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Building Your CRM Dream Team:
Piecing the Puzzle Together
Rebecca Hunt, Josh Rogers
experience:LIAISON
SEATTLE | FEBRUARY 15-16, 2023

Speakers

Rebecca Hunt

Recruitment Specialist

Josh Rogers

Director of Student Services

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- Navajo and Apache Counties in Arizona
- Nine campuses/centers
- Service area the size of West Virginia
- Serves three Native American Tribes
- High poverty and unemployment rates

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Outcomes

- Who should be on the team and who leads it?
- How should your team evolve?
- Who champions TargetX?
- How do you ensure institutional buy-in and mitigate challenges?

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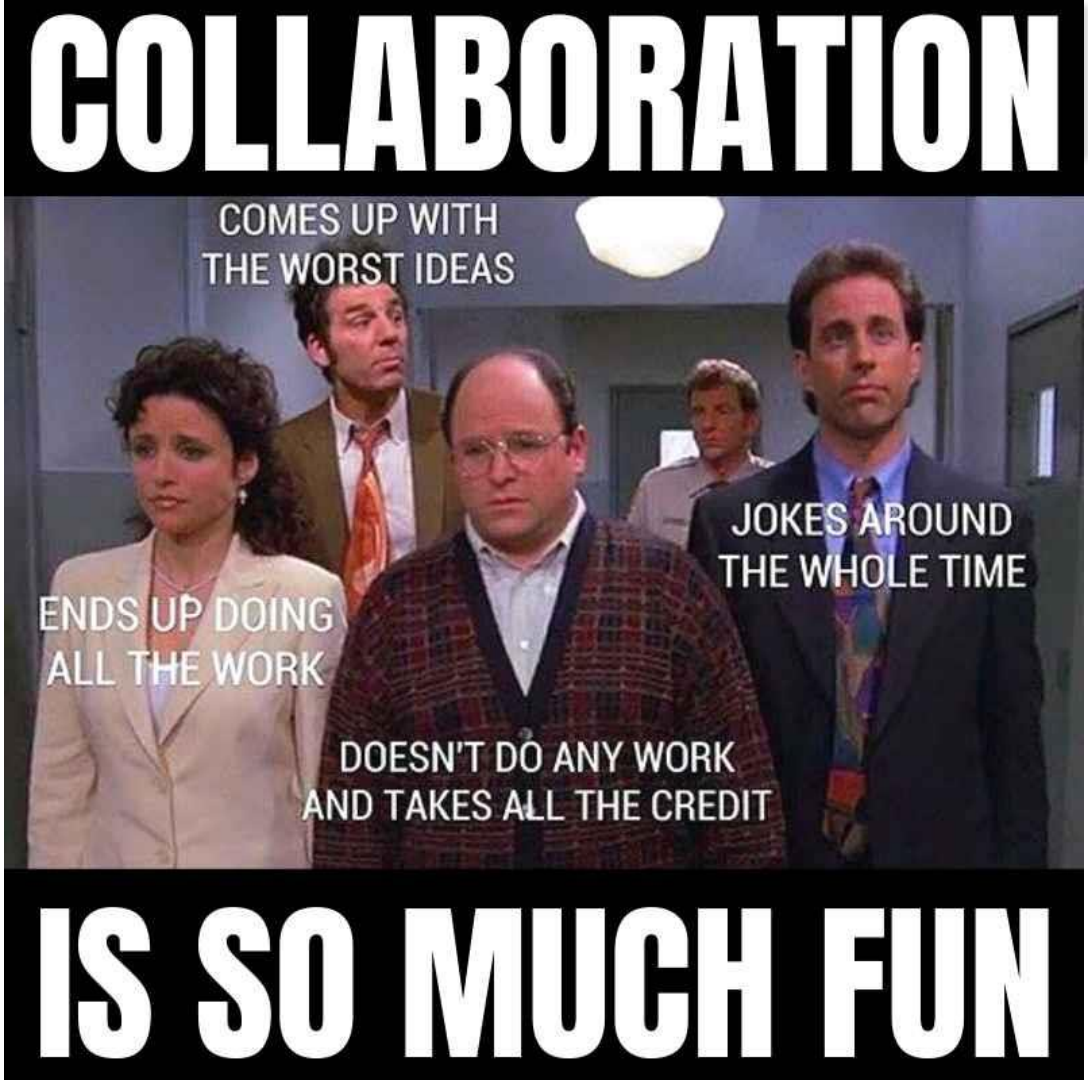
Who should be on the team and who leads it?

