

# Algonquin College Adopts Salesforce

Renay Dixon,  
Transfer Pathways Officer

# Agenda

- Need for solution
- Development
- Future plans



# Need for a Solution

- Algonquin College offers over 600 articulation agreements.
  - Our offerings grow by about 10 agreements per year.
  - At any given time we have about 5 agreements in active development.
- Heavy reliance on Excel and the Transfer Pathways Officer's experience.
- Stakeholders could not track agreement development – making cross college liaising difficult.




**ARTICULATION AGREEMENT CHECKLIST**

**For Receiving Agreements**

<b>Partner Institutions</b>					
<b>Description of Pathway (Always list AC program(s) first)</b>					
<b>Discussions Initiated by:</b>		<b>Date of First Contact</b>		<b>Expected Dev. Timeline</b>	
<b>GPA Required</b>		<b>Credits Received</b>		<b>AC Completion Time</b>	
<b>Program Delivery</b>		<b>Student Implications</b>			
<b>Pre-Approved AC Template used?</b>		<b>Sections that require attention</b>			
<b>Date of Agreement Signature</b>		<b>Agreement Expiration Date</b>			
<b>Additional Notes</b>					



Action	Completed by (Area)	Date Completed	Notes	Sign Off Required
Does idea of Agreement fit				
Is this a system wide				
Send memo to SVPA and				
Send memo to Registrar's				
Send memo to Academic				
Inform Finance and				
Are there any limiting	Registrar's Office			
Are there Unique	Registrar's Office			
Does the Academic Area	Academic Chair			
Receipt of course outlines,	Partner Institution			
Initial Program level and				
Mapping Confirmed by				
Interpretation of Mapping				
Draft agreement created				
Draft agreement reviewed	AC Pathways Team			
Draft reviewed by	academic pathways			
Changes input by	Transfer Pathways			
Draft agreement reviewed	Dean, Academic			
Draft agreement reviewed	Senior Vice President			
Changes input by	AC Pathways Team			
Agreement Signed	Senior Vice President			
Signing Ceremony, if	AC Pathways Team			
Information Memo to	AC Pathways Team			
Information Memo to	AC Pathways Team			
Information Memo to	AC Pathways Team			
Information Memo to	AC Pathways Team			
Information Memo to	AC Pathways Team			
Press Release, MyAC,	Marketing and PR			
If admission to upper	Senior Vice President			
If admission to upper	Registrar's Office			
Pathway created for	Registrar's Office			
Communicate via Website	AC Pathways Team			



# Background

The main goals of the platform:

- To streamline the development of agreements and make the process more efficient
- To allow stakeholders to check the status of an agreement in development, and action any items needing their attention.
- To automate the renewal process as a number of agreements were approaching expiration or had expired.
- To feed our degree pathways website to facilitate a student's search for their options.



# Creating the Platform

Algonquin is currently using Salesforce in a variety of departments to streamline their processes and track their student interactions.

Our use case is similar to that of another department on campus who have been using the platform for about a year.



# Creating the Platform

Initial meetings with the Salesforce team involved outlining our goals for the platform and included listing what our eventual future state would be.

In the interest of time, this meeting included a review of what Salesforce is designed to do in relation to tracking the development of contracts. Where similarities existed between these processes, we would defer to the language and set-up used within Salesforce to reduce our development time.





# Creating the Platform

The first challenge for our team was aligning our language and processes with the language and processes that are available as default settings in Salesforce.

Partner Institution became “*Accounts*”

Agreement Documents became “*Contracts*”

Programs in an Agreement became “*Opportunities*”



RELATED DETAILS NEWS

**We found no potential duplicates of this account.**

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

**Contacts (1)**

New

Cyril Gavaghan ▾  
Title:  
Branch:  
Email: [cyril.gavaghan@staff.ittralee.ie](mailto:cyril.gavaghan@staff.ittralee.ie)

[View All](#)

**Contracts (1)**

New

1711 261 ▾  
Contract Name:  
Contract Start ... 20/05/2016  
Contract End D... 19/05/2022

[View All](#)

**Opportunities (2)**

<u>Culinary Management</u> ▾	<u>Early Childhood Education</u> ▾
File Number: 17 12 817568	File Number: 17 12 817569
Margin:	Margin:
Stage: Closed Won	Stage: Closed Won

