IMPROVING FORSYTH TECHNICAL COMMUNITY COLLEGE'S ABILITY TO DEVELOP AND MAINTAIN PARTNERSHIPS: LEVERAGING TECHNOLOGY TO DEVELOP PARTNERSHIPS

A disquisition presented to the faculty of the Graduate School of
Western Carolina University in partial fulfillment of the
Requirements for the degree of Doctor of Education

By

Alan K. Murdock

Director: Dr. Ann Allen
Assistant Professor of Educational Leadership
Department of Human Services

Committee Members:
Dr. Gary Green
Dr. Robert Crow
Dr. Marie-Line Germain

March 1, 2017

Dedication

I would like to dedicate this product to my mother, Linh Murdock, for all her encouragement over the years. It has been a long journey and I am happy to announce that it has come to an end.

ACKNOWLEDGEMENTS

I would like to acknowledge and thank my committee for coming together not only to approve this disquisition but for their patience and encouragement along the way. I would also like to thank Dr. Allen for taking on this disquisition.

A special thank you to my team at Forsyth Technical Community College. To Sharon Anderson, Jennifer Coulomb, Michael Harris, Wesley Hutchins, Ann Watts, Michelle Dixon, Russ Read and Lanette Tysinger. Thank you for your patience, contributions to the process, multiple survey trials and holding the division together in my absence.

A final acknowledgement to Western Carolina University for the courage to move forward with the disquisition process. The issues facing academics are real, with no silver bullets to fix complex problems. Programs like this enable those of us working toward change to make meaningful differences in an environment strife with inefficiencies and traditions difficult to circumvent.

TABLE OF CONTENTS

Page

LIST OF TABLES

LIST OF FIGURES

DEFINITION OF KEY TERMS

Customer Relationship Management (CRM). An online database that contain the college's accounts, contacts and history with businesses

Account. A business that has a relationship with Forsyth Technical Community College

Contact. A person that is employed by an account

Account Integration. The number of contacts associated within an Account. Ideally, a number greater than three is expected.

Work Based Learning. Formerly known as Cooperative learning and referred to as an internship in four year institutions.

Criticalization. A difficult time in an organization due to internal and external factors Goldstein, Hazy, and Lichtenstein (2010).

Plus/Delta. A quick assessment and feedback tool (Louis, 1995).

ABSTRACT

IMPROVING FORSYTH TECHNICAL COMMUNITY COLLEGE'S ABILITY TO DEVELOP AND MAINTAIN PARTNERSHIPS: LEVERAGING TECHNOLOGY TO DEVELOP PARTNERSHIPS

Alan K. Murdock, Ed.D.

Western Carolina University (March, 2017)

Director: Dr. Ann Allen

Forsyth Technical Community College (FTCC) face a shortage of funding to meet the demands of students, faculty, staff and businesses. Through this practitioner research, the utilization of the college's current customer relationship management (CRM) database advanced. By leveraging technology, the researcher assisted the college in meeting the needs of stakeholders and supported the strategic plan of Forsyth Technical Community College.

The researcher delivered two interventions (survey and professional development). The first intervention consisted of a pre- and post- intervention anonymous survey delivered electronically to all 650 full-time employees. The surveys acquired a response rate of 33% and 28%, respectively. In addition to determining that 71 employees were aware of the CRM the survey also served to inform all full time employees of the existing CRM and its relationship to partnerships.

The second intervention consisted of seven Professional Development training sessions each followed by an anonymous Plus/Delta. The Plus/Delta forms were categorized and used to develop better Professional Development sessions. After

completing the interventions, the researcher determined that the interventions were successful in raising awareness of the CRM. More importantly, the researcher learned that although the technology is very important in the CRM implementation, it is second to employee engagement. Face to face professional development with a member of the executive team elevated the importance of CRM usage. Employee engagement included step by step instruction, guided practice and real world data entry.

Findings from this practitioner research were that colleges intent on a successful CRM implementation must embrace three other design points to support implementation. First, engagement of executive management is crucial to users. Utilization by executive management alerts users to the importance of the CRM and encourages participation. Second, make the technology easy to navigate and demonstrate how utilizing the CRM can help their students, areas of control or building professional networks. A new CRM must compete for usage from users, difficult to use or irrelevant tools are used last. Finally, as best practices and research indicates change management is a necessity, training and support cannot be a onetime event. Utilization of an enterprise wide CRM must receive continuous attention to become an integral contributor to partnership development.

CHAPTER ONE: INTRODUCTION

Reductions in educational funding, student headcount and increased industry demands are forcing Forsyth Technical Community College to operate with insufficient resources. To counter the shortfall, Forsyth Technical Community College (FTCC) has elected several countermeasures. For this improvement science disquisition, the researcher will focus on the Transforming Partnerships part of the college's strategic plan titled Transformation (Appendix A). Dr. Gary Green, president of FTCC, has designated the researcher (Alan Murdock Vice President of Economic and Workforce Development) to lead this important effort for the college. We will discuss multiple options to increase partnerships but focused on the two interventions approved by the Disquisition committee, which include Dr. Green.

To develop and strengthen partnerships we will increase usage of our existing Customer Relationship Management (CRM). When successful, FTCC will begin the process of capturing its history with local businesses, improve our position when requesting funding through the Capital campaign, assist students with Work Based Learning opportunities and begin the process of data mining our collective interactions to assist businesses, students and drive decisions at the college through collected data.

Problem of Practice

Due to decreased funding, shrinking enrollments and increased community needs FTCC finds itself with insufficient resources to meet the needs of the community or to expand programming. The college is not able to pay market rates for top level instructors in difficult to staff teaching areas, such as welding and sciences. Local businesses and community groups are also looking to the college to support their efforts whether that is placing programming at their location or starting new programs to meet their workforce needs.

Over the last five years the overall funding for North Carolina Community Colleges has remained relatively flat (NC state aid allocations and budget policies). Although the fluctuation over the last five years has been insignificant (less than one percent), the ability to obtain maximum funding has become more difficult. North Carolina Community College funding is predicated on the amount of Full Time Equivalency (FTE) generated. The tiers associated with FTE funding have increased from three to four with the highest-level tier tied to science, technology, engineering and mathematics (STEM) training. The lowest level, tier 3, has seen a decline in value of eight percent since 2011. This tier of funding serves our students in College and Career Readiness program, who are our students with the greatest needs. These students are in pursuit of a high school credentials to become more attractive prospective employees to hiring companies and to move forward in the education process.

Over the last three years, FTCC has seen a reduction in enrollment. Spring of 2016 resulted in a reduction of nine percent from Spring of 2015 and Spring 2017 enrollment is down five percent from the previous semester. Student headcount is directly related to FTE funding as the college is funded primarily by how many hours students spend in a classroom. This reduction in student headcount is not uncommon when the economy improves. As more people find employment fewer are looking to the community college to retrain or upgrade their skill sets.

Finally, the college is frequently approached to hold classes at various off campus sites and develop new programming to support specific local industry needs. Currently, there are requests from local non-profit organizations and churches for FTCC to hold High School Equivalency courses at their location. Although this does increase the college's reach into the community, there are seldom enough students to cover the cost of hiring an instructor. The college also has a group of local Aviation companies that have requested the college to begin an Airframe and Power plant (A&P) program. The cost to start the program will be roughly $16 million when we consider a building multiple airplane hangars, purchasing equipment and hiring personnel. The benefits for initiating this program would be wide spread and directly aligned with our mission.

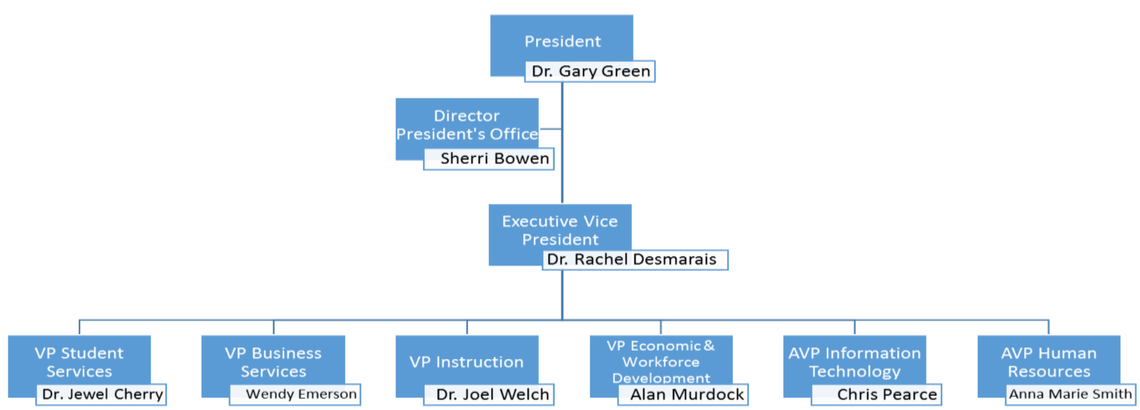
The mission of FTCC is "Forsyth Technical Community College provides flexible educational pathways to a competitive workforce for the community and global community" (FTCC, 2016a, para. 1). Without the labs and equipment necessary to offer relevant training we are not completing our mission and those who suffer are our students and business communities. Established and clearly developed existing partnerships inform the college of the needs of business and provide opportunities for students to experience business settings through Work Based Learning, company tours and panel discussion from local industry.

As a Community College, we are many times the only avenue to the middle class. Providing a path to the middle class impacts all people and is our way of enacting social justice. The ancillary results of strong partnerships allow students a glimpse of the expectations and rewards of the middle class. The history of FTCC demonstrates that as an organization we do have great positive impact on individuals, private and public organizations and businesses in our community.

History and Description of Forsyth Technical Community College

Forsyth Technical Community College (FTCC) is the sixth largest of North Carolinas 58 community colleges. Located in the Piedmont Triad area of North Carolina, FTCC serves two counties, Forsyth and Stokes. Currently, FTCC trains 9,000 students seeking a certificate, diploma or degree. Additionally, the college trains 19,000 students annually in non-credit classes such as Notary Public, Leadership, Job training, First Responder, Entrepreneurial training and several other areas.

The college is governed by a Board of Trustees chaired by Mr. Alan Proctor. The board directs its sole employee, Dr. Gary Green, President of Forsyth Tech. Dr. Green is responsible for all 635 full time staff and faculty as well as 1100 adjunct instructors and other part time personnel. Reporting directly to Dr. Green is the Executive VP, Dr. Rachel Desmarais and the Director of the President's office Mrs. Sherri Bowen. Reporting to Dr. Desmarais are four Vice Presidents and two Associate Vice Presidents. As the Vice President of Economic and Workforce Development I (Alan Murdock) report directly to Dr. Desmarais.



Source: Adapted from FTCC (2017).

Figure 1. Forsyth Technical Community College Organizational Chart.

The strategic plan, Transformation was born during the Cabinet (Executive leadership of the college) retreat in the fall of 2014. Annually, the Cabinet spends two to three days off campus discussing the previous year, going over reports, and talking about what direction they would like to see the college move. During the retreat of 2014 many topics were covered; candid conversations were had and consensus was reached that Forsyth Tech needed to be transformed.

Transformation was not a buzz word at the retreat but a couple of statements followed by personal stories shared helped the college Cabinet realize it was time to transform. One such comment was made by myself about the employment application process. I said, in hindsight I should have thought a little more about the employment application process being manual in 2011. Applications were completed and mailed in for review instead of electronic submission. This should have been a red flag that the college was not technologically savvy. Vice President Cherry (Student Services) stated that the college was "Old School" indicating that we were not moving forward in the knowledge economy. When discussing toxic people in the workplace Vice President Desmarais asked "When is enough, enough?" These and other discussion led to the Strategic plan of Transformation.

Transforming culture, process, partnerships and teaching and learning. As with any initiative, someone must be accountable for it to move forward. Each of the four parts of the strategic plan was tasked to one VP. I was tasked with Partnerships, Wendy Emerson, VP of Business Services, was assigned Processes, VP of Instruction was assigned Teaching and Learning and the EVP was assigned Culture.

Historical and Current Initiatives to Address the Problem

Partnerships enable two or more groups or organizations to pool resources, talents, space and other resources to reach a common goal. Many colleges do not have the resources to complete their work and need to partner to be successful for their community and students. The complex practice of partnering between a college and a business requires support of the colleges top leadership and its representatives (Sundberg, 2002).

Forsyth Technical Community College is not new when it comes to developing and maintaining partnerships, FTCC has been fortunate to have a strong partnership with Goodwill Industries of Northwest North Carolina. This partnership started over 30 years ago, with a handshake between the president of Forsyth Tech and Goodwill Industries. To this day there are no contracts or Memorandums of Understanding between the two entities. We continue working together by sharing and redesigning space, providing leads for one another and remaining in constant contact. As of January 1, 2017, I assumed the role of Board Chair for Goodwill Industries of Northwest North Carolina. This is important because it shows interaction between two partners outside of monetary or space agreements. The fact that Goodwill Industries of Northwest North Carolina trust me enough to serve as their Board Chair strengthens the relationship.

The Toyota T-TEN strategic partnership was created through an organization called C4 which is supported by the Association for Career Technical Education (ACTE), designed to develop strategic partnerships. Through this successful partnership, Forsyth Tech has been designated a center of excellence in the automotive industry. This designation and our successful students has led to an increase in territory we cover from Toyota. We are now able to place students in Toyota dealerships in NC, SC, and GA.

This has also led to other auto manufactures requesting that we create the same program for their automobiles (ACTE, 2016).

President Green has been very aggressive in meeting the needs of the college and the community. Over the last three years FTCC has started and completed the following nine initiatives:

1. The college created a Customer Relationship Management (CRM) database. The database allows the college to track relationships and keep an electronic history of the interactions. This is crucial to maintaining partnerships. As people enter and leave organizations, there is a gap in interactions that may result in the partnership dissolving.
2. The college initiated a capital campaign headed up by Mamie Sutphin, VP of Institutional Advancement. Ms. Sutphin has since moved on and has been replaced by Dr. Rev. Corey Miller. The campaign will help to cover cost associated with developing new programs and scholarships for students. As of January, 2017 the capital campaign has raised 16 of the 18 million goal
3. Alan Murdock was appointed as the front person for the state bond referendum in March of 2016. Forsyth Tech will receive 5.9 million dollars for infrastructure improvement and building renovations. The state bond was approved in March of 2016. These monies will afford FTCC the opportunity to complete renovations on the main campus and build a facility in Stokes County to support Trades careers.

4. Forsyth Tech was approved for a Forsyth County bond in the amount of 65 million dollars in November of 2016. These dollars will go to programing and construction needs for the college.
5. The college began its new strategic plan for fiscal years 2015–2020. The main theme is transformation, the transformation of Culture, Process, Partnerships and Teaching and Learning. Although everyone at the college is responsible for all parts of the strategic plan, I have been designated to work with transforming partnerships.
6. Renewed focus on expenses. All positions whether new or replacement are now under greater scrutiny for funding. Classes must now have minimum enrollment numbers or they are cancelled.
7. The college now charges for utilization of some of its space. This initiative is not necessarily a revenue stream, but a cost reduction measure.
8. Hired additional staff in our Self- Support areas, to increase a revenue stream that is not tied to the Full-Time Equivalency funding model. Additionally, two members of my staff have had their salaries transferred from state funding to Self-Support funding.
9. The college has begun calling students that have registered for classes but were dropped for nonpayment.

