

UNIVERSITY
OF MIAMI



Interactions for Student Recruitment

Data and Process Diagrams

Information

Interactions for Student Recruitment is a solution for recruiting top prospects to your college or university.

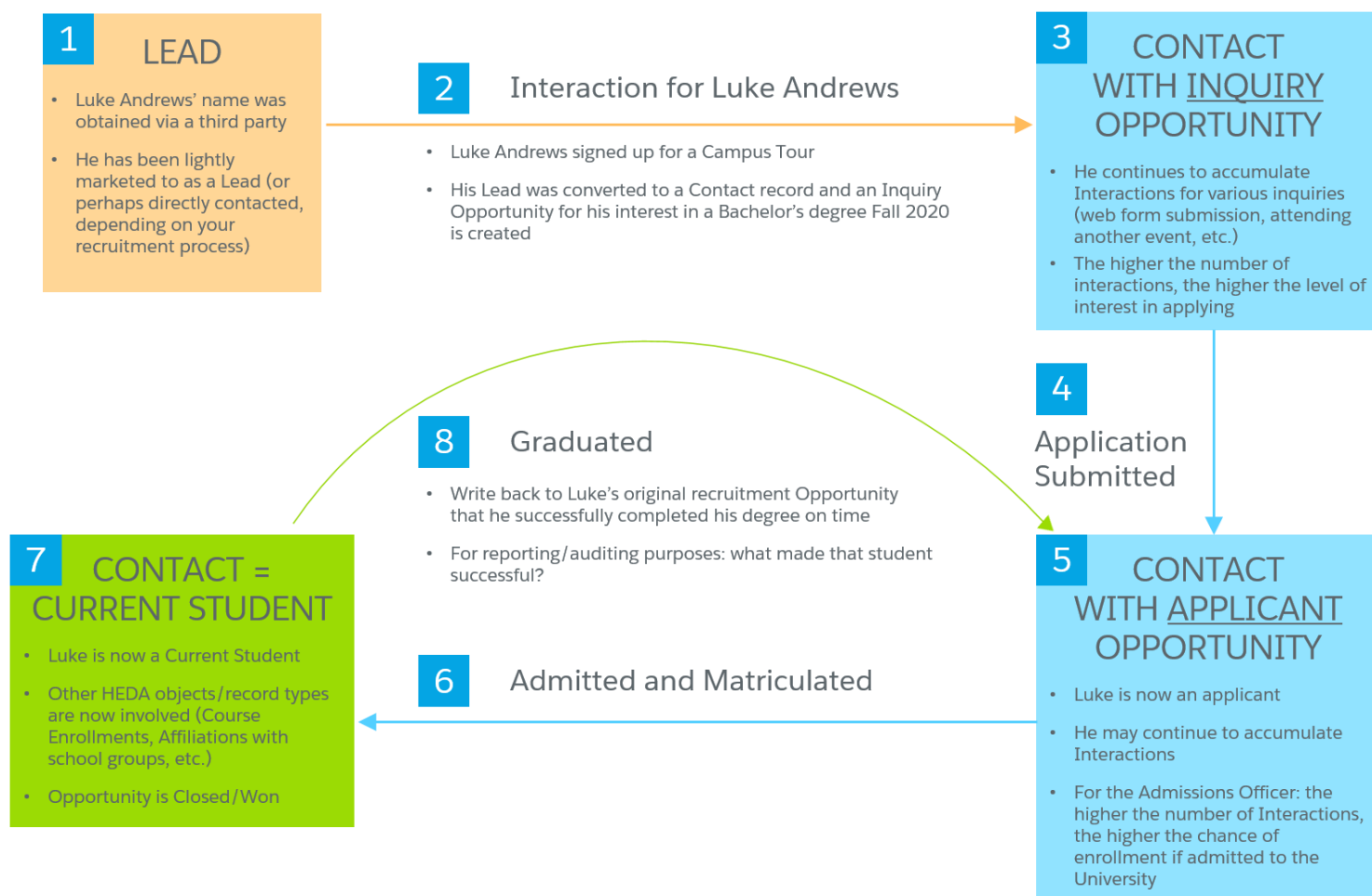
Built on the Salesforce platform, Interactions allows you to track prospective students through all stages of the application process. Interactions also ties recruitment information to Contact and Lead data, simplifying application pipeline management so you can focus recruiting efforts on the most promising prospects.

Developed by the University of Miami with funding from Salesforce.org, we are proud to offer this free, open-source solution to the higher education community.



The Student Recruitment Model

The Student Recruitment Model demonstrates the common path a prospective student may go through from being a purchased list name to a graduate of your university. Additionally, it is the primary data flow model that Interactions for Student Recruitment follows:



The Student Recruitment Model (cont.)

