

Algonquin College: Utilizing Salesforce to Improve Student Recruitment

Erin Nordhof



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Situation Analysis

What is Salesforce?

- **Customer Relationship Management (CRM) platform**
 - Integrates information from various teams into one place

What is CRM?

Helps colleges manage relationships with prospective students by streamlining the process, making it easier to maintain and track.

What is Salesforce?

- **Utilizes Cloud Technology**
 - Easy access to information from any web browser

What is Cloud Technology?

The ability to store data (students contact information) using the internet, versus a hard drive.

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Algonquin and Salesforce

Track Conversion Targets

- Gain understanding of why prospective students are applying
 - Ensures Algonquin meets student applicant goals

Algonquin and Salesforce

Manage Lead Scoring and Segmentation

- Salesforce Tracks:
 - Platforms bringing in the most prospective students
 - Prospective students most drawn to Algonquin

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Algonquin and Salesforce

Execute Targeted Communications

- Communicate with prospective students at certain points in recruitment cycle
 - Email, regular mail, or social media

Algonquin and Salesforce

Automate Student Lead Capture

- Determine metrics for admissions
 - i.e. GPA, Standardized Test Scores, Extracurriculars
- See which platforms prospective students access application

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Who Uses Salesforce?

Recruitment

- Track what content converts prospective students into applicants
- Student demographics and content

Who Uses Salesforce?

IT Department

- Salesforce resources provide additional information for IT case management
 - Trailblazer Community
 - Salesforce Resource Center specifically for IT

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Who Uses Salesforce?

Advancement Team

- Easier to communicate between different departments
 - More focus on prospective student communications

Who Uses Salesforce?

Employees, Current Students and Prospective Students

- One platform for announcements, updates, and upcoming events

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Who Uses Salesforce?

Admissions

- **Counselors**
 - *Admissions Connect*: Defines application content
 - *Salesforce Path*: Track applicant's progress
- **Applicant**
 - *Admissions Connect*: Application checklist
 - *Portals*: Easy to use for application

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Who Uses Salesforce?

Admissions

3rd Party Applications that Integrate with Salesforce

E-SIGNATURE	DocuSign	nintex Drawloop
LOCATION & TERRITORY MAPPING	geopointe	MapAnything
DOCUMENTS	conex	springcm
RECRUITING EVENTS	Fonteva	cvent
FORMS	FormAssembly	formstack

Who Uses Salesforce?

Admissions

- **Connect with admitted students**
- **Build community**
- ***Service Cloud***
 - Personalize Salesforce workspace
 - Build email templates for certain communications
 - (i.e. waiting on student for more information)

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How Else Can Salesforce Be Used?

- **Algonquin and Admitted Students**
 - Organize data about vaccination status
 - IBM and Accenture utilize *Vaccine Cloud*

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The Downside To Salesforce

- Salesforce implementation process can be long and difficult
- If not all available features are used, it's not cost efficient

Other Platforms to Consider

- **Sugar CRM**
 - Budget friendly
 - Better Tech and Community Support
 - *Downside:* Limited Integration tools

Other Platforms to Consider

- **Microsoft**
 - Recognizable Brand
 - Easy integration with most systems
 - Budget friendly
 - *Downside:* Customer Support isn't the best

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The Job Of The Technical Writer

A Project Plan

- Algonquin's Implementation of Salesforce
 - How to implement
 - When to implement
 - Who to train during implementation

The Job Of The Technical Writer

Technical Documentation

- Teaches the team about Salesforce
- Lays out process for implementation

The Job Of The Technical Writer

Manuals

- Design how-to-guides for employees starting to use Salesforce

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Questions To Consider

- How else will Algonquin use Salesforce?
- Possible implementation issues?
- Why choose Salesforce over competitors?

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Implementing Salesforce at Algonquin

Problem Statement

Algonquin wants to improve data management throughout recruitment, including contact information for prospective students and applicants. Through the implementation of Salesforce, Algonquin avoids duplicate contact information, makes it easier to share contact information with other departments, and increases new student enrollment.

Goals of the Agreement

I will contribute to implementing Salesforce at Algonquin through the creation of documents such as manuals and data policies. These documents make it easier for current and future employees to learn about data management within Salesforce. All documents will be posted on the Algonquin Employee Resource page.