As evidenced by these nine initiatives there are many completed and ongoing interventions to meet the needs of the college. Many of these are dependent on internal and external relationships. Therefore, someone needs to be the one responsible for keeping these important interventions front and center. Primary responsibility for all areas of FTCC falls on the shoulders of President Green.

Forsyth Technical Community College Facing Criticalization

Forsyth Technical Community College is one of 58 community colleges in North Carolina. The reasoning behind the 58 community colleges is that every person in North Carolina should be no more than thirty minutes from advanced education. The college is administratively run by Dr. Gary Green as President of Forsyth Technical Community College. Dr. Green reports to a board of trustees appointed by Forsyth County government, the North Carolina Governor's office and the Winston Salem Forsyth County school board. The college is then divided into six divisions, each managed by a vice president, each operating autonomously but connected in specific functions. This pushes Forsyth Technical Community College into the Divisional form as a structural configuration (Bolman and Deal, 2008). FTCC is undergoing many changes due to internal and external forces. This paper will sample some of these forces to develop a basic understanding of FTCC and glean an understanding of the people and skills needed to become a college that values partnerships. Increasing and maintaining the number of partnerships requires technical and interpersonal skills.

Forsyth Tech is facing criticalization on several fronts locally and nationally. The ability to meet these challenges will help the community college survive. Table 1 describes a few of the criticalization elements or "conditions in an organization that signal a critical period" Goldstein, Hazy, and Lichtenstein (2010) including the symptoms of criticalization as well as employees that may help resolve the critical issue. Addressing these conditions will push FTCC towards becoming a premiere college.

Table 1

Criticalization Symptoms at Forsyth Technical Community College

Conditions	Symptom	Employee
An increase sense that what we had been doing is no longer working or appropriate	Declining enrollment Increased cancellation rate	Executives, mid-level managers, front line staff
A sense of urgency begins to enter planning sessions and executive meetings	Reduced budget	Executives
Performance declines due to shifting markers and changing environments—the organization's traditionally reliance of specialized activities or offerings is no longer effective.	Performance funding Political affiliations Declining unemployment rate	Executives, mid-level managers, front line staff
Increased interpersonal conflict—constructive and destructive—puts line employees and supervisors on edge	Partner relationship	Executives, mid-level managers, front line staff

Source: Goldstein et al. (2010)

Theoretical Framework

The theoretical framework for this intervention follows the Bolman and Deal (2008) model as we look at Forsyth Tech in five years. Bolman and Deal state that an organization can be looked at through four lenses: Structural, Symbolic, Political, and Human Resources (Bolman and Deal, 2008). Through these four lenses we can examine how to transform into an organization that values partnerships, continuously attracts new partners and does all of this while empowering employees (Table 2).

Table 2

Theoretical Framework

Framework lens	Current state	Future desired state
Structural	Reactive to internal and external forces	Multi source data driven decision making
Symbolic	Only highly noticeable ideas are acted upon	Partnerships are meaningful throughout the organization, partnership award
Political	Programs are awarded based on media	The sum is greater than the parts
Human Resources	Skills based	Empowering and fair

Like any large organizations with separate divisions, departments and ideas on how to fulfill our mission, Forsyth Technical Community College is subject to multiple forces that shape its decision making. A few of the most prevalent of these internal forces are, lack of financial means, entitled employees and a competitive separation between divisions. The lack of financial means leads to inflation of the issues with the entitled employees and the competitive separation between divisions. Forsyth Tech. has seen several instances where employees looking for equipment or staff will exaggerate their needs to enhance their opportunity to get a larger slice of the pie or develop a stance that what they do is more important than others. These aggressions have impacted internal relationships to the point that the college is not operating as well as it could to serve students and businesses.

Just as with internal forces, Forsyth Technical Community College is faced with external forces that drive its decision making. The number of external forces are much greater than that of the internal forces. To some degree, every tax payer in North Carolina is an owner of Forsyth Tech. Compound that with politicians, municipalities, businesses, philanthropists, local media and state and national agendas and a system develops that is constantly changing to meet the needs of all. Since Forsyth Tech does not have the financial means to meet all needs, there is an increase in conflict. Developing and maintaining partnerships can ease this stress factor. For instance, a local company would like us to create a class that introduces potential new hires to a manufacturing environment. The issue for the external organization is that they hire people with no experience working in a manufacturing environment. Once on the job, the new employee discovers that manufacturing is not for them and they quit, resulting in a significant turnover rate for the organization.

Through multiple external and internal partnerships, I will develop a course that introduces students to manufacturing environments and develop a pool of qualified and informed candidates for the partners to interview. To address the issues listed here and become a premiere college, changes need to occur at all levels. These changes will need to come in a variety of mediums such as skills, attitude and process revamping. Although all employees will need to adjust, the executive team sets the tone and must be the example for the college.

The skills required for Forsyth Tech to work through the criticalization period will initially fall under three areas, although additional areas must eventually be added to create an organization wide shift at the college. The three areas for skill development (Table 3) are focused on executive and administrative level employees and fall under the following headings (People, Technical, Thinking). The purpose behind these three training headings is to identify the skills state of mind executives and administrators need to see a bigger picture than just their area of concern. Additionally, the interventions will enhance their capabilities to work with one another and see issues that may impact other areas of the college and look for entrepreneurial solutions that satisfy all areas of the college.

Table 3

Skills needed at Forsyth Technical Community College

People	Technical	Thinking
Relationship building	Budgeting	LEAN
Emotional Intelligence	Understanding the process	Systemic
Negotiation	Entrepreneurial	Outcomes based

In face of the many challenges, Forsyth Technical Community College has an opportunity to persevere. To become a college that leverages partnerships, Forsyth Tech. must not only invest in their incumbent workforce but hire people that fit the new organizational philosophy. Change must be led by the executive and administrative teams if it is to become a permanent fixture at the college and lead the college to change.

Increasing utilization of the Customer Relationship Management (CRM) will enable FTCC to leverage existing and new partnerships. The ability to conduct data mining with the CRM will be beneficial to many members of the college community. Our Work Based Learning group is constantly looking for businesses that will take on one our students as an intern. They rely on their own network as well as companies calling in asking for an intern. Utilizing the CRM, the Work Based Learning group will be able to identify all the manufacturing companies that currently have a relationship with FTCC.

Once related manufacturing companies are identified, the department can contact these companies since they have an existing relationship with FTCC and inquire about internship opportunities for our students. This builds a trained workforce for the companies and leads students on an educational pathway to enter the workforce with competitive skills as we describe in our Mission statement. As we progress in this paper we will discuss alternative means of developing partnerships. Some of these additional means were not approved for this action research but will be incorporated as the development of the CRM and its infusion into Forsyth Tech continues.

Scholar Practitioner Description

I was selected to lead the partnership portion of the college’s strategic plan, for a variety of reasons. Primarily, my staff works in the community, developing relationships with local businesses, nonprofits, government agencies, the community and other educational institutions. I have a positive track record working with large organizations through economic development and sales. I have also used online tools in the past to track the sales pipeline such as Salesforce and participated in sales meetings within a college text and within the for-profit arena.

The idea of sales at a Community College are foreign to most employees. Many of our employees believe that if we develop a program, students will automatically be drawn to enroll. That may be true when we are experiencing a depression resulting in a high unemployment rate. People looking for work or to continue their subsidies turn to educational institutions for assistance obtaining new skills, locating employment or meeting the requirements of state assistance plans. This is not necessarily true when we are facing full employment, as we are now.

As a former Sales person, I am familiar with the skills and processes required to develop a Sales team. Realizing that very few of the current employees were hired on their ability to close sales, the training to do so must be administered slowly. The Economic and Workforce Development division previously hired a sales professional, unfortunately he passed shortly after his hiring. In addition to training employees I must create an environment where sales are considered an asset and not an affront of the community college philosophy. To that end the college will continue investing in Sales training for the Business and Industry team headed by Dean Coulombe. Although Dean Coulombe does not have a background in sales, she does come from the corporate world and understands the importance of developing partnerships and cultivating sales. Sales help the college, students and the community.

In the next chapter, we discuss the research of the problem of practice as well as several interventions proposed to offset the decline in funding. Completing all of the proposed interventions would have been exciting work, that would have required a significant time commitment that a full-time employee is not able to give. The disquisition committee determined that moving the CRM forward was the wisest choice. Since the disquisition never ends, the interventions not completed during this process will become part of the plan to move the college forward in developing partnerships that help all areas of the college.

CHAPTER TWO: RESEARCH AND PROPOSED INTERVENTIONS

Little educational research has been completed regarding the process, development or value of partnerships at the community college level. There have been several case studies written highlighting successful partnership endeavors.

> Sadly, although these partnerships are growing in popularity, relatively little is known about them. Of the research that exists, most is descriptive, focusing on a single institution or partnership. Of equal concern, most of the research highlights the K-12 institution and fails to discuss the perspective of the community college or four-year institution. (Amey, Eddy, and Ozaki, 2007, p. 5)

To even a lesser extent is research around community colleges and the characteristics to partner effectively.

> To fill this gap in the literature and ultimately strengthen these partnerships, it is critical for policy makers and scholars to consider the process involved in establishing these arrangements, how they function and the factors that help sustain them over time. (Amey et al., 2007, p. 5)

A collateral outcome of this improvement science project will start the conversation regarding an appropriate process for Community Colleges to follow when developing partnerships.

The continued reduction and stretching of resources is forcing community colleges to do more with fewer dollars. In fact, states are spending $2,353 less per higher education student across the nation from 2008 to 2013 (Oliff, Palacios, Johnson, and Leachman, 2013). In North Carolina, the funding for education has declined $1,710 from 2008 to 2013 per student (Oliff et al., 2013, p. 5). The research reveals that the reduced education funding in North Carolina has negatively impacted community colleges' ability to hire the most qualified faculty. As Jennifer Haygood, executive vice president of the NC Community College system states "We are very concerned about what we are calling a salary crisis at our colleges" (Arcieri, 2015, p. 7). The inability to hire the faculty required to bring together good instructors may have lingering effects on the community college that go beyond the immediate budget shortfall. Community problems are often so immense that community colleges can only respond effectively by forming organizational partnerships (Kussrow, 1995). Forsyth Technical Community College can develop additional partnerships, but needs to develop a systems approach and long-term goals to capitalize on current partnerships as well as building new ones.

The continued decline in funding will have long term effects on community colleges. As community colleges try to keep profitable classes open other departments may need to relinquish portions of their budgets. These released budgets may result in fewer resources for students, delayed building maintenance and fewer STEM instructors (Katsinas, Tollefson, and Reamy, 2008). Continuous neglect for the financial well-being of the college has resulted in programming and infrastructure delays at Forsyth Tech.

As the economy improves and the unemployment rate declines, community colleges enroll fewer students. The reduction of students has a direct negative impact on state funding, which is difficult to manage if the college increased personnel and programs to meet the needs during the high unemployment timeframe. Fortunately, Forsyth Tech has been conservative in its hiring during the recession and was only faced with a small reduction in forces due to the budget shortfalls.

To meet budgets, community colleges nationally have embraced disruptive innovations such as becoming private, mandating full time enrollment, building dorms, abolishing remedial education and developing strategic long-term relationships with business and industry (Myran, 2013). Of the options listed above, the only one viable in North Carolina is to develop strategic long-term relationships with industry and community partners. The level of subsidized funding from the state of North Carolina, makes transitioning into a private company unreasonable. Limiting enrollment to full time students only limits the college's ability to reach many students and abolishing remedial education would leave too many students behind. For many students, community colleges are the only realistic means to advance in their careers. No cost remedial training and state subsidized education place it within reach of those that have the least.

The Education Advisory Board (EAB) published *Reaching Search and Shop Students* (2013). A portion of the book is dedicated to evaluation, purchase, implementation and descriptions of position responsibilities for a CRM rollout. Their research consisted of interviews with 200 individuals from universities, CRM vendors and marketing professionals. None of the 200 persons interviewed were from a Community College. After their exhaustive research, they could identify five risk points when implementing a CRM (Table 4).

Table 4

Risk Points

Risk Points	Definitions
Poor objective setting	Failing to set Anchor initiative
Inadequate planning and scope	Attempting “Big Bang” implementation
Implementation missteps	Improperly staffed teams
Lack of change management	CRMs impact daily routines
Inadequate post implementation operations	CRM is an ongoing process not a one-time event
Lack of senior management	Leaders disengage before completion

Source: Education Advisory Board (2013)

Literature Review for Proposed Interventions

Networking was selected as a potential intervention for this improvement study for four reasons. The first reason behind choosing networking is that research shows that small to medium sized companies benefit from networking (Schoonjans, Van Cauwenberge, and Bauwhede, 2013). Secondly, networking efforts are easily quantifiable and therefore lend themselves to qualitative research. Third, networking efforts are low costs. Finally, other interventions fall under the umbrella of networking. Most of the costs associated with this intervention will be tied to mileage to and from networking events. Other options to increase the number of potential partners included increased marketing, new programs and expanding the college’s reach into foreign countries.

Another factor for proposing networking as an intervention comes from a recent study by Mitrega, Forkmann, Ramos, and Henneberg (2012, p. 744). The authors determine that relationships fall into three stages: initiating, developing and termination. Although Forsyth Tech has not reached this level of analysis, the authors do advocate three very sound ideas. First, successful companies are systematically searching for new partners. Second, social relationships can be transformed into institutional relationships.

Finally, partnerships fail if they are not nurtured. We see these truths at FTCC every day. A successful local company has contacted us about assisting them to solve a problem. Since 2011 they have grown from a company of 25 to over 400 full time employees in Winston Salem, NC. Due to limited space, they have also built a new facility in another NC town and began hiring 200 full time employees. They would like to continue their growth in Winston-Salem NC, but without additional airplane hangars to conduct their work, they are not able to grow We have partnered with this successful company to build a set of hangers where their new workers and our students will work side by side. Thereby creating learning and employment opportunities for students, helping a company grow and improving the local economy.

There is also the opportunity to convert social relationships to professional. Recently, I was approached by a colleague who sits on the Forsyth Humane Society Board. One of her fellow board members, an employee of the Department of Social Services approached her with an opportunity. This individual would like to speak with the college about training their staff in the future. Finally, we also see the downside of partnerships, when we do not continue working with them. During a recent job fair held at one of the college facilities, I met a recruiter from a local company. He was disappointed in the colleges lack of interaction with his company, primarily the difficulty of accessing our students. I apologized and let him know the college only had one person positioned to deal with business and student interactions. He responded by letting me know that the college next to us, which has more students and more companies in their service area was very responsive to his requests. This indicates that the current status of partnerships at FTCC has room to improve beyond the indications of our recent data indicators.

The team of networkers will be required to track their interactions at formal and informal networking events during each plan, do, study, act (PDSA) cycle (Langley et al., 2009). The data will be logged in the customer relationship management database. At the end of each cycle the data will be manually extracted and analyzed. As the researcher analyze the data through Statistical Package for the Social Sciences (SPSS) searching for correlations. Correlations between setting follow up meetings at the networking event or requesting a follow up meeting via email afterwards. Listed below are a few of the data interactions that may occur through networking.

1. The number of networking events
2. The number of contacts
3. The number of appointments
4. The number of sales
5. The amount of training sold, donations received, students connected

Utilizing networking as a building block to developing partnerships is not a new science, but one that is constantly evolving. As shown in a recent Flemish study of small- and medium-sized enterprise (SME) that coordinated networking efforts.