[View All](#)

**Notes (0)**

New

**Files (0)**

Add Files





Contract 1802-275

New Note New Case Edit

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
University of West England	Draft	01/09/2017	31/08/2022	60

Draft
In Approval Process
Activated
Mark Status as Complete

RELATED DETAILS

**Opportunities (4)** New

<p><a href="#">Interactive Media Management</a></p> <p>Stage: Closed Won Close Date: 09/02/2018</p>	<p>▼ <a href="#">Environmental Technician</a> ▼</p> <p>Stage: Closed Won Close Date: 09/02/2018</p>
<p><a href="#">Environmental Technician</a></p> <p>Stage: Closed Won Close Date: 09/02/2018</p>	<p>▼ <a href="#">Bachelor of Building Science (Honours)</a> ▼</p> <p>Stage: Closed Won Close Date: 09/02/2018</p>

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**Notes (0)** New

**Contract History (1)**

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
20/02/2018 2:16 PM	Created.	Renay Dixon		

**ACTIVITY**

Email

Write an email... Compose

Activity Timeline ▼ ↺ Expand All

Next Steps More Steps

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

Past Activity Load More Past Activities ▼

No past activity. Past meetings and tasks marked as done show up here.



## New Opportunity: B2B APATH

### Opportunity Information

\* Opportunity Name

\* Contract

\* Account Name

Opportunity Owner

Renay Dixon

Contact

\* Close Date ⓘ

Date of First Contact

\* Stage

Probability (%)

### APATH Detail

GPA Required

AC Program

Percentage Required

Partner Program

Letter Grade Required

Credits Received ⓘ

Cancel

Save & New

Save



# Creating the Platform

The biggest challenge was amending our process map to align with the process features within Salesforce.

- Steps within the process had to be sorted into “Stages”
- Stages were assigned “Task Subjects”
- Task Subjects would include the specific tasks needed at that stage of the process.

The challenge here was taking a long multi-step multi-stakeholder process and boil it down to simple steps without diluting the intention of our processes.



Action	Create task when Stage change to	Response Time (Max in business days) from the date task created	Task Subject	Task Description
Does idea of Agreement fit with 5 Factor Model?	Needs Analysis	2	5 Factor Analysis	<p>Does the agreement fit the following 5 factors?</p> <ol style="list-style-type: none"> <li>1- Number of agreements that already exist for a program.               <ol style="list-style-type: none"> <li>a. Is there a need for an extra agreement?</li> </ol> </li> <li>2- Student demand and student demographics               <ol style="list-style-type: none"> <li>a. Are students likely to follow this path?</li> </ol> </li> <li>3- Overall quality of the agreement               <ol style="list-style-type: none"> <li>a. Does this agreement provide a value that is equal to or greater than the agreements that currently exist?</li> </ol> </li> <li>4- Potential impact of agreement on program               <ol style="list-style-type: none"> <li>a. Student perception of job market after they complete their diploma program.</li> <li>b. Potential impacts on student recruitment.</li> </ol> </li> <li>5- Reputation of partner institution and sense of the agreement.               <ol style="list-style-type: none"> <li>a. Accreditation of program at receiving institution.</li> <li>b. International partnerships – is this degree recognized in Canada?</li> <li>c. Does this pathway make sense?                   <ol style="list-style-type: none"> <li>i. Similar programs</li> <li>ii. Moving in the same field</li> </ol> </li> </ol> </li> </ol>
Inform Academic Chair and program coordinator	Needs Analysis	7	New agreement alert	Send email to programs chairs and program coordinators about the initial discussions for this agreement. Write as an FYI and provide an opportunity for rejection.
Does the academic area approve of the opportunity?	Needs Analysis	15	Academic Approval	If the academic area responds to the FYI email act on their recommendation.



