

Graduate CRM Implementation Weekly Update - 9.17.2018

I hope everyone is staying as dry as possible on this incredibly wet Monday. Let's get right into the most recent updates.

Application

- It is now live! We already have **313** applications in progress and **12** submitted. The application is being fed to Banner daily with a return file to TargetX from Banner also coming back daily.

Review

- The ATT is reviewing the feedback from the liaisons to understand the full scope of the work needed to get these updates completed ASAP.
- The team will connect with each college to set up a time to talk through the documented changes and ensure we are on the same page about what updates need to be made and when the changes can be test by the college.

Communications and Marketing

- The RFI went live on Friday (9/14) for Fall 2019 forward. We are keeping the Spring 2019 RFI available as well – both are represented on the central admissions page – [click here to view it](#).
- We continue to see some great dialogue on the comms group chatter. We believe this will continue to be a strong space for all units to understand best practices and collaborate on comms and marketing strategies and troubleshoot issues.
 - Jade posted something just today about making sure we limit the number of days we set for daily broadcasts to only be set for 2 years in the future (versus until 2099) to ensure better performance in the system.

Portal

- As of this afternoon the portal templates for each college were released to the units to manage moving forward.
 - Just a note that these portals will work as they stand now and only need updating if the colleges would like to added college-specific information for students.

Graduate CRM Implementation Weekly Update - 9.10.2018

I hope everyone had a wonderful weekend! Today is the day we launch the application. We don't see any fireworks going off, rather a long, slow fuse as we don't see a ton of students clamoring to fill out the application on day 1. But we are hitting a big moment and day, so I want to start by **thanking everyone involved in this project** for lending your time and talents to make this the best CRM we can. I know there is plenty more to do, but I think we should **start by appreciating all of the hard work** from so many folks that has led us to this point. Here is a quick update for the week:

Application

- Launch date is today! We are closely monitoring the application and even still testing it. We have Kennedy and TargetX on high alert if we come across any troubles.

Review

- Liaisons were to submit changes to their application reviews by September 4th or a future date with a window of about a month for the technical team to make these updates. Amazingly, all colleges handed in edits. I know it was a lot of work and there remains concerns from some of the colleges, but we appreciate the time and effort being put into getting this right.

Integration

- At this point, we are able to pass data back and forth from TargetX to Banner and back, but it is going to be a manual push and pull. The automation is still being worked on, but we will leverage our manpower to ensure that data is getting back and forth in the meantime.

Portal

- We are putting some final touches on the Portals as I write this. We are breaking them into the various colleges from the initial template built by K&Co and expect to deliver them to the colleges in the next week.
- The guidelines on how to use these pages has been distributed.

Data Load

- As of last week, the ATT loaded the inquiry data from Radius into TargetX.

This was a quick update for the week. We are working with Derek to get another iteration of the project timeline up and running for the post-launch items. So we will provide an update on that in the weeks to come.

Graduate CRM Implementation Weekly Update - 8.27.2018

Happy first day of the Fall 2018 term. We are just about 14 days until we launch the Fall 2019 grad application in TargetX! Let's get to the updates from the project (just a short run of updates this week):

Application

- With 14 days to go, we are working through the last bit of feedback, but we feel great about where the application is and see no issues with launch of September 10th.

Review

- The team worked with Kennedy and Co. last week to figure out where we felt that we could make some improvements on the Review tool. We had 1 immediate win that th K&Co. team was able to deliver on:
 - We added labels to the scorecard to indicate if a reviewer is Parallel or Binding – this created confusion for many of the faculty testers and we feel confident that this adjustment will be a big help.
- We will continue to work through the rest of the feedback to identify areas for better training and to see if there are any other significant improvements we can make.

Portal

- We will distribute all of the 1 pagers on how to manage the portal in the next couple of days to provide the type of guidance the units need to understand how they will manage their college portal.

Decision Letters

- K&Co. is working on the latest version of the edits and we expect this version done by the end of the week.

Training

- As outlined in the Town Hall on Thursday, we feel strongly that our plan for training is robust enough to properly serve our base of users. The end user trainings in July already provided +60 members of the graduate units with an opportunity to learn the system.
- We connected with K&Co. late last week to review the quick video tutorials that we plan to have prepared by the time we launch the application. This will entail 8 videos that are less than 10 minutes to walk through specific functionality within our org.
- The Admissions Technical Team continues to work with the academic units to set up unit specific trainings.
- All prior trainings will continue to be available via recordings to viewing at any time.

Town Hall

- We had a good showing at the Town Hall on Thursday and felt that it went smoothly. Caitlin's team will distribute the survey and we will look for feedback and provide answers where necessary.
- If you would like to see the presentation used, it is saved on the Sharepoint site here:

- https://gmuedu.sharepoint.com/:p/s/GraduateAdmissionsTargetXImplementation/EerSk_m6gFJHh4_ML5toyUIBCoqc2TfMYdted-UMru83aQ?e=mn727K

Graduate CRM Implementation Weekly Update - 8.20.2018

I hope you are having a wonderful Monday! I know we are all gearing up for the beginning of the semester. We continue to make great progress on the CRM Implementation.

Application

- We are working to address the feedback from the Grad units we received last week.
 - The team will address feedback and provide another opportunity for the units to review by mid-next week.
- A final piece of testing on the payment portal is currently in progress as one of the last steps to ensure the full application and all components are in place.
- Reminder that we are launching the Application on **September 10th**.

Review

- We have consolidated the feedback from the Faculty UAT members and will review with Kennedy tomorrow (**August 21st**). We should be able to address the feedback by the end of the week.
- 19 pieces of feedback came from the testing period, but a larger group from the faculty accessed the system. In the GAP Steering/Vision and Strategy Meeting last week, the question was asked about who accessed the system who was on the Faculty UAT List.
 - See attached list
- The majority of the feedback from faculty can be addressed through more training and discussions on the manner in which the system works. We see a lot of this as a part of the change management from the old system to the new one.

Portal

- This past Thursday, the Liaisons and Communications folks in the units received an overview on the Portal. The take away for the project team was:
 - 1 pager on how the Portal works and best practices for the technical build and management (Central Grad providing)
 - 1 pager with tips on improving the look and feel for the portal (Integrated Enrollment Marketing providing)
- These 1 pagers will be done this week and we will provide a date to allow the Grad Units into the portal to begin improving it.

Decision Letters

- Some tweaks were made by Kennedy to the decision letters in the past week and the Mason team is reviewing and should be confident to sign off on these in the next week.