Networking facilitates the acquisition of knowledge, skills and resources essential for firm growth and survival that would otherwise be difficult to obtain. SMEs particularly benefit from networking as they often lack sufficient resources and knowledge to deal with the environment in which they operate (Schoonjans et al., 2013, p. 179). Based on the Schoonjans et al.'s (2013) study using networking as an intervention to create additional partnerships will be successful in meeting many of FTCC's articulated objectives. Networking helps the college develop more partnerships as required by the strategic plan. These partnerships can in turn provide additional resources to the college; provide a workforce to local businesses and lead students to jobs; increase our enrollments; and support the community that FTCC serves.

To sustain the pursuit of additional partners a culture shift must be initiated. The networking intervention will move the needle temporarily but lose momentum if the FTCC culture does not recognize the value that it can bring to the college. To sustain the networking intervention, the college must in tandem pursue a culture shift. Per Matheny and Conrad (2012), for internal change to occur a social cognition model must be used. Essentially, this is the communication/sense-making portion of the culture shift.

Networking as an Intervention

The conceptual framework for this improvement science networking intervention is based on six basic elements of sales (Mitrega et al., 2011). Ideally, participants will attend networking events, schedule a meeting to learn more about another business issue and eventually end up with a deliverable. For this intervention, we will focus on contracts as deliverables. As we progress in the process the definition of deliverable may expand to include, referrals, invitations to other networking events and industry information.

Figure 2. Networking process. (Mitrega et al., 2011)

A process does not currently exist to track potential partners. Tracking and nurturing are left to the devices of the individual with the relationship. Secondly, there are easily quantifiable measurements to this improvement process. A simple form completed monthly, will be tabulated and analyzed. Finally, it leads to a culture shift of accountability through the Customer Relationship Management (CRM) software. Contact, Account, Proposal and Contract information will be uploaded to the CRM and the data analyzed to assist the college in data driven decision making.

The intervention design team consisted of six members including the researcher and one-member external to the college. Each member was chosen not only for purposes of this disquisition but their role in creating partnerships for the college and their control over processes. Roger Cubicciotti a local industry representative, strong supporter of the college and has developed several national professional relationships. Mamie Sutphin was the Vice President of Institutional Advancement and Executive Director of the Forsyth Technical Community College Foundation. She led the college's capital campaign and was dependent on identifying the college's current partnerships to ask for contributions toward the campaign. Mamie, having left Forsyth Technical Community College was replaced by Rev. Dr. Cory Miller, the new Executive Director of the Forsyth

Tech Foundation. Wendy Emerson is the Vice President of Business Services at Forsyth Technical Community College and handles all of the college's contracts and funding. Pamela Shortt is the Dean of Business and Information Technology. Pamela has been with Forsyth Technical Community College less than two years but has proven to be collaborative and a true partner in spanning boundaries between divisions within the college. Jennifer Coulombe is the Dean of Business and Industry training and reports directly to the researcher. Jennifer is the face of the Economic and Workforce Development division to the business community.

A very important part of the research turned up a Partnership Development Model from (Amey et al., 2007). The Partnership model made it much easier to talk about the elements of a partnership in a linear format. The model presented in Figure 4 has become the base for partnerships within the Economic and Workforce Development division at Forsyth Technical Community College. In addition to this model, management members of the Economic and Workforce Development division were required to read and report on a book by some of the authors of the model.

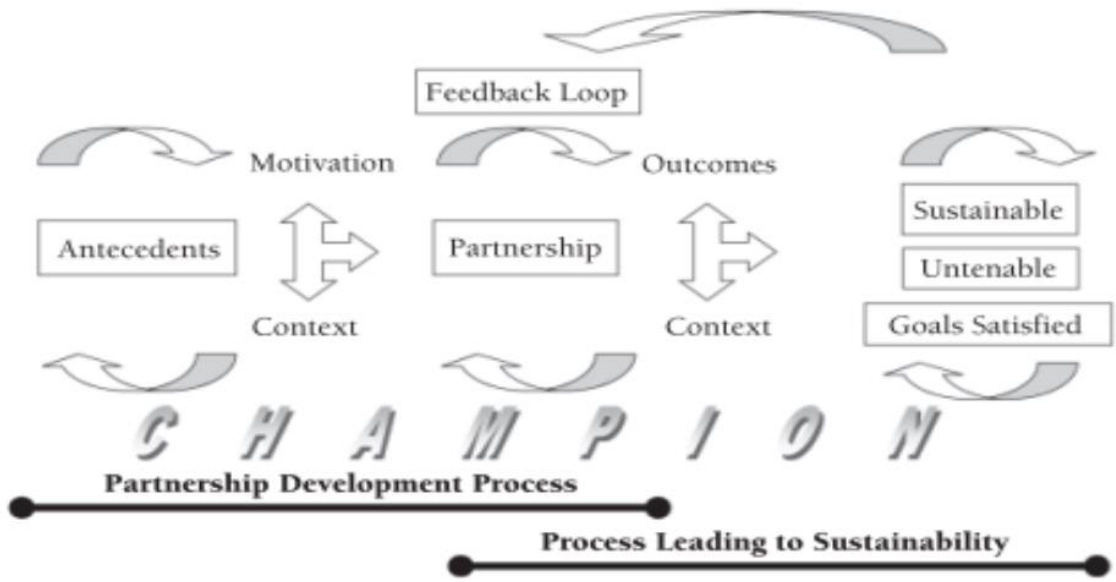


Figure 3. Partnership Development Model (Amey et al., 2007).

Implementation and Assessment of Intervention Plan

The goal is to increase the number of clients served by Forsyth Technical Community College. We intend to achieve this goal by increasing networking activity and tabulating follow-up interactions from the team through Sugar CRM, an open source customer relationship management software program. Based on previous studies in other contexts and organizations increasing the number of clients, should help FTCC meet the budget shortfall and set the groundwork for developing future partnerships.

Proposed Sales Team

Another proposed intervention was to develop a Sales team. At the time of this paper the Sales team has not been created. The participants will be required to attend one networking event weekly. At each event, they are to introduce themselves to six people and obtain contact information. From these six people, they are to schedule a minimum of one meeting. From the minimum of four meetings a month they should close one sale. If the four participants can follow this process, each should generate one contract a month resulting in 48 new clients on an annual basis. Average contract value at Forsyth Technical Community College is $924.00. Adding the 48 new clients would increase sales by $44,342 for the current fiscal year. The additional $44,342 would be an increase of 35% in contract training sales.

The participants will be tracked through self-reporting via Sugar CRM and monthly meetings to discuss sales leads. The monthly meeting will be held by the Vice President of Economic and Workforce Development, the supervisor of all the participants. This meeting will also enable the participants to bring to light any issues with the current process. Following the 90 day Carnegie model, the process and data will be evaluated as a part of the Plan Do Study Act (PDSA) model (Langley et al., 2009). The PDSA model encourages participants to develop an intervention, complete, study the results and act upon those results by changing the process for better results.

Figure 3 depicts the standard networking sales cycle. The premise of the cycle, for this intervention is that if four people each attend two events they should generate six meetings. From these six meetings two proposals will be delivered based on customer needs and that ideally one will be converted into a contract.

Data collection and analysis for the anticipated interventions will be mixed methods (qualitative and quantitative). Combining both quantitative and qualitative methods provides a better understanding of a problem than either can do alone (Creswell, 2012). Given the complex nature of partnerships, it is evident that a mixed method must be used to show improvement within the organization, not only from a balance sheet but from cultural standpoint.

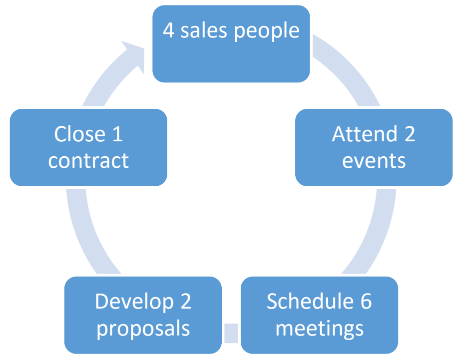


Figure 4. Sales cycle.

The quantitative portion of the disquisition addresses a means by which to track networking efforts between FTCC and partners. To develop more partnerships, we will start tracking our networking efforts. The sales people will track the number of networking events that they attend, formal or informal. From each event, they will track the number of follow up meetings that are generated. Finally, they will track the number of deliverables (Contracts, Student Placement, Gifts, etc.). We will use our Customer Relationship Management software (SugarCRM) to log the interactions, meetings and subsequent activities.

The researcher designed and conducted a preliminary survey in Fall of 2015. Two open ended questions were asked in the survey and responses were analyzed to identify key terms.

- What comes to mind when you think about partnerships at work?
- What would you suggest Forsyth Tech do to increase its number of internal and external partnerships?

Data were collected at monthly sales meetings. Participants submit their Template for entering Network efforts at the department level (Appendix B). Additional contract and notes data will be pulled from the Customer Relationship Management database. At the conclusion of each 90-day cycle the design team will review the data. The data will be compared against the goal of one new contract customer monthly. Notes placed in the CRM will be reviewed to see if connections were made between the client and other parts of Forsyth Tech. For instance, were new partners invited to sit on an advisory board or offered the opportunity to post open positions on our website.

Ethical Considerations

The Disquisition proposal team recommended that this sales team intervention be eliminated as part of the disquisition study. Although we have people that are responsible for sales we have yet to formalize a sales team no members of the sales team were hired as salespersons. Their talents are in developing relationships or training, not in identifying opportunities and closing deals. While reviewing the data, it must be kept in mind that these people have limited training in the area of sales. Therefore, judgement will not be passed on their success or lack of sales during the cycles. To keep these participants' identities safe the researcher will conduct the interviews alone and report back to the design team. The work on development of a sales team continued during the duration of the two interventions (Professional Development and Survey) implemented. However no reportable data were collected.

Professional Development Intervention

Another proposed intervention was Professional Development training utilizing the CRM. The Professional Development intervention was designed to complete three objectives. The first objective was to train college employees how to use the CRM. The second objective was to interact with the users and during the training to answer questions and put to rest any fears they may have of using the CRM. Finally, engage the participants through an anonymous Plus/Delta Louis (1995) form to extract feedback regarding the professional development session.

Training

Completion of the CRM Professional Development enabled participants to access the online application. In addition, participants, learned how to add accounts, contacts, notes and history and task to the CRM. They also left knowing how to mine the CRM for data such as identifying all the manufacturing companies partnering with the college.

Interaction

The second objective will be to interact with the class and uncover their thoughts or concerns about using the CRM. If possible to answer their questions and help lead them to a point of self-discovery as to the CRM's value to their departments and students. This was also a method to help them actively participate in the formulation of the CRM as it matures. We cannot say for sure that they will feel ownership from their input and therefore play a more active role in populating the CRM with data, but we have given them the opportunity.

Plus/Delta

At the completion of each training session each participant will be given a plus delta sheet regarding the usefulness of the training session. Responses from the plus delta forms will be reviewed and integrated into the next training session. This will enable me to become a more effective teacher and deliver more effective training to subsequent classes. Feedback from the Plus/Delta will be incorporated into subsequent professional development sessions.

Anonymous Survey

An anonymous survey will be delivered to full time FTCC employees via email with a Qualtrics link to a three-question survey at the beginning of the intervention and at the completion of the second 90-day cycle.

1. "Do you use the Forsyth Tech's Customer Relationship Management (CRM) database?" (Yes or No)
2. If you answered "YES" to the previous questions, how often do you use the CRM? (Daily, Weekly, Monthly)
3. "Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college in meeting its needs for equipment, positions, money, etc.?" (Low 1, high 10)

The goal after one cycle of professional development is to see gains in the number of employees aware of and using the CRM as well as a belief that the pursuit, development and maintenance of partnerships are important. Ideally, if every employee completes the survey they will become aware of the CRM.

The data gathered from the quantitative portion of the intervention in many ways will be reliable. Confirming contracts sold and proposals submitted can easily be gathered through the CRM. The efforts leading up to the contracts is more questionable as I will rely on the participant to complete the data form accurately. The qualitative data is more subjective as I will be looking for a culture shift. Both sets of data will be suspect due to the short length of the interventions, relationships that become partnerships take time to develop.

Analysis of Assessment Results

Procedures used to conduct analysis of results:

- Monthly tally sheets (see Appendix B) and CRM data will be used for analysis.
- Interviews completed after each cycle
- Quantity of introductions through the CRM to other parts of the college
- Survey results
- Plus/Delta results

Potential Limitations

Networking is a tried and true tactic to increase sales for a multitude of organizations. It is not a means to immediate success, it is fraught with limitations. In Winston-Salem, the opportunities for organized networking is typically conducted by the Winston-Salem Chamber of Commerce, through early morning coffee events at local businesses. These venues offer the host an opportunity to showcase their establishment, but is typically attended by sales people. Resulting in sales people trying to sell to other sales people and not company decision makers. Forsyth Tech networkers will attend these meetings but may end up filling the CRM with data that is not truly a lead but data. It will be important to train the Forsyth Tech networks on how to work at a networking event, ask questions that lead to potential partnerships and determine if a person they meet is worth the time and effort to add them to the CRM. Too many of these contacts that do not convert into a sales opportunity may be discouraging to the networker. This type of networking is potentially limited to local companies instead of larger more lucrative statewide or national contracts.

To help bridge the gap we can look at the existing literature and what it says about creating, maintain and growing partnerships. Shearer and Maes (2014) and Kisker and Carducci (2003) are in some ways different when considering characteristics of successful partnership (see Table 5).

Table 5

Creating, Maintaining and Growing Partnerships

Shearer and Maes (2014)	Kisker and Carducci (2003)
• Each stakeholder seeks all-win solutions. • Communication flows freely. • Trust and openness are norms. • All understand that no one benefits from exploitation of the other. • Innovation is encouraged. • Each partner is aware of the other's needs, concerns, and objectives. • Overall performance and outcomes are improved.	• Recognition of community need that calls for action • Establishment of shared mission and goals • Value and benefits for all partners • Strong leadership • Shared governance and accountability

Kisker and Carducci (2003) place much emphasis on leadership, accountability, shared mission and urgency. In contrast, Shearer and Maes (2014) are focusing on communication lines, all-win solutions and trust. Shearer and Maes's (2014) list was developed 11 years later and may be the result of changing needs of not just organizations but individuals. Thornton (2013) also follows Shearer and Maes (2014) when he states, "Successful partnerships are based on equity and mutual respect" (p. 57). Unfortunately, there must be a commonsense measure to partnerships as they require resources to be successful. "From a business perspective, there must be an investment performance to corporate-community partnerships" (Esteves and Barclay, 2011, p. 190).

We cannot forget that the idea behind partnering is to help ourselves and others. What is evident from the literature review is that there is a level of leadership skills that need to be honed at all levels of the college.

CHAPTER THREE: INTERVENTION ONE

This first intervention was a pre-and post Qualtrics survey delivered to all full-time employees electronically. Both the pre-and post-surveys were anonymous and contained consent language (Appendix E) The survey was to accomplish three goals. Primarily, make the community college employees aware of the CRM. Secondly determine a baseline of the employee's feelings towards partnerships and its ability to assist needs of the college. Finally, an identical post survey was delivered to determine if over the course of the research, more employees were aware of the colleges CRM and if the belief that partnerships could assist the college with its needs increased. Prior to leveraging the Customer Relationship Management (CRM) database there needs to be sufficient information entered. To notify the college community of the CRM, the researcher delivered an electronic anonymous survey with consent language. The intervention will be a pre-training intervention survey of all FTCC employees to determine a benchmark of employee awareness of and usage at the onset of the action research. An identical post survey will be administered at the completion of the intervention two and compared to the pre-survey.

