Configuration Scope

The Configuration Scope below describes the TargetX Deliverables, Client Responsibilities and Acceptance Criteria for all TargetX modules listed in the TargetX Order Form. The Configuration Scope only applies to the modules purchased by the Client as identified in the TargetX Order Form.

Recruitment Suite

Project Foundations

- Salesforce Provisioning
- Salesforce Security
- Data Imports
- Informatica Cloud
- Project Support

Recruitment

- Appointment Scheduler
- Events
- Group Assignments
- Prospect Scoring
- Telemarketing
- TargetX Engage
- UChat
- Payments

Communications

- Email
- TX Forms
- TX Print
- TX SMS

Admissions

- Application Requirements Manager (ARM)
- Application Review Tool (ART)
- Decision Letters
- Online Application
- Portal

Retention Suite

Project Foundations

- Salesforce Provisioning
- Salesforce Security
- Data Imports
- Informatica Cloud
- Project Support

Communications

- Email
- TX Forms
- TX Print
- TX SMS

Engagement

- Action Plans
- Appointment Scheduler
- Cohort-Based Success Scores
- Events
- Faculty Early Alerts
- Student Success Center
- Surveys
- TargetX Engage

LIAISON targetx	TargetX Insights

TargetX Deliverables	● Provision a TX Home account for the Client, setting up the initial Client Project Team users.
	● Enable TargetX Insights feature for the Client Project Team users.
	● Provision one instance of TargetX Insights connected to the Client TargetX CRM production environment.
	● Facilitate the following technical sessions to validate the Client configurations and ensure proper use of the Insights tool:
	    • Insights Introduction
	    • Insights Data Review
	    • Insights Setup and Settings

Client Responsibilities	● Complete Data Fields and Standardized Values mappings. ● Configure term-based Targets. ● Configure Roles & Permissions. ● Define and configure Filter Groups. ● Add additional users.
Acceptance Criteria	● Verify TargetX Insights is accessible to enabled users.

Project Foundations

Salesforce Provisioning	Services Description
TargetX Deliverables	• Install all necessary package(s) into one designated Salesforce environment. Unless specifically identified on the TargetX Order Form, these packages will be deployed to a new Salesforce Org. • Facilitate the following technical session to provide an overview of the foundational elements and relational data architecture of the TargetX Salesforce CRM: ◦ Salesforce Foundations
Client Responsibilities	• Procure/Confirm all necessary Salesforce Licenses from Salesforce Account Executive. • Implement Salesforce MFA (Multi Factor Authentication) for your Salesforce instance. • Implement Salesforce Single Sign-On (SSO) authentication, if desired. • Set up Project Team Users in Salesforce. • Complete Implementation Readiness Tasks.
Acceptance Criteria	• Verify that all purchased TargetX modules have been installed in the designated environment.

Salesforce Security	Services Description

TargetX Deliverables	• Facilitate the following technical sessions to provide guidance on managing Salesforce profiles, roles, sharing settings
	    ◦ Salesforce Security
	    ◦ Communities Security Review
	    ◦ Salesforce Security Review
	• Configured the following custom Salesforce profiles:
	    ◦ CRM Administrator
	    ◦ CRM Power User
	    ◦ CRM Power User - Platform
	    ◦ CRM Counselor
	    ◦ CRM Counselor - Platform
	    ◦ CRM Advisor (Retention Only)
	    ◦ CRM Advisor – Platform (Retention Only)
	    ◦ Read Only
	    ◦ Customer Community User (TargetX), if applicable
	• Configure one custom Salesforce Role:
	    ◦ Internal Users

Client Responsibilities	• Update delivered profiles or make new profiles as needed. • Add new Salesforce Users. • Modify standard and custom Salesforce page layouts.
Acceptance Criteria	• Verify all Project Team users are assigned to a custom profile and Salesforce role.