Town Hall

- Final reminder via these updates – the final iteration of these gatherings for this project will take place **Thursday, August 23rd at 12:30p in Research Hall Rm. 163.**

These are the updates for now. For more in depth notes on the project, feel free to peruse our documentation in the follow location:

<https://gmuedu.sharepoint.com/sites/GraduateAdmissionsTargetXImplementation/SitePages/Home.aspx>

Graduate CRM Implementation Weekly Update - 8.13.2018

We are back with another rendition of “What’s Happening in the Grad CRM Implementation.” Onto the quick updates for the week:

Application

- Purshara has sent out one last request for final thoughts from the grad liaisons on the application. Their feedback is due by **Thursday, August 16th**.
- At this point in the project, the team will handle any edits that come back and only bring Kennedy and Co. into the work if there is some significant, show-stopping issue (unlikely).

Review

- We received 19 responses from faculty on the review tool. The deadline was this past **Friday, August 10th**.
- We are **aggregating this feedback** and handing over thoughts to Kennedy and Co. **by Wednesday, August 16th**.
- We had a great breakthrough regarding the review tool in the past week:
 - The team was able to create a process by which the liaisons **can stop the auto publishing of the Provisional and Conditional decisions for each program**. This relieves quite a bit of concerns about the Liaison Review Period. This can be managed by the liaisons very easily.
- The liaisons have been asked to go through their decisions for each of the programs and provide feedback on any changes to their processes by **Tuesday, September 4th**. This is meant to give the team a month to update the system for their review processes to go live at the beginning of October.

Portal

- The template for the portal is ready to be reviewed by the Liaison and GRAC groups. There will be a **demo and discussion this Thursday, August 16th at the liaison meeting.**

Data Migration

- The Admissions Technical Team is working to have data migrated from Radius to Salesforce over the course of the next week to allow the graduate units to begin leveraging the system to engage with prospective students.

Town Hall

- Not to be overly redundant, but I want to make sure that we get the word out as much as possible – the Town Hall will take place **August 23rd at 12:30p in Research Hall 163** or via Webex.

Attached is the updated project plan and as a reminder, you have access to the Sharepoint site any time you would like to check into the project:

<https://gmuedu.sharepoint.com/sites/GraduateAdmissionsTargetXImplementation/SitePages/Home.aspx>

If you have any questions, please let me know.

Graduate CRM Implementation Weekly Update - 8.7.2018

Application

- The Admissions Technical Team is reviewing the last few details and will finish this next review prior to passing it to the liaisons for one final pass.
- We expect to open the application to another round of testing in the **next two days.**
- The liaisons will have a week to review the application and provide one last round of feedback.

Review

- We continue to work through the Faculty Testing period with the end of the timeframe coming at **5pm on Friday, August 10, 2018.**
- The team will consolidate the feedback and provide any adjustments needed to Kennedy and Co. by next Wednesday, August 9¹⁵.

Portal

- We plan to begin the feedback loop on the portal, which is the space in which students will receive information about their next steps after they are admitted.
- The liaisons will be presented the portal template next **Thursday, August 16** at the next OGAL meeting.
- The initial pass at the development of the IE form has occurred and will go through an initial edit prior to presenting it to the Liaisons for review. This form has two capabilities – one to be used within the portal and another that can be emailed as part of communications.

Decision Letters

- The decision letters have gone through a second round of edits and are just about ready to be reviewed by a wider audience.

Town Hall

- The next town hall to discuss the implementation progress to the community at large will take place on August 23. As part of this event, we anticipate a video presentation developed by Caitlin's team to help show the capacity of the tools and some discussion on where the project stands.

Graduate CRM Implementation Weekly Update - 7.30.2018

Application Review

- **Tomorrow (7/31)** morning at 9am is the training for the faculty on the testing process for the review tool.
 - We are offering this both in-person in JC Room A or over a Webex session. The session will also be recorded for later usage.
 - The faculty will have between 7/31 and 8/10 to review the two applications we have on file for the testing process.
 - Their **sole focus is on the Review Tool and interface**. We are not asking the faculty to work through any of the application processing components or other pieces of the larger review process.
 - Lauren and Kevin, from K&Co. are leading the session.
- The faculty testing is part of the ongoing component of the larger review build. There are still moving pieces to the part of the project and we do not anticipate the build being complete until early September (with continued testing going on throughout that month).
- OGAL Meeting
 - This week in the Liaison meeting, KZ and Jade are going to present on the liaison's component of the review process and ask that they begin providing feedback on the tools we have built.

Application

- We are in the final stage of the application testing and feel confident that we will have it set by 8/6.

Portal

- As a reminder - this is the tool students will use to review their next steps after admission into the program.
- Kennedy and Co. is tweaking the template for us to then make available for each college. This means **each college has 1 version** of this portal to support the distribution of information relative to enrollment in their programs.

Training

- The feedback from End User training last week was really positive. We have all of the sessions recorded for further review and Shukri continues to provide office hours for the college staff to receive further training as needed.

Graduate CRM Implementation Weekly Update - 7.23.2018

Application

- We are in our last bit of work on this piece of the project.
- We will release the application for one more round of feedback from the Grad units before checking this portion of the project off.

App Review

- We will be setting aside time with the SET Liaisons to walk through the Review process and get some of their feedback on the system. Nicole, Stephanie, and Stevie have kindly taken the first swing at understanding the system and we will look to get their feedback this week.
- Today's training will be the first-time folks outside of the SET team get the opportunity to see the system. We will likely get quite a bit of feedback in today's session and use it to adjust as much as possible.

Decision Letters

- K&Co. has delivered another round of the decision letters.
- The Mason team is sitting with the K&Co. later this week to walk through the letters and make sure all edits are being made.

Portal

- Mason is providing some last thoughts on how the construction of the Portal needs to go – these will be delivered today and the initial Portal template will likely be delivered this week.

Faculty Testing of the System

- We will plan to have the faculty testing the system on July 31st. I will be sending an email to all faculty who have signed up as testers in the next day to announce the training date/time/location.

Graduate CRM Implementation Weekly Update - 7.17.2018

Application

- The Mason team is in the process of taking a final pass at reviewing the application.
- At this point, K&Co. will pass the editing work onto the Mason team with the exception of any “showstopper” items.