Team Members

- Project manager
- Team lead
- Key departments
- Decisionmakers
- Frontliners
- Superusers/future trainers
- Champions



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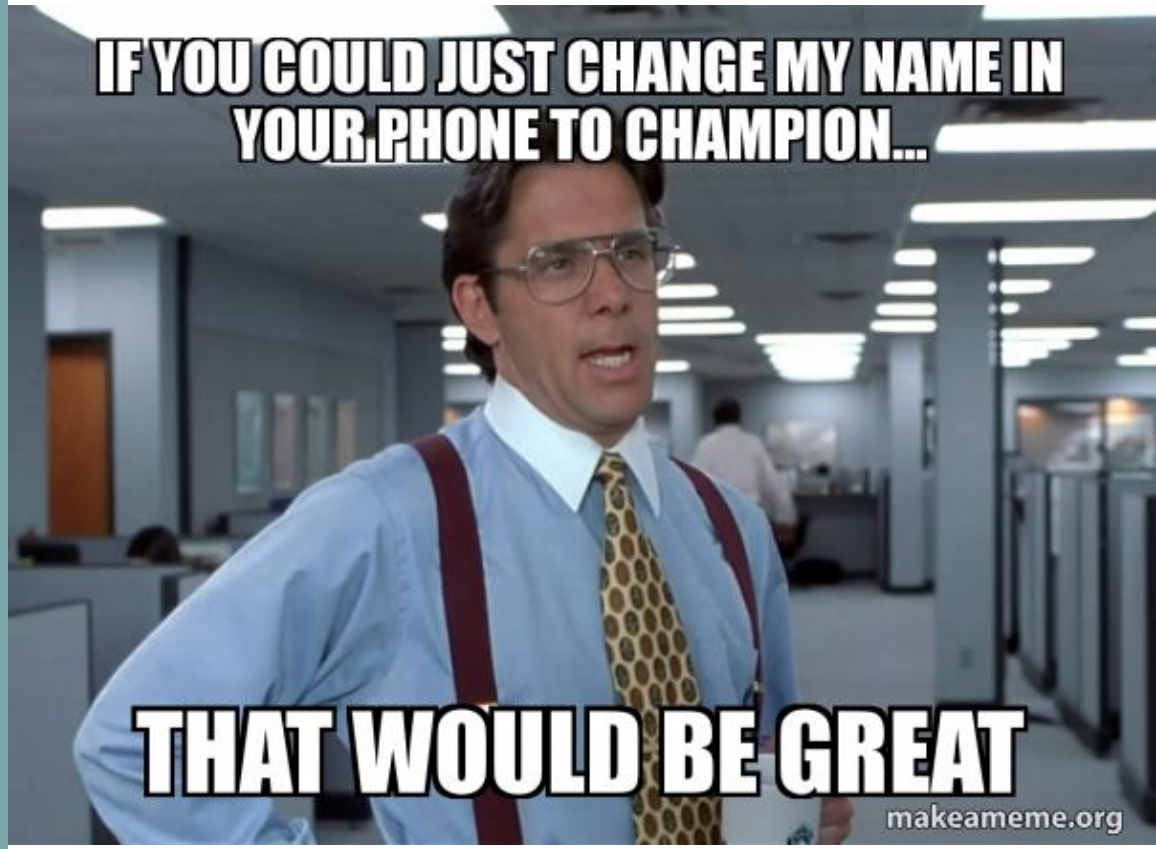
Who should champion TargetX?

The Champions

- Comfortable being vocal
- Understand the bigger picture of student success
- Background knowledge
- Spread the word/give presentations
- Should come from resistant departments



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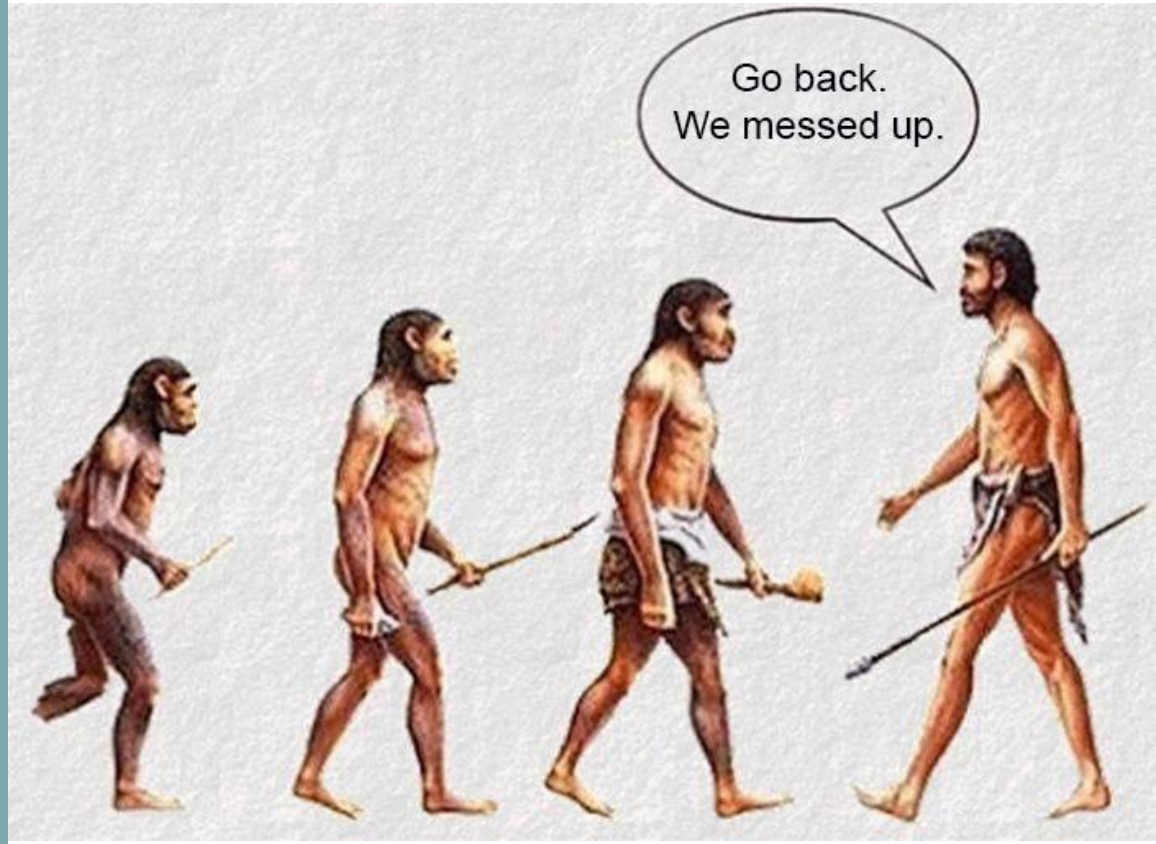
- How should your team evolve?

