



# ENROLLMENT RX 2018 CONFERENCE

BUILDING ON THE BEST

PLATFORM. PRODUCTS. PEOPLE.

UNLV, GRADUATE COLLEGE

## LAS VEGAS, NEVADA

MAY 16<sup>TH</sup> – 18<sup>TH</sup>, 2018



PROGRAM

## Contents

|  |          |
|--|----------|
| <b>WELCOME .....</b>                                     | <b>1</b> |
| <b>CONFERENCE SITE ADDRESS &amp; ACCOMODATIONS .....</b> | <b>1</b> |
| <b>GENERAL SCHEDULE .....</b>                            | <b>1</b> |
| <b>SHARE YOUR CONFERENCE EXPERIENCE.....</b>             | <b>1</b> |
| <b>QUESTIONS .....</b>                                   | <b>1</b> |
| <b>CONFERENCE AGENDA SUMMARY OVERVIEW .....</b>          | <b>2</b> |
| <b>TRAINING SESSION DETAILS .....</b>                    | <b>3</b> |
| <b>BREAKOUT SESSIONS OVERVIEW .....</b>                  | <b>4</b> |
| <b>BREAKOUT SESSION DESCRIPTIONS .....</b>               | <b>5</b> |
| <b>CAMPUS MAP/ PARKING .....</b>                         | <b>7</b> |
| <b>BAG CHECK .....</b>                                   | <b>7</b> |
| <b>DINING NEAR UNLV .....</b>                            | <b>8</b> |

# WELCOME

May 16-18, 2018 | UNLV Graduate College

**Enrollment Rx**  
BUILDING ON THE BEST

## WELCOME

Welcome to the 2018 Enrollment Rx Conference hosted by our friends at University of Nevada, Las Vegas (UNLV) Graduate College. 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 conference will 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.

Our conference will represent this theme throughout the agenda by providing 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.

## CONFERENCE SITE ADDRESS & ACCOMMODATIONS

The 2018 Building on the Best conference will take place in the beautiful Science and Engineering building at the University of Nevada, Las Vegas. The address is: 4505 S Maryland Pkwy, Las Vegas, NV 89154

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

## GENERAL SCHEDULE

**Wednesday, May 16, 2018: 12:00 pm – 5:00 pm**

Pre-Registration and Client Training

**Thursday, May 17, 2018: 8:00 am – 8:00 pm**

Continental breakfast, Keynote Address, break-out sessions, cocktail reception

**Friday, May 18, 2018: 9:00 am – 1:00 pm**

Continental breakfast, break-out sessions, closing remarks

## 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: #ERXConference2018

## QUESTIONS

Should you have any questions not answered in this program do not hesitate to reach out to [Jon Hazelgren](#), Director of Client Success or [Melissa Creaney](#), Director of Marketing.



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SPECIAL THANKS TO



# CONFERENCE AGENDA

## CONFERENCE AGENDA SUMMARY OVERVIEW

### WEDNESDAY – MAY 16<sup>th</sup>, 2018

|                   |  |                     |
|-------------------|--|---------------------|
| 12:00 noon        | Pre-registration & Client Refreshments   | SEB Atrium          |
| 1:00 pm – 5:00 pm | <b>Client Training Sessions (see follow page for details)</b>                                | Classroom 1242/1243 |
| 5:00 pm           | Night out on your own (contact <a href="#">Jon Hazelgren</a> for group dining participation) |                     |

### THURSDAY – MAY 17<sup>th</sup>, 2018

|                 |  |
|-----------------|--|
| 8:00 am         | General Registration & Continental Breakfast<br>(SEB Atrium)   |
| 9:00 – 10:45 am | Welcome & Keynotes<br><u>Lawrence Levy</u> - Enrollment Rx,<br><u>Kate Hausbeck Korgan</u> - UNLV Graduate College, <u>Jay Goff</u> - Saint Louis University,<br><u>Pat McQueen</u> - Salesforce.org<br>(Auditorium) |
| 10:45 am        | BREAK  |
| 11:00 am        | Product Roadmap<br><u>Marc Satin</u> - Enrollment Rx<br>(Auditorium)   |
| 12:00 noon      | Box Lunch: Birds of a Feather<br>(SEB Atrium)  |
| 1:00 – 4:00 pm  | <b>Breakout Sessions (see following pages for details)</b>   |
| 5:00 pm         | BREAK  |
| 6:00 pm         | Cocktail Reception<br>(SEB Atrium)   |