Review

- At last week’s SET meeting, we walked the team through the process of managing the review process in the system.
- We have asked the SET liaisons to take a pass at using the system and provide initial feedback on the functionality.
- The Mason team continues to work through the tweaks associated with the process in conjunction with the K&Co team.
- UAT for Faculty
 - We anticipate this starting on July 31st with a 2 hour kick off training for the reviewers.

Decision Letters

- K&Co. passed along their first round of edits on the letters.
- Currently the Mason team is reviewing the letters and will send feedback to K&Co. by July 20th.

Portal

- K&Co. is finalizing components of the first build out of the portal template. This will likely be delivered July 20th.
- Keep in mind that we plan to leverage this template to replicate it for each college.

End User Training

- Training begins on Friday, July 20th. I pulled the sign ups as of this morning, which you can see in the attached spreadsheet.
- We will be utilizing a webex session for each meeting. I will distribute the links for each session in the coming day or so.

As always, please let us know if you have any questions about any of this. The most recent project plan is attached as per usual.

Graduate CRM Implementation Weekly Update - 7.9.2018

Good Evening Everyone,

I hope everyone is having an easy transition into the post-July 4th week. We are here for a quick recap of the week and look ahead:

Application

- Kennedy and Co. is processing the last of our most recent updates to the application after the feedback from the units.
- We will roll out another round of testing in the next week.

Review

- The team is currently working to fill in the faculty members who fill the roles as both parallel and binding reviewers in the system. This is due by Friday.

Decision Letter

- The team is reviewing the decision letters and providing feedback to Kennedy and Co. by Friday.

Communications

- The units have been working with the IEM interns to extract the comms from Radius and begin building in TargetX
- We have seen some great progress in the building of these comms in the system and expect to see the system continue to populate with emails

Training

- The end-user training for the functional users in TargetX/Salesforce will take place on July 20th, July 23rd, and July 24th
- We are finalizing the granularity of those trainings in the next couple of days and distribute it to the units. We are working to make sure we break up those three days so no one feels like they need to block out the entire days, instead make choices on the individual portions of the day that are necessary.

Faculty Testing of the System

- We recognize that many faculty members who signed up to do the testing of the review tool do not have a form on file to gain access.
- Shukri has been reaching out to the liaisons to indicate who is missing their forms. We are not providing access unless the faculty have a signed form on file.

Graduate CRM Implementation Weekly Update - 7.2.2018

Good Morning Everyone,

I hope many of you are enjoying some time off during this 4th of July week. But we all know the Graduate Implementation Weekly Update never rests! Onto the updates for this week:

Application

- The team is combing through the 70 pages of feedback from the academic units on the application testing.
- The feedback is being broken up into operational concerns, technical concerns, and adjustments that we need K&Co. to address.
- We expect to have the next round of testing occur within the next week. This will involve another round of testing by the academic units.

Review Tool

- There is a meeting today (7/2/2018) for the central teams to review the more complex part of the build from K&Co. and ensure we are on the right path.
- We anticipate initial testing on this tool to begin by the end of the week.

Training

- We are still planning to hold 3 days of training for the main CRM users in the colleges (not the faculty reviewers) on July 20, 23, and 24.
- The team will further flush out the details for those training days to help the units prepare for who needs to attend which session.

OGAL Meeting

- KZ, Jade, and myself attended the OGAL meeting to discuss the process of liaison's reviewing decisions after the final faculty review and before the decision goes live.
 - This period we are deeming the Liaison Review Period has been cause for some concerns, but largely the liaisons seemed to feel better after the meeting.
 - We agreed to revisit some greater work down the road on setting the decision publish date based on the different decision codes (provisional, conditional, and funding).

Decision Letters

- K&Co. delivered the initial version of the decision letters that need to be tested by the central team.
- Once the central team reviews and provides feedback to K&Co., we will open this up to a wider audience for testing.

Communications

- Communications builds are well under way. We have seen the interns work with the units to begin building out some really strong comm plans in the system.

While this will likely be a quiet week on campus, we will continue to take strides to make sure the system is ready for our September launch.

Graduate CRM Implementation Weekly Update - 6.25.2018

Morning Everyone,

I hope everyone had a wonderful weekend! We are here for a quick recap of the week and look ahead on the grad implementation project.

Application

- The initial feedback from the academic units is due TODAY.
- We will review the feedback from both the survey and the submitted documents with more detailed thoughts and provide a comprehensive set of edits for K&Co. to help us resolve.

Review Tool

- We had the initial review of the scorecard and review screen presented at SET last week. The layout looks really good.
- We are now in the midst of the complex sequential reviews getting built out.

Decision Release

- In the SET meeting this past week, we discussed the decision release process.
 - Decisions will be set by default to release 3 days after the decision is made.
 - The time between decision and decision release can be controlled by the units for each program.
 - There is no way to adjust the timeline for decision release by individual decision types. This caused some concern in the meeting for Provision and Conditional Decisions. We will provide reporting to support the review of any provisional and conditional decisions made by faculty.

Decision Letters

- K&Co. is building these out currently and we anticipate the first iteration being completed by Friday, June 29th

Communications

- Lauren (K&Co.) provided 2 days of trainings last week in which a majority of the units were able to meet with her 1 on 1. We are reviewing some notes and consistent questions that were brought up in the meetings and will work to address any themes that were brought up as questions in the meetings.

Trainings

- We are currently looking at the end-user training dates as follows:
 - Friday, July 20th
 - Monday, July 23rd
 - Tuesday, July 24th
- These will be the A-Z training for all users. This means K&Co. will provide the basic overview of navigation to how to build reports to how to review a student's application information.
- The more detailed schedule will come out as we get closer to these dates.

Graduate CRM Implementation Weekly Update - 6.18.2018

Morning Everyone,

I hope you had a great weekend. We are here for a quick recap of the week:

Application

- The application is still out for feedback. The initial responses have been positive. But there is another week until the college's need to provide their full set of feedback
 - Due date: Monday, June 25th

Review

- K&Co. is still in the midst of building out the review process.
- The K&Co. team will provide the team previews of the sequential reviews as they are built
- Some of the technical team will sit with K&Co. to assess the parallel review process which has been built out. This discussion is occurring on Friday, June 22nd.

Decision Letters

- K&Co. has the initial documentation for the Decision Letter build.
- We anticipate this build being completed in the next week or so.