Objectives of the Agreement

Task	Deliverable
Research through onsite " <u>Observation Day</u> "	Situation Analysis slide deck
Research through onsite " <u>Observation Day</u> "	Procedure for Duplicate Contacts (manual)
Research through onsite " <u>Observation Day</u> "	Data Integrity Policy Manual
Research through onsite " <u>Observation Day</u> "	Importing Contacts Into Salesforce (manual)
Create technical email examples for internal (<u>Recruitment Team</u>) and external audiences (Senior Management and departments outside of recruitment).	Technical Emails Training Documents

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Administration

1. At the beginning of each week, the technical writer will report to the department head of Recruitment (RDH) about the progress for that week's deliverables. This meeting will also be an opportunity to discuss what the technical writer will need for the development of the writing projects.
2. At the beginning of the month, the technical writer, project manager and Senior Management will meet to discuss the development of the writing projects, and evaluate the progress. Any adjustments to the timeline will be discussed during these meetings.

Timeline

Deliverables	Due Dates
Situation Analysis	02/04/22
Procedure for Duplicate Contacts	02/11/22
Data Integrity Policy Manual	02/18/22
Importing Contacts Into Salesforce	02/25/22
Technical Emails Training Documents	03/11/22
Technical Emails Training	03/15/22
Final Technical Documentation	03/18/22
Regularly Scheduled Meetings	
Monthly Meetings with Algonquin Senior Management, Project Manager and Technical Writer	First Monday of every month
Weekly Meeting with Technical Writer and Recruitment Department Head	Every Monday

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Project Timeline

Task Name	Start	Finish	Assigned To	Duration	Status	Project Deliverable Description
Final Draft of Technical Documentation	01/31/22	03/15/22		0		
Project Brief	01/31/22	02/18/22		45d	Not Started	
Situation Analysis for Algonquin and Salesforce	01/31/22	02/04/22	Erin Nordhof	5d	Not Started	Evaluation and research
Meeting With Algonquin Senior Management	02/07/22	02/07/22	Erin Nordhof	0	Not Started	Discussion of evaluation and research results
Meeting with Algonquin Recruitment, Social Media, and IT	02/10/22	02/10/22	Algonquin Senior Management	0	Not Started	Department meeting with Senior Management
Project Management for Algonquin's Contacts in Salesforce	02/28/22	03/04/22	Erin Nordhof	5d	Not Started	Project Overview (Scope of Work and Tracker)
Meeting with Algonquin Senior Management	03/07/22	03/07/22	Erin Nordhof	0	Not Started	Senior Management meeting with Project Manager.
Meeting with Algonquin Recruitment, Social Media, IT and Data Security	03/10/22	03/10/22	Algonquin Senior Management	0	Not Started	Meeting with Senior Management project manager, technical writer, Recruitment, Social Media, IT and Data Security.
Technical Emails	03/07/22	03/11/22	Erin Nordhof	5d	Not Started	Instructions.
Meeting with Algonquin IT and Data Security then	03/15/22	03/15/22	Erin Nordhof	0	Not Started	Informational Sessions with IT and Data Security, then Recruitment and Social Media.

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meeting with Social Media and Recruitment						
Data Policy	02/14/22	03/04/22		40d	Not Started	
Data Integrity For Salesforce at Algonquin	02/14/22	02/18/22	Erin Nordhof	5d	Not Started	Data Policy Manual
Training	02/21/22	02/23/22	Algonquin College Senior Management	3d	Not Started	Informational Sessions with Senior Management, Recruitment, Social Media, IT and Data Security.
Implementation	02/28/22	02/28/22	Algonquin Recruitment, Social Media, IT, Data Security	0	Not Started	Implementation of Data Policy; available in Algonquin College Employee Resources
Manuals	02/22/22	03/15/22		35d	Not Started	
Importing Contacts into Salesforce	02/21/22	02/25/22	Erin Nordhof	5d	Not Started	Instruction Manual
Training	03/01/22	03/03/22	Erin Nordhof	3d	Not Started	Training Sessions for Social Media, Recruitment, IT and Data Security
Implementation	03/04/22	03/04/22	Algonquin Recruitment and Social Media Departments	0	Not Started	Implementation of Duplicate Contacts Document; available in Algonquin College Employee Resources
Procedure for Duplicate Contacts	02/07/22	02/11/22	Erin Nordhof	5d	Not Started	Instruction Manual
Training	02/14/22	02/14/22	Algonquin IT Department	0	Not Started	Training Session
Implementation	02/18/22	02/18/22	Algonquin Recruitment and Social Media	0	Not Started	Implementation of Duplicate Contacts Document; available in Algonquin College Employee Resources