Data Imports	Services Description
School File Import	TargetX provides an import template to load in the client's list of secondary schools and higher education institutions (i.e. your organizations list) into the TargetX CRM with relevant data. The import template is built based on the College Board School file.
3rd Party Standard Imports	TargetX knows how critical search files and test files are to the work of the Admissions office. TargetX provides baseline templates for the following 3rd Party Standard Imports to be used with Informatica Cloud: ACT, AP Scores, Common Application, Encoura, GMAT, GRE, SAT, TOEFL, and Student Search Services (College Board SSS).
SIS Import to/Export from TargetX CRM	TargetX provides guidance on imports and standard student information system (SIS) export flat file templates and mapping workbooks that can be used to assist your team in importing/exporting data to/from the student information system (SIS) using Informatica. TargetX will provide recommendations for getting data in and out of the CRM using flat files. TargetX can suggest a preferred vendor if additional assistance is needed for student information system (SIS) integration.
TargetX Deliverables	Facilitate the following technical sessions to validate Client data imports: ● **Recruitment Suite** ○ Data Foundations ○ Data Mapping Review ○ Data Finalization ● **Retention Suite** ○ Data Foundations: Contacts & Success Team Members ○ Data Foundations: Advising & Activities + Interests ○ Data Foundations: Academic Profiles & Academic Periods ○ Data Foundations: Courses & Course Attendance ○ Data Finalization
Client Responsibilities	• Provide a list of secondary schools and higher ed institutions to be imported into the TargetX CRM. • Procure files (i.e., standardized test scores, purchased name lists, etc.) in the required format that are prepared for import. • Create new templates or modify delivered templates to be used for importing external data into the TargetX CRM. • Create new templates or modify delivered templates to be used for exporting data from the TargetX CRM to the student information system (SIS) or other external systems.
Acceptance Criteria	• Verify 3rd Party Standard Import templates are installed in Client's Informatica instance. • Verify TargetX CRM Export templates are installed in Client's Informatica instance.

Informatica Cloud	Services Description
TargetX Deliverables	• Install Informatica Cloud package into the Client's TargetX Salesforce production instance and provision Client's instance of Informatica, setting up the initial Client user. • Create Informatica Connectors to the Client's TargetX Salesforce production instance, drobox folder, and lookup folder. • Facilitate the following technical session to review navigation of and Client specific configurations in Informatica Cloud: ○ Informatica Overview
Client Responsibilities	• Complete assigned Informatica training in Liaison Academy. • Complete Implementation Readiness Tasks specific to Informatica. • Install Informatica Secure Agent on a Client or web-hosted server. • Setup Informatica Default Directory Structure. • Ensure import files are placed in the designated folder of the Informatica Default Directory Structure.
Acceptance Criteria	• Verify Informatica Cloud package installed. • Verify Informatica instance is accessible via single sign-on (SSO). • Verify Informatica Connectors are created and validated for the Client's TargetX Salesforce production instance, drobox folder, and lookup folder.

Project Support	Services Description

TargetX Deliverables	• Provide a Project Manager and Implementation Consultant resource for the duration of the implementation project.
	• Provide the necessary product training collateral which may consist of online learning modules, documentation, pre-recorded training videos, and facilitated technical sessions.
	• Provide an overview of the implementation Project Plan with target completion dates.
	• Facilitate the following sessions to guide to project completion:
	  ○ Weekly Project Management calls
	  ○ Weekly Technical sessions (detailed below)
	  ○ Guided TargetX upgrade sessions
	• Transition in-production modules to TargetX Client Support team

Client Responsibilities	• Assign a Project Team that includes a Project Manager, CRM Administrator and Business Process expert(s). • Commit resources to complete the Implementation Readiness Tasks and assigned training curriculum per mutually agreed upon project timeline. • Complete Client Responsibilities detailed for each TargetX module, including all trainings, workbooks and acceptance testing tasks.

Acceptance Criteria	• Project Plan delivered to Client. • Weekly Technical Sessions, Project Management Calls, and guided upgrade sessions are executed according to the Project Plan. • Day-to-day support for TargetX transitioned to TargetX Client Support Team.

