UNIVERSITY
OF MIAMI

Interactions
for Student Recruitment

DISCOVERY DOCUMENT

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.

Contents

Purpose and Project Objectives

The purpose of this document is to guide administrators through the process of determining the level of effort that will be needed in order to implement Interactions for Student Recruitment in an existing org. It includes questions pertaining to the current org's setup and business requirements, how to translate these into Interactions for Student Recruitment, and what types of resources will be needed based on the answers to the previous questions.

The goal of this project should be to enhance your University's recruiting experience, particularly for administrators and end users. Additionally, it is extremely helpful for data loading and integrations by funneling data through a single object (Interactions) while the custom code (along with Interaction Mappings) does the hard work for you.

Review Interactions for Student Recruitment

Before delving into the discovery process of Interactions for Student Recruitment, it is extremely important that you understand how the data model is setup, how it works with HEDA, and how the Interactions custom code functions. This understanding will help you to determine, via the discovery process, the level of effort for installing Interactions for Student Recruitment. Whether it is simply downloading the package from the link or recruiting a developer to dive into the code, it is crucial for your success to fully understand Interactions for Student Recruitment before implementing it.

Here is the link to the GitHub repository for Interactions for Student Recruitment, there you will find the Interactions custom code as well as all of the documentation pertaining to the package.

For additional information or to connect with the community about Interactions for Student Recruitment, please join the chatter group in the Power of Us Hub.

Discovery Questions

The following questions provide a starting point for discussions around how recruitment is currently done, what needs to happen in the future, and how this project should be managed. The "How Are Things Done Now" section is numbered, and each set of questions maps to its same number in the "Moving Forward, How Should They Be Done" section. Additional questions should be added to each section as needed.

How Are Things Done Now?

1. What type of recruiting do you do? Centralized, decentralized, or both? What defines a unique recruitment record (ex: If two records are for the same student, academic level, and term, are they considered the same record regardless of any other data)?
2. What defines a unique individual (ex: If two records have the same first name, last name, and email, are they considered the same record regardless of any other data)?
3. What information do you collect? Where does your data come from? How is the data structured? If you already have a Salesforce org, do you use HEDA?
4. What setup data do you store or collect? (ex: terms, plans or programs of interest, educational institutions, business organizations, etc.)
5. What do you currently report on?
6. What is your current security model? Can different groups see each other’s data? Is security based on department ownership or the user's job functions?
7. What are some typical use cases for your organization? What are your pain points?

Moving Forward, How Should They Be Done?

1. Does the Opportunity Key fit your recruitment process? If not, how does it need to be customized?
   - Review Opportunity Key section on page 80 of the Installation and Configuration Guide

2. What, if any, changes need to be made to Salesforce matching rules to minimize the creation of duplicate records for individuals?
   - Review Create Duplicate and Matching Rules section on page 39 of the Installation and Configuration Guide

3. Where will your data come from? What information do you need to collect? How will your current data model map to the HEDA and Interactions data models? WIll you use HEDA?
   - Review Creating Interactions via Integrations section starting on page 60 of the Installation and Configuration Guide
   - Review and update Data Dictionary
   - Review and update Data and Process Diagrams

4. What setup data do you need in Salesforce? What additional data do you need to collect for these records?
   - Review and update Sample Data
   - Review and update Data Dictionary

5. What reports and dashboards do you need? What additional fields do they depend on that are not currently in the package?
   - Review Reports and Dashboards section starting on page 90 of the Installation and Configuration Guide
   - Review and update Data Dictionary

6. Do you need an open or closed security model? Will departments be able to see each other's data? Will access be based on the department a user is in, or their job functions?
   - Review User Permissions and Security Models section starting on page 88 of the Installation and Configuration Guide

7. What are the main use cases that must be delivered? What functionality do you need that has not yet been discussed?
   - Create UAT and training plan
   - Review all functionality described in the User Guide

What Resources Are Needed?

The following questions will help you plan how this project will be run, who will need to be involved, and how you will determine it has been completed:

- Based on the discovery you have completed so far, will you require a developer in order to customize the code?
    - Review the Technical Implementation Guide, especially the sections on HEDA (pg. 4), Business Logic (pg. 9-19), Interaction Mappings (pg. 31-33), and Metadata (pg. 67-68)
- What should the implementation and development lifecycle look like? How many sandboxes are needed? What will the project management style be?
    - Update the Project Plan and Timeline
- What should UAT look like? Who will create the test plan? Who will lead documentation and training, and which users will be involved?
    - Update the Communication and Training Plan
    - Update your UAT and training plan
- Who is the point of contact for the project? What is the approval process for this project?
    - Update the Project Plan and Timeline
    - Update the Communication and Training Plan

Discovery Deliverables

Here is a list of the deliverables that should come out of the Discovery process:

- Data Model
    - Review current data models
    - Map to HEDA and Interactions data model
- Data Dictionary
    - Identify integration sources and data that will be brought from other systems, including values for picklist fields and where the data will live in Salesforce
    - Identify brand new fields needed, including values for picklist fields, how the data will be collected, and where it will live in Salesforce
    - Identify unique keys needed to prevent duplicates for Opportunities, Affiliations, and Campaign Members
    - Identify matching rules needed to prevent duplicates for Leads and Contacts
- Sample setup data for configuration and testing
- Project Plan and Timeline
    - Create a contact list for internal and external teams involved in implementing the package
    - Identify tools that will be used
    - Create development lifecycle
    - Design approval process
- Create UAT and training plan – Communication and Training Plan?
    - Create test stories
    - Determine training documentation that will be needed
    - Identify power and end users that will be involved
    - Identify trainers and leaders that will be involved in managing UAT and training

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