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Data Integrity for Salesforce at Algonquin

Algonquin College Policy and Procedure Manual

Date: 05/08/22

Supersedes: 04/10/22

Responsible Department: Algonquin Senior Management

Source of Document: N/A

Exhibit A: Adding Data into Salesforce

Exhibit B: Procedure for Duplicate Contacts in Salesforce

Exhibit C: Misuse of Data Investigation Process

Exhibit D: Contact Information for Data Security Team

I. Purpose

This policy manual outlines the proper usage of Algonquin College's data within Salesforce. The policy manual discusses who can access and use the data, how it will be used, and the necessary procedures to keep the data secure.

II. Definitions

- A. Data: This refers to contact information that prospective students provide Algonquin for enrollment purposes. Data includes the prospective student's full name, email, phone number, and address.
- B. System Administrator: The manager on the recruitment team is responsible for maintaining the data collected within Salesforce.
- C. Data Security Team: A group from IT whose main focus is to ensure that all security measures and protocols are followed by everyone accessing Salesforce.
- D. Data Breach: Any circumstance that puts the data at risk of being compromised and leaked out to a third party.
- E. Third Party: Any organization outside of the Algonquin College teams (Recruitment team, Social Media team, IT, Data Security team, Senior

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Management) that is allowed access to this data. No third party outside of the listed teams is allowed access to this data unless approved by Senior Management.

- F. Written Consent: When a prospective student willingly agrees to provide Algonquin College with their data. Examples of written consent include signing a physical form or clicking the box next to *Agreement Policy* when filling out online forms.

III. Policy

Algonquin is responsible for ensuring that the data collected from prospective students during the recruitment process is used only for contact about topics pertaining to enrolling at Algonquin. The college is also responsible for protecting this data from unauthorized access and misuse by employees or any third parties.

IV. Roles and Responsibilities

Algonquin College is the owner of all data collected within Salesforce. Certain teams will have regular access to Algonquin's Salesforce data. These teams are responsible for ensuring the data is used only for the purpose of enrollment at Algonquin College. These teams are also responsible for protecting the data. For any issues regarding data safety, these teams are responsible for reporting, troubleshooting, and/or resolving the issue.

A. System Administrator for Salesforce

1. Ensures that all data collected within Salesforce is accurate.
2. Any information that is out of date, incorrect, or duplicated is properly managed or removed.

B. Social Media Team

1. Collects data from Algonquin's social media or website from prospective students.
2. Ensures data added into Salesforce is only for the use of Algonquin College recruitment.

C. Recruitment Team

1. Accesses data to contact students interested in Algonquin College.

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2. Collects data from prospective students at recruitment events.
3. Ensures that data collected at these events is properly disposed of (if collected using physical means such as a paper form).

D. IT Team

1. Handles any issues that may arise in the functioning of Salesforce.
 - a) Performs maintenance on the system to ensure it is functioning properly.
 - b) Performs system updates.

E. Data Security Team

1. Handles any security issues that may arise.
 - a) Investigates any security issues involving the data within Salesforce.
 - b) The Data Security team will then compile reports on the cause of the issue and the solution.
 - c) The Data Security team is responsible for training the other teams accessing Salesforce best practices in maintaining data security.

V. Procedures

A. Collecting Data

1. Data can only be collected from prospective students with their consent.
 - a) Proper consent is considered written consent (i.e., the prospective student filling out a form and signing it).
 - b) Online written consent means the prospective student clicks the box next to the Agreement Policy. If this box is not clicked, the prospective student's data will not be added to Algonquin College's system.
2. Any data collected without the prospective student's consent will be considered "misused".

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B. Adding Contacts to Salesforce

1. The Social Media and Recruitment teams can add new contacts to Salesforce.
 - a) Adding Data into Salesforce.
2. The Social Media and Recruitment teams cannot add new contacts if:
 - a) There is a duplicate of the contact.
 - b) The contact information is not valid.
 - c) There is a data breach within Salesforce.