The chart on the previous page follows Luke Andrews through his recruitment experience and shows how Interactions played a role at both the Inquiry and Applicant levels for Luke.

(1) We start the path at the Lead level. Generally, Lead names come from third-party vendors and are purchased by your institution. When the Lead reaches out to your university (or their level of interest is otherwise eligible to become a Contact), (2) the Lead is converted into a Contact record via an Interaction. (3) At this point, the Contact is now considered an inquiring student and an **Inquiry** Opportunity record type record is also created for the newly converted Contact with Inquiry level stages.

Recruiters market to the Contact through the Opportunity record with personalized emails and phone calls as well as inviting them to events on campus. (4) The student submits their application. (5) Now, the Inquiry Opportunity is converted into an Applicant Opportunity record type to include additional application fields as well as Application stages to track their progress. (6) The Contact is eventually admitted to the university and decides to matriculate and enroll. (7) The Contact is now a current student.

(8) Down the line, the Contact successfully finishes their degree on time and this information is added to his Applicant Opportunity for reporting purposes.



What do Interactions do?

Each Interaction record that is created has the potential to:

- Convert an existing Lead record into a Contact
- Create or update a Campaign Member
- Create or update a Contact
- Create or update an Opportunity
- Create or update an Affiliation

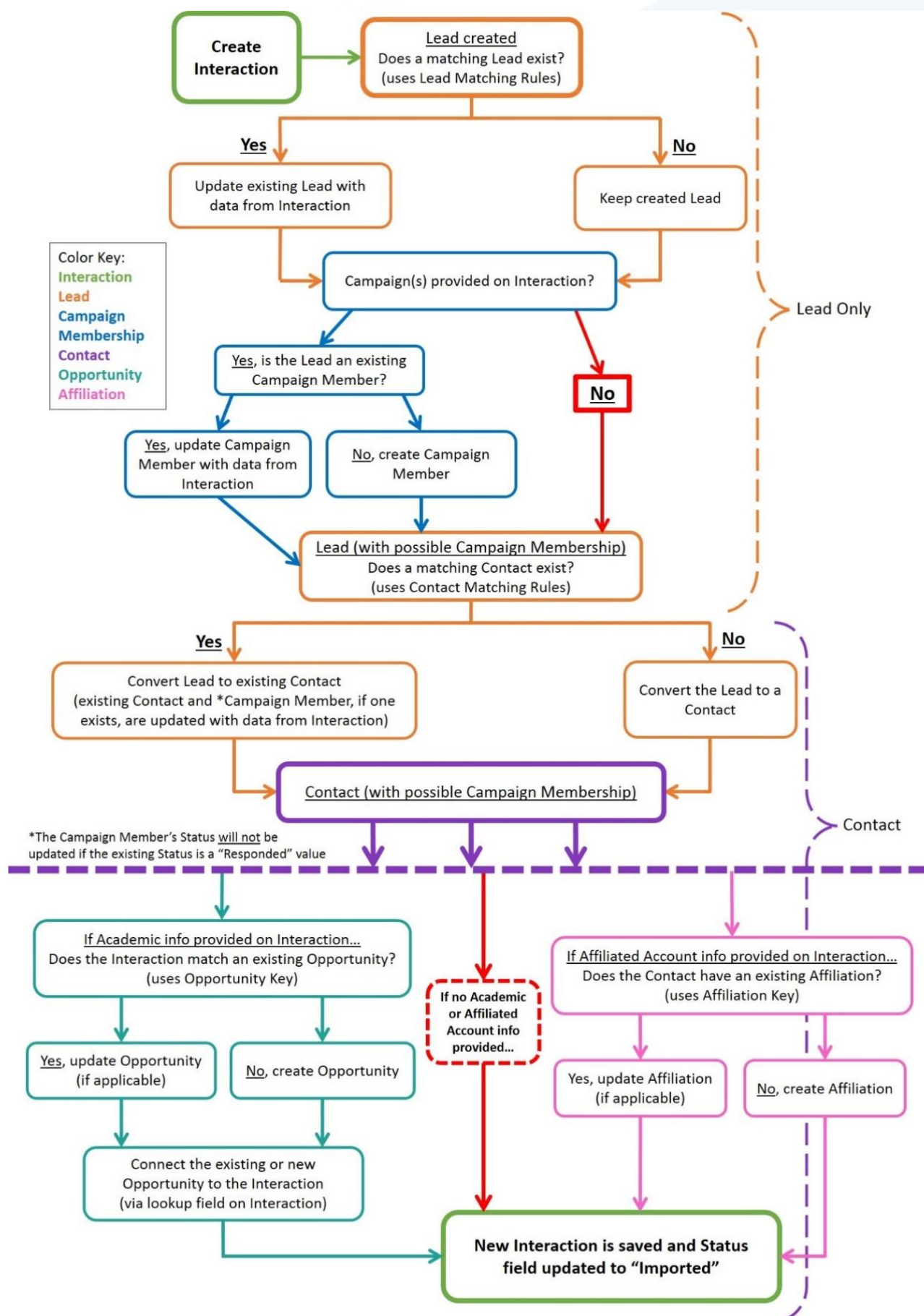
These powerful records provide historical snapshots to recruiters of every noteworthy moment when a prospective student (Contact) has reached out to the university. They also keep a prospect's Contact record and its related records up-to-date, whether it be their bio/demo information or academic interests.

