseling
- Student Life
- Financial Aid Directors & Staff



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### Speaker(s)

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**Dr. Julie Selander**  
*University of Minnesota*

Dr. Julie Selander has worked in higher education administration and finance for over 30 years and her experience includes a variety of leadership positions in student services and service operations. Prior to Julie's current role as the Director of the One Stop Student Services and University Veterans Services at the University of Minnesota, she collaborated with her colleagues to develop the "One Stop" model, providing seamless and integrated student services in the areas of enrollment, registration, financial aid, billing, academic records, and veteran services.

Julie presents frequently on various topics related to higher education student services and has written several articles for publication, including a chapter for NACUBO's Student Centered Financial Services: Innovations That Succeed. She is the President for the Institute for Student Services Professionals and consults for a variety of higher educational institutions on student services, customer service, and financial literacy topics.

Julie has her bachelor's, master's, and PhD degrees from the University of Minnesota. Her PhD is in Organizational Leadership, Policy, & Development with an emphasis in Higher Education. She has been a part-time instructor for several years at the University of Minnesota and has taught Strategic Customer Relationship Management and Customer Service Training.

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### Newsletter



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## Registration Information .....

Print Name		Job Title	
Institution/Organization			
Address			
City	State/Province	Zip/Postal Code	Country
Telephone	Fax	Email	
Innovative Educators Password (Choose a password for our records and future registrations)		Assistant's email (For registration confirmations & pre-conference communication)	
How did you hear about this event? (email, listserv, colleague, conference, other) _____			

## Payment Method .....

You can call us at 303.955.0415 or fax the completed form to 1.866.508.0860. If you would like to mail in the registration form and/or check, please send it to: Innovative Educators, 3277 Carbon Place, Boulder, CO 80301.

Paying by: (select one)    Credit Card    Check    Purchase Order (if applicable) P.O.#: \_\_\_\_\_  
(If you select PO as your payment method, a PO number is required.)

### Credit Card



Name on card		Account Number	
Billing Address	Billing City	Billing State	Billing Zip/Postal Code
Exp. Date	Security Code (last 3 digits on the back of Visa and MC)		

## Packages & Pricing

### Select your webinar package:

\$425 - 1 webinar (Unlimited connections at your institution and recording for one year)  
\$900 - 3 webinars (Save \$375)

\$1500 - 6 webinars (Save \$1050)  
\$3995 - Purchase Go2Knowledge to receive unlimited access to webinars & recordings for one year (Best Deal!)



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## Login Directions .....

The login directions provide the following information:

- A link and a password for the event.
- A link to test webinar access. Please test your computer prior to the event.
- The date and time of the webinar. Please be sure to reference the time zone converter on the login directions to confirm your event time.
- Audio instructions: You can stream the audio over your computer speakers, but you may want to have a phone available for backup purposes.

You will receive the login directions twice via email. The process is as follows:

- 1 week prior to the live event: You will receive login instructions.
- 1-2 days prior to the event: You will receive a link to the presentation and any additional handouts. Copies can be made for attendees if desired.
- The day of the event: Participants can login to the IE Webinar 30 minutes prior to the start time. Once logged in, participants can see the PowerPoint slides, ask questions, and make comments via the chat feature.
- Participants are encouraged to save and print the login directions to refer to on the day of the webinar.

## Site Connections .....

The basic registration fee allows you to access the webinar from one computer only. If you need multiple site connections, please register for the unlimited site connection price.

## Recording Information .....

The Monday following the live event you will receive a link to the recording, it can be forwarded to all faculty and staff for viewing anytime, anywhere.

**Recording Benefits:**

- Share the presentation with other staff members
- Pause presentation for convenient viewing
- Review the presentation after the live event
- Train new hires throughout the year
- Show during an in-service training

## Technical Details .....

Innovative Educators uses WebEx as its web conferencing provider. If you have not previously attended a WebEx event, please click here to make sure your computer is compatible with WebEx. Be sure to complete this test prior to the live conference. See system requirements for more information.

## What equipment is required? .....

An Internet connection, computer speakers, and LCD projector are required if a large group is viewing the presentation. Participants can call in via phone if they are having trouble retrieving the audio over the computer. Please be sure to reserve a meeting room prior to the live event that can accommodate these requirements as well as your attendees. You should reserve the room 30 minutes prior to the webinar start time and allow at least 15-30 minutes after the webinar for discussion.

## Cancellation Policy .....

- 30 days prior: Full refund
- 14 days prior: \$100 processing fee
- Less than 14 days: Credit towards another IE event

## Satisfaction Guaranteed .....

We want you to be satisfied with your purchase. For questions, concerns, or problems, please email [support@ieinfo.org](mailto:support@ieinfo.org) or call 303.955.0415.