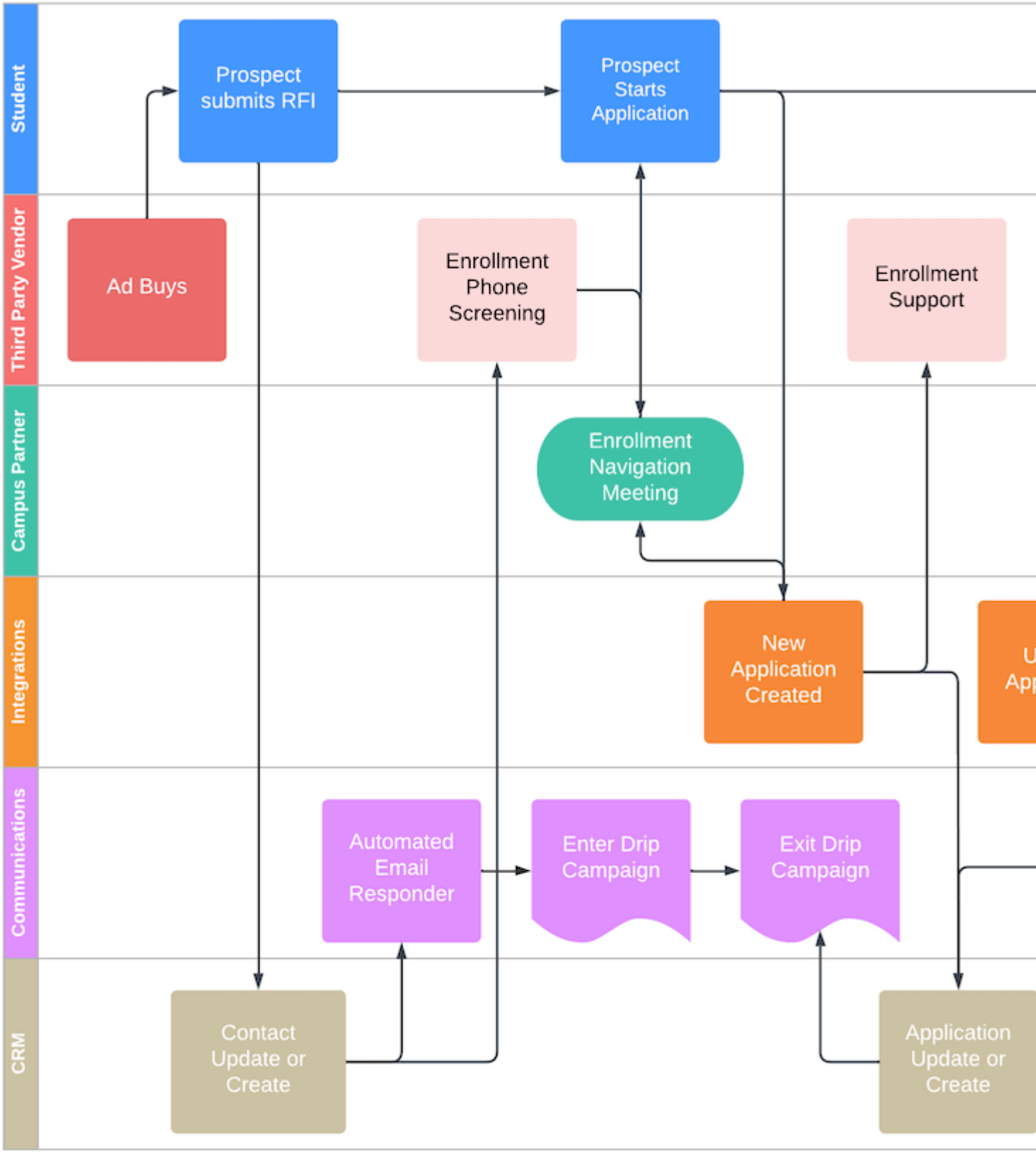
Published on *University of Colorado* (https://www.cu.edu)

IOS Business Process Overview [1]

November 30, 2023 by m.essa [2]

The map below generally shows how a lead travels through our internal systems, and what major events happen at each milestone.



IOS Business Process Map

Prospect Starts RFI

- Once a lead has entered our system through any given lead source, a Contact record is created or updated in Salesforce.
    - The values they selected on the RFI form will be populated in the "Program of Interest" and "Specialization" fields on the Contact record.
- Depending on the Program of Interest/Specialization selection, the prospect receives an automated response, thanking them for their interest.
- Depending on the Program of Interest/Specialization selection, the prospect is entered into a drip campaign.
- Depending on the Program of Interest/Specialization selection, the prospect is sent to a third-party call center for qualification.
- The prospect can be contacted by a campus-based Enrollment Navigator

Prospect Starts Application

- A contact is found or created via email lookup.
    - The "Primary Academic Program" and "Student Status" fields are updated on the contact record.
- An "Application" record is created or updated, and associated with the contact record.
- The prospect can be contacted by a campus-based Enrollment Navigator.
- Depending on the Program of Interest/Specialization selection, the prospect exists a drip campaign.
- Depending on the Program of Interest/Specialization selection, the prospect is sent to a third-party call center for Enrollment Navigation.
- Miscellaneous application and enrollment communication is triggered or sent.

Applicant Matriculates

- A Contact is created or updated via email lookup.
    - The "Primary Academic Program" and "Student Status" fields are updated on the contact record.
- An Application is created or updated via a unique identifier.

Student Enrolls

- A Contact record is updated or created via email lookup.
    - The "Primary Academic Program" and "Student Status" fields are updated on the contact record.
- A "Program Enrollment" record is created or updated and associated with a contact record.

- The student can be contacted by a campus-based Success Coach

To learn more about how data is stored and labeled in our Salesforce, click below.

Learn More [3]

Related Wiki Posts

- Intro to the Integrated Online Services Salesforce [3]
- Data Model and Tooling Overview [4]

Display Title:
Data Model and Tooling Overview
Send email when Published:
No

Source URL:https://www.cu.edu/blog/integrated-online-services/ios-business-process-overview

Links
[1] https://www.cu.edu/blog/integrated-online-services/ios-business-process-overview
[2] https://www.cu.edu/blog/integrated-online-services/author/108091 [3] https://www.cu.edu/blog/integrated-online-services/intro-integrated-online-services-salesforce-org
[4] https://www.cu.edu/blog/integrated-online-services/data-model