TargetX Tools

Actions Plans	Services Description

TargetX Deliverables	• Facilitate the following technical sessions to validate Client created Action Plans and ensure proper use of the Action Plans tool:
	  ○ Action Plans Consultation
	  ○ Action Plans Review

Client Responsibilities	• Build Action Plans, following the Action Plans Consultation session. • Validate Action Plans can be manually assigned through the Student Success Center (SSC). • Validate triggered Action Plans populate based on imported data or other automations.
Acceptance Criteria	• Verify TargetX Retention package is installed. • Verify TargetX Retention Toolkit package is installed.

Application Requirements Manager (ARM)	Services Description

TargetX Deliverables	• Facilitate the following technical sessions to collect and validate the Client requirements, ensuring proper use of the Application Requirements Manager (ARM) tool:
	  ○ Application Requirements Manager (ARM) Discovery
	  ○ Application Requirements Manager (ARM) Workbook Review
	  ○ Application Requirements Manager (ARM) Admin Training
	• Configure the Application Requirements Manager (ARM) tool based on the requirements workbook submitted by the Client.
	• Provide testing instructions.

Client Responsibilities	• Conduct an internal review of the institution’s current application requirements (checklist items). • Complete the designated workbook following the Application Requirements Manager (ARM) Discovery session. • Verify the final scope of the Application Requirements Manager (ARM) build. • Complete user acceptance testing of the Application Requirements Manager (ARM) build.
Acceptance Criteria	• Verify TargetX Recruitment Manager package is installed. • Verify Application Requirements Manager (ARM) is configured for use by Community Users. • Validate build of Application Requirements Manager (ARM) based on the approved scope.

Application Review Tool (ART)	Services Description

TargetX Deliverables	• Facilitate the following technical sessions to collect and validate the Client requirements, ensuring proper use of the Application Review Tool (ART):
	    ○ Application Review Tool Discovery
	    ○ Application Review Tool Workbook Review
	    ○ Application Review Tool Admin Training
	• Configure the Application Review Tool (ART) based on the requirements workbook submitted by the Client.
	• Provide testing instructions.

Client Responsibilities	• Conduct an internal review of the institution’s current application review process. • Complete the assigned Application Review training in Liaison Academy. • Complete the Application Review Tool workbook following the Application Review Tool Discovery session. • Verify the final scope of the Application Review Tool (ART) build. • Complete user acceptance testing of Application Review Tool (ART) build.
Acceptance Criteria	• Verify TargetX Decision package is installed. • Validate build of the Application Review Tool (ART) based on the approved scope.

Appointment Scheduler	Services Description

TargetX Deliverables	• Configure one Salesforce Digital Experience Site for the Appointment Scheduler tool.
	• Facilitate the following technical sessions to validate the Client specific Appointment Scheduler configurations:
	  ○ TargetX Appointment Scheduler: Introduction
	  ○ TargetX Appointment Scheduler: Settings & Review Working Session

Client Responsibilities	• Complete the assigned TargetX Appointment Scheduler training in Liaison Academy. • Confirm that the appropriate licenses are purchased from Salesforce. • Configure appointment scheduler profiles and availability for desired internal users. • Configure calendar syncing to connect Client's Salesforce calendar with an external calendar, such as Microsoft® Outlook® or Google Calendar™, if desired. • Customize Appointment Scheduler picklist values and email templates.
Acceptance Criteria	• Verify TargetX Events package is installed. • Verify TargetX Communities package is installed. • Verify Appointment Scheduler site is configured for use by external users. • Verify Appointment Scheduler experience is configured for use by Community Users. • Verify Appointment Calendar is accessible to internal users.