C. Sharing Data within Salesforce

1. The data within Salesforce can only be shared with the following teams: Recruitment, Social Media, IT, Data Security, and Senior Management.
2. Any team or organization not mentioned in the previous list is considered a third party.
 - a) No third party is allowed direct access to the data within Salesforce, even if that third party is a part of Algonquin College.
 - b) The third party must receive permission from Senior management for any access to the data within Salesforce.

D. Misuse of Data

1. When there is found to be a misuse of data by an Algonquin employee, an investigation will be opened with Algonquin's Human Resources team and upper management.
 - a) Investigation Process.

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E. Data Breaches

1. Any member of the teams accessing Salesforce can alert the Data Security team of a breach.
 - a) Contacting the Data Security team in the event of a possible data breach.
2. In the case of a security breach:
 - a) Salesforce will be closed to access for adding new contacts.
 - b) The Data Security team will perform an investigation.
 - c) Only the System Administrator is allowed access to Salesforce during a Data Security breach, even if the security breach is an issue with one department.
3. The System Administrator is not allowed access to Salesforce in the following situations:
 - a) The breach is a result of an issue due to the System Administrator's account.
 - b) The breach is system-wide and affects the accounts of everyone who has access to the Salesforce data.

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Importing Contacts into Salesforce

After collecting contacts from prospective students at recruiting events or via social media, the contact information is organized into a spreadsheet. Before importing the contacts into Salesforce, the spreadsheet must be cleaned.

For information on how to clean the spreadsheet, read [10 Tips to Prepare Salesforce Import Data](#) or watch [Data Import: Clean and Prepare Your Data Using Excel](#).

Once the spreadsheet is cleaned and formatted, the contacts must be uploaded to Salesforce using the Data Import Wizard to make the information accessible for recruitment.

To Access The Data Import Wizard:

1. Go to **Settings** on the Salesforce homepage.

***Settings** is the cog in the upper right-hand corner.*

2. Click **Set Up**.
3. Go to the **Quick Find** bar on the top left side of the screen.
4. Search **Import**.
5. Click **Data Import Wizard**.
6. Click **Launch Wizard**.
7. Under **What Kind of Data Are You Importing?** is the **Standard Objects** menu with four options:
 - a. Accounts and Contacts
 - b. Leads
 - c. Solutions
 - d. Campaign Members
8. Click **Leads**.

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9. Choose **Add New and Update Existing Records**.

Since there is a possibility of the prospective student's contact information changing, this makes it easier to ensure that whoever is updating the contact information is updating the correct student's information.

10. Find **Match Leads**. Click the drop-down menu and choose **Email**.

This prevents duplicate contacts from being added to Salesforce.

11. If the contact information being uploaded belongs to a specific group (for example, college fair contacts or social media contacts), click **Assign New Leads To This Source**.

Leaving it blank allows the uploader to be the default owner of the contact information.

12. Click **CSV File**. Click **Choose File** to find the correct spreadsheet for upload.

13. Click **Next** to proceed to **Edit Mapping**.

14. Click **Manual Mapping**.

15. Check that column headers from the CSV file align with Salesforce headers.

*If they don't align, click **Map** on the left side of the table. A list of possible header names will appear to automatically fill in the header title. If the desired header doesn't appear in the list, search for it in **Find Field** at the top of the page.*

16. Click **Next**.

17. Click **Import**.

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Procedure For Duplicate Contacts

Salesforce's duplicate rules avoid multiple **contacts** for one prospective student. Having duplicates slows the system down and allocates valuable resources toward maintaining the duplicate records. Duplicate contacts also create an unprofessional image, as Algonquin is more likely to send repeat communications to one contact.

[Setting Up Duplicate Contact Rules](#)

[Merging Contacts](#)

[Duplicate Alert Messages](#)

[Avoiding Duplicate Contacts](#)

[Overriding Duplicate Rules](#)

Setting Up Duplicate Contact Rules

Before setting up duplicate rules, the **Standard Contact Duplicate Rule** must be active. Newer editions of Salesforce typically have **Standard Contact Duplicate Rule** activated, but it's important to check before proceeding.