Communications Support

- The colleges will be meeting with K&Co. this Thursday and Friday. The schedule for the meetings is as follows:

Thursday, June 21st	
10:00 AM – 11:00 AM	CEHD - Nicole Mariam
11:15 AM – 12:15 PM	SCAR - Monique Barner
1:15 PM – 2:15 PM	CHHS - Amanda Stokes
2:30 PM – 3:30 PM	CHSS - Laura and Stephanie
3:45 PM – 4:45 PM	Schar - Caroline and Travis
Friday, June 22nd	
9:00 AM – 10:00 AM	CVPA - Shanika Boyd
10:15 AM – 11:15 AM	VSE - Suddaf Ismail
11:30 AM – 12:30 PM	OPEN
2:00 PM – 3:00 PM	COS - Melissa
3:15 PM – 4:15 PM	OPEN

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- The colleges are expected to bring items with which they would like to address with Lauren.

If you have any questions about this or any other component of the project, please let me know.

Graduate CRM Implementation Weekly Update - 6.12.2018

Morning Everyone,

I hope you are all doing well. We are here for a quick recap of the week on the graduate CRM implementation project:

Application

- As of yesterday afternoon (6/11), Purshara distributed the application to the Liaisons to gather feedback on the application. The email distributed is attached.
- The feedback is due on **Monday, June 25th**
- The units are asked to provide feedback in two ways:
 - Word document – more of a running qualitative assessment of the application
 - Survey – gives us a more overarching understanding of the application feedback
- We expect to sign off on the application by July 2nd.

Review

- We continue to provide clarity to K&Co. on our very complex review processes. But the documentation needed has been provided.

- We expect an iteration of the Review Tool to be **tested by June 25th by the central technical team.**
 - After initial feedback is provided to K&Co, we will go through edits again before we distribute to a larger group for testing.

Communications

- Lauren (K&Co.) is returning for 2 full days of communications trainings on June 21st and June 22nd
 - These are days with specific time slots dedicated to the colleges to work on their comm plans and have specific questions answered.
 - Prior to these trainings, we will ask the colleges to provide some information on what they hope to get out of their hour with Lauren so Lauren can appropriately prep.

Decision Letters

- We are currently working on providing the documentation for the Decision Letters to K&Co. In TargetX, there is a great interface for displaying the decision letter within their online portal, but it takes some significant coding on the uplift.

Training

- I know many questions continue to bubble up about the remainder of the end user training. We are finalizing the details on this with K&Co. and feel confident that we have a stronger outline by the end of next week.

Graduate CRM Implementation Weekly Update - 6.4.2018

Morning All,

I hope everyone had a wonderful weekend. With last week being a short week, this will be a quick update. Let's get to it:

Application

- K&Co. has gone through all of our feedback and we have a meeting set for today (6/4) to review their latest round of edits to the application. We anticipate cleaning it up over the course of this week.
- Wider testing of the application will begin June 11th.

App Review

- The team is finalizing the last bit of documentation on the review types over the course of today and will pass this along to K&Co. to begin the larger scale build.
- K&Co. will need 3 weeks to build out all of the iterations of our application review.

Communications

- Based on the Radius-based templates Caitlin provided, K&Co. has developed 3 templates for the colleges to utilize in their building of communications. These templates are being vetted by some of the members of the colleges who specialize in marketing and communications.
- Based upon feedback, we will be offering an **advanced marketing and communications training with Lauren from K&Co.** This will be 2 days (**June 21 and 22**) in which the colleges will be able to sign up for a time to meet with Lauren and talk through the development of their communications plan in TargetX. I will be distributing a sign-up sheet in the days to come and it will be a first come first serve set up.

As always, attached is the most updated project plan for you to peruse at your leisure.

Let us know if you have any questions.

Graduate CRM Implementation Weekly Update - 5.29.2018

Hello All,

I hope everyone had a wonderful holiday weekend! We are here for a quick recap of the week:

Application

- The team continues to work back and forth with K&Co. on the last few details of the application build. With the complications associated with this, we are making a slight adjustment to the schedule for testing. **We now plan to release the application to the liaison group for testing on June 11th. This was originally June 4th, but the build needs more time to be prepared for the wider testing.**

Review

- The team is currently working diligently to provide another round of documentation on the college's review processes – particularly on the Review Types (funding review, initial review etc).
 - The team is scrubbing the current reviews in Radius to determine where commonalities lie as to provide the update to K&Co. by Monday COB (6/4).
- I want to reiterate that we will not be able to begin the faculty testing until the **latter part of July**. The faculty UAT will begin with a webex training on how to use the tool and we will provide a survey to help with feedback.

Communications

- Caitlin is working with K&Co. on building the 3 templates to distribute to the OGAL and GRAC groups for the colleges to add to their communications plans.

- 2 interns have been hired by IEM and will be providing 40 hours of support to each unit in the build process.
- We are working on a plan for offering a stronger working session with the colleges to help with the lift on the communications components of their CRM. More to come on this soon.

RFI

- There is a lot of back and forth on the inquiry form regarding the added field of Prior College Attended. THE DECISION:
 - We will be *adding the prior college field to the RFI as an optional field*. Anyone who doesn't answer will be set to a generic Account.
 - Based on the feedback we have received, I believe this will work well for the group as a whole.

Operations

- As we get further into the build process, we are getting a better sense of how we will better operationalize the system from a central standpoint. The central admissions operations leadership met on Friday to go over the use of the system and we will provide updates when decisions begin to be made about how applications will be processed, how the IEing process will occur, etc.

As always, the updated project plan is attached. Please let the team know if you have any questions about this.

Graduate CRM Implementation Weekly Update - 5.21.2018

Morning All,

I hope everyone enjoys the post-graduation lull. The rain has finally stopped and we can all enjoy a bit of sunshine. Time for a quick recap of the week:

Visit to TargetX in Philly

- Quick bit of thanks to the Mason team that spent most of last week at the TargetX office with Kennedy and Co. to help push things along a bit faster. Thanks to Purshara, Michele, Jade, KZ, and Crystal.
- It was a really productive few days in which we got some things accomplished and revealed some pain points that we need to address.
- The majority of the time was spent on the Application and Review build processes – largely trying to work through some system limitations. We still have some work to do to marry our expectations with the capacity of the TargetX components.