Intervention one was selected because of a discussion during the disquisition proposal. The group felt that the proposed interventions were too many and that moving the CRM forward would be a good investment. Dr. Crow felt that since the college had already invested in the existing CRM, that making it successful was a worthy of action research (R. Crow, personnel communication, March 2016).

Methods

Intervention One—An anonymous survey was delivered to all fulltime (FT) employees via email with a Qualtrics link to a three-question survey at the beginning of the intervention. At the time of the pre-survey there were 650 full time employees at FT. The three questions will reveal the status of the employee usage and simultaneously generate awareness of the CRM availability. The following three question survey took approximately two minutes to complete:

1. Are you aware that Forsyth Tech has a Customer Relationship Management (CRM) database?" (Yes or No)
2. If you answered "YES" to the previous questions, how often do you use the CRM? (Daily, Weekly, Monthly)
3. "Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college in meeting its needs for equipment, positions, money, etc.?" (Low 1, high 10)

After the anonymous survey was delivered electronically two potential participants emailed and asked me to define the term CRM. I explained to both potential participants that the CRM for Forsyth Tech was an online tool for college employees to store relationship information with outside businesses. One participant replied via email on October 19, that the survey questions were limiting. The participants email message is as follows:

> Hi Alan,
>
> Hope you're getting lots of good data! I submitted a survey but, I have to tell you, I was uncomfortable with the question on the value of partnerships. Of course, I believe that partnerships can result in additional resources for the college, but that isn't the primary reason I feel strongly about creating and maintaining them. I

> believe that strong partnerships are essential to our achieving our mission—how else do we know what work force needs are now and what they're expected to be, where the demand is for folks we are educating and training, and how to efficiently allocate the resources we already have? When we have honest partnerships, the needs of all partners are considered—our partners will certainly help us gain the resources we need, while we do the same for them. Valuing partnerships based solely on resources provided seems too limiting to me. (Participant email October 19, 2016)

Post-Survey

Identical pre- and post-surveys were distributed via email prior to and after the completion of the second intervention. Pretests and posttest comparison are used to measure characteristic of a group after an intervention (Creswell, 2013, p. 297). The goal of the post survey comparison is to see gains in the number of employees aware of the CRM, using the CRM more frequently and an increase in the belief that the pursuit, development and maintenance of partnerships are important. If there is an increase in all three categories would could assume that the CRM has become a larger part of the FTCC culture.

The Qualtrics pre-survey was delivered via email on October 19 to 650 fulltime employees. Of the 650 employees, 212 (33%) completed the survey. The Qualtrics post survey was also delivered via email to 650 employees and was completed by 184 (28%) of the potential participants. Analysis of the pre- and post-survey determined that there was an increase in the number of full time employees that were aware of the CRM. There was also an increase in the number of participants using the CRM monthly, but fewer on a daily or weekly basis. I believe this is due to fewer people participating in the post survey. One potential participant emailed to say that they had already completed the survey. I replied that this was the post-survey. This may account for the decline in the number of people completing the post survey, believing that they have already completed the survey.

The mean for the belief that the pursuit of partnerships was important to the college in meeting its needs for equipment, positions and money decreased from 8.53 pre-survey to 8.49 in the post survey. The pre- and post-survey results are displayed in Table 7 with a brief synopsis. The cumulative statistics for the pre- and post-survey were tabulated by SPSS. The full Qualtrics report is as available in Appendix B. Q1 Pre- and Post-Survey Results.

Table 6

Question 1: Pre- and Post-Survey

	n		%		Valid %		Cumulative %	
	Pre	Post	Pre	Post	Pre	Post	Pre	Post
Valid		2		1.1		1.1		1.1
No	141	105	66.5	57.1	66.5	57.1	66.5	58.2
Yes	71	77	33.5	41.8	33.5	41.8	100.0	100.0
Total	212	184	100.0	100.0	100.0	100.0		

Survey Question 1

Are you aware that Forsyth Tech has a Customer Relationship Management database (CRM)? A slight increase was noticed in the number of participants that were aware of the CRM. The data show an increase in post-survey awareness by six participants, although 28 fewer participants completed the survey. From a percentage standpoint, awareness rose from 33% to 42%. The post number of participants aware of the CRM should have been higher, since participants were made aware of the CRM if they took the pre-survey.

Survey Question 2

If "Yes," how often do you use the Forsyth Tech Customer Relationship Management database? Question 2 of the pre- and post-survey was designed to evaluate usage of the CRM. If a participant selected "Yes" from the first question, they were now given the option to select frequency of use or select "Do not use". Ideally, an increase of the participant's use Daily through Monthly will increase. Table 8 displays the results from of the Qualtrics survey computed by SPSS. Figure 5 represents CRM usage disaggregated by frequency. Figure 5 depicts the same information as Table 8 but in a graphical state.

Table 7

Question 2 Pre- and Post-Survey

	n		%		Valid %		Cumulative %	
	Pre	Post	Pre	Post	Pre	Post	Pre	Post
Valid	45.0	31.0	21.2	16.8	21.2	16.8	21.2	16.8
Daily	2.0	1.0	0.9	0.5	0.9	0.5	22.2	17.4
Do not use	148.0	127.0	69.8	69.0	69.8	69.0	92.0	86.4
Monthly	10.0	21.0	4.7	11.4	4.7	11.4	96.7	97.8
Weekly	7.0	4.0	3.3	2.2	3.3	2.2	100.0	100.0
Total	212.0	184.0	100.0	100.0	100.0	100.0		

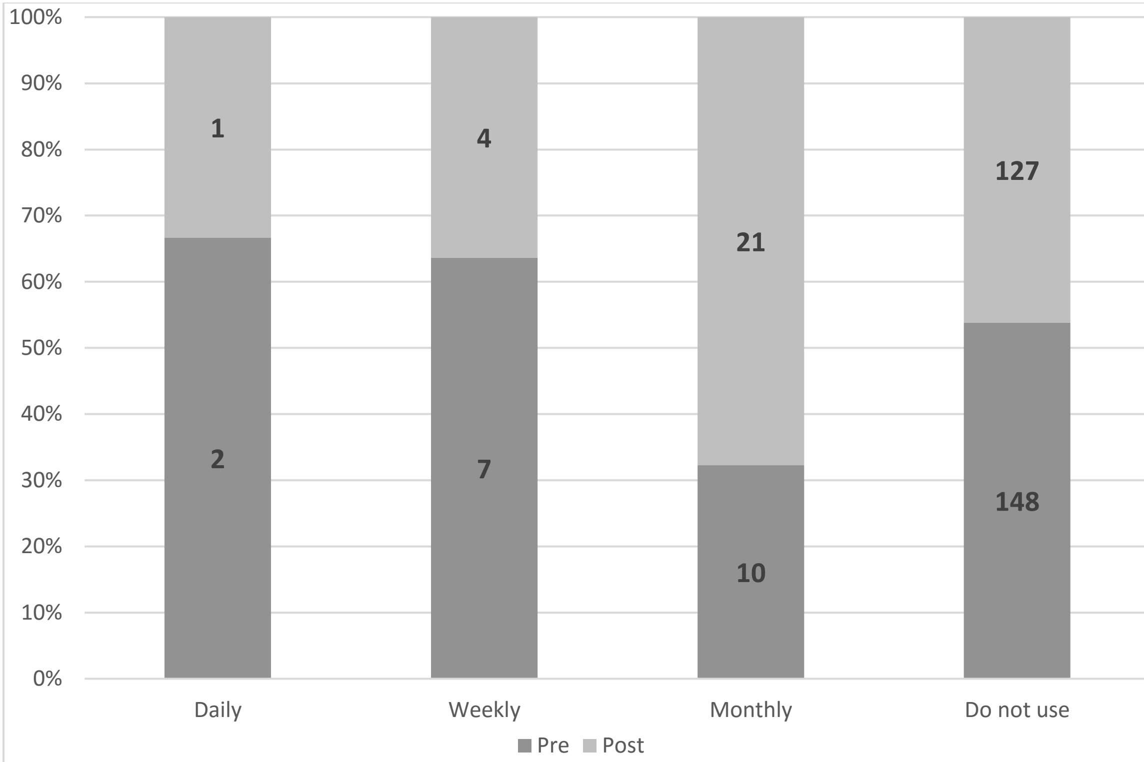


Figure 5. CRM usage.

Question two of the pre- and post-survey resulted in an increased number of users of the CRM, 19 to 26 that used the CRM daily, weekly or monthly. The decline in the daily and weekly users is concerning, columns one and two respectively. Ideally, this number would have tripled from seven to 21. The increase in monthly CRM usage numbers is encouraging, many of the monthly numbers need to be converted to weekly users if the CRM is to remain relevant. For a CRM to be useful, it must contain enough information to be of value to the user or they will not access. Although there is no way to know for sure, it may be that participants that are now aware of the CRM, but do not have interactions with outside businesses on a daily or even weekly basis are using it to see what new things are happening.

Survey Question 3

Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college in meeting its needs for equipment, positions, money, etc.? (Low 1, high 10). Survey Question 3 was designed to evaluate if there was an increase in the attitude of the college that partnerships are important. Table 9 represents responses to Question 3 from the survey computed by SPSS and visual representations created by Qualtrics.

Table 8

Question 3 Pre- and Post-Survey Likert scale 1 low, 10 high

	n		%		Valid %		Cumulative %	
	Pre	Post	Pre	Post	Pre	Post	Pre	Post
Valid								
1		4		2.2		2.2		2.2
2	2	1	.9	.5	1	.6	1	2.8
3	2	2	.9	1.1	1	1.1	2	3.9
4		1		.5		.6		4.4
5	14	9	6.6	4.9	6.9	5.0	8.8	9.4
6	11	7	5.2	3.8	5.4	3.9	14.2	13.3
7	16	10	7.5	5.4	7.8	5.6	22.1	18.9
8	36	33	17.0	17.9	17.6	18.3	39.7	37.2
9	35	38	16.5	20.7	17.2	21.1	56.9	58.3
10	88	75	41.5	40.8	43.1	41.7	100.0	100.0
Total	204	180	96.2	97.8	100.0	100.0		
Missing System	8	4	3.8	2.2				
Total	212	184	100.0	100.0				

The partnership pursuit mean dropped from 8.53 to 8.49. Although this change does not seem significant, I believe that is telling in that an effort in change management must be made for the CRM to become relevant. There is also the possibility that there may have been some participants that were trying to distort information by selecting “1.” Four participants selected 1 in the post survey whereas no participants selected 1 in the pre-survey. Were the participants unaware that the number 1 was the lowest level response? If we were to exclude participants that chose 1 as a response the mean would change to 8.67, an increase from the pre-survey.

Discussion

The pre- and post-surveys delivered mixed results. Questions 1 and 2 showed a greater awareness and utilization monthly. Question 3 resulted in a lower mean for the importance of partnerships. Regardless of the survey computations, the fact that the participants completed the survey makes them aware that FTCC has a CRM and that the college is moving forward on the partnership portion of the strategic plan.

If I were to complete this intervention again at Forsyth Tech or at another institution I would change two aspects regarding the anonymous survey. First, I would add at least two questions that identify participants. There is no need to know specifically who completed the surveys but by collecting gender, division and position information, I would be able to complete a better analysis of who is onboard with the CRM. This would allow me to focus on certain sectors of the college if I found a group was resistant to the CRM or of developing partnerships. Second, I would add an open-ended question about the participant’s thoughts around partnerships. Adding this question to the survey would inform the Professional development intervention. The open- ended comments could lead to additional topics for the training manual, or simply alert me to concerns of the college. Many times, the first impression is the only one we have when introducing a new set of tools and process. Getting it right the first time can make a world of difference.

CHAPTER FOUR: INTERVENTION TWO

The disquisition committee approved two interventions to advance the use of the existing CRM. The first intervention described in Chapter 3 consists of an online pre- and post-survey to be distributed to all full-time employees and completed anonymously. The second intervention consisted of professional development to use the CRM. The professional development interventions total seven training sessions between October and December of 2016. Members from the Economic and Workforce Development division, Forsyth Tech Foundation and Presidents Cabinet were invited to attend one of the seven interventions. After each intervention, Plus/Delta forms were distributed and returned anonymously to the Assistant of the VP of Economic and Workforce Development for tabulation. After tabulation, the comments were sent to me via email.

The second intervention, to deliver multiple training interventions on accessing and using the CRM, were completed between October and December 2017. Most of the professional development took place at the West campus of Forsyth Tech. Two of the sessions occurred at other locations, the Oak Grove Center on main campus and the Innovation Quarter location in downtown Winston-Salem. The alternate locations were included as a matter of convenience. The session at the Oak Grove Center was the sight of Professional Development day at FTCC. Professional Development day is an annual event where all full-time employees are encouraged to participate in several learning opportunities. The Innovation Quarter session was a matter of convenience as most of my business facing employees are located at the college’s Innovation Quarter location in downtown Winston-Salem.

As the scholar practitioner, I conducted the CRM trainings using the handouts found in Appendix D. The handouts were created by using screen shots of each phase of entering the CRM and loading specific data and information required to build the database. Each participant was asked to bring a business card to class of someone they had met during their work day. Each participant was taught how to search the database, to see if the account (business) already existed. This is extremely important because if we have the same business listed more than once we will never know the true level of interaction between the business and FTCC. A prime example of this is that we have one business listed twice in the CRM. Winston Salem Forsyth County Schools and WSFCS are both listed as separate accounts within the CRM. They are obviously the same business, and operate under both names in the community. Once we were sure the business did not exist in the CRM each participant was required to create an account, add a contact, insert notes and schedule an appointment.

Methods

Seven professional development sessions were conducted to train personnel on the CRM. The first intervention delivered on October 19 was part of a college wide Professional Development day. All fulltime employees were invited to attend multiple training sessions on a variety of topics. Attendees of the CRM training chose this session over others. Professional development sessions two through six were by email invitation. Three divisions that typically work with outside organizations were invited. The President's Cabinet, Economic and Workforce Development and the Forsyth Technical Community College Foundation were invited to participate at one of the session delivered at the College's West Campus or Innovation Quarter location.

After the completion of each session an anonymous Plus/Delta form Appendix G was passed out with instructions on how to complete. The participants were instructed to note items they liked about the training under the Plus title of the paper and note items that need to be improved under the Delta portion of the paper. These were then collected by a class participant and delivered to the Staff Associate of the Economic and Workforce Development division. The staff Associate then recorded all of the comments to a single document and emailed them to me. I reviewed responses from the Plus/Delta forms and integrated them into the next training session through changes in delivery or augmentation or the training materials (Appendix D). This will enable me to become a better teacher capable of deliver more effective training to subsequent classes. This is important because to engage employees the interface should be easy to navigate and they must see relevance in their efforts.

Findings

After reviewing the first set of Plus/Delta comments I decided to code the information by dropping each Plus and each Delta comment into one of four buckets. The buckets were derived from the coding process as described by (Creswell, 2012). The Plus/Delta information from intervention 2-1 and were reviewed and separated into themes. After intervention 2-1 three themes arose for plus from the Plus/Delta form. The three themes were Presentation/Presenter, Content and Miscellaneous. Under the Presentation/Presenter theme comments such as “I liked learning the history of why it was created to solve a problem” and “Relaxed, inclusive.” The Content theme comments were “Great tool for the future” and Relevant.” The final theme, Miscellaneous had comments such as “Showed potential” and “kudos to you for taking on this project, could be a game changer." After intervention 2-2 a fourth theme was created, Materials, due to the number of comments regarding the handouts. The Delta themes emerged immediately from intervention 2-1. The four delta themes are Presentation, Software, Tools and Moving forward. The presentation theme contained comments such as "There are so many questions—perhaps a longer session." And Maybe help direct maintain focus of participants." The Software theme revealed "Work out some bugs of the system." And Nature is confusing-tough to share." Under Tools there was only one comment which was "Use an online evaluation. The final theme Moving forward contained "Add in next steps" and Offer involvement for those that want to do so." The moving forward theme from the delta portion of the comments was very exciting. I gleaned from these comments that the participants wanted to know more about the CRM, what's next for the CRM and how could they get involved.