Cohort-Based Success Scores	Services Description
TargetX Deliverables	• Configure Success Score settings in the Student Success Center. • Facilitate the following technical sessions to validate the Client configurations and ensure proper use of the Cohort-based Success Scores tool: ○ Cohort Success Scores: Settings & Review
Client Responsibilities	• Complete the assigned Cohort Success Scores training in Liaison Academy. • Complete configuration of desired cohort scores. • Enable daily batch job.
Acceptance Criteria	• Verify TargetX Retention package is installed. • Verify Success Scores builder is accessible to internal users.

	• Verify new cohorts can be created and saved. • Verify daily batch job is running.

Decision Letters	Services Description

TargetX Deliverables	• Facilitate the following technical sessions to collect and validate the Client requirements, ensuring proper use of the Decision Letter tool:
	  ○ Decision Letter Discovery
	  ○ Decision Letter Workbook Review
	  ○ Decision Letter Admin Review
	• Configure Decision Letters based on the requirements submitted by the Client.
	• Provide testing instructions.

Client Responsibilities	• Conduct an internal review of the institution's current decision notification process. • Confirm that the appropriate licenses are purchased from Salesforce. • Provide Decision Letter requirements, including letterhead logos, content and signatures, following the Decision Letter Discovery session. • Verify the final scope of Decision Letter build. • Complete user acceptance testing of Decision Letter build.
Acceptance Criteria	• Verify TargetX Applicant Dashboard package is installed. • Verify Decision Letters are configured for use by Community Users. • Validate build of Decision Letters based on approved scope.

Email	Services Description

TargetX Deliverables	• Enable TargetX Email submitter account.
	• Facilitate the following technical sessions to validate Client created email templates and campaigns, and ensure proper use of the Email tool:
	  ○ Communication Planner Introduction
	  ○ Communication Planner Review/Working Session

Client Responsibilities	• Register DNS records provided by TargetX that will be used for white-labeling. • Complete the assigned Email training in Liaison Academy. • Update default Email Preferences including contact information. • Create email related records, including templates, reports, queries, test lists, and campaigns. • Schedule campaign broadcasts.

Acceptance Criteria	• Verify TargetX Email package is installed. • Verify Email Preferences page is populated. • Verify successful completion of an email campaign sent to test records.

Events	Services Description
TargetX Deliverables	• Configure one Salesforce site for Events. • Facilitate the following technical sessions to validate the Client created events and ensure proper use of the Events tool: ○ Events Introduction ○ Events Review/Working Session
Client Responsibilities	• Conduct an internal review of the institution's current events. • Complete the assigned Events training in Liaison Academy. • Create and test desired events. • Update Events branding ○ Events calendar logo ○ Events default poster image ○ Events default thumbnail image ○ Event-specific images, if desired
Acceptance Criteria	• Verify TargetX Events package is installed. • Verify successful participant registration through the Events site.

Faculty Early Alerts	Services Description
TargetX Deliverables	• Configure one Salesforce Digital Experience Site for the Faculty Early Alerts tool. • Facilitate the following technical sessions to validate the Client configurations and ensure proper use of the Faculty Alerts tool: ○ Faculty Alerts: Settings & Review I ○ Faculty Alerts: Settings & Review II
Client Responsibilities	• Complete the assigned Faculty Early Alerts training in Liaison Academy. • Confirm that the appropriate licenses are purchased from Salesforce. • Complete Faculty Early Alerts Settings configuration. • Update delivered email templates related to Faculty Early Alerts.
Acceptance Criteria	• Verify TargetX Retention package is installed. • Verify Faculty Early Alerts site is configured for use by faculty users.

	• Verify Faculty Early Alerts (Roster) tab is accessible to internal users.

Group Assignments	Services Description

TargetX Deliverables	• Configure the Group Assignments tool settings.
	• Configure the Group Assignments Contact trigger.
	• Facilitate the following technical sessions to validate Client created assignments groups and ensure proper use of the Group Assignments tool:
	    ○ Group Assignment Introduction
	    ○ Group Assignments Review/Working Session
	• Configure Group Assignment Rules based on the requirements submitted by the Client.