### FRIDAY – MAY 18<sup>th</sup>, 2018

|                       |   |
|-----------------------|---|
| 9:00 am               | Continental Breakfast<br>(SEB Atrium)                             |
| 10:00 am – 12:00 noon | <b>Breakout Sessions (see following pages for details)</b>        |
| 12:00 noon            | Closing Thoughts & Raffle<br><b>Enrollment Rx</b><br>(Auditorium) |

## SAVE THE DATE!

2019 ERX Building on the Best Conference  
Hosted by: Saint Louis University  
May 20<sup>th</sup> – 22<sup>nd</sup>, 2019



**SAINT LOUIS**  
UNIVERSITY



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# TRAINING SESSION AGENDA



## TRAINING SESSION DETAILS

WEDNESDAY, MAY 16<sup>th</sup>, 2018

| TIME    | TRAINING SESSION   SPEAKERS  | 1242 | 1243 |
|---------|--|------|------|
| 1:00 pm | <b>FormBuilder Rx</b><br><b>Kathy Koh/Jim Scott</b><br>During this training session we will review how to create and configure custom pages to use with Force.com Sites and Communities.   | X    |      |
|         | <b>Events Rx</b><br><b>Marc Satin/Zach Singer</b><br>During this training session 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.                               |      | X    |
| 2:00 pm | <b>Import Rx</b><br><b>Marc Satin/Zach Singer</b><br>This training session is from a system admin perspective, working through the necessary steps to import a flat file, transform, and de-dupe the data into Enrollment Rx & Salesforce objects.   | X    |      |
|         | <b>Reader Rx</b><br><b>Kathy Koh/Jim Scott</b><br>During this training session, we will review how to configure Reader Rx for application review.  |      | X    |
| 3:00 pm | <b>ERX Core (Checklists, Touch Points, Assignment Manager)</b><br><b>Kathy Koh/Zach Singer</b><br>During this training session, we will review key Core features such as, Checklist Requirement Sets, Touchpoints, Field Sync, and Assignment Manager. In addition, the training session will cover a review of the Core admin panel, configuration options, and review best practices when it comes to configuration. | X    |      |
|         | <b>Transitioning to HEDA</b><br><b>Marc Satin/Matt Palmer</b><br>Come learn about HEDA, what it means for your institution and how you should be using HEDA. In addition, we will discuss how Enrollment Rx works with HEDA and the assistance we can offer around thought leadership, configuration and deployment of HEDA.   |      | X    |
| 4:00 pm | <b>Pardot</b><br><b>Marc Satin/Matt Palmer/Salesforce.org</b><br>If you are a user of the Salesforce Pardot marketing tool, or interested in seeing how Pardot works, come learn from Salesforce Marketing Cloud experts on general functionality as well as some best practices followed by other higher ed Pardot users.   | X    |      |



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# BREAKOUT SESSION AGENDA

## BREAKOUT SESSIONS OVERVIEW

THURSDAY, MAY 17<sup>th</sup>, 2018

| TIME    | BREAKOUT SESSION   SPEAKERS   | 1240 | 1242 | 1243 |
|---------|---|------|------|------|
| 1:00 pm | FormBuilder Rx Client Panel<br><b>Enrollment Rx Clients</b>   |      | X    |      |
|         | How to Best Prepare for CRM Success<br><b>Enrollment Rx</b>   |      |      | X    |
| 2:00 pm | Migrating from "Custom Portal" to FormBuilder Rx<br><b>Enrollment Rx</b>  |      | X    |      |
|         | Multichannel Communication- Leveraging Salesforce<br><b>Enrollment Rx ERX Partners</b>  |      |      | X    |
| 3:00 pm | Salesforce AppExchange Partner<br><b>Jitterbit</b>  | X    |      |      |
|         | Reader Rx Client Panel<br><b>Enrollment Rx Clients</b>  |      | X    |      |
|         | Building Partnerships in a Centralized Graduate Model:<br><i>Using Technology to Work Collaboratively in Graduate Admissions</i><br><b>UNLV, Graduate College</b> |      |      | X    |
| 4:00 pm | Salesforce AppExchange Partner<br><b>MapAnything</b>  | X    |      |      |
|         | Introduction to Assignment Manager<br><b>Enrollment Rx</b>  |      | X    |      |
|         | Integration for the Rest of Us<br><b>Enrollment Rx</b>  |      |      | X    |