# Creating the Platform

## Sending Steps

*Highlighted Steps = Input to Salesforce*

- Initial Discussions
    - Does idea of Agreement fit with 5 Factor Model?
    - Inform Academic Chair and program coordinator
    - Does the academic area approve of the opportunity?
  - Planning/Drafting
    - Send Course Outlines to partner institution for mapping
    - Receipt of Mapping Results, number of credits granted, and other admissions requirements?
    - Drafting
      - Draft Agreement Received
      - Draft Review by Pathways Coordinator
      - Draft Review by Academic Manager
      - Draft Reviewed by Partner Institution
      - Any Changes input by Pathways Team
      - Draft Review by Dean of Academic Development
      - Draft Review by Senior Vice-President Academic
      - Any Changes input by Pathways Team
      - Draft Reviewed by Partner Institution
  - Agreement Approval and Signature
    - Agreement Approved
    - Agreement Signed
    - Signing Ceremony, if needed
  - Communication and Maintenance
    - Inform Academic Area of Signature
- Communicate via Website and Other Channels (Marketing office, Recruitment and International)




Tasks  
My Tasks ▾

<input type="checkbox"/> 5 Factor Analysis <a href="#">Business Administration - Marketing</a>	27-Feb
<input type="checkbox"/> New agreement alert <a href="#">Business Administration - Marketing</a>	4-Mar
<input type="checkbox"/> Academic Approval <a href="#">Business Administration - Marketing</a>	12-Mar

5 Factor Analysis  
27-Feb

[Edit Comments](#) [Change Date](#) [Create Follow-Up Task](#) ▾

Task Information

Assigned To  <a href="#">Renay Dixon</a>	Task Record Type
Due Date 27/02/2018	Related To <a href="#">Business Administration - Marketing</a>
Subject 5 Factor Analysis	Name ⓘ
Status Not Started	
Priority Normal	
Type	





▼ Task Information

Assigned To



[Renay Dixon](#)

Due Date

27/02/2018

Subject

Agreement Signature -  
Program - Partner

Status

Not Started

Priority

Normal

Type

Call Result

Comments

Communicate agreement via  
MyAC, Blackboard, and other  
internal messaging options.

Employee

Task Record Type

Related To

[Bachelor of Building Science  
\(Honours\)](#)

Name





Search tasks and more...



Tasks My Tasks

<input type="checkbox"/>	Agreement Signature - Program - Partner <a href="#">Bachelor of Building Science (Honours)</a>	27-Feb
<input type="checkbox"/>	Inform Academic Area of Signature <a href="#">Bachelor of Building Science (Honours)</a>	27-Feb
<input type="checkbox"/>	Agreement Signature - Program - Partner <a href="#">Environmental Technician</a>	27-Feb
<input type="checkbox"/>	Inform Academic Area of Signature <a href="#">Environmental Technician</a>	27-Feb
<input type="checkbox"/>	Agreement Signature - Program - Partner <a href="#">Environmental Technician</a>	27-Feb
<input type="checkbox"/>	Inform Academic Area of Signature <a href="#">Environmental Technician</a>	27-Feb
<input type="checkbox"/>	Agreement Signature - Program - Partner <a href="#">Interactive Media Management</a>	27-Feb
<input type="checkbox"/>	Inform Academic Area of Signature <a href="#">Interactive Media Management</a>	27-Feb

Agreement Signature - Program - Partner  
27-Feb

Edit Comments Change Date Create Follow-Up Task

Task Information

Assigned To <a href="#">Renay Dixon</a>	Task Record Type
Due Date 27/02/2018	Related To <a href="#">Bachelor of Building Science (Honours)</a>
Subject Agreement Signature - Program - Partner	Name
Status Not Started	
Priority Normal	
Type	
Call Result	
Comments Communicate agreement via MyAC, Blackboard, and other internal messaging options.	
Employee	



# Design for Continued Growth

Though this platform is addressing a current need for our area in terms of enhancing our ability to track the development of agreements and continue to inform stakeholders of agreement development. We also designed it to facilitate our plans for future growth:

- Using program codes.
- Developing a nomenclature standard.