Client Responsibilities	• Complete the assigned Group Assignments training in Liaison Academy. • Complete the Group Assignment Workbook/Planning Guide. • Complete user acceptance testing of the Group Assignment build • Refresh triggers following customizations. • Validate that record ownership is assigned based on client defined criteria.
Acceptance Criteria	• Verify TargetX Base package is installed.

Online Application	Services Description

TargetX Deliverables	• Configure one Salesforce Digital Experience site for the Online Application.
	• Facilitate the following technical sessions to collect and validate the Client requirements, ensuring proper use of the Online Application tool:
	    ○ Online Application Discovery
	    ○ Online Application Workbook Review
	    ○ 3-Day Online Application Build Workshop
	    ○ Online Application Build Review/Working Session
	    ○ Online Application Admin Review
	• Assist Client with configuration of the Online Application tool based on the requirements workbook submitted by the Client.
	• Provide testing instructions.

Client Responsibilities	• Conduct an internal review of the institution's current application process. • Complete the assigned TargetX Online Application training in Liaison Academy. • Confirm that the appropriate licenses are purchased from Salesforce. • Complete the Online Application workbook prior to the 3-Day Online

	Application Build Workshop. • Finalize the Online Application build post-workshop. • Complete user acceptance testing of the Online Application build.
Acceptance Criteria	• Verify TargetX Online Application package is installed. • Verify TargetX Applicant Dashboard package is installed. • Verify TargetX Communities package is installed. • Verify Online Application site is configured for use by external users. • Verify Online Application experience is configured for use by Community Users.

Payments	Services Description
TargetX Deliverables	• Configure one Salesforce site for payment collection. • Configure Payment Connector records based on requirements submitted by the Client.
Client Responsibilities	• Conduct an internal review of the institution's current payment needs (e.g. application fees, event registrations, etc.). • Identify and contract with a TargetX supported payment vendor. • Complete the designated workbook with the required configuration components. • Verify the final scope of the Payment Connector configuration. • Complete user acceptance testing the Payment Connector configuration.
Acceptance Criteria	• Verify TargetX Payment Connector package is installed. • Validate configuration of the Payment Connector based on the approved scope.

Portal	Services Description

TargetX Deliverables	• Configure one Salesforce Digital Experience Site for the Portal tool.
	• Facilitate the following technical sessions to guide on proper use of the Portal tool:
	    ○ Portal Introduction
	    ○ Portal Review/working Session
	    ○ Portal Admin Review

Client Responsibilities	• Complete the assigned TargetX Portal training in Liaison Academy.

	• Confirm that the appropriate licenses are purchased from Salesforce. • Complete the Portal Builder: Consultation Preparation and Questionnaire. • Finalize the Portal Build Plan following the Portal Builder Consultation sessions. • Build portal content, including use of conditional content, images, widgets, etc. • Validate portal content and conditions are working as expected.
Acceptance Criteria	• Verify TargetX Base package is installed. • Verify TargetX Applicant Dashboard package is installed. • Verify TargetX Communities package is installed. • Verify Portal site is configured for use by external users. • Verify Portal experience is configured for use by Community Users.

Prospect Scoring	Services Description
TargetX Deliverables	• Configure template scoring model. • Provide Prospect Scoring Overview video for client
Client Responsibilities	• Conduct an internal review of the institution's current scoring process. • Complete the assigned Prospect Scoring training in Liaison Academy.
Acceptance Criteria	• Verify Prospect Scoring package is installed. • Validate build of Prospect Scoring based on the approved scope.

Student Success Center	Services Description

TargetX Deliverables	• Configure baseline settings for the Student Success Center (SSC) and Retention Settings page.
	• Facilitate the following technical sessions to validate the Client configurations and ensure proper use of the Student Success Center (SSC) interface:
	    ○ Student Success Center: Overview & Data Readiness
	    ○ Student Success Center: Settings Review

Client Responsibilities	• Complete Student Success Center Settings configuration. • Review and, if needed, update default Retention Settings. • Customize picklist fields that are viewable in the Student Success Center (SSC) interface.
Acceptance Criteria	• Verify TargetX Retention package is installed. • Verify TargetX Retention Toolkit package is installed. • Verify Student Success Center is accessible to internal users. • Verify Retention Settings are configured.