*To activate **Standard Contact Duplicate Rule**:*

1. Go to **Setup**.
2. Click **Duplicate Rules**.
3. Go to **Standard Contact Duplicate Rule**.
4. Check the **Active** column for a checkmark.

After activation, the **Potential Duplicates Component** must be added to **Contact Page Layout**.

*To add **Potential Duplicates Component** to **Contact Page Layout**:*

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1. Go to **Search Function** in the top left-hand corner.
2. Search for **Lightning App Builder** and open **Contact Page Layout**.
3. Click **Edit**.
*Click **New** to create a new page layout.*
4. Add **Potential Duplicates Component** to the layout.
5. Click **Save**.

Merging Contacts

The recruitment team can view and merge duplicate records. Merging duplicate contacts makes tracking specific communications between the contact and Algonquin easier.

To merge duplicate contacts:

1. Click the contact's name.
2. In the top right corner of the contact's page, click **View Duplicates**.

If a team member creates a new contact for an existing one, the two contacts can be merged.

1. Click **Contacts**.
2. Click **New Contact**.
3. Enter the contact information.
*A message appears at the top of the contact editing page if there is a duplicate contact. The message will end with **View Duplicates**.*
4. Click **View Duplicates** to merge the new and existing contacts.

Duplicate Alert Messages

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The **System Administrator** can customize the **Duplicate Alert Message** for when there is a duplicate contact.

*To customize the **Duplicate Alert Message**:*

1. Go to **Setup**, then **Duplicate Rules**.
2. Click **Edit**.
3. Scroll to **Actions**.
4. Go to the **Alert Text** section and edit the "**Duplicate Alert**" message.

Avoiding Duplicate Contacts

Matching Rules find duplicate contacts using certain criteria. Then team members can find out if the same contact was already added from a different platform.

*To set up **Matching Rules**:*

1. Go to **Set Up**, then **Duplicate Rules**.
2. Scroll to **Matching Rules**.
*If it says "**Mapping Not Selected**," click **Field Mapping**.*
3. Select **Title** and choose criteria for identifying duplicate records.

The **System Administrator** can also prevent the creation of duplicate contacts.

To prevent duplicates:

1. Go to **Set Up**, then **Duplicate Rules**.
2. Under **Actions**, there are two items:
 - a. **Action on Create**.
 - b. **Action on Edit**.
3. Click the drop-down menu next to these items.
4. Click **Block**.
5. Click **Save** at the top of the page.

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Overriding Duplicate Rules

For the **System Administrator** to edit duplicate contacts, it must be defined in **Duplicate Rules**.

*To enable editing for the **System Administrator**:*

1. Go to **Set Up**, then **Duplicate Rules**.
2. Scroll to **Conditions**.
3. Click **Field**.
4. Choose **Current User: Profile**.
5. Under **Operator**, choose **Not Equal To**.
6. Under **Value**, type **System Administrator**.
7. Click **Save**.
8. On **Standard Contact Duplicate Rule**, click **Activate**.

Technical Emails Training Documents

Board of Directors Email

To: AlgonquinChairBoard@algonquincollege.edu

From: firstname.lastname@gmail.com

Subject: Salesforce's Customer 360 for Algonquin

To the Chair of the Algonquin College Board,

I recommend Salesforce's Customer 360 platform for improving Algonquin College's recruitment.

Salesforce's Customer 360 is a Customer Relationship Management (CRM) database utilizing cloud technology for employees to access information from anywhere easily. This means Algonquin College recruitment, social media, and admissions teams can access applicants' information for their projects, even if they aren't in the office.

After using Salesforce's Customer 360 platform, users, such as Arizona State University, saw improvement within these areas of their organization:

- **Higher overall productivity and efficiency (94%)**
 - Salesforce is accessible from anywhere, allowing more time to focus on building relationships with applicants.
- **Better overall knowledge and intimacy (96%)**

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- Salesforce is an easy-to-use platform, which means employees can familiarize themselves with how to use the database quickly and easily
- **Better access to overall data and information (97%)**
 - Easy access to the database means employees understand what information is available and develop better strategies to connect with applicants
- **Better tech and app support (96%)**
 - Through online technical support and documentation, as well as programs such as the [Trailhead](#), the IT department can further develop their knowledge in Salesforce to solve any technical issues.