The Interaction diagrams on the following pages show when and which records are created or updated by logging a single Interaction, including the other objects and processes involved (such as Duplicate Management) each step of the way. When an Interaction record is created, the Interaction Processor (the behind-the-scenes custom code) searches for any existing records via Lead and/or Contact Matching Rules. If existing records are found, they are updated as applicable. Depending on other data provided on the Interaction such as academic interest information or current school data, other related records may be created or updated.

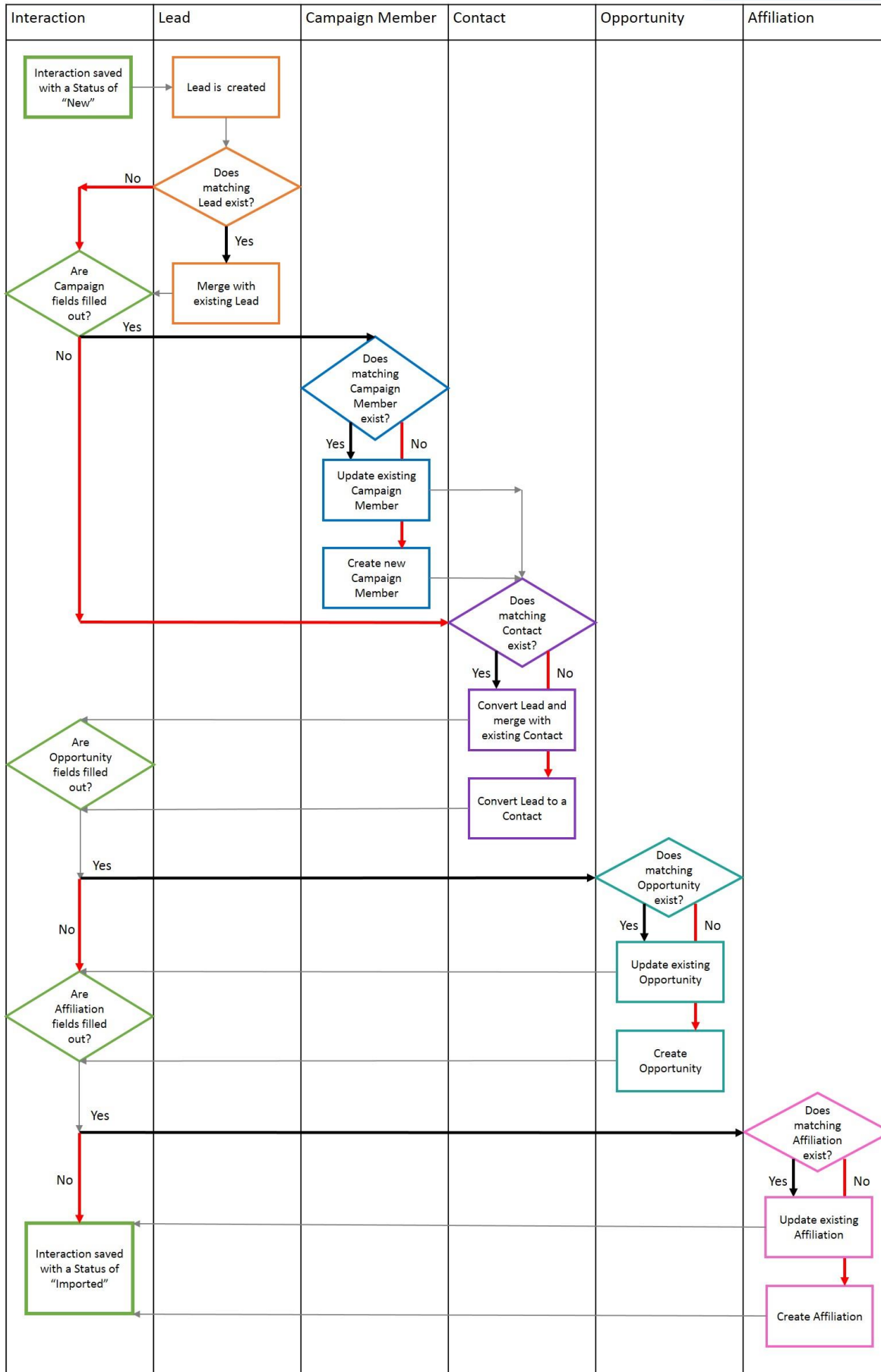
Since everyone learns differently, we've provided the same Interaction model as both a flow chart and a swim lane diagram for your convenience.