Surveys	Services Description
TargetX Deliverables	• Configure one Salesforce site for Surveys. • Facilitate the following technical session to validate the Client created surveys and ensure proper use of the Surveys tool. o Surveys: Settings & Review
Client Responsibilities	• Complete the assigned Survey Tool training in Liaison Academy. • Build surveys, including survey questions. • Post surveys or design email campaigns to send surveys for response.
Acceptance Criteria	• Verify TargetX Survey Tool package is installed. • Verify a successful survey submission through the Surveys site.

TargetX Engage	Services Description
TargetX Deliverables	• Configure one Salesforce site for Engage. • Confirm Transactional SMS account is setup. • Facilitate the following technical session to validate the Client created rooms and ensure proper use of the TargetX Engage tool: ○ Engage Introduction ○ Engage Settings and Review Working Session • Configure Engage settings based on the requirements submitted by the client.
Client Responsibilities	• Complete the assigned TargetX Engage training in Liaison Academy. • Complete the designated Engage workbook after the introduction session. • Complete user acceptance testing of the Engage configuration. • Confirm that required Users have correct permissions sets assigned.
Acceptance Criteria	• Verify TargetX Engage package is installed. • Verify successful sign in through the Engage site. • Verify TargetX Engage dashboard is accessible to internal users.

Telemarketing	Services Description
TargetX Deliverables	• Configure standard settings in the Telemarketing tool.
Client Responsibilities	• Complete assigned TargetX Telemarketing training in Liaison Academy. • Create and test telemarketing campaigns.
Acceptance Criteria	• Verify TargetX Telemarketing package is installed. • Verify TargetX Telemarketing is accessible to internal users.

TX Forms	Services Description
TargetX Deliverables	• Configure one Salesforce site for Forms. • Facilitate the following technical sessions to validate the Client created forms and ensure proper use of the TX Forms tool: ○ TX Forms Introduction ○ TX Forms Review/Working Session
Client Responsibilities	• Conduct an internal review of the institution’s current forms. • Complete assigned TX Forms training in Liaison Academy. • Build and test desired forms.

Acceptance Criteria	• Verify TargetX Base package is installed. • Verify successful form submission through the Forms site.

TX Print	Services Description
TargetX Deliverables	• Provision a TX Home account for the Client, setting up the initial admin user. • Enable TX Print feature for the admin user.
Client Responsibilities	• Complete the assigned TX Print training in Liaison Academy. • Add additional users.
Acceptance Criteria	• Verify TX Print is accessible to enabled users.

TX SMS	Services Description
TargetX Deliverables	• Provision a TX Home account for the Client, setting up the initial admin user. • Enable TX SMS feature for the admin user.
Client Responsibilities	• Complete the assigned TX SMS training in Liaison Academy. • Setup Twilio account. • Add additional users. • Verify that Mobile field on Contact is populated in the TargetX CRM. • Create message templates and reports. • Build “View in TX SMS” custom button on the Contact object in the TargetX CRM, if desired. • Validate SMS service by sending a message to test records.
Acceptance Criteria	• Verify TX SMS is accessible to enabled users.

UChat	Services Description
TargetX Deliverables	● Provision UChat Client account. ● Add initial Client users. ● Set-up configuration as defined in Client Readiness Guide. ● Provide Client with HTML code for website.
Client Responsibilities	● Complete the assigned UChat training in Liaison Academy. ● Complete UChat Readiness Guide. ● Add additional users. ● Set up profiles for active users. ● Configuring additional settings as desired. ● Populate HTML code on website when ready to launch. ● Verify the UChat widget is functioning properly.
Acceptance Criteria	● Verify that Client users have access to UChat.