In terms of pricing, the Salesforce Customer 360 platform is \$100 per month, which is charged annually (\$1,200 per year).

For more information about Customer 360 for Higher Education Recruitment, please review the [Customer 360: Modernize Recruitment and Admissions page](#).

As was discussed during the meeting on March 7th, the final decision will need to be made by Friday, March 25th. I would greatly appreciate your feedback by Monday, March 21st. Then, I can contact Salesforce and create the presentation for the rest of the board before March 25th.

Thank you for taking the time to provide guidance throughout this important decision.

Best,

Erin Nordhof

Erin Nordhof

Technical Writer

Phone Number: (555)555-5555

Email: [firstname.lastname@gmail.com](#)

Website: [enbnwebsite.com](#)

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Algonquin College Employees Email

To: Algonquin College Recruitment Team

CC: department-manager01@algonquincollege.edu;
department-manager02@algonquincollege.edu;
department-manager03@algonquincollege.edu;
department-manager04@algonquincollege.edu

From: firstname.lastname@gmail.com

Subject: Algonquin's New Recruitment Platform & Training Sessions

To the Employees of Algonquin College,

First of all, thank you for all the feedback and guidance you have provided throughout the process of deciding what platform will be best for Algonquin College Recruitment.

After much consideration, the best platform for Algonquin is [Salesforce's Customer 360](#). Customer 360 makes it easier to organize contact information and share it among all the departments involved in recruitment.

Salesforce is a Customer Relationship Management (CRM) platform utilizing cloud technology to access the database from anywhere, not just through Algonquin College work computers. This allows different departments within Algonquin College to share information about recruitment and applicants for use in their own projects.

Here are a few ways Customer 360 can help Algonquin College's student recruitment:

- **Manages lead scoring and segmentation** by tracking which platforms bring in the most applicants and what types of applicants are interested in Algonquin.

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- **Social Media Recruitment tracks** what content converts prospective students into applicants and prospective student demographics. Salesforce also tracks conversion targets to see what motivates prospective students to apply and ensures that Algonquin meets their applicant goals.
- **Automates student lead capture** so that Algonquin College can see where applicants are accessing the application.
- **Executes targeted communications** with applicants at certain points in the college recruitment life cycle.

Next Monday, each department manager will contact their individual departments about further training and informational sessions. If you have any questions or concerns you would like addressed before the training sessions, please email me or your department manager.

Thank you again for all of your hard work, and I look forward to working with all of you in the upcoming training sessions!