Table 9

Plus/Delta

Plus	Delta
Presentation/Presenter	Presentation/Presenter
MISC	Software
Content	Tools
Materials	Moving forward

It is important to note that some comments could reside in multiple buckets and that some were difficult to interpret. There could have been several more buckets on both the Plus and Delta matrix. I chose to stay with four on each side to look at the feedback holistically and not try to unravel each comment. After reviewing the comments, I would augment the delivery, materials or content to make for a more engaging professional development intervention.

A graphic representation of the Plus/Delta feedback (Figure 7) indicates that the deltas declined from the first professional development session with 16 deltas to the last professional development session with five deltas. I would also note that six of the delta comments were "Nothing or None." It may have made sense to remove the "Nothing or None" comments, but to be transparent they were included as part of the data. The evolution of the trainings provides an overview of how the training developed and how I as the trainer also improved. My learning in this improvement science research guided the growth of the CRM as a viable tool for partnership development at FT.

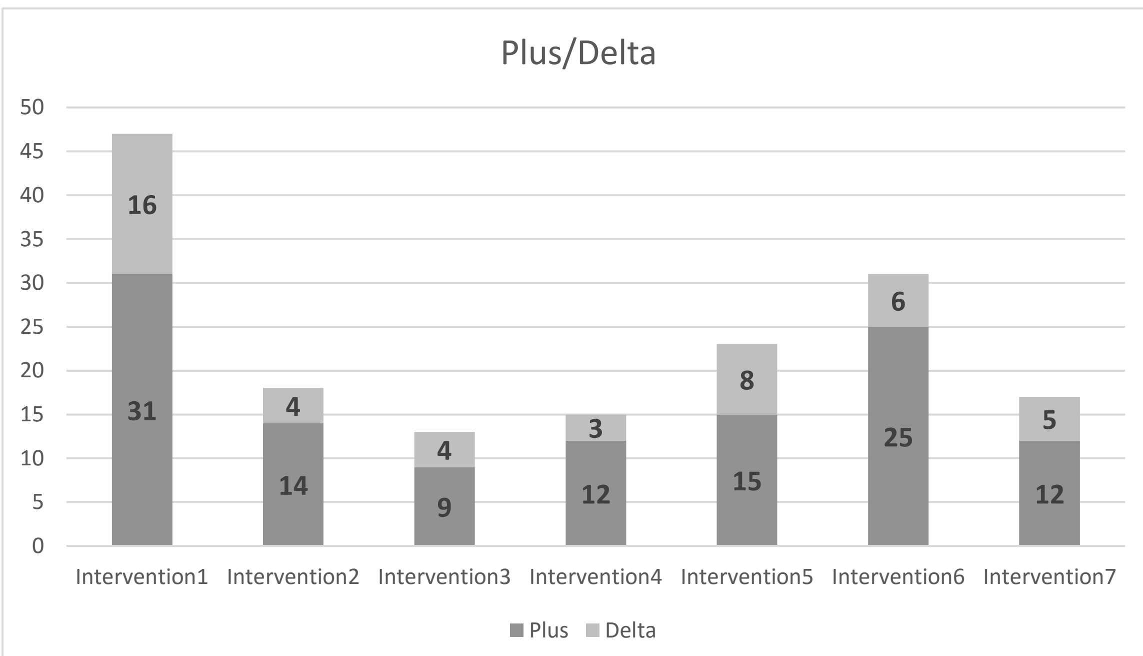


Figure 6. Plus/Delta.

Professional Development Intervention 2-1

Training intervention 2-1 was conducted on October 20 to a group of 9 participants. The group submitted 31 plus and 16 delta comments. The participants varied in departments. Six of the ten participants are part of the Economic and Workforce Development division. Four of the participants came from Instruction, Forsyth Tech Foundation and Talent and Knowledge Development. After reviewing the Plus/Delta comments I added two action items in preparation to intervention 2-2. Due to a comment regarding the amount of time need to get through the materials I adjusted the class time from 60 minutes to 90 minutes. An additional page was also added to the training manual called "Next Steps" so that participants knew what to expect in the future.

Professional Development Intervention 2-2

Training intervention 2-2 was conducted on October 28 to a group of 5 participants. The group submitted 14 plus and 4 delta comments. The participants were from the Economic and Workforce Development division. I also included an additional handout with the agenda, as it was difficult to follow along for the participants as the agenda was incorporated into the training manual.

Professional Development Intervention 2-3

Training intervention 2-3 was conducted on November 2 to a group of 4 participants. The group submitted 9 plus and 4 delta comments. The participants were from the Economic and Workforce Development division. Added a verbal conversation to help them determine which contacts to add the CRM.

Professional Development Intervention 2-4

Training intervention 2-4 was conducted on November 4 to a group of 7 participants. The group submitted 12 plus and 3 delta comments. The participants were from the Economic and Workforce Development division. After reviewing the Plus/Delta comments to Actions were inserted. First, I stopped talking about the future of the CRM, specifically the Sales portion of the tool, as it seemed to confuse participants. I also started bringing businesses cards that I had collected. These business cards were not yet entered into the CRM and therefore offered participants the opportunity to create an account and a contact within the account.

Professional Development Intervention 2-5

Training intervention 2-5 was conducted on November 9 to a group of 3 participants. The group submitted 15 plus and 8 delta comments. The participants were from the Economic and Workforce Development division. Based on one comment, I made sure that I let the participants know that we would not cover all aspects of the software in the 90-minute training session. This training session was also very informative to me as a leader and trainer. The previous session consisted of seven participants and took about 60 minutes to complete. This session with less than half the number of participants took the full 90 minutes. Of the three participants, one was under the age of 46, the other two participants were both over the age of 60. The two older participants had a difficult time logging into and navigating the CRM. For instance, when I would say type in the URL, the older participants would enter the URL in the Google search box. I had to spend a lot of time behind each one of them to ensure they were keeping up with the class. After the class, the younger student stated, “See what I’m dealing with." One of the younger student's responsibilities is moving my team from a paper existence to an online existence.

Professional Development Intervention 2-6

Training intervention 2-6 was conducted on November 18 to a group of five participants. The group submitted 25 plus and six delta comments. The participants were from the Economic and Workforce Development division. Based on the comment "Do's and Don'ts of doing this" I will emphasize the Etiquette page of the training manual.

Professional Development Intervention 2-7

Training intervention 2-7 was conducted on October 20 to a group of 10 participants. The group submitted 12 plus and 5 delta comments. The participants were from the Economic and Workforce Development and Student Services division. Based on feedback from the Plus/Delta I will show how to complete a procedure before I have them do it for themselves. Another interesting detail of this training was that two of the students were not invited by me, but by their Vice President. I spoke with the Vice President of Student Services and she reported that she wanted to see if the CRM could be used in her area to track potential students, to convert more prospective students to enrolled students. I informed her that this type of CRM was not an effective tool for her needs. I encouraged her to look at off the shelf CRM designed to recruit college students. The fact of the matter is that, very few companies are concentrating on CRM development to assist community colleges connect with businesses. There are on the other hand, several CRM companies focused on student recruitment for community colleges and universities.

Following the Partnership model through intervention 2-1. The researcher could engage the students at their level. For each student, the antecedents, motivation, context and outcomes were very different. Relying on the idea that this work was good for the college was not enough for the students to commit to using the CRM. For every student, I had to determine their antecedent and show how the CRM could help meet their goals. One of the keys to a successful CRM integration would be for someone that does not report to me, finding value in utilizing the CRM and passing on that good news to their colleagues. Ideally, a Dean from the Instructional Service division would use the CRM to recruit committed Advisory Board members for their programs. The Partnership Development Model was used to develop Table 5 Analysis of Intervention 2-1 through Partnership Development Model.

Table 10

Analysis of Intervention 2-1 through Partnership Development Model

Model	Researcher (CRM)	College Employees
Antecedent	Create history Place in charge of partnerships	Expand network Learn new skill
Motivation Context	Leverage relationships Develop partnerships Eliminate budget shortfalls	Required Curiosity
Partnership	Professional development	Attended training
Outcomes Context	Professional development conversations	Plus/Delta
Sustainable Untenable Goals satisfied	Additional users	Changes
Feedback loop	Redesigned training	Improved partnership for next class Plan to utilize in department

For the purposes of this example we will look at intervention two and apply the actions to the Partnership model. The researcher/instructor was one side of the equations, while participants were the other side of the equation. Every time intervention two was run was an instance of executing the partnership model multiple times. For each participant, the motivation and context were very different. In this session one participant was concerned with entering data only for the college to purchase another system next year and must reenter his data. A second participant had reservations about the sensitivity of some of the data he would enter regarding donations to the college. A third participant was concerned that college employees would harass contacts in the CRM for their own use, spoiling the relationship. For each of the participants the motivation was different, managing the Partnership Development Model during these interactions, some at the same time was cumbersome but worth the effort. I believe this to be true as some of the participants entered information into the CRM after the professional development.

Through the professional development nine additional people were trained on the CRM. Some identified ways for them to use the information for their respective areas and we increased the number of accounts and contacts through hands on portion of the training. Participants could ask questions, express concerns and offer suggestions.

Much of this information was gleaned from the Plus/Delta forms completed anonymously from each of the class participants. The Plus/Delta information was used to improve intervention 2-2. Key lessons from intervention 2-1 was that as a presenter I needed to make sure the students connected with the data, that they saw how it could benefit the college and possibly their own area. Another area of information were questions asked by attendees in the training.

In this instance feedback was delivered immediately to students or the delivery of professional development was augmented to make for a better class. Using the Plan-Do-Study-Act (PDSA) model from (Langley et al., 2009). The researcher practiced continuous improvement by reviewing and using the plus/delta comments. Subsequently, the professional development has become increasingly beneficial to the participants based on the reduced number of delta comments as the series of professional development progressed.

The previous example is a short-term use of the model, in some cases only lasting a few seconds, but it is also well suited for much more complex models. Such as, FTCC and Goodwill Industries of Northwest North Carolina experiencing a 30-year partnership. Although the partnership does not have access to this model, they both practice the model through actions. Each entity is aware of the antecedents for the other and is willing to run through the model including the feedback loop and making changes when necessary to continue the relationship.

Through the professional development intervention, the CRM has grown. As the pre-survey was distributed, the CRM contained 150 accounts and 249 contacts. By the time the post-survey was distributed there was a total of 204 accounts and 318 contacts. Resulting in a 38% increase in accounts and a 27% increase in contacts. Even as this action research has come to an end, employees continue to populate the CRM. As of February 7, there are 221 account and 344 contacts increases of 8.3% and 8.2% respectively since the end of the action research. The CRM accounts have increased by 71 and contacts by 95 or 47% and 38%, respectively. Although the accounts and contacts have increased, ideally, we will see a much more exponential increase in the number of contacts per account. Although the researcher was not able to find an industry standard for the number of contacts per account to safeguard against volatility when people leave an organization. Currently, the CRM averages 1.6 contacts per account.

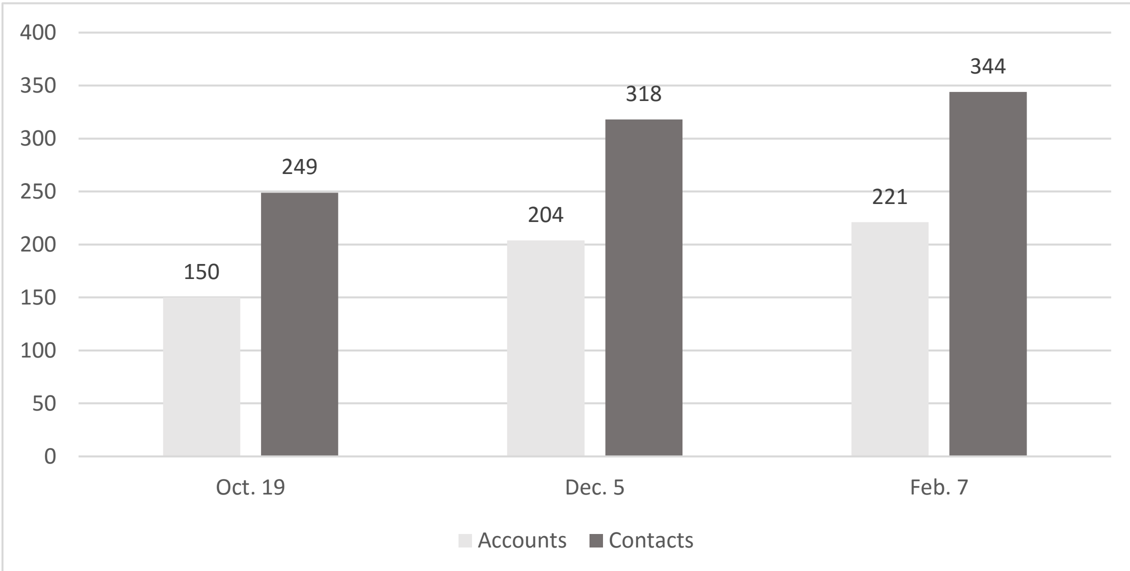


Figure 7. CRM accounts and contacts.

Discussion

Having completed both the survey and professional development interventions has had great success moving the CRM forward. Although the increase in accounts and contacts are significant, there remains a great deal of work to be done. Intervention two informed the researcher of some of the work that still needed to be completed. Foremost was that employees need to feel that the CRM is benefiting them or their students, assisting the college alone is insufficient. Next there are also some tactical items that need to be addressed within the CRM. On the back end of the system our programmers need to make the CRM easier to navigate and develop an access hierarchy. All of this leads back to the Partnership Model, it's a matter of determining the antecedents for each of the employees and adjusting the CRM to meet their needs through the feedback loop.

CHAPTER FIVE: PLAN AND EPIPHANY

To this point we have discussed the dire fiscal situation that FTCC faces. We have discussed several proposed and completed interventions to move the college forward with creating and maintain partnerships to meet the financial issues. And we have analyzed the survey and professional development interventions approved by the committee. At this point we move to what we have learned and how to continue the process of developing and maintaining partnerships.

The action research interventions (Surveys, professional development) were positive except for the mean score on the post survey regarding question three. Question three was on a scale of one to ten, “Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college meetings its needs for equipment, positions, money, etc.?” There was an increase in the level of awareness and increased usage of the CRM. There was also a decrease in the number of Delta comments on the Plus/Delta form as the professional development training progressed. There are now 30 additional users of the CRM trained at the college to not only add accounts and contacts to the CRM, but to look for opportunities within their respective area. Increasing the number of users from 25 to 60.

There was important information learned during the process. Foremost in lessons learned was that the CRM needed to be relevant for users at their level. As noted in Chapter three, there was concern from a potential participant that the survey was too self-serving. Although the researcher wanted to develop the CRM to help the college better leverage its partners, the value of the CRM is much greater. In addition to the college leveraging its partners for resources needed due to unmet financial burdens, the CRM had to hold value for the users. This epiphany has made me realize that it is extremely important that the employees not just the executives are eager to use the CRM and populate with valuable information. Due to this revelation, I believe that for everyone who the college requires to utilize the CRM, the researcher must complete the Partnership model, Antecedents through Feedback during future professional development sessions and within casual conversation. Through the Partnership Development model the researcher can identify antecedents for each user, obtain a better understanding of their context and motivate them to participate.