Application Build

- Kennedy and Co. is currently going through a 2nd round of edits on the application.
- They will have the edits back to us for June 1st.
- The Mason team begins another round of testing on the application June 4th. This round will include a larger audience of Liaisons.
- This round of testing will conclude by June 15th

Review Process

- The visit to TargetX revealed some gaps in our documentation, particularly regarding the BAM review process. We are expected to have the remaining documentation to Kennedy and Co. by June 1st.
 - Given the delay in getting K&Co. some of this additional documentation, we do not anticipate the Review Tool being prepared for **testing by the faculty volunteers until late July**, which is likely a couple of weeks later than we originally anticipated.
- The Mason team is currently working on the layouts for the Review Sheets – these will be the way to application questions and materials display for the faculty reviews. It will be a unique view per college. All individuals in each college will see the same layout.
- The other component of the review sheet is the scorecard. This is the element of the review sheet that allows the reviewer to insert comments and add decisions. Jade and Co. are currently getting the documentation together on this and will provide it to K&Co. This will be 1 review type per college per review round. This means that every college will have their own scorecard for funding review, final review, etc.

Portal

- We spent a portion of the time at TX discussing the lay out for the Portal. I believe we have a strong sense of the right series of sections that will work for all units.
- This will be something we begin to put together after we get through the heavy lift on the application and review.

Communications Support

- Caitlin has hired two part time workers to spend time supporting the graduate units in building their communications plans in TargetX.
- They begin this week and will need some time training before they get into the actual building process.

We have an updated project plan attached. If anyone has questions about this, please let me know.

Late Update - Graduate CRM Implementation Weekly Update - 5.16.2018

Hello Everyone,

My apologies for the delayed update. Myself and a portion of the implementation team are currently in Philadelphia with Kennedy and Co. and TargetX working through some of the kinks in the project and attempting to accelerate some things. Time for a quick update of the week:

Visit to TargetX

- To give you all some context on the visit to TargetX's office, we felt it would be good to lock ourselves in a room for 3 days and try to figure out some areas where we are seeing some challenges with the tool and process. TargetX flew one of their developers out from the California office to participate in these sessions. We are working through the following:
 - Ironing out some details with the Application Review tool regarding sequential, parallel reviews
 - Resolving some components of our supplemental application
 - Discussion on managing 9 different Portals simultaneously and the pitfalls associated with this
 - Time with TargetX discussing our likes and dislikes of the product suite and requests for product improvements

Application Build

- Kennedy and Co is taking our feedback that was provided in the past week and during the on-site sessions this week and will be building over the course of the next week
- The next round of edits will include the Liaisons as part of our feedback loop so that we can ensure we get a larger pool of perspectives on how the system is working
- Final testing should occur by June 4th

Review

- The Kennedy (Lauren) and Co. team have done a great job of coming up with some outside the box concepts to fit our incredibly complex review processes. There are a few details on how this is going to work that we have thought through this week and we anticipate most of the review processes being established in the next two weeks (by June 1).

Access to the System

- I know there is a lot of questions around access to the system for the liaisons and communications folks in the colleges. We think the system will be ready in June for staff members to get into the system and begin building communication plans and events.
- REMINDER: We need your forms on file in order to grant access to the system, so please be sure to provide them to OGA

Portal

- Based on this week's conversations, we anticipate being able to mock up the portal template for the units by the end of next week to then get feedback and begin the building process.
- This tool will be used for applicants post decision.

As per usual, Derek has update the project plan and it is attached. Please let us know if you have questions or concerns.

Graduate CRM Implementation Weekly Update - 5.7.2018

Morning Everyone,

I hope you had a wonderful weekend. We are here for a quick recap of the week and a bit of a look ahead.

Town Hall

- The Town Hall on Tuesday seemed to be very well received. There was a strong turn out with ~50 people present.
- There was a survey sent out to the attendees to provide feedback on the tool and offer any questions that might be lingering.
- Many of the questions brought up in the room were about operations, which were not addressed in the Town Hall as we are still working through those aspects of the implementation.

Application Build

- The K&Co. Team has provided the next iteration of the application.
- SET is reviewing the application and providing feedback to the K&Co. team with an anticipated completion date of May 16th.
- There were some technical difficulties with the latest iteration of the application that the K&Co. team worked to quickly rectify.

Faculty Volunteers

- Reminder that we need all academic units to provide at least 2 volunteers to provide User Authentication Testing of the Application Review tool over the summer.
- We anticipate the testing to happen in late June.

Travel to TargetX

- A core group of Admissions and Enrollment team members will be traveling to Philadelphia next week (5/14-5/16) to spend a few days at the TargetX office meeting with K&Co. and the TX developers to discuss the future of the tool and move the project forward.

Portal

- During the weekly SET meeting, we demoed the Portal Tool for the team. This is the tool used to present dynamic context to the admitted student pool specific to the college.
- During implementation, we will build a base template for the colleges and the colleges will be responsible for the maintenance and further development of the tool.
- We anticipate gathering the requirements for the template in the next couple of weeks.

The week ahead will be spent primarily on ensuring the application is built out in the ways we need it to be. As per usual, Derek has kindly updated the project plan which I have attached.

Let us know if you have any questions about any of this.

Graduate CRM Implementation Weekly Update - 4.30.2018

Good Morning All,

I hope everyone had a wonderful weekend. It is time for a quick update of the week.

Application Build

- The K&Co. team continues to work diligently to finish the build of the application. We will see the next iteration by April 30th.

Review Tool

- Same with the application build, the K&Co. team continues to translate all of our various application review processes into the new system.

Events Tool

- The K&Co. team provided a great training for the events model this past week. This training was for the OGAL and GRAC members who manage the admissions related events within each of the colleges.

TOWN HALL

- **REMINDER:** K&Co and the Mason team will be hosting a Town Hall May 1st (tomorrow) 12:30p – 2:00p in Merten 1202.
- Any members of the university community interested in seeing the *first iteration of the application and review tool* should make an attempt to attend.

- We will be spending time on the user experiences (the applicant and the faculty reviewer). Remember that this tool is still in development and this session is just an early preview and opportunity to gather feedback.

Attached is the most up to date project plan. Derek Kan will continue to update these as we move through all of the details of the project.

Please let me know if you have any questions about any of this.

Graduate CRM Implementation Weekly Update - 4.23.2018

Hello All,

Time for a quick recap of the week in the exciting world of the grad CRM implementation.