Is Evolution Real?

- Yes. Yes, it is.
- Evolve with product suites
- Bring in key players for different features within the product suite
- Pre-plan for future team reformation
- Communicate with future team members early-on



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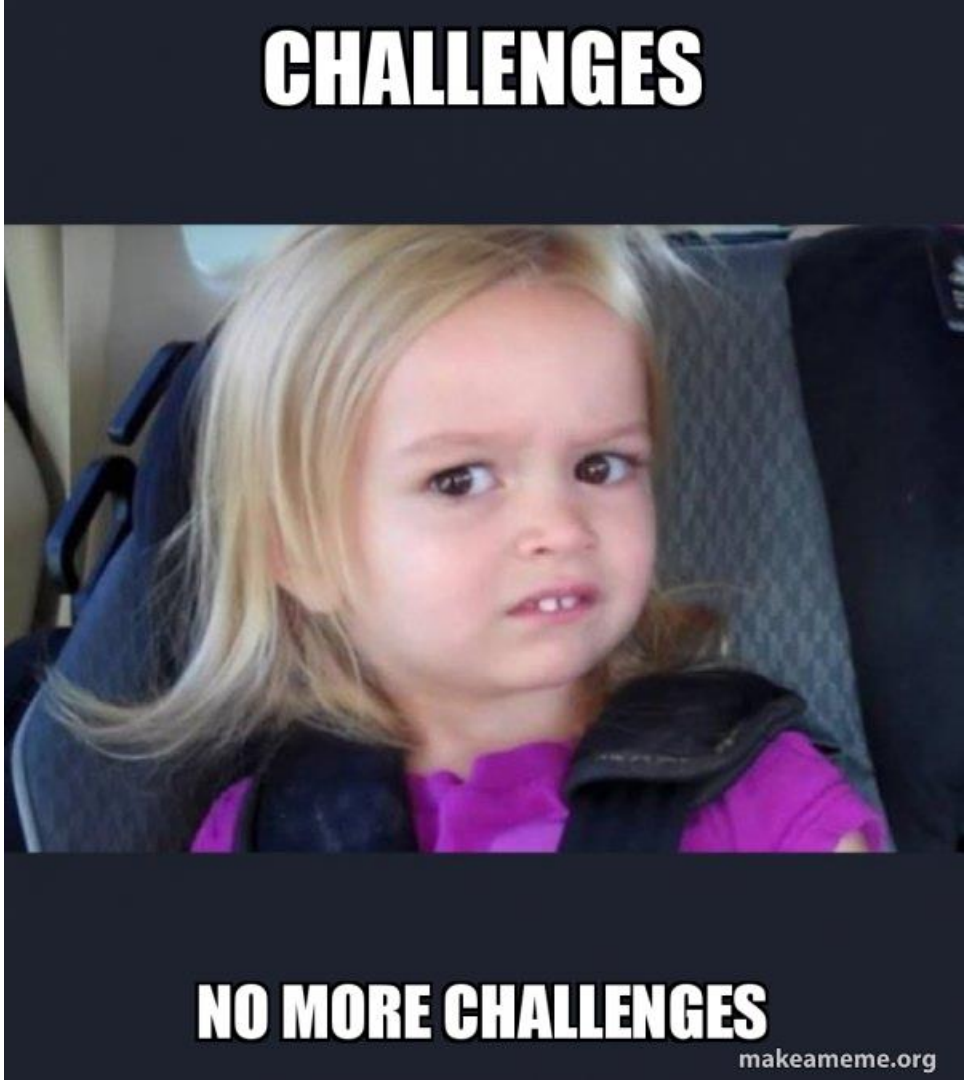
How do you ensure institutional buy-in and mitigate challenges?

The "Why" and the "How"

- Someone needs to be in charge
- Top-down and bottom-up simultaneously
- Champions need to create collegewide buy-in
- Communication is key- make a written plan



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Thank You

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