The college can also mine the data to determine areas that the college should invest. Through the Notes and History section of our accounts within the CRM, we can begin looking for trends from various accounts. If several of our manufacturing companies are requesting TS16949 training and we are not able to deliver it now, this is an opportunity to invest in that training and meet the needs of several companies. The ability to identify future needs of our partner organizations place us in a much better position than our competitors. There are also opportunities to leverage CRM content to assist our departments at the college, bringing the antecedent to the local level. When trying to locate companies to place students, our Work Based Learning department can mine the database for all Manufacturing or Healthcare companies that have an existing relationship with Forsyth Tech. Once they determine partners of the college that they were not aware of they can contact the Account user and ask for an introduction. In this exercise the Work Based Learning department has greater opportunity to place a student and the account user has another opportunity to provide value to the Account.

Although there was a lot of success experienced though this action research, the college has a long way to go to truly leverage the CRM technology for the college. FTCC still has a need for more partners, deeper relationships with existing partners and a college wide commitment to be a good partner internally and externally. To continue this success an implementation plan needs to be developed for the next 12 months. The implementation plan will need to address some easily fixed issues within the CRM. Color coding input areas, removing generic fields that the college does not require and modifying drop down lists will make using the CRM a much more enjoyable experience. Per Foss, Stone, and Ekinci (2008, p. 68), most CRM implementations have a high failure rate. To offset these failure rate, we will dissect pitfalls and recommendations for success. After success and failure analysis we will develop a plan to move the CRM forward that engages employees increasing the level of adoption and therefore success.

CRM Moving forward at Forsyth Technical Community College

There is a gap in the literature regarding CRM implementation for community colleges. There is one exception which is the Education Advisory Board (EAB). The Education Advisory Board is a subscription organization that researches contemporary issues facing Colleges, Universities and as of late Community Colleges. Although they identify pitfalls and success factors for CRM implementation, the focus of their research is on incoming students, not the businesses that this action research is targeting. As with most of the studies they are related to business endeavors, although they are not reflective of a community college culture, there are still some nuggets of information that may be universal to CRM implementation We will mesh success and failure factors from several researchers and develop a plan to keep the CRM moving forward.

To begin we reviewed success factors described by Foss et al. (2008). There was no mention of the types of companies that were surveyed, so this does not relate directly to educational, but universal concerns. Foss and company received 40 open-ended survey responses from contacts who had personal experience with CRM implementations (Foss et al., 2008, p. 71). After analyzing the responses, the Foss team determined four success factors: CRM readiness assessment; change management; CRM project management; and employee engagement (Table 11). Interestingly, the success factors have nothing to do with the technology, but with the employee abilities, employee engagement and management support and direction. This is significant for several reasons, first of which is that it aligns with participants in intervention two who were interested in what value the CRM had to them or their area. Through intervention two a skills gap was identified when it came to using computers and online applications.

Table 11

CRM Success Factor

Success Factor	Definition
CRM Readiness Assessment	Overview of the company culture, are we ready for a CRM?
Change Management	CRM Change management involves strategic organizational change and cultural change.
CRM Project Management	Development of cross functional teams that manage the CRM
Employee Engagement	Trained and motivated employees

Source: Foss et al. (2008)

Typically, the researched CRM implementations are enterprise level implementations that incorporate Sales, Marketing and Accounting. The CRM implementation underway at Forsyth Technical Community College does not include Marketing or the Accounting functions and initially will not include the Sales function. Given the fewer areas of incorporation with the CRM implementation at Forsyth Technical Community College, our success will be easier to achieve.

As Shum, Bove, and Auh (2008) state, “Making change throughout an implementation requires long-term investments on ‘soft-selling,’ such as training, team building exercises, and cultivating a culture that embraces change” (p. 1365). This was evident upon reflecting on the email I received following the Pre-Survey from a potential participant. The participant expressed concerns about the CRM be self-serving, but I believe what she was really after was an antecedent. How does the CRM positively impact her and her department?

Shum et al. (2008) try to address the gap in literature surrounding CRM implementation success factors. To do so they conducted interviews with three banks that had initiated a new CRM. They spoke to managers at three banks that had recently installed a new CRM. What this disquisition study addresses is an intentional effort by one scholar-practitioner to increase the usage of the CRM at a community college. The scholar practitioner in this study was positioned within the organization to exert a greater level of pressure on divisions to encourage participation from a wide range of employees to participate in the training and usage of the CRM.

The Education Advisory Board (EAB) through a study of interviews with over 200 University, College and CRM providers developed a CRM Risk Point Map (Ho, 2014, p. 197). The risk points detailed in table 4 represent discussion points for a steering committee. Ho goes on to point out that CRM implementations change how organizations interact with constituents and therefore changes the jobs and responsibilities of the employee.

In CRM Failure and the Seven Deadly Sins, Kale (2004) states that “Estimates of CRM projects failing to achieve their objectives range anywhere from 60% to 80%” (p. 44). Kale discusses the seven deadly sins of CRM implementation. Again, we see as we did with EAB the pit falls have common themes of management support planning and change management. The full list of seven deadly sins is shown in Table 13.

Table 12

Seven Deadly Sins

Sins	Definition
Focusing solely on technology	Technology is a tool, employees make the CRM work or not. A great employee with poor tools will still be successful, a mediocre employee with great tools will still be mediocre.
Losing sight of customers	Companies need to focus on the C of CRM and not lose sight of who the CRM is for.
Ignoring customer lifetime value	Shifting from transactions to relationships to develop long-term partners
Lack of management support	Managers at the very top of the organization need to own the CRM.
Undervaluing data analysis	Data integration is key, consider appropriate data fields
Underestimating change management	Lack of adequate change management was the primary cause of failure in 87% of the cases investigated. (p. 46)
Inflexible business process	Changing the way, we interface with customers

Source: Kale (2004)

After reviewing various literature on the success and failure of CRM implementations, the researcher identified common themes. The common themes detailed in Table 14, revolve around employee engagement in order for the CRM implementation to be successful. The employees want to feel their efforts are supported by upper management. “Knowing that top management supports the CRM strategy will most likely affect employees’ behavior as well. This is crucial as employee support is not only regarded as a key driver of organizational success but also of CRM technology success” (Becker, Greve, and Albers, 2010, p. 36). That the work they are doing is relevant to their students and departments and that the change required is positive.

Table 13

Common Success Factors

Success Factor	Kale	EAB	Pashupati
Sr. Management	Management support	Senior Management	Leadership
Change Management	Change Management	Change Management	Organizational integration
Relevance	Losing sight of customers	Inadequate planning	Complex system

There were four important points that arose from my field notes. First, The Interim Director of the Foundation praised the CRM during a Foundation Board meeting, stating that the CRM was in part responsible for the Foundation closing in on the Capital Campaign goal. Solidifying the value of the CRM to external stakeholders. Second, Dr. Green, president of FT has used the CRM, showing others that upper management is onboard with CRM utilization and is relying on it to gather information. Third, Technology is not the answer and this is reinforced not only in my study but also by Becker et al. (2010). Finally, employee engagement is crucial to the success of the CRM.

If employees are not engaged and realize the potential for the college, they will not use the CRM or just place data into the CRM without context.

Forsyth Tech CRM Related Goals

To move the CRM forward at FTCC we will follow a short-term plan and reevaluate prior to the Fall 2017 semester (Appendix H). Correction of immediate concerns will take place between February and April, 2017. Open access was granted to all employees. Part time employees also have access to the database. Forsyth Technical Community College does not differentiate part time employees, so all of them have access. An employee that works twenty hours a week has the same access as an employee that works three hours annually. The CRM access should be limited to full time employees and appropriate part time employees.

Other areas that need immediate attention to promote the CRM implementation are to develop hierarchy of control for the CRM; identify customers (internal) 75 total; develop deliverables and benchmarks for internal customers. Along with these changes we plan to reorganize CRM interface (April – June, 2017) the following list outlines the necessary adjustments:

1. Redevelop drop down menus to better capture pertinent information
2. Change the color scheme so that it is easier to navigate for end users
3. Remove fields that do not serve a purpose and confuse users
4. Determine upper management support mechanisms
5. Determine engagement opportunities

Especially in the area of determining engagement opportunities some specific changes will be made including: a notes development area of the home page; adding a place to include cabinet corner stories; offering a section to update reports; enabling an update feature for more efficient tracking of manufacturing companies and providing features that highlight opportunities for data mining information.

Because we found that relationships and the people are key to the success of implementing the CRM at FTCC we plan to work with upper management to train and educate their staff on the CRM (April–July, 2017). The researcher will develop a training calendar for incoming employees and upper management members of the institution. We will continue to work to add missing information from existing partners. It has also been determined that training the following key leaders of FTCC is imperative to comprehensive partnership accounting: (a) Board of Trustees, (b) Forsyth Technical CC Foundation Board members, and (c) Advisory board members. To ensure sustainability of the progress made it will be vital to develop an internal CRM group beyond just the practitioner-scholar.

Evaluating Success

To gauge success of the continued CRM implementation we will monitor the completion of action items identified in the plan, in addition to the plan we will be searching for additional signs of a successful implementation. We will never know all the good accomplished by the CRM implementation, but here are a few signs that would be very encouraging.

1. The number of contacts per account averages four. Increasing our relationships with an account to include contacts at multiple levels safeguards the relationship from a single employee leaving an organization and dissolving the relationship.

2. Data mining results in actionable responses. If college departments are able to data-mine the CRM to identify additional Advisory Board members that would bring the antecedent to a local level.
3. College President trusts the CRM enough to use it as his go to source for information about local companies. Currently as seen in Figure 8.

Eliminating the email chain could very well be a significant step in CRM adoption. Currently when the college president has a meeting with a local business he will start the email chain. The email chain consists of him emailing the Vice President of Economic and Workforce Development to see if there have been any interactions with the company from a non-credit standpoint. The VP of Economic and Workforce Development will then email his staff to see if any contact has been made. If there has been contact, then the VP will collect all relevant data and forward to the college president. The same process is repeated for the Vice President of Instruction and the Executive Director of the Forsyth Tech Foundation. Once the college president receives three sets of information he then cyphers through all of it and determines what is relevant for the upcoming meeting.

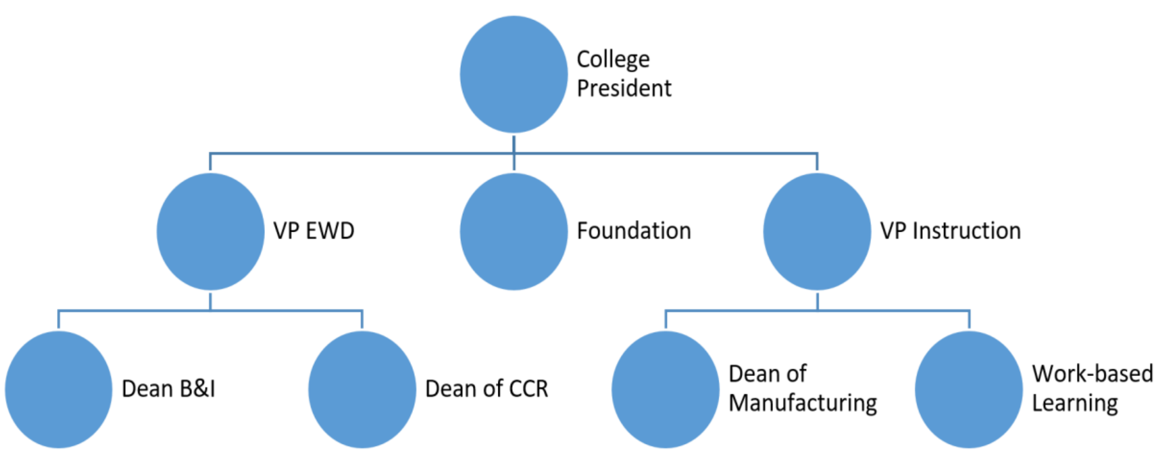


Figure 8. Email chain.

The alternative is for Dr. Green to lookup Reynolds American's Notes/History document Appendix F in the CRM. With less than a minute's work he will be able to see an overview of all the interactions with Reynolds America and call specific colleagues if he has questions. Once he completes this task a few times, word will circulate that it is an expectation that interactions with accounts are placed in the CRM.

Recommendations for Community Colleges Attempting A CRM Implementation

If Forsyth Tech were to complete this process again I would recommend the following actions: (a) identify the issues the CRM will address; (b) develop a cross functional team to discuss the CRM; (c) determine what success look like; (d) determine all people that will use the CRM; (e) determine antecedent for each person; and (f) watch out for scope creep.

Interventions Conclusion

After completion of the two interventions I believe three things are much more evident. First that there is much work to be completed if we are to integrate the CRM into our daily lives at Forsyth Technical Community College. Second, based on the survey there is already an appreciation for partnerships with industry at the college. Finally, CRM needs to have a larger focus than that of this disquisition and the reduction of funding. The CRM needs to not only assist the college, but our business partners and students if we are to obtain buy in from areas of the college that do not regularly interact with outside businesses. We can do so by making the CRM easier to navigate and continue to show relevance at multiple levels of the organization.

There are some concerns moving the CRM forward. During Intervention two there were a couple of requests to augment the CRM to assist in other areas of the college. Our Work Based Learning program would like to add fields and forms to the CRM to assist them in capturing the information they need for state reporting responsibilities. Two representatives from our Student Services division came to a professional development intervention, uninvited. They came to learn if the CRM could work in their area. Could this CRM be used to help them recruit students? I informed the representatives that this CRM could not assist them without diluting its intent to connect FTCC with our business partners. I did let them stay and participate in the training so that they would have a better understanding of CRMs and become familiar with some of the languages and process involved with developing a CRM. I also sent them away with copies of Reaching "Search and Shop" Students by the Education Advisory Board. This book outlines the process to evaluating a CRM designed to assist colleges in the recruitment of students. It also includes a short description of 13 CRMs available for purchase and lists of current customers for each product. I see this as a positive move for the college, that the CRM is being discusses across divisions to recruit new students to the college.

Although the original concept for the CRM was to develop stronger relationships with the business community to help FTCC overcome some of its financial needs, many other benefits have come to light through the survey and training interventions. Table 14 shows a partial list of the benefits to the college, community and students. This will be integrated into the CRM manual so that participants in future training classes can easily identify the antecedents for their areas. The table will continue to grow as we identify additional ways of leveraging the data for our students, the college and the community.

Table 14

Table of Leverage

FTCC Division	Business Search	Industry Search	Segment Search
President's Office	Research for upcoming meetings with local businesses		
Wok Based-Learning		Identify new opportunities for Work Based Learning students	
Department Chairs	Identifying new Advisory board members		
Student Services division	Identify potential businesses to support the annual job fair	Identify businesses to recruit for industry panel discussions	
Economic and Workforce Development division			Data mine for trends of business needs

As we close out this chapter of the CRM implementation, it only seems fitting that we end with Bolman and Deal's (2008) Four Frame Model (p. 18). As we consider FTCC moving forward with the CRM we must consider its adoption through multi-frame thinking. As Bolman states, "A frame is a mental model—a set of ideas and assumptions (Bolman and Deal, 2008, p. 11). We will apply the four frames (Structural, Human Resource, Political and Symbolic) to the integration of the CRM into the FTCC culture.