- **Application Build**
 - K&Co. is working through the series of edits we provided on the application.
 - We anticipate getting back the application for a second round of edits by April 30th
 - Final sign off for the application from K&Co. will be May 15th.
- **Review Tool**
 - Len and Lauren demoed their Application Review Tool on Tuesday (4/17) afternoon for the technical team.
 - The demo went really well and the Mason team was universally impressed with the creativity the K&Co. team has shown in redeveloping the TargetX tool to fit our needs.
 - Jade is finalizing the App Review Workbook to present the remainder of the program review mapping to K&Co. so they can move forward with the remainder of the build.
 - We will hope to begin User Authentication Testing in the next month or so.
 - In the initial build, we are going to use 1 review sheet, but we will go back and adjust those review sheets for the colleges when we get more consensus from the liaisons on the way those sheets should be set up.
- **Communication Training**
 - On Thursday morning, Lauren from K&Co. provided a great training for the OGAL and GRAC groups. The general consensus is that it was really help.
 - The follow up training on May 1st from 9a to 12p.
 - These sessions are being recorded to allow for folks who cannot make it to review them later.
- **Discussion on Decision Letters and Portal**
 - The core technical team and OGA connected with K&Co. this week to discuss the next steps for implementing the decision letters and the admissions portal
 - We plan to set up a portal for each college
 - The Decision Letter will be broken up into a variety of pages of code for ease of management in the future
 - We owe K&Co. the Decision Letter Workbook by May 25th to begin building these letters in the system

Per last week's update, I have attached the most up to date project plan. This is an evolving document that is a collaborative effort amongst all parties involved. It is the best document we have for laying out the full breadth of deadlines and testing plans.

If you have any questions about any of this, please do not hesitate to ask.

Graduate CRM Implementation Weekly Update - 4.16.2018

Hello All,

I hope you are having a wonderful Monday morning! We are here for just a quick recap of the week:

- **Application Build**
 - Kennedy and Co delivered the first iteration of the application (as described in last week's update) and the central team took a swing at feedback, which has been delivered to K&Co. We will now go through another round of building and editing.
- **Application Review Tool**
 - K&Co. has a proof of concept developed to show the technical teams on Thursday afternoon (4/19). During the demo, we will see a PhD review in action and discuss whether or not that it fits our needs and what tweaks will need to be made to fulfill the central admissions, liaison, and faculty needs.
 - Review sheet reduction – as part of this ongoing discovery, we believe that it will be best to limit the number of review sheets to 1 per college. This is an ongoing discussion.
- **Communications Training**
 - Our first training with the OGAL and GRAC groups for communications will occur on Thursday morning (4/19) from 9a to 12p in Innovation. This will be a hands-on training and will cover the basics of building an email campaign.
 - The members of that training are being provided with pre-work to prep for the session so that they have some understanding of Salesforce prior to the meeting on Thursday morning.
- **Updated Project Plan**
 - As indicated last week, we will continue to work on an in-depth project plan with greater depth and more specific due dates. Attached is the latest iteration of this.

Please let me know if you have any questions about any of this and have a great week.

Graduate CRM Implementation Weekly Update - 4.9.2018

Good Morning Everyone,

Here we are again for a quick recap of the week and a look ahead.

- **Spring 2019 Application**

- Per the email from Amy early last week, we are going to forego the Spring application in TargetX and **launch the Radius application on May 1st**. The central graduate team is working diligently to prepare the Radius application for this launch date. This does mean that we are wiping the August 15th Spring application launch date from the project plan for the implementation.
- **Project Plan**
 - As promised, Derek Kan has worked hard for the past week and a half to develop the attached detailed project plan with all due dates front and center (**see attached**). We are still adding layers of detail into this plan, but this is a really strong starting point to help everyone recognize the upcoming work and deadlines.
- **Communications Training**
 - We are planning to do a communications training with the OGAL and GRAC groups as an introduction to the tools in TargetX. This is slated for April 19th 9am to 12p.
 - The session will be recorded and we plan to do follow up trainings to build on this one and help catch up the folks who could not make this day/time.
 - Some questions came up about the events tools as part of this training. I wanted to clarify that we will provide a separate training focused on the events tool at a future date.
- **Application Review Tool**
 - This continues to be an ongoing dialogue, but Kennedy and Co. will deliver a proof of concept at the end of this week to help us understand the approach that they have proposed as a way to accommodate our particular needs in this review.
 - The central team will take the first review of the tool to see if it fits all of the criteria we have set forth then go back to K&Co. with thoughts and concerns then move to either build or break down and start again.
 - This continues to be a major pain point in this project as we are a university that loves a complex graduate admissions review process and bending the tool to meet our needs will require so innovative thinking and compromise.
- **Application Build**
 - Members of the central team connected with K&Co. Friday (4/6) to review the first build of the application. As with all other areas, this will be a process of review and provide feedback. The team will spend the week providing the necessary feedback for K&Co. to complete the build.

I will be out of the office after today for the remainder of the week, but I am sure anyone on the SET team can answer any questions that come up after today.

Graduate CRM Implementation Weekly Update - 4.2.2018

Good Morning All,

Happy Monday morning! On this dreary day, let's get right into it:

- **Requirements**
 - We moved forward with the initial build of the application **having the requirements in the initial application** as opposed to collecting them in a supplemental application after

the initial submission. This is a bit of a change of pace from the current process in Radius where some requirements are collected after the initial application is submitted. As discussed in SET, this is how we are handling the initial build of the application – we will test this initial build and take all feedback into consideration as we continue to determine if we should be using the supplemental application for some of the requirements.

- **Project Plan**
 - Based on some feedback we received, Derek Kan, Jade, and myself are working on developing a more user-friendly project plan that includes a chronological set of project deadlines and underlying calls to actions for the various involved constituents. This will be used to supplement the project plans that Kennedy has provided us. We anticipate a version of this new project plan being distributed by early next week.
 - While we develop this plan, keep in mind the K&Co. plan is available for everyone to consume. It is useful for consideration of what we are currently working on and what is to come on this project:
 - <https://instagantt.com/shared/s/513075278735652/latest>
- **App Review Process**
 - Given the limitations of the TargetX product, the admissions technical team and enrollment management team are working with Kennedy and Co. on some work arounds to make our complex processes possible. There are a couple of questions from SET that Nicole has carried forward to the OGALS:
 - Do we need to continue to have many of the review processes conclude with a final review by the liaison?
 - Can we have 1 review sheet (the area by which the reviewer rates and comments on the application) per college rather than the multitude currently used across the campus?
 - These questions to the liaisons are driven by a desire to simplify our review process.
 - On Friday, Jade provided a breakdown of a series of reviews in a workbook for K&Co. to begin creating in the system. These initial builds will be a vital part of our discovery on where the limitations exist with this tool.
- **Communications Training**
 - SET went through the initial Communications training with K&Co. on Thursday. The session was recorded for anyone to review at your leisure (ha!).
 - In the coming weeks, K&Co. will conduct a similar, but more extensive training for the OGAL and GRAC groups. This is currently being scheduled.
- **Spring 2019 Application Release**
 - We continue to discuss a way in which we can make the Radius application available for Spring 2019 to allow for an earlier launch than the previously discussed August launch. We anticipate a final decision on this by the beginning of next week.