# Using Program Codes

AC Program

AC Program

0216D



## SIS Program Codes

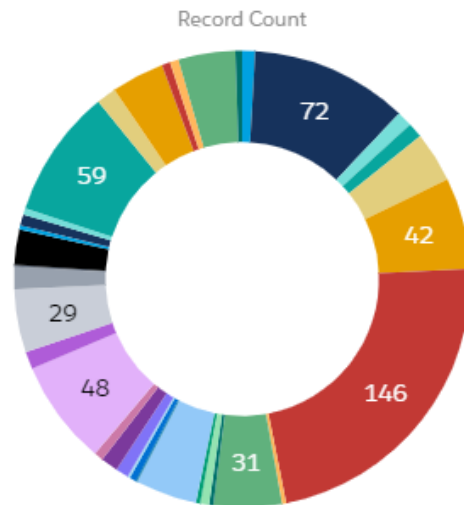
1 Result

SIS PROGRAM CODE NAME	PROGRAM CODE	CAT	CAT_DESC	CREDENTIAL	SCHOOL SHORT NAME
<a href="#">Business Administration - Marketing</a>	0216D	1	Post Secondary		



# At A Glance Reporting

## ACPathway Opportunities



Account Name	
Algonquin College	●
Athabasca University	●
Bishop's University - William's School of Business	●
Brock University	●
Cape Breton University	●
Carleton University	●
Davenport University	●
Endicott College	●
Griffith University	●
Hartpury College	●
Institute of Technology, Carlow	●
Institute of Technology, Tralee	●

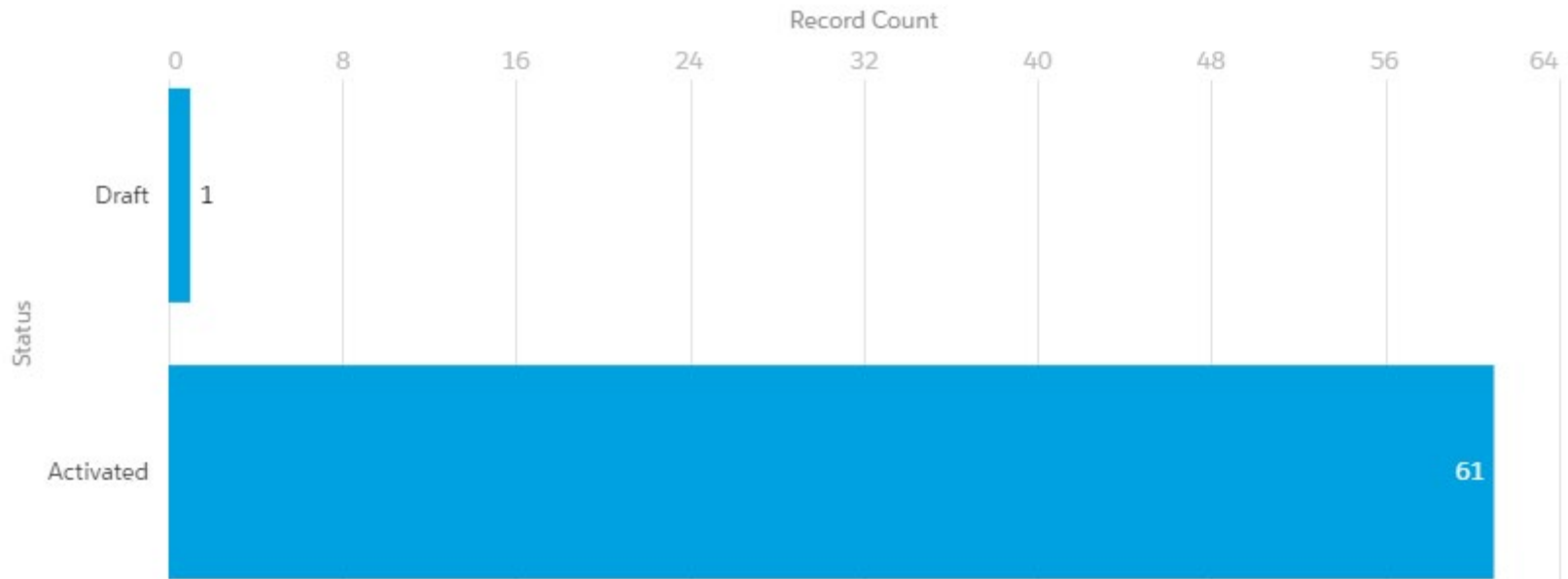
[View Report](#)

As of Today at 5:54 PM



# At A Glance Reporting

## ACPathway Contract



[View Report](#)

As of Today at 6:22 PM