Erin Nordhof

Technical Writer

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Website: enbnwebsite.com

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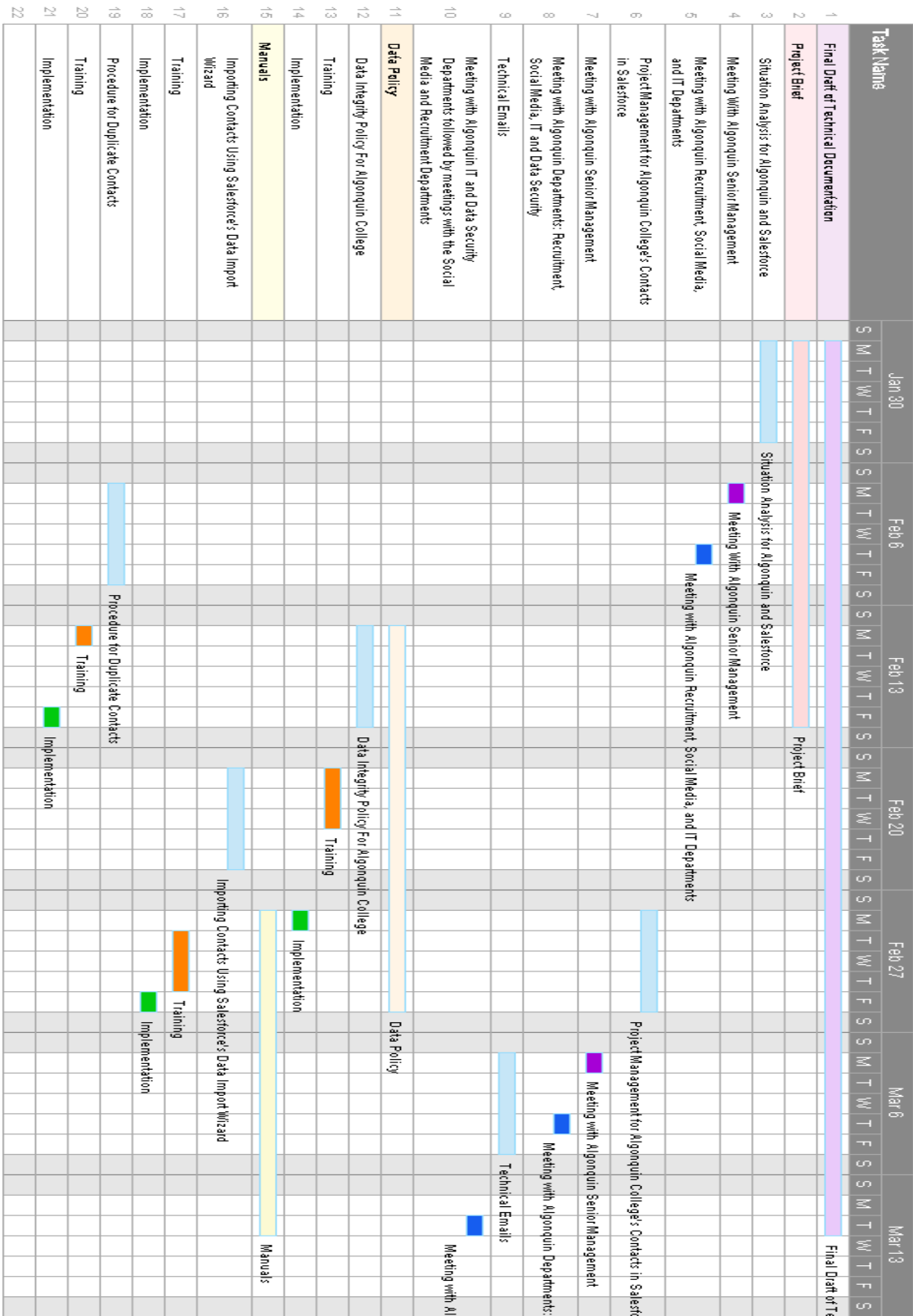
Appendix

Implementing Salesforce at Algonquin College (Glossary)

Term	Definition
Recruitment Team	All departments and teams involved in recruitment, such as Recruitment, Social Media, IT and Data Security.
Observation Day	The technical writer will need to work within Algonquin College's Salesforce system to understand the process and write about it. These observation days are an opportunity for the technical writer to talk with other employees in the Social Media and Recruitment departments about any issues or questions they run into when using Salesforce.
IT	Stands for Information Technology, which is run by Information Technicians. This department is responsible for maintaining and handling the data and technology the Recruitment Team uses.
Data Security Team	A department within the IT department specifically focusing on maintaining the data integrity policy developed by the technical writer. They will be considered their own department throughout this project.

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Project Timeline (Gantt Chart)



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Data Integrity Policy for Algonquin (Exhibit A)

Adding Data Into Salesforce

- 1) On **Homepage**, click **Leads**.
- 2) Click **+ New Lead**.
- 3) Fill in contact information.
- 4) Click **Save & New** at the bottom of the window.

Data Integrity Policy for Algonquin (Exhibit C)

Misuse of Data Investigation Process

1. Employees will be put on administrative leave until the investigation is complete.
2. Investigations can take anywhere between three to seven business days, depending on the severity of the case.
3. If there is no case against the employee, then the employee will be allowed to return to work at Algonquin.
4. If there is a case against the employee, then they will be terminated after the completion of the investigation.

Data Integrity Policy for Algonquin (Exhibit D)

Contacting the Data Security Team

Phone Number: (555)555-5555

Email: DataSecurity123@algonquin.edu

Office Hours: Monday-Friday (8 am-6 pm)

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Via Algonquin Employee Portal:

1. Login to **Algonquin Employee Portal**.
2. Click **Contacts** in the upper right hand corner.
3. The **Data Security Team** is on the list of contacts. Click on the **envelope** next to the Data Security Team.
4. A pop-up window appears where you can send an email to the Data Security Team about your concerns.

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