FRIDAY, MAY 18<sup>th</sup>, 2018

| TIME     | BREAKOUT SESSION   SPEAKERS   | 1240 | 1242 | 1243 |
|----------|---|------|------|------|
| 10:00 am | Salesforce App Exchange Partner<br><b>Mogli</b>                               | X    |      |      |
|          | Best Practices- Managing Checklist Requirements, etc.<br><b>Enrollment Rx</b> |      | X    |      |
|          | Managing Events for Recruitment & Admissions<br><b>Enrollment Rx</b>          |      |      | X    |
| 11:00 am | Product Roadmap Deep Dive<br><b>Enrollment Rx</b>                             |      | X    |      |
|          | Integration Rx/Import Rx Client Panel<br><b>Enrollment Rx Clients</b>         |      |      | X    |



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# BREAKOUT SESSION DESCRIPTIONS



## BREAKOUT SESSION DESCRIPTIONS

### **Building Partnerships in a Centralized Graduate Model:**

Room 1243

#### ***Using Technology to Work Collaboratively in Graduate Admissions***

**Presented by:** Kara Wada, Janine Barrett- UNLV, Graduate College/ Jon Hazelgren-Enrollment Rx

Graduate school administration is complex and challenging when managing both centralized and individual graduate program initiatives. Are outdated technologies and inefficient processes hampering your strategic GEM (Graduate Enrollment Management) efforts? Are you looking for ways to easily deliver personalized messaging, provide support to graduate faculty, and better manage the data at both the graduate centralized office and program level? We will share first-hand experiences of how the Graduate College at the University of Nevada, Las Vegas has partnered with Enrollment Rx and Salesforce to boost recruitment efforts, admissions processes, student progression and completion, and to empower students, while providing expanded tracking, data, reporting, and more efficient processes for faculty and staff.

Room 1242

### **FormBuilder Rx Client Panel**

**Presented by:** Marc Satin-Enrollment Rx, Enrollment Rx Clients

FormBuilder Rx has been a transformative product for higher education clients, as it allows us to implement and deploy Salesforce's 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.

Room 1243

### **How to Best Prepare for CRM Success**

**Presented by:** Kathy Koh & Matt Palmer-Enrollment Rx

CRM Success begins well before the RFP process, and requires vigilance and dedication to ensure on-going value from your CRM system. What are the ingredients that are necessary to best-ensure a successful CRM implementation? Who are the people that will be required to maintain and support a strong user base within your institution? How can your CRM system best scale within your institution? Join us as we talk about CRM success, best practices for implementation preparedness, staffing requirements, and executive sponsorship.

Room 1243

### **Integration for the Rest of Us**

**Presented by:** Lawrence Levy & Barb Smith-Enrollment Rx

Integrating CRM with the Student Information System is often one the biggest concerns when selecting and deploying a solution. Join us as we demystify the questions about integration and talk about the options that are available to all types of institutions, from the resource challenged to the highly self-sufficient.

Room 1243

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

**Presented by:** Barb Smith- Enrollment Rx, Enrollment Rx Clients

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.

### **Introduction to Assignment Manager**

Room 1242

**Presented by:** Marc Satin & Jim Scott-Enrollment Rx

From the secret labs of Enrollment Rx comes our latest innovation to ERX Core: "Assignment Manager". Join us to learn how clients can easily configure complex logic to assign contacts, applications, cases, accounts (and more) to individuals and round-robin queues.

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# BREAKOUT SESSION DESCRIPTIONS



## Managing Events for Recruitment and Admissions

Room 1243

Presented by: Peter Dupre-Enrollment Rx

Can we empower the Marketing/Event team to own and control event management? Can we empower them to create, publish, and modify any registration form? Can we accommodate walk-ups, wait-lists, and guest registrations? Join us to learn how clients are leveraging Events Rx to manage campus visits, public, and private events.

## Migrating from “Custom Portal” to FormBuilder Rx

Room 1242

Presented by: Marc Satin-Enrollment Rx

Still living with a custom-built applicant portal? Stop the Madness! Join us to talk about migrating from a custom-built applicant portal onto a Salesforce Community environment powered by FormBuilder Rx.

## Multichannel Communication- Leveraging Salesforce to Communicate Across Multiple Channels

Room 1243

Presented by: Salesforce.org, Enrollment Rx, Enrollment Rx Partners

Email, Text, Print, Phone - Join partners and clients alike to hear how colleges and universities are leveraging Salesforce to deliver communications across multiple communication channels.

## Operation Best Practices - Managing Checklist Requirements, Documents, etc.

Room 1242

Presented by: Kathy Koh-Enrollment Rx

Missing items, checklist requirements, admissions documents, oh my! Join us to discuss operational best-practices, tips, and use-cases about how clients are leveraging the product suite to manage admissions requirements across various programs and applicant types.

