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**Process Document**

**CRM – Outreach**

Liverpool John Moores University

**Outreach: Creating and Updating Contacts**

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**Creating and Updating Contacts in CRM**

**Set-Up**

* All new contacts should be recorded on Dynamics, against the relevant Organisation. School contact information should be recorded from all incoming emails to the Outreach Dashboard, by one of the OA’s.
* AM’s should arrange for any new contacts to be recorded on CRM and that existing contacts are regularly checked to see if they are still valid.

**Procedure**

***School Liaison > Contacts > New***

When recording contacts, there are six main things to ensure

1. The **‘School Contact’** form is being used, not the **‘Student’** form



1. Their **Job Title** fits into the parameters detailed below
2. **Company Name** is recorded as their school/college
3. You have an email address for the contact – you cannot create a contact otherwise!
4. Once this is done, you save the contact record.
5. Finally, they should be categorised as ‘**School Contact’** under ‘**Contact Type’** on the right hand side

**If they are also the Primary Contact (i.e. Roy Bellmon):**

1. Open the **Organisation** Record
2. On the right hand side, click the magnifying glass next to Primary Contact
3. Select the contact from the drop down list

**Or:**

1. Open the Organisation Record
2. Click the ‘+’ next to Contacts
3. Add a new contact as detailed above

(The advantage here is that the Company Name is already pre-populated)

**Amend a contact – update details**

1. Open up the contact record
2. Amend job title, company name, and e-mail
3. Remove as primary contact from the school if necessary

**Amend a contact – e.g. retired teacher**

1. Open up the contact record
2. ‘Deactivate’ the record. This still allows us to see the record and any interactions and communications, but removes them from mailing lists etc.
3. Update primary contact for school if necessary.

**Job Titles**

When DataFiltr was migrated over to Dynamics, we had to ensure that Job Title was recorded consistently, so that targeted mailouts can be ran accurately. As such ALL Job Titles must contain *at least* one of the below words/phrases. NB They must be recorded exactly as below:

|  |  |  |
| --- | --- | --- |
| **Non Subject Specific Phrases** | **Subject Specific Phrases** |  |
| Access | Art | English  |
| Careers | Dance  | Geography |
| E-Mentoring | Design | History |
| Head of Year X (where X = 7-14) | Graphics | Humanities |
| LAC |  | Sociology |
| Pre-16 | Built Environment  |  |
| Sixth Form | Construction | Health and Social Care |
| Volunteering | Engineering | Food |
| SENCO |  | Physical Education  |
|  | Biology | Travel and Tourism |
|  | Chemistry | Information Technology |
|  | Maths  | Sport |
|  | Physics |  |
|  | Psychology |  |
|  | Science |  |
|  | STEM |  |

* Phrases **can** be added to the above, but no existing contacts in CRM would show up with a search that is ran solely on this phrase. If a new phrase is included a job title (if absolutely necessary) then it must also be added to the list above.
* Provided that you include at least one of the above set phrases, any other detail is fine to be included. Eg *Sixth Form* Admin Officer, *Volunteering* Coordinator, *Access* Tutor. You can also include more than one phrase Eg *LAC* Officer *Geography*
* As the job titles might become a bit nonsensical (*E-Mentoring* Head of *Sixth Form Maths*) we won’t actually show Job Titles on any printed/electronic materials. If needed we can insert a generic job title for everyone when running a mail merge or simply just leave it as the named contact.
* When we are running mail outs for subject areas, we will include multiple search terms to capture all relevant contacts E.g. *Built Environment & Construction & Engineering*