As always, please let us know if you have any questions about this or any other part of the project.

Graduate CRM Implementation Weekly Update - 3.26.2018

Good Morning All,

I hope this email finds you well! I hope for the folks that were able to get away that it was a relaxing week. Now we can all look forward to some potential mid-March winter weather in the week to come. For now, here are your Graduate Implementation updates:

- **Requirements**
 - This is the discussion of the moment in the implementation. As described in last week's update, the SET team in conjunction with the OGAL group and Kennedy and Co. are working through the decision-making process for how we will handle the requirements. Based on feedback coming late last week, ***it looks like we are leaning towards requiring the items I laid out previously within the application and having a more limited population of items being submitted in the Supplemental form.*** There should be some finality to this discussion by next week's update.
- **Spring Application Launch**
 - Amy, Andrew, and myself are looking at some ways to provide an application for Spring 2019 prior to the current August launch date. This is going to take a couple more weeks to resolve, but more to come on this.
- **Academic Council Update**
 - Just a note, there will be an update regarding the implementation on Thursday morning at the Academic Council meeting. We can provide the slide deck that will be used once it is completed.
- **General Notes about the current process**
 - **Application** is being built by the Kennedy and Co team and we should see something next week
 - **App Review Process** is still in a discovery phase as we need to figure out some innovative ways to work around some of the system limitations
 - The **initial training for the Communications** aspect of the implementation is happening with SET this Thursday and will then be rolled out to the OGAL and GRAC groups.

As always, please let us know if you have any questions about this or any other part of the project.

Graduate CRM Implementation Weekly Update - 3.19.2018

Good Morning All,

Welcome to the dreaded Monday following Spring Break! I hope for the folks that were able to get away that it was a relaxing week. Now we can all look forward to some potential mid-March winter weather in the week to come. For now, here are your Graduate Implementation updates:

- **Deadlines**
 - The conversation that will never end, BUT I think we are one Liaison meeting away from affirming the actual dates. As a recap, the GAP Steering/Vision and Strategy Group affirmed the decision to use *an app closure date of 10 business days prior to the end of the Adding Classes period for all degree seeking programs and 3 Business days prior to the end of the Adding Classes period for all non-degree programs.* To put this into actual dates, here is how this would be operationalized in real dates:
 - Spring 2019
 - Degree Seeking App Closure

- Last Day to Add Classes = 1/29
 - App Closure (10 business days before 1/29) = 1/15
 - Non-Degree App Closure
 - App Closure (3 business days before 1/29) = 1/24
 - Fall 2019
 - Degree Seeking App Closure
 - Last Day to Add Classes = 9/3
 - App Closure (10 business days before 9/3) = 8/20
 - Non-Degree App Closure
 - App Closure (3 business days before 9/3) = 8/29
 - These actual dates will go before the OGAL group for final approval THEN we will seek sign off from the Associate Dean level at each college.
- **Program Names**
 - The program names will now align with the names according to what is provided to and approved by SCHEV. Attached is the latest list we will be working with.
- **Requirements**
 - As the application is being built, we need to focus our collective efforts on deciding the manner in which we will collect application requirements (goal statements, letters of rec etc.) within the application.
 - There are two paths to consider:
 - Within the application, attaching required items in order to even submit the application.
 - After paying the fee and submitting – collecting the documentation through a supplemental documents form that we distribute to students after the submission of the initial application
 - During the *initial discussion*, here is the breakdown that we think may work for the degree seeking programs:

Within Application (true for ALL)	Supplemental Application (adjusted by program)
Bio-demographic information	Test Scores
2 Recommendations	Transcripts
Resume	Writing Sample
Goal Statement	OTHER...

- The Liaisons and SET will tackle this then move it up to GAP Steering for final approval.
- **Spring 2019 Open**
 - At the end of the GAP Steering meeting, we began a discussion on the opening date for the Spring 2019 application. As of right now, we plan to open August 15, 2018, but some of the academic units have brought forth concerns about the delay compared to last year when we opened the application in April for the spring.
 - This will need to be an ongoing discussion to understand how we can serve the units with large app volumes for spring between April and August.

Good Morning Everyone,

Happy Spring Break! I hope many of you are enjoying some time away from campus and in a warmer spot. For some, this is the best week in sports as the NCAA Tournament ramps up, but that is not nearly as exciting as this Grad Implementation, so let's get to the updates:

- **Deadlines Decision**
 - I had to hear it with my own two ears, but after meeting with the Graduate Liaisons on Thursday, I can **officially say that we have a consensus on the Deadline Decision**
 - 1 Start Date
 - 1 No New App Date & 1 End Date (same date) – 5 days prior to the term
 - This decision will be verified via the Vision and Strategy group on Tuesday (3/13), but this allows us to move forward with the completion of the application build.
- **Banner Integration**
 - Thanks to Purshara on leading the charge and building out the visual to define the integration between TargetX and Banner. I have attached the visual.
 - We will also **affirm this in the Vision and Strategy meeting on Tuesday (3/13)**.
- **Application Review Tool**
 - The Kennedy and Co team is working with TargetX to develop a couple of “proof of concept” application reviews so that we can review the tool with SET and begin to brainstorm ways in which we can build out the various reviews for the programs.
 - This remains the biggest pain point in the process and we will be anxious to **review the built out proofs as a way to really dig into the decision making on how to manage the remainder of this build.**
- **Communication Plans**
 - There have been some swirling rumors about the management of marketing campaigns in TargetX. I want to provide a couple of points of clarification:
 - Kennedy is working to build out campaigns with our support, but they will provide at least three templates for us to build from, but this will mean that some of the remainder of the work will fall on the Mason team and various GRAC members to ensure that the totality of the campaigns are developed.
 - Some felt that K&Co. indicated during early discovery that the colleges wouldn't be able to touch their communications for 6 months after the system is set up. This is *absolutely untrue*. As soon as we provide the training and access to the college personnel, they will be able to begin working on their campaigns.
 - The current plan is to get the OGAL and GRAC members into the system by Mid-April
- **Requirements**
 - We continued this discussion in SET this week. We will need to continue to work with the academic units to best determine what items should be required as part of the initial application completion and what items we will take as part of a supplemental application
 - Purshara and Chris provided a proof of concept on what the Supplemental Application will look like.
 - This is a bit early in the process to be too worried about the supplemental app, as we need to build out the core application then move forward with the ways we will use the supplement.