## Product Roadmap Deep Dive

Room 1242

Presented by: 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

Room 1242

Presented by: Marc Satin & Jim Scott-Enrollment Rx, Enrollment Rx Clients

Decisions, decisions, decisions! How can colleges and universities leverage Salesforce to manage complex application approval processes and 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?

## Salesforce AppExchange Partner

Room 1240

Presented by: Jitterbit

Jitterbit is a cloud integration platform that allows non-technical users to achieve Salesforce integration with data, apps, and devices. Jitterbit is 100% graphical, no-coding Salesforce integration.

## Salesforce AppExchange Partner

Room 1240

Presented by: MapAnything

Map your Salesforce data! MapAnything provides Geo-based territory management, route planning & optimization, lead gen, and reporting through a real-time, interactive map of your Salesforce data.

## Salesforce AppExchange Partner

Room 1240

Presented by: Mogli

Mogli helps Higher Ed institutions improve their outreach capabilities through intelligent SMS texting technology. Mogli can take an incoming text message, and automatically update contacts, leads, and custom objects in Salesforce.



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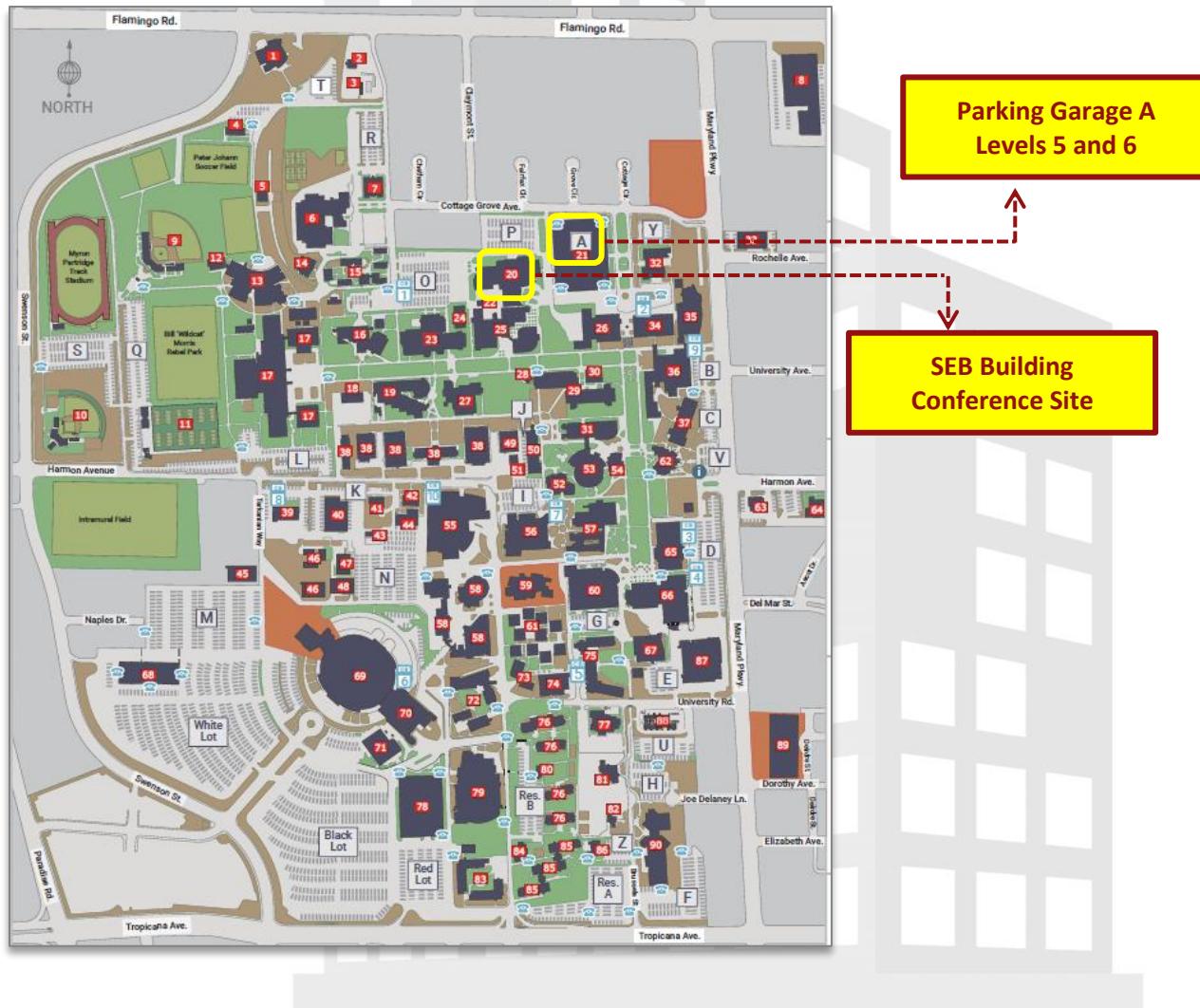
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## CAMPUS MAP / PARKING

Participants driving to the conference location must park in the following specified location on campus to avoid fines and/or towing:

Parking garage A- **TOP TWO FLOORS** (level 5 and 6 only) has been reserved for the Enrollment Rx Conference guests.