Interactions Process Flow Chart



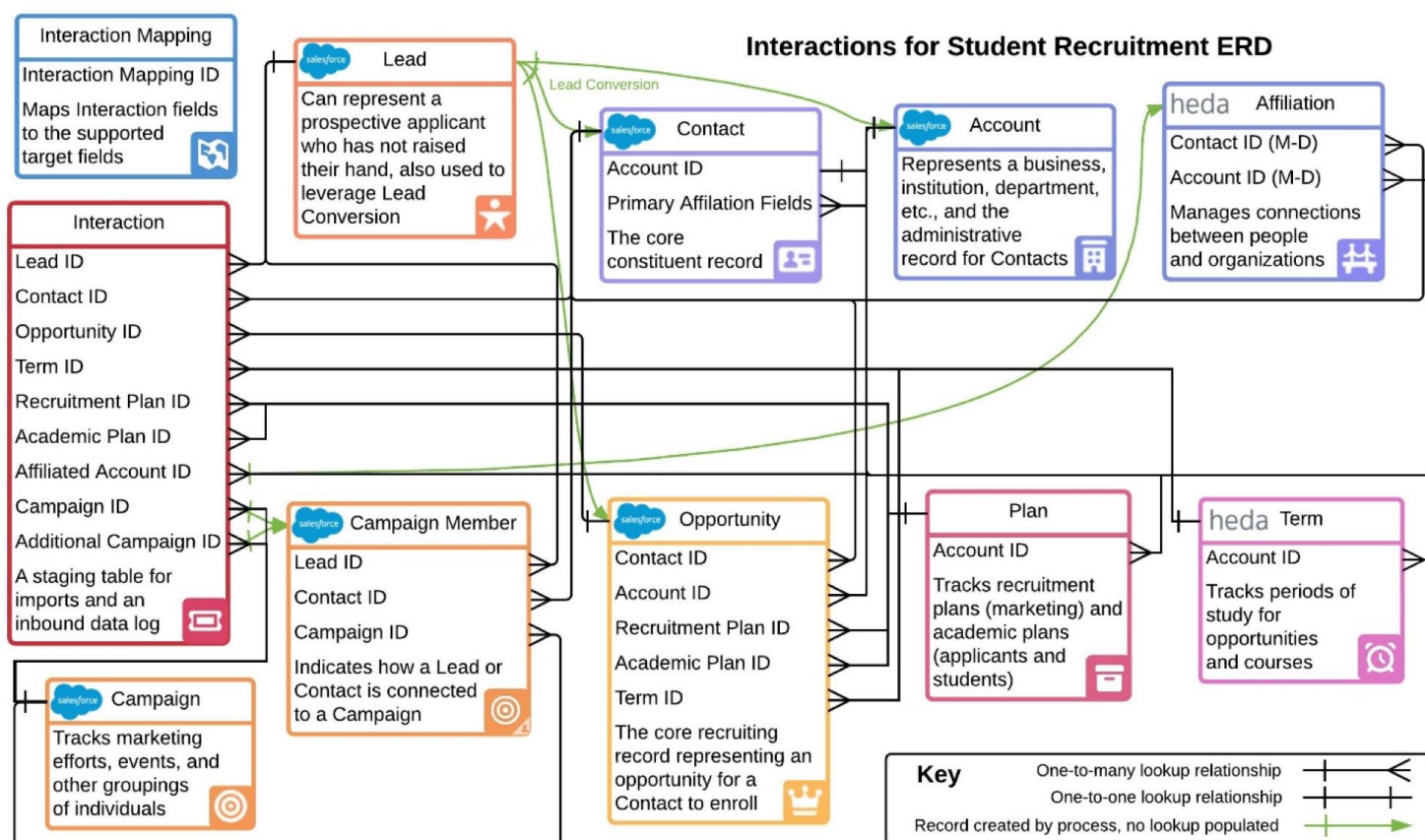
Interactions Process Swim-Lane Diagram



Interactions Data Model (ERD)

The icon in the top left of each object box indicates whether the object is a standard Salesforce object or a HEDA custom object. If there is no icon, the object is a new custom Interactions for Student Recruitment object.

Additionally, green lines represent the a process of record creation.



Other Resources

[GitHub: Interactions for Student Recruitment](#)

[Click here](#) to download the package from the Installation section of the ReadMe file on GitHub.

Credits

Nina Gomez-Fernandini

Florence Parodi

Debbie Duran

Stella Arista

Kara McIntyre