Graduate CRM Implementation Weekly Update - 2.19.2018

Good Monday Morning to All,

Happy President's Day to everyone. Here are your updates on the Graduate Admissions CRM Implementation:

- Training Plan
 - A core group met this week to **review the plan of action for the forthcoming trainings with Kennedy and Co.** We mapped out a plan for all the trainings to occur between now and the end of the implementation. We will finalize this with the Kennedy and Co. team in the week to come and provide the updated plan to the group.
- Program Names update
 - We have **finalized the list of program names being placed into TargetX** for the Spring and Fall 2019 recruitment cycle. We will continue to the dialogue on this topic as we will need to create a more formal set of guidelines and policies regarding the addition or programs and the edit of current program names. Once a final proposal is created and vetted by the System Execution Team, the Vision and Strategy Group will be asked to provide it full approval.
- Deadlines – oh the deadlines conversation
 - I truly believe we are **getting close a consensus on the deadlines discussion.** There was discussion in both SET and Vision and Strategy about deadlines and we are narrowing our focus on the final decision. As of right now, I believe the likely conclusion will be:
 - 1 Masters Deadline (1 week prior to beginning of term)
 - A series of PhD Deadlines (~10 options for the programs to choose from)
 - Kathy Zimmerman and Purshara Gray are going to provide a **demo of the application and deadline management to the OGAL group this week.** This will hopefully further contextualize the conversation and allow us to move closer to a final decision.
- Next on the Discussion Docket – **Requirements**
 - We are ensuring that the OGALs work with the faculty to affirm their application requirements for the programs. This will be another important part of the decision process as these requirements should be defined in the coming weeks so we can properly build the application.

Graduate CRM Implementation Weekly Update - 2.12.2018

Good Morning Everyone,

I am back with your weekly update on the Graduate Admissions CRM Implementation. Let's get right into the updates:

- OGAL Meeting with TargetX and Kennedy & Co.
 - We had a productive meeting and demonstration for the OGAL group on Thursday where we saw and discussed the Application Review tool in TargetX
 - The biggest area of discussion came around the process for distribution of the applications to the committees which will be more complicated and technical in TargetX
 - This will need to be an area where we continue conversations around how complex the review processes in the programs need to continue to be.

- ITGG Presentation
 - Kathy Zimmerman and myself presented to ITGG this week on the Graduate CRM Implementation and importance of this project to the campus community. See attached if you are interested in viewing the presentation.
- Application Build
 - The Admissions Technical Team, led by Purshara Gray, is working on the Application workbook which will assist the K&Co. team on building the applications
- Application Deadlines
 - We continue to do some discovery on the application deadlines. While we had intended to have a final decision on deadlines by the Feb. 15th, we will need to **extend this deadline by to March 2nd**. KZ has built out a copy of the application to better demonstrate the complexities of the app deadline maintenance in TargetX which will be shown over the course of the week to come and decisions will be made in the weeks following.
- RFIs
 - We are finalizing the organization of the RFIs and anticipate them beginning to be built in the next two weeks.
- Project Plan
 - I want everyone to be aware that we have a link available to the Project Plan built out by the K&Co. team. This will continue to evolve as the project moves forward, but you can get a general sense of timing for many of the components of the project here:
 - <https://instagantt.com/shared/s/513075278735652/latest>
- The Mason team and K&Co team are working on a finalized **list of trainings** which we should have set by the end of this week and the scheduling of those trainings will begin. All involved parties with the appropriate trainings will be provided invites.

Graduate CRM Implementation Weekly Update - 2.5.2018

Morning Everyone,

This is your weekly update for the Graduate Admissions Implementation. Let's begin by acknowledging the first Super Bowl win for my Philadelphia Eagles – E-A-G-L-E-S Eagles! Now your updates:

- Trainings
 - The initial training with the Kennedy and Co. with SET occurred on Thursday, which was largely an introduction to the group on navigating the system
 - A second training occurs today, which will cover more depth on the technical side of the CRM build and maintenance
- SET Meeting Update
 - This past week, we began a discussion on the build of the Application Review tool and the complexities it entails.
 - The Admissions Technical Team are going to provide a proof of concept build request to the K&Co. team to gain a better understanding of the complexities associated with the new Review Process
 - OGAL Request
 - Stevie and Nicole will ask that the OGAL group provide a timeline as to when the colleges would expect to begin leveraging the new CRM to recruit the Spring 2019 class

- The OGAL group will review the items currently being extracted from Radius and placed into the SAAQUAN table – many of which can likely continue to just stay in the CRM rather than be a part of the integration in the future
- The list of **Program Names** has been finalized and will be loaded into the system. We will need to have a finalized formal policy on updating these names to be approved at the next GAP Steering meeting
- A meeting **to further review the Project** Plan will occur Tuesday (2/6) with the K&Co. team and members of the project leadership to ensure we have what we need regarding the timeline and deliverables.

Graduate CRM Implementation Weekly Update - 1.29.2018

Hello Everyone,

This email is going to be a weekly brief overview of where this project stands. I intend to send these updates every Monday morning to provide some details on where this project stands and where it is going. The intended audience is the members of the three engaged workstreams. Here is the update as of January 29th:

- All aspects of the TargetX Managed Package have been installed into the Salesforce instance
- An initial training of the Forms Assembly product (primarily used for developing RFIs) occurred with the Administrators on Monday, January 22nd
- Additional Trainings conducted by Kennedy and Co. for the System Execution Team as being scheduled currently and will occur in the weeks to come
- Outstanding Items for Be Resolved:
 - **Organization for the RFI** – how do the colleges want the main RFI organized to limit the student from needing to scroll through the entire list of academic offerings?
 - GRAC is the owner of this decision
 - **Naming of the Programs in the CRM** – The colleges have provided any updates they are requesting from the current naming convention in current use in Radius. This list should be finalized by February 2nd
 - Matt Boyce will provide a written policy on how the naming process will be handled moving forward to be vetted by SET then approved by GAP Steering
 - **Deadline Decisions:** SET is working with the OGAL group to finalize a policy on how deadlines will be handled moving forward. More discovery needs to occur, but a decision should be set by February 15th
 - **Integration Discussion:** Discovery continues on this, but a decision should be finalized by the February 15th deadline