## BAG CHECK

Participants planning to depart to the airport immediately following the closing remarks can bring their bags to the conference location on Friday morning. Melissa Creaney, with Enrollment Rx, will store your bags onsite in the SEB building until you are ready to depart.

# NEARBY DINING OPTIONS



## DINING NEAR UNLV

**Bahama Breeze Island Grill** - A laid-back, no worries Caribbean atmosphere serving up seafood, chicken and steak, inspired by the flavorful and colorful ingredients of the islands. 375 Hughes Center Drive, 702-731-3252

**Culinary Dropout** - Cool, British-style gastropub chain with quirky decor, serving inventive cocktails & comfort food within the Hard Rock. 4455 Paradise Rd, 702-522-8100

**Ferraro's Italian Restaurant & Wine Bar** - A Southern Italian-influenced cuisine with a modern twist. Pastas, breads and desserts are made daily on premise. Mangia! 4480 Paradise Road, 702-364-5300.

**Firefly Tapas Kitchen & Bar** - Large variety of hot and cold plates to assemble a multi-course feast or order in waves and enjoy as many flavors as possible! Known for their house-specialty sangria, which marinates for three days. 3824 Paradise Road, 702-369-3971

**Fogo de Chão Brazilian Steakhouse** - Upscale Brazilian chain for all-you-can-eat meat carved tableside plus an extensive salad bar. 360 E Flamingo Rd, 702-431-4500

**Fu** - Hard Rock Hotel & Casino eatery serving familiar Chinese, Thai & Korean eats amid dynamic decor. 4455 Paradise Rd, (702) 522-8188

**Gangnam Asian BBQ Dining** - Polished eatery featuring Korean- & Japanese-style barbecue in a contemporary setting. 4480 Paradise Rd., 702-802-5508

**Gordon Biersch** - Known as one of the area's premier locals' destinations. One of 35 restaurants across the US, with superior beer, great food and good times being served up fresh daily. 3987 Paradise Rd, 702-312-5247

**Hofbräuhaus** - The first and only German beer hall and restaurant in Las Vegas. Provides an unforgettable and authentic experience as the 400-year-old original with nightly live entertainment to the tree-lined Beer Garden. 4510 Paradise Road, 702-853-2337

**Kaizen Sushi** - With a unique blend of progressive style and energy influenced by Japanese cuisine, Kaizen Sushi combines the clever creation of sushi, Japanese fare and savory libations to deliver a truly distinctive experience. 4480 Paradise Road Suite 900, 702-641-7772

**Lotus of Siam** - Recipient of the James Beard Award for Best Chef, this authentic Thai food specializing with a Northern and Eastern Thai menu with recipes that have been passed down from generations spanning over 100 years. 620 E Flamingo Rd., 702-538-6135

**Mint Indian Bistro (Las Vegas East)** - Wide range of Indian cooking, with vegan & gluten-free options, plus lunch buffet & rare-beers list. 730 E Flamingo Rd, 702-894-9334

**Morton's The Steakhouse** - Upscale chain for aged prime beef, seafood & other traditional steakhouse fare in a clubby space. 400 E Flamingo Rd, 702-893-0703

**Naked City Pizza** - With 15 years of cooking experience and a specialty in authentic Buffalo, NY pizza and wings, this pizza shop has been featured on Food Network's Diners, Drive Ins & Dives, Las Vegas Weekly Magazine and Eating Las Vegas 2013. 4608 Paradise Road, 702-722-2241

**Paymon's Mediterranean Café & Lounge** - Features Greek, Italian, Persian, Middle Eastern, Indian and Vegetarian Specialties. A warm, casual and fun ambiance in addition to in-house Hookah Lounge. 4147 S. Maryland Parkway, 702-731-6030

**P.F. Changs** - Asian inspired made-from-scratch recipes with fresh ingredients on our signature menu. 4165 S Paradise Rd., 702-792-2207

**Pink Taco Mexican Restaurant** - Festive cantina in the Hard Rock featuring Cal-Mexican eats, margaritas & a patio with pool views. 4455 Paradise Rd, 702-693-5525