Structural

Within the structural frame, it is incumbent upon managers to set goals and develop a structure for people to work within. Without structure, there is confusion, conflict and frustration among the employees (Bolman and Deal, 2008, p. 329). FTCC management needs to support the growth of the CRM, develop expectations for its use and rules on how to apply the knowledge gained through the CRM. The college also needs to be sure to intervene when an employee is not committed to the Colleges CRM.

Human Resources

The Human Resources frame invests heavily in the people of the organization. Feeling that by attending to their goals and making them feel supported they can count on them to be committed and loyal (Bolman and Deal, 2008, p. 331). Regarding the CRM, the college must help each employee discover their antecedent and tie it to the context of their work when discussing the CRM. Without buy in from the employees, the data entered into the CRM will be nonexistent or sparse, just enough to say they did it. Sparse data does not help the college leverage the CRM.

Political

The CRM is in competition with every other initiative at the college that requires thought and work from the employees. As a college, we must be aware of these competing initiatives and help the employees understand the importance of the CRM and the benefits it can have for the students, departments and community. Developing a method to showcase positive results of the CRM are essential to its success as it competes against other initiatives.

Symbolic

Symbolic leaders believe that inspiration is an important aspect of their job. That inspiration makes employees excited and committed to their work (Bolman and Deal, 2008, p. 336). Symbolically, FTCC must embrace the success of the CRM to continue the momentum acquired through this action research. A simple way to do this is through the CRM. When someone adds a new account, contact or sale, management can congratulate them through the CRM interface.

Concluding Thoughts

The CRM implementation at Forsyth Technical Community College was a success. The most successful part of the interventions is the realization that there is much more work to complete. That employee engagement and buy in will determine the success or failure of the CRM, not the technology. That the Partnership model is not something we consider on an annual basis, but must be engaged every day. A plan to continue the implementation of the CRM at Forsyth Tech was developed and moving forward. We identified requirements from employees if we want them to engage the new technology. Moving the CRM forward is going to require a great deal of work. Not only must we continue to improve the user interface and therefore their experiences with the CRM. We must also nurture the environment of using the CRM for each employee, celebrate their efforts and publicize our rewards.

REFERENCES

Amey, M. J., Eddy, P. L., and Ozaki, C. C. (2007). Demands for partnership and collaboration in higher education: A model. *New Directions for Community Colleges, 139,* 5–14. doi:10.1002/cc.288

Arcieri, K. (2015, April 24). 'Salary crisis' has colleges lobbying for funding. *Triad Business Journal,* p. 7.

Association for Career and Technical Education. (2016). *Taking business to school: Toyota T-TEN.* Alexandria, VA: Author. Retrieved from https://www.acteonline.org/uploadedFiles/Resources/Business_and_Industry_Resources/Taking%20Business%20to%20School_Toyota.pdf

Becker, J. U., Greve, G., and Albers, S. (2010). Left behind expectations how to prevent CRM implementations from failing. *GFK-Marketing Intelligence Review, 2*(2), 34-41.

Bolman, L. G., and Deal, T. E. (2008). *Reframing organizations artistry, choice, and leadership.* San Francisco, CA: Jossey-Bass.

Creswell, J. A. (2012). *Educational research planning, conducting and evaluating quantitative and qualitative research.* Boston, MA: Pearson Education.

Esteves, A., and Barclay, M. (2011). New approaches to evaluating the performance of corporate-community partnerships: A case study from the minerals sector. *Journal of Business Ethics, 103*(2), 189–202. doi:10.1007/s10551-011-0860-7

Forsyth Technical Community College. (2016a). *About us.* Retrieved from http://www.forsythtech.edu/about-us/

Forsyth Technical Community College. (2016b). *Destination: Transformation.* Retrieved from https://www.forsythtech.edu/destination-transformation/

Forsyth Technical Community College. (2017). *Faculty and staff directory*. Retrieved from https://www.forsythtech.edu/about-us/leadership-faculty/faculty-staff-directory/

Foss, B., Stone, M., and Ekinci, Y. (2008). What makes for CRM system success—Or failure? *Journal of Database Marketing and Customer Strategy Management, 15*(2), 68–78. doi:10.1057/dbm.2008.5

Goldstein, J., Hazy, J. K., and Lichtenstein, B. B. (2010). *Complexity and the nexus of leadership leveraging nonlinear science to create ecologies of innovation.* New York, NY: Palgrave MacMillan

Ho, M. (2014). *Capturing alternative revenues strategic lessons and compendium of tactics for increasing nontraditional operating revenue*. Education Advisory Board.

Kale, S. H. (2004). CRM failure and the seven deadly sins. *Marketing Management, 13*(5), 42–46.

Kussrow, P. G. (1995). *Why community colleges need organizational partnerships*. Retrieved from ERIC database. (ED386230)

Katsinas, S. G., Tollefson, T. A., and Reamey, B. A. (2008). Funding Issues in U.S. Community Colleges: Findings from a 2007 Survey of the National State Directors of Community Colleges. *American Association of Community Colleges.* Retrieved from http://www.aacc.nche.edu/Publications/Reports/Documents/fundingissues.pdf

Kisker, C. B., and Carducci, R. (2003). UCLA Community college review: Community college partnership with the private sector—Organizational contexts and models for successful collaboration. *Community College Review, 31*(3), 55–74.

Langley, G. J., Moen, R. D., Nolan, K. M., Nolan, T. W., Norman, C. L., and Provost, L. P. (2009). *The improvement guide, A practical approach to enhancing organizational performance.* San Francisco, CA: Jossey-Bass

Louis, J. B. (1995, August). Assure improvement with the plus/delta method. *Managers Magazine*, 70(8), 31. *Business Source Complete*, EBSCO*host* (accessed March 29, 2017).

Matheny, C. J., and Conrad, C. (2012). A framework and strategies for advancing change and innovation in two-year colleges. *New Directions for Community Colleges, 157,* 111–124.

Mitrega, M., Forkmann, S., Ramos, C., and Henneberg, S. C. (2012). Networking capability in business relationships—Concept and scale development. *Industrial Marketing Management, 41*(5), 739–751. doi:10.1016/j.indmarman.2012.06.002

Myran, G. (2013). The new community college business and finance model. *New Directions for Community Colleges, 2013*(162), 93–104. doi:10.1002/cc.20063

Oliff, P., Palacios, V., Johnson I., and Leachman, M. (2013). *Recent deep state higher education cuts may harm students and the economy for years to come.* Retrieved from Center on Budget and Policy Priorities website at http://www.cbpp.org/cms/?fa=view&id=3927

Schoonjans, B., Cauwenberge, P., and Bauwhede, H. (2013). Formal business networking and SME growth. *Small Business Economics*, *41*(1), 169–181. doi:10.1007/s11187-011-9408-6

Shearer, R., and Maes, J. D. (2014). Does partnering still work? Reflecting on 25 years in the trenches. *Organization Development Journal*, *32*(1), 75–83.

Shum, P., Bove, L., and Auh, S. (2008). Employees' affective commitment to change: The key to successful CRM implementation. *European Journal of Marketing, 42*(11-12), 1346–1671.

Sundberg, L. L. (2002). Building partnerships with business that make a difference. *New Directions for Community Colleges, 2002*(119), 13.

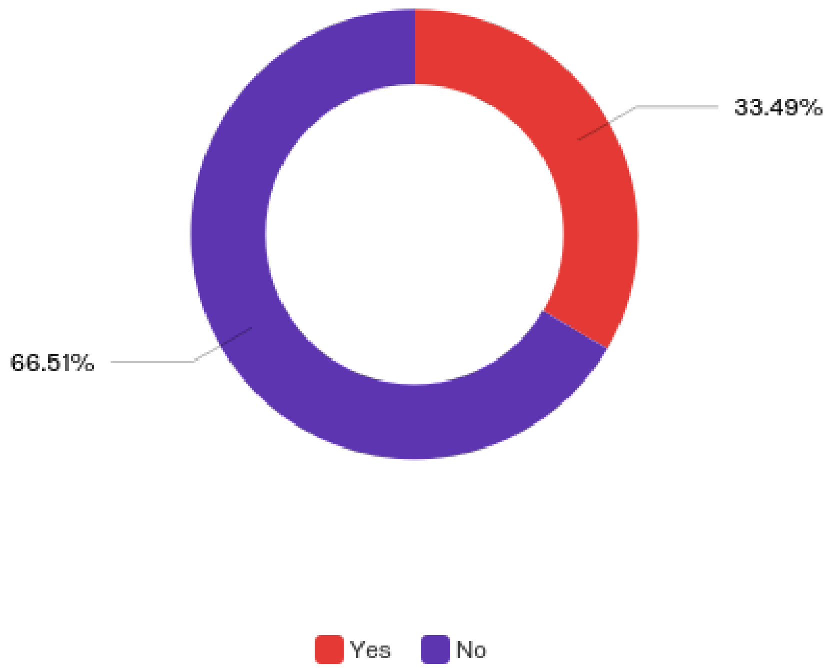
Thornton, J. S. (2013). Reframing community partnerships. *New Directions for Community Colleges, 162*, 55–61.

APPENDICES

APPENDIX A: FORSYTH TECH TRANSFORMATION

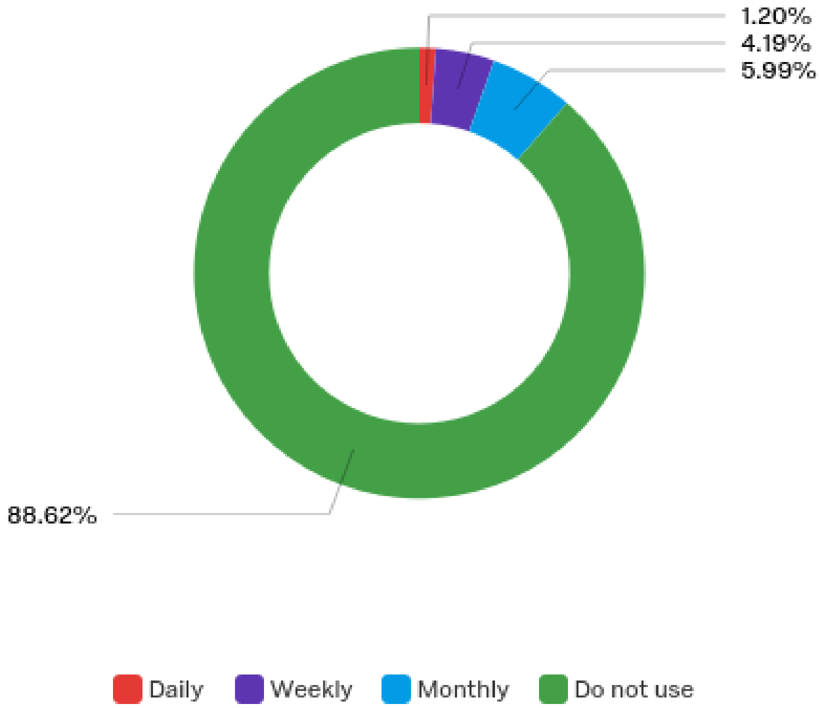
APPENDIX B: PRE-SURVEY RESULTS FOR ALL FULL-TIME EMPLOYEES

Q1: Are you aware that Forsyth Tech has a Customer Relationship Management database (CRM)?



#	Answer	%	Count
1	Yes	33.49%	71
2	No	66.51%	141
	Total	100%	212

Q2 – 1. If "Yes," how often do you use the Forsyth Tech Customer Relationship Management database?



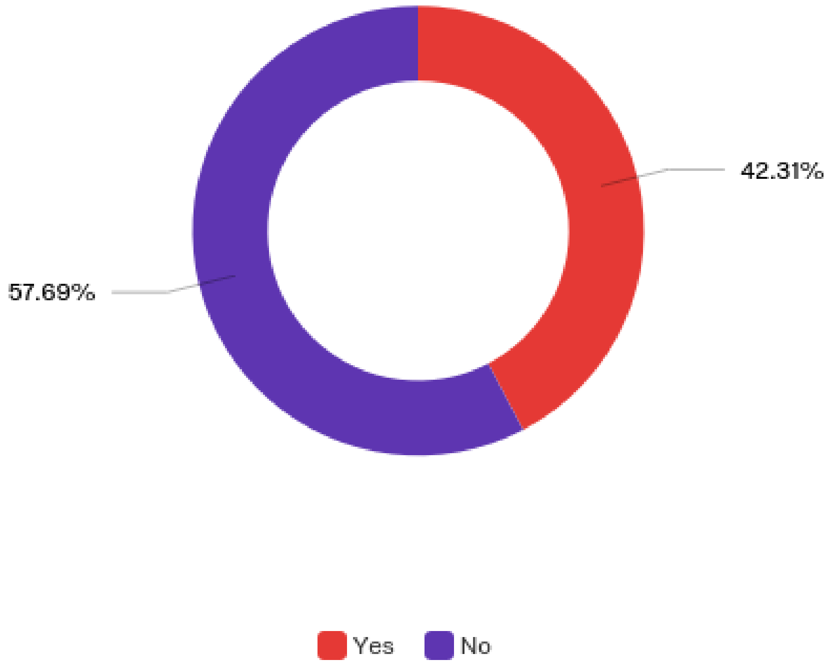
#	Answer	%	Count
1	Daily	1.20%	2
2	Weekly	4.19%	7
3	Monthly	5.99%	10
4	Do not use	88.62%	148
	Total	100%	167

Q3 – 1. Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college in meeting its needs for equipment, positions, money, etc.? (Low 1, high 10)

Field	Minimum	Maximum	*M*	*SD*	Variance	Count
	2.00	10.00	8.53	1.77	3.12	204

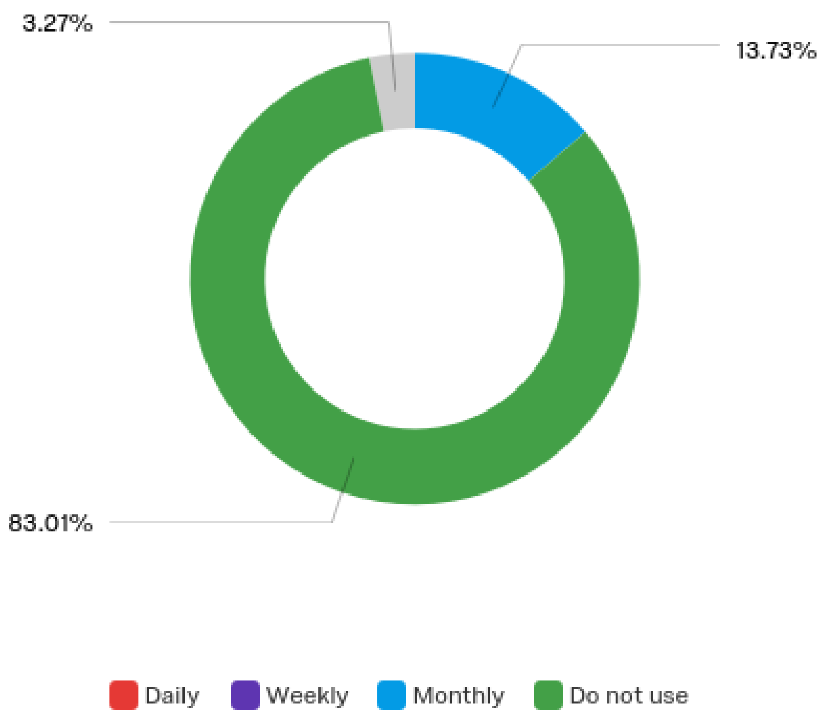
Post Survey

Q1: Are you aware that Forsyth Tech has a Customer Relationship Management database (CRM)?