Implementation Working Sessions and Timelines

The TargetX approach to implementation is to assign every client an Implementation Consultant and a Project Manager. The Implementation Consultant meets weekly with clients for 60 to 90 minutes to help them with the configurations of the tools they have chosen to implement and to teach them how to make changes so that they become independent system owners who can continually adjust and improve on their CRM. Additionally, every client will meet weekly for 30 minutes with their Project Manager to review the project schedule, action items and any change requests.

The Implementation Technical Sessions for the entire Recruitment Suite project are detailed below. The TargetX Project Manager helps clients with the planning and prioritization of the sessions based on their stated goals. Total project duration is dependent on desired scope of tools to be implemented and client availability to attend these sessions. TargetX, however, will allocate no more than a twelve (12) month timeframe to complete the full Recruitment Suite. After the initial Foundations Sessions, clients may choose to implement the tools in their priority order and can go live with tools when ready and do not have to wait until all tools have been configured before using the CRM.

TARGET X by LIAISON

Recruitment Technical Sessions

Foundations Milestone

- Salesforce Foundations
- Salesforce Security
- Salesforce Security Review
- Informatica Overview
- Data Foundations
- Data Mapping Review

Recruitment Milestone

- Group Assignment Introduction
- Group Assignment Review/Working Session
- TX Forms Introduction
- TX Forms Review/Working Session
- Events Introduction
- Events Review/Working Session
- Appointment Scheduler Introduction
- Appointment Scheduler: Settings & Review Working Session
- Engage Introduction
- Engage Settings and Review Working Session

Communication Milestone

- Communication Planner Introduction
- Communication Planner Review/Working Session

Admissions Milestone

- Online Application Discovery
- Online Application Workbook Review
- 3-Day Online Application Build Workshop
- Online Application Review/Working Session
- Online Application Admin Review
- Application Requirements Manager Discovery
- Application Requirements Manager Workbook Review
- Application Requirements Manager Admin Review
- Application Review Tool Discovery
- Application Review Tool Workbook Review
- Application Review Tool Admin Review
- Decision Letter Discovery
- Decision Letter Workbook Review
- Decision Letter Admin Review

Portal & Wrap Up Milestone

- Portal Introduction
- Portal Review/Working Session
- Portal Admin Review
- Upgrade 1
- Upgrade 2
- Communities Security Review
- Recruitment Data Finalization
- Recruitment Implementation Audit

The Implementation Technical Sessions for the entire Retention Suite project are detailed below. The TargetX Project Manager helps clients with the planning and prioritization of the sessions based on their stated goals. Total project duration is dependent on desired scope of tools to be implemented and client availability to attend these sessions. TargetX, however, will allocate no more than a six (6) month timeframe to complete the full Retention Suite. After the initial Foundations Sessions, clients may choose to implement the tools in their priority order and can go live with tools when ready and do not have to wait until all tools have been configured before using the CRM.

TARGET X by LIAISON

Retention Technical Sessions

Retention Foundations

- Salesforce Foundations
- Salesforce Security
- Student Success Center: Overview & Data Readiness
- Informatica Overview

Retention Data Foundations

- Data Foundations: Contacts & Success Team Members
- Data Foundations: Advising & Activities + Interests
- Data Foundations: Academic Profiles & Academic Periods
- Data Foundations: Courses & Course Attendance

Retention Engagement & Success Tools

- Action Plans Consultation
- Action Plans Review
- Appointment Scheduler Introduction
- Appointment Scheduler: Settings & Review Working Session
- Communication Planner Introduction
- Communication Planner Review/Working Session
- Engage: Introduction
- Engage Settings and Review Working Session
- Events Introduction
- Events Review/Working Session
- Faculty Alerts: Settings & Review I
- Faculty Alerts: Settings & Review II
- Forms Introduction
- Forms Review/Working Session
- Cohort Success Scores: Settings & Review
- Surveys: Settings & Review

Retention Completion

- Data Finalization
- Student Success Center: Settings Review
- Salesforce Security Review