

# BUILDING ON THE BEST 2019

*Platform. Products. People.*

Enrollment Rx Conference  
Saint Louis University  
Saint Louis, MO  
May 20<sup>th</sup> - 22<sup>nd</sup>, 2019



## PROGRAM

*hosted by*



## TABLE OF CONTENTS

WELCOME.....	1
HOST ADDRESS & ACCOMMODATIONS .....	1
GENERAL SCHEDULE .....	1
SHARE YOUR CONFERENCE EXPERIENCE .....	1
QUESTIONS .....	1
CONFERENCE AGENDA SUMMARY OVERVIEW .....	2
TRAINING SESSION DETAILS.....	3
BREAKOUT SESSIONS OVERVIEW.....	4
BREAKOUT SESSION DESCRIPTIONS .....	5
WEATHER/ATTIRE .....	7
TRAINING SUPPLIES.....	7
SITE LOCATION ADDRESS .....	7
CAMPUS MAP/ PARKING .....	7
BAG CHECK .....	8
THANK YOU.....	8

## WELCOME

Welcome to the 2019 Enrollment Rx Conference hosted by our friends at Saint Louis University (SLU). We are very excited that you can join us and hope that you will enjoy a few days of learning and fun with us.

Our 2019 conference continues to focus on the theme “Building on the Best”, as we strive to ensure that we deliver the best CRM products, using established higher ed best practices, on the world’s best platform.

As with last year’s conference, our theme will be consistent throughout the agenda with substantive and informative sessions, offering real-life client success stories, and fostering a forum of collaboration to ensure that we continue “Building on the Best” for the future.

**NEW THIS YEAR** we took your feedback and we acted on it by placing you front-and-center! Through the call for proposals process we have incorporated many client-led sessions that are sure to spark engagement as you learn more about Salesforce and Enrollment Rx products through the eyes of your peers.

## HOST ADDRESS & ACCOMMODATIONS

The conference will take place in the beautiful Busch Student Center located on the Saint Louis University campus at 20 North Grand Boulevard, Saint Louis, MO 63103.

We have posted a few reasonably priced hotels located nearby on the conference website [here](#).

## GENERAL SCHEDULE

### Monday, May 20, 2019: 9:00 am – 8:30 pm

Pre-Registration, continental breakfast, client training workshops, offsite cocktail reception

### Tuesday, May 21, 2019: 8:00 am – 8:00 pm

Registration, continental breakfast, opening remarks/welcome, break-out sessions, onsite happy hour

### Wednesday, May 22, 2019: 9:00 am – 1:00 pm

Continental breakfast, training workshop, break-out sessions, closing remarks and raffle

## SHARE YOUR CONFERENCE EXPERIENCE

Get social with Enrollment Rx on [Twitter](#), [LinkedIn](#), [Facebook](#), and the Salesforce Power of Us [HUB!](#)  
Remember to use the conference hashtag: **#BuildingontheBest2019**

## QUESTIONS

Should you have any questions not answered in this program do not hesitate to reach out to [Audrey Sutherland](#), Marketing Events Coordinator.

SPECIAL THANKS TO



## CONFERENCE AGENDA SUMMARY OVERVIEW

Monday, May 20 <sup>th</sup> , 2019 – Bring a laptop!		
9:00 am – 10:00 am	Registration & Continental Breakfast	Wool Ballroom
10:00 am – 12:00 pm	<b>Client Training Sessions (see following page for details)</b>	Room 253ABCD
12:00 pm – 1:00 pm	Box lunch/exhibit hall mingle	Billiken Club & Grill
1:00 pm – 5:00 pm	<b>Client Training Sessions (see following page for details)</b>	Room 253ABCD
5:30 pm – 8:30 pm	Offsite Cocktail Reception	City Museum

Tuesday, May 21 <sup>st</sup> , 2019		
8:00 am – 9:00 am	General Registration & Continental Breakfast	Wool Ballroom
9:00 am – 10:15 am	Opening Remarks and Welcome <b>Lawrence Levy - Enrollment Rx</b> <b>Jean Marie Cox – Saint Louis University</b>	Wool Ballroom
10:15 am – 10:30 am	BREAK	
10:30 am – 11:30 am	Product Roadmap- The Future of the Enrollment Rx Product Suite <b>Marc Satin – Enrollment Rx</b>	Wool Ballroom
11:30 am – 12:00 pm	Trends in Higher Education Admissions <b>Margo Martinez- Salesforce.org</b> <i>Hear how admissions offices are changing the way they find, attract, and engage with their prospective students, giving them fresh insights into what drives yield and identify applicant and enrollment trends across geographies, demographics, clusters of personas, and devices.</i>	Wool Ballroom
12:00 pm – 1:00 pm	Box Lunch- Birds of a Feather/Exhibit hall mingle	Billiken Club & Grill
1:00 pm – 5:00 pm	<b>Breakout Sessions (see following pages for details)</b>	varies
5:00 pm – 8:00 pm	Onsite Happy Hour	BSC Outdoor Auditorium

Wednesday, May 22 <sup>nd</sup> , 2019 – Bring a laptop!		
8:00 am – 9:00 am	Continental Breakfast/exhibit mingle	Wool Ballroom
9:00 am – 12:00 pm	<b>Breakout Sessions (see following pages for details)</b>	varies
12:00 pm – 1:00 pm	Closing Remarks and Acknowledgements/Raffle	Wool Ballroom

## TRAINING SESSION DETAILS

Monday, May 20<sup>th</sup>, 2019

Each session includes an instructor-led portion and a hands-on workshop portion.

Please bring a laptop so that you may participate in the workshops.

Time   Location	Training Session   Speakers
10:00 am – 10:50 am 253ABCD	<b>Get on the T.R.A.I.L (Matt Palmer)</b> Are you getting the most out of Trailhead? Whether this is your first badge or tenth badge, join us to explore recommended Trail Mixes and gamify training for your admin and general users. <i>You + Laptop = Success!</i>
11:00 am – 12:00 pm 253ABCD	<b>Import Rx Hands on Workshop (Zach Singer)</b> Our introductory training session will focus on Import Rx, Enrollment Rx's data import and transformation tool. As a system admin, we will work through the necessary steps to import a flat file, transform, & de-dupe the data into Enrollment Rx & Salesforce objects. <i>You + Laptop = Success!</i>
12:00 pm – 1:00 pm Billiken Club & Grill	<b>Lunch/Exhibitor Mingle</b>
1:00 pm – 2:20 pm 253ABCD	<b>Reader Rx Workshop (Marc Satin/Jim Scott)</b> This training session is dedicated to Enrollment Rx's Reader Rx solution. During this training session, we will review how to configure Reader Rx for application review. <i>You + Laptop = Success!</i>
2:30 pm – 3:50 pm 253ABCD	<b>FormBuilder Rx Workshop (Kathy Koh-Gigante/Lisa Mulcrone)</b> We will focus on Enrollment Rx's FormBuilder Rx solution during this training session. We will review how to create and configure custom pages to use with Force.com Sites and Communities. <i>You + Laptop = Success!</i>
4:00 pm – 5:00 pm 253ABCD	<b>Events Rx Workshop (Marc Satin/Matt Palmer)</b> During this training session, we'll discuss Events Rx, Enrollment Rx's event & visit management tool. We will review step by step how to create, manage, and publish an event, and how to create a custom event registration form. Additionally, for schools that offer campus visits or visits with scheduled activities, learn how to create a calendar of visits & the available activities for that day. <i>You + Laptop = Success!</i>

## BREAKOUT SESSIONS OVERVIEW

Tuesday, May 21<sup>st</sup>, 2019

Time	Breakout Session   Speakers	Room
1:00 pm – 1:50 pm	FormBuilder Rx Client Panel <i>Jonathan Babbitt (Trinity Western University)   Maulik Maniar (University of Nevada, LV)</i>	251AB
2:00 pm – 2:50 pm	Experiences and Successes with Einstein Analytics <i>Carol Thomas (New England College)</i>	256
	Events Rx Client Panel <i>Amy Alexander (Trinity Western University)   Cody Kaemingk (Dordt College)</i>	251AB
	Salesforce- Partner Session	253C
3:00 pm – 3:50 pm	Reader Rx Client Panel <i>Daniel Gualotuna (Fielding Graduate University)   Jen O'Brien-Knotts (Lehigh University)</i>	251AB
	Analyzing Your Year Over Year Enrollment Funnel <i>Jonathan Babbitt, Amy Alexander (Trinity Western University)</i>	256
	Mogli- Partner Session	253D
4:00 pm – 4:50 pm	Headache to HEDA <i>Eric Kenney (College of Nursing, University of Utah)</i>	251AB
	Moving from Slate to SFDO <i>Carol Thomas (New England College)</i>	256
	Creating a Center of Excellence - Continued CRM Success <i>Wendy Hamstra-Smith (Enrollment Rx)   Emily Anstoetter (Saint Louis University)</i>	253AB

Wednesday, May 22<sup>nd</sup>, 2019

Time	Breakout Session   Speakers	Room
9:00 am – 9:50 am	ERX Core (Training) – <b>You + Laptop = Success!</b> <i>Lisa Mulcrone, Mark Farrell, Paul Chacon, Kathy Koh-Gigante (Enrollment Rx)</i>	253AB
	Integration Rx/Import Rx Client Panel <i>Jennifer O'Brien-Knotts (Lehigh University)   Roxi Shupp (Cedar Crest College)</i> <i>Payam Ezatpoor (University of Nevada, LV)</i>	251A
	Salesforce – Partner Session	253C
10:00 am – 10:50 am	Managing Data Quality <i>Barbara Smith, Jim Scott, Lawrence Levy (Enrollment Rx)</i>	251A
	Incorporating Current Students into the Grad Rebel Gateway <i>Janine Barrett (University of Nevada, LV)</i>	251B
	Mogli – Partner Session	253D
11:00 am – 11:50 am	Product Road Map Deep Dive <i>Marc Satin, Jim Scott (Enrollment Rx)</i>	Wool Ballroom

## BREAKOUT SESSION DESCRIPTIONS

### **Analyzing Your Year Over Year Enrollment Funnel**

*Jonathan Babbitt, Amy Alexander (Trinity Western University)*

Trinity Western University will discuss how they customized Salesforce in order to show year-over-year funnel reports based on any point in time, allowing them to analyze their admissions funnel performance.

### **Creating a Center of Excellence - Continued CRM Success**

*Wendy Hamstra-Smith (Enrollment Rx) | Emily Anstoetter (Saint Louis University)*

Join the Saint Louis University team to talk about life post-implementation so that you can continue your CRM success. Learn how to empower your users to have ownership of the data while establishing best practices for system growth. Ideas such as utilization of regular trainings, "super-user" groups, tiered support levels and much more will be discussed.

### **Events Rx Client Panel**

*Amy Alexander (Trinity Western University) | Cody Kaemingk (Dordt College)*

Event management is a crucial component of the recruitment and admissions experience for prospective students. Join us to hear from other institutions that are using Events Rx to manage everything from open houses and info sessions to campus visits and itineraries.

### **Experiences and Successes with Einstein Analytics**

*Carol Thomas (New England College)*

E=mC 2. New England College has successfully harnessed the power of Einstein Analytics and Discovery to analyze the enrollment funnel, adapt and change strategies during the admissions cycle, and develop predictive and forecasting models. The presentation will include an overview of management and analytic strategies, the specific challenges NEC is addressing, and their overall results.

### **FormBuilder Rx Client Panel**

*Jonathan Babbitt (Trinity Western University) | Maulik Maniar (University of Nevada, LV)*

FormBuilder Rx has been a transformative product for higher education clients, as it allows for the rapid implementation and deployment of Salesforce Communities and Sites in record speed, with "clicks-not-code". Join us as a panel of clients talk about how they are using FormBuilder Rx to easily configure dynamic and personalized online forms and portals for constituent engagement.

### **Headache to HEDA**

*Eric Kenney (College of Nursing, University of Utah)*

University of Utah's College of Nursing implemented Salesforce in 2015 without a proper implementation strategy. It was a perfect storm for the perfect headache. After meeting with Enrollment Rx in 2016, a plan was set in place to execute a HEDA conversion and to build out a new application. Join them to learn about the helpful tips and tricks Enrollment Rx provided them so they could convert their org to HEDA in about three weeks.

## **Incorporating Current Students into the Grad Rebel Gateway**

*Janine Barrett (University of Nevada, LV)*

University of Nevada, Las Vegas launched their applicant portal, the Grad Rebel Gateway, in 2015. Used for recruitment and admissions, their prospective students could submit applications, review checklist items, and monitor their application status. UNLV launched Phase 2 in 2019, and current student data was added to the system, giving students their own portal, specialized communications, and electronic forms, adding to the student lifecycle. They will discuss their experiences with launching Phase 2, as well as challenges and the outcomes.

## **Integration Rx/Import Rx Client Panel**

*Jennifer O'Brien-Knotts (Lehigh University) | Roxi Shupp (Cedar Crest College) | Payam Ezatpoor (University of Nevada, LV)*

Please join us as we present a panel of clients that are leveraging Integration Rx and Import Rx to support the bidirectional integration of Salesforce and their Student Information System. We will discuss their evaluation, implementation, and on-going support of their integration strategy at their institution.

## **Managing Data Quality**

*Barb Smith, Jim Scott, Lawrence Levy (Enrollment Rx)*

When it comes to duplicate records, unfortunately there is no silver bullet that is 100% effective. Join us to examine the sources of potential duplicates and discuss best practices to eliminate this scourge from our CRM world.

## **Moving from Slate to SFDO**

*Carol Thomas (New England College)*

Yes, they did! Over the past two years, New England College has systematically transitioned from Slate to SFDO/ERX to support graduate, online, and undergraduate recruitment, admissions, and enrollment. They will discuss how Salesforce, Enrollment Rx and Pardot have contributed to better pipeline management and how integration was a key component to the success of their implementation. They will also look at what's next as they consider the benefits of Salesforce as their enterprise marketing, communications, and services solution.

## **Product Road Map Deep Dive**

*Marc Satin, Jim Scott (Enrollment Rx)*

From the (not so) secret labs of Enrollment Rx comes our regular product releases, upgrades, and enhancements. Join us as our team walks through a deep dive of the last 12 months of enhancements and describes the upcoming roadmap for the next year. We welcome attendees to participate in an exchange of product ideas, challenge our priorities, and influence our roadmap direction.

## **Reader Rx Client Panel**

*Daniel Gualotuna (Fielding Graduate University) | Jennifer O'Brien-Knotts (Lehigh University)*

How are universities and colleges using Salesforce to manage multifaceted, decentralized admissions decisions? Hear from a panel of clients that are using Reader Rx to control evaluation criteria and admission process across multiple departments and programs at their institutions.



## WEATHER/ATTIRE

The average weather in Saint Louis during May ranges from a low of 55°F to a high of 80°F, with consistent cloud cover and a 30-40% chance of rain.

The conference dress code is business casual which includes:

Men: slacks, khakis, or nice jeans, with dress shirt, casual button-down shirt, or polo shirt

Women: dress, skirt and top, pants outfit, nice jeans and top

*NOTE: Monday evening event includes optional walking, please wear comfortable shoes.*

## TRAINING SUPPLIES

If you are planning to attend the user training workshop sessions, please bring a laptop to ensure that you are able to participate and benefit from this hands-on experience.

## SITE LOCATION ADDRESS

Saint Louis University Main Address: One North Grand Boulevard, St. Louis, MO 63103

The conference will take place in the beautiful Busch Student Center located on the Saint Louis University campus at 20 North Grand Boulevard, Saint Louis, MO 63103.

## CAMPUS MAP/ PARKING

Parking is available for free for all attendees at the Laclede Garage: 3602 Laclede Ave.



Conference Location



Parking Garage

## BAG CHECK

Participants planning to depart to the airport immediately following the closing remarks can bring their bags to the conference location on Wednesday morning. Audrey Sutherland, with Enrollment Rx, will store your bags onsite until you are ready to depart.

## THANK YOU

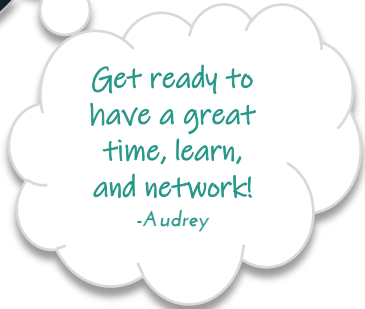
Thank you for participating in the 2019 ERX Building on the Best conference. We could not do it without the support and involvement of our amazing clients. You are the reason for our continued success, and we are proud to be a part of your story.




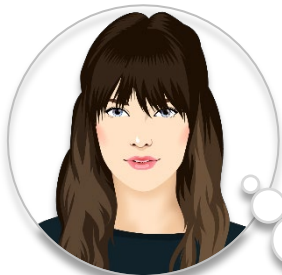
THANK YOU for participating in our annual Building on the Best conference!  
-Lawrence



Shout out to our clients and partners for making this event AWESOME!  
-Misty



Get ready to have a great time, learn, and network!  
-Audrey



We can't wait to see you at the conference!  
-Zach