#	Answer	%	Count
1	Yes	42.31%	77
2	No	57.69%	105
	Total	100%	182

Q2 – 1: If "Yes," how often do you use the Forsyth Tech Customer Relationship Management database?



#	Answer	%	Count
1	Daily	0.65%	1
2	Weekly	2.61%	4
3	Monthly	13.73%	21
4	Do not use	83.01%	127
	Total	100%	153

Q3 – 1: Do you believe that the pursuit, development and maintenance of partnerships is a means to assist the college in meeting its needs for equipment, positions, money, etc.? (Low 1, high 10)

Field	Minimum	Maximum	*M*	*SD*	Variance	Count
	1.00	10.00	8.49	1.99	3.95	180

APPENDIX C: TRAINING INTERVENTIONS

Training intervention 2-1 was conducted on October 19.

Plus

Presentation/Presenter

- Great presentation.
- Hands-on is best.
- Excellent logic.
- Necessary information.
- I liked the hands-on approach of logging in and trying it for ourselves.
- I liked that you gave real life examples of how the different parts of the college can collaborate.
- No PowerPoint (yeah)
- Good balance of talking and doing
- Alan responded to questions but kept the session moving.
- Informative
- Relaxed, inclusive
- I liked learning the history of why it was created to solve a problem.
- Open forum – questions were allowed to be asked at any time during the presentation.
- The interaction (hands-on).
- Class materials
- Good handout.
- I liked the handout.
- Handout.
- Hands on use to information presented.
- Hands on – in computer lab
- Interactive

Misc.

- Interesting topic
- Excellent way to present open source.
- Kudos to you for taking on this project; could be a game changer.
- Very informative. More people need to know about this.
- Showed potential.

Content

- Relevant
- Great tool for the future.

- This software will be very useful for those who need to maintain relationships with stakeholders.
- The information shared on how to use the CRM.
- New information provided of benefit.

Delta

Presentation

- More time for specific questions and answers.
- A little more time to practice or use of software, to presenter points on use and benefits of software.
- There are so many questions – perhaps a longer session.
- Guidelines need to be established before too much information has been entered.
- Slow down a little as you click through menus so those of us that are new to the subject matter don't get lost.
- Maybe help direct maintain focus of participants.
- Increased knowledge regarding all of the features – will come.

Software

- Work out some bugs of the system.
- Very complex tool that is open source.
- Nature is confusing-tough to share.

Tools

- Use an on-line evaluation

Moving forward

- This will be better once the kinks are ironed out.
- Add in next steps.
- More concrete next steps on using the CRM as a college as a whole and additional training opportunities.
- More areas need to be finalized. There are still a lot of unanswered questions.
- Offer involvement for those that want to do so.

Training intervention 2-2 was conducted on October 28.

Plus

Presentation/Presenter

- Agenda followed.
- Definitions of CRM, what it is, how it will help us.
- Questions answered adequately.
- Good interaction, clear, knowledgeable.
- Facilitator was very knowledgeable about content
- Presentation was very thorough

Class materials

- Hands on demo of CRM.
- Very useful tool.
- Straight forward.

Misc

- Informative and useful.
- CRM is very useful and informative.
- Everything! Very informative.

Content

- Information was valuable.
- Comprehensive

Delta

Presentation

- Allow time for typing/correcting entries during our data entry session.

- Nothing.

Software

Tools

- Add handout info to PowerPoint for better visibility.

Moving forward

- More time.

<u>**Action items:**</u>

Hand out an agenda on a separate sheet so that participants could follow along.

Training intervention 2-3 was conducted on November 2.

Plus

Presentation/Presenter

- Concise and straight forward.
- Walked around and insured everyone on same page with hands-on portion.
- Demonstrated patience and openness to questions and suggestions.

Class materials

- How to enter, uses for information.
- Step by step instructions.

Misc.

- Everyone stays informed.

Content

- Options, what can be listed, used.
- Lists of type companies.
- Lists of type companies.

Delta

Presentation

- None.
- More detail or time to write down steps until I get used to using system.
- None.

Software

Tools

Moving forward

- Suggestion as continued planning – Best Practices for data entry of information into system

Action

Began conversation at the end of training about determining which contacts to enter into the CRM.

Training intervention 2-4 was conducted on November 4.

Plus

Presentation/Presenter

- Helped to establish norms and ??? conventions ???? for the CRM that my team can follow.
- Short and concise.
- Explained the need and benefit of the CRM well.

Class materials

- Hands-on.
- Step-by-step instruction
- Hands-on application.
- Hands-on computer lab.

Misc.

- I feel confident I can navigate the CRM.
- I can perform the basic tasks.
- I understand how the CRM connects to EWD's mission.

Content

- Used actual relevant data to populate the CRM.
- Added contact info from business cards.

Delta

Presentation

- Spend more time on what you want in the history of the accounts. How far down do you want the information?

Software

Tools

- Clarify definition of opportunities vs quotes vs contracts.

Moving forward

- Create a test account and use to show what not to do with examples.

Misc.

Share in advance that business cards are needed.

Action:

Began bringing extra business cards to class, for those that did not read the instructions.

Stopped talking about features that are relevant to a select few.

Training intervention 2-5 was conducted on November 9.

Plus

Presentation/Presenter

- Subject matter and process was well laid out.
- Each agenda item was well discussed and articulated.
- Goal of subject matter and purpose was well presented in a logical manner.
- Interactions between Alan and trainees
- Alan's enthusiasm and small group.
- Understood directions on process.
- Explained reason behind project.
- Interesting-shows how we can develop and grow our contacts to help students and school.

Class materials

- Hands on.
- Good handouts.

Misc.

- This is something that is needed in any and all companies. I enjoy knowing that this in place for the college.
- Pertinent to our division.
- Small group.
- Group mostly on same level.
- **Great need for this program.**

Content

Delta

Presentation

- Pace was a little fast; it was hard to catch up sometimes.
- Trying to use software and follow the process was sometimes chaotic.

Software

- My PC was slow and missed letters when keys were hit. This slowed me down. Make sure PCs work well for trainees.

Tools

Moving forward

- Better understanding of how smaller departments can benefit from CRM.
- Some of the menu items were not fully covered, otherwise – no change needed.

Misc.

- I enjoyed the training and getting to know what is happening here at FTCC.
- I would not change nothing about the training.
- Nothing – I was very impressed.

Action:

Discuss that not all options of the software will be discussed in the 90-minute session

Training intervention 2-6 was conducted on November 18.

Plus

Presentation/Presenter

- Alan took ample time.
- During the presentation, Alan made sure everyone was following along and allowed time for questions.
- Very clear explanations.
- Addressed the pitfalls well.
- Concise.
- Interesting.
- Hands-on approach.
- Very informative and prepared for those who did not bring business card.
- How simple it was to manage.
- It was very informative, and I feel more at ease using it.
- Increases opportunity to conduct cross-analysis of data.
- Quick.
- Efficient
- Clear.
- The information presented was very helpful.

Class materials

- Clear instruction on how to utilize the CRM website. The CRM handout is helpful.
- Great handouts to follow.

Misc.

- Knows we cannot reach his mind.
- The lookup feature.
- Most.

Content

- Great concept. History is often forgotten. This is one way to preserve it and build upon our relationships.
- Applicable background information about CRM and why it is important.
- Centralized location for important stakeholder information.
- Excellent resource for senior management to remain informed and to re-strategize for future initiatives and projects.
- This is a good program.

Delta

Presentation

- List of good contacts to seek.

Software

- Use additional colors (i.e. grey tones) to give contrast to the user interface.

Tools

Moving forward

- Address the need for data refinement and updates.
- *Do's* and *Don'ts* of doing this.

Misc.

- Nothing.
- Nothing.

Action:

No actions required

Training intervention 2-7 was conducted on November 30.

Plus

Presentation/Presenter

- The hands-on opportunity.
- It was very much a conversation rather than a lecture.
- Very informative and clear instruction
- Good hands-on training.
- Presented well be a knowledgeable instructor.
- The fact that others who were not in EWD talked about application to CU and student services showed an effective presentation was provided.

Class materials

- The guides were very helpful.

Misc.

- Could utilize this program in my area.
- The hands-on experience was essential.

Content

- Used real world scenarios to show its benefits.
- The scenario shared really helped us to see "what is in it for us" and how it applies to the college.
-

Delta

Presentation

- It would help if you have the group pause and watch you do a process before they try it on their own.
- It is often hard to "listen and do" at the same time when the pace is fast.
- 90 minutes is long.

Software

Tools

Moving forward

Misc.

- Nothing I can think of.

- Time will continue to expand possibilities. It is still early in the process.

Action:

Demonstrate actions before leading the process

APPENDIX D: CUSTOMER RELATION MANAGEMENT

CRM

Customer Relationship Management

Customer relationship management (**CRM**) is a set of processes that enable you to manage your interactions with your customers. (Salesforce.com)

Leveraging Technology to Build Partnerships….

Mission

Forsyth Technical Community College provides students with flexible educational pathways to a competitive workforce for the community and global economy.

Transformation

Transforming Teaching and Learning by…

Providing students, faculty and staff with an environment that fosters success.

Transforming Partnerships by…

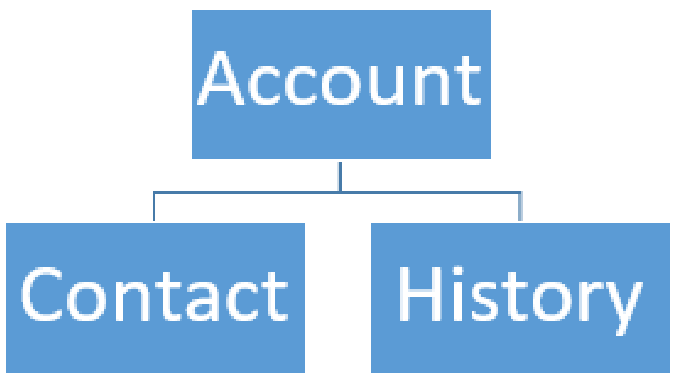
Developing, nurturing and enhancing internal and external partnerships for the mutual benefits of our students, employers and community.

Transforming Processes by…

Identifying, understanding and reengineering processes which increase our efficiency and effectiveness.

Transforming Culture by…

Becoming a college characterized by openness, collaboration and thoughtful risk-taking.

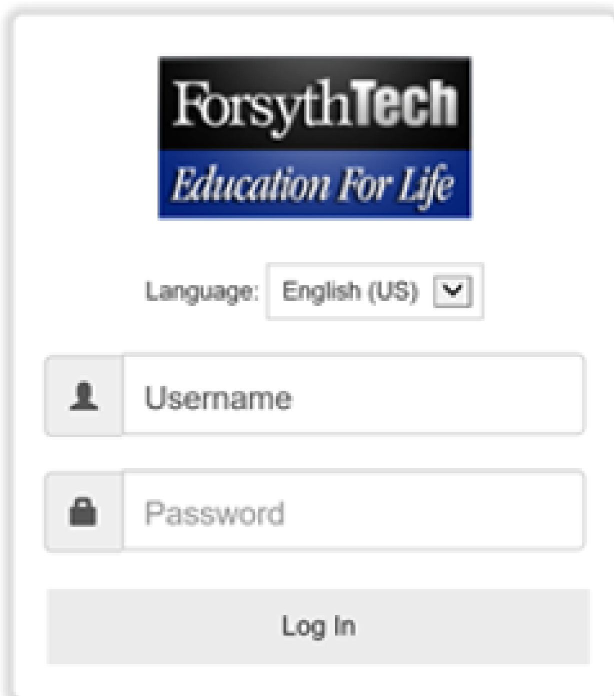


Account
Contact
History

Logging into the CRM

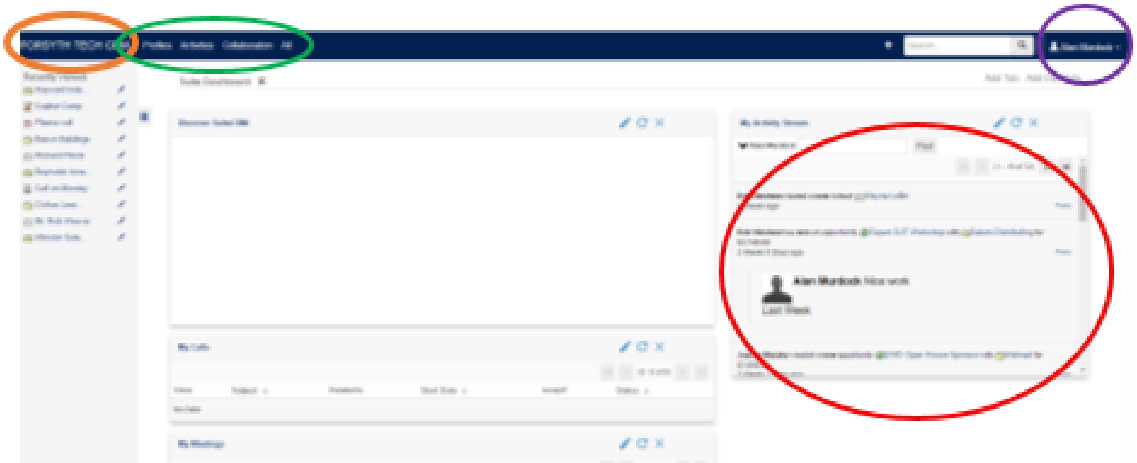
Go to crm.forsythtech.edu (try IE and Google)

Use college credentials to login



Note – Can be accessed remotely

<u>Home page</u>

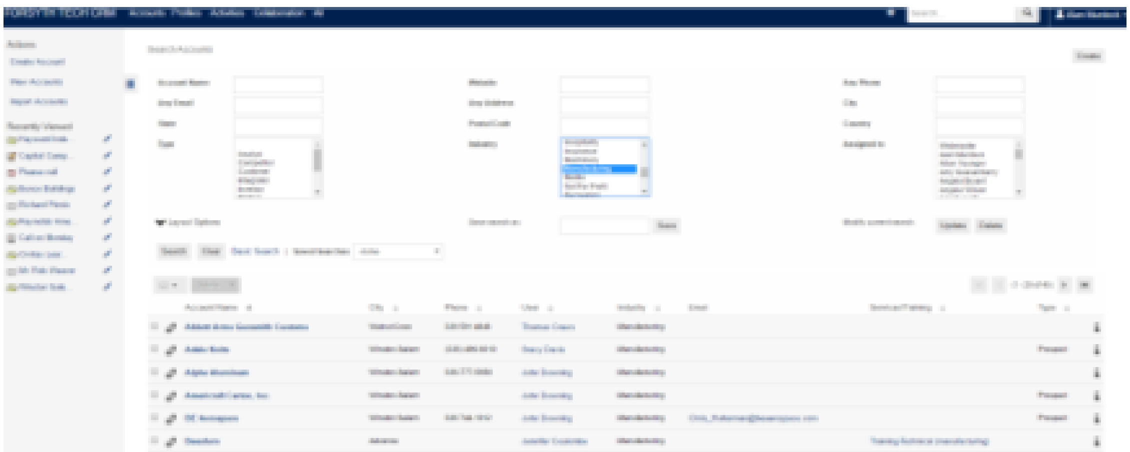


Key elements of the home page

1) This button brings you back to this page "FORSYTH TECH CRM" Circled in orange
2) These buttons with drop down menus help you navigate the tool. Circled in green
3) This is the update area. Circled in red
4) Your name is a drop down menu, that allows you to log out. Circled in purple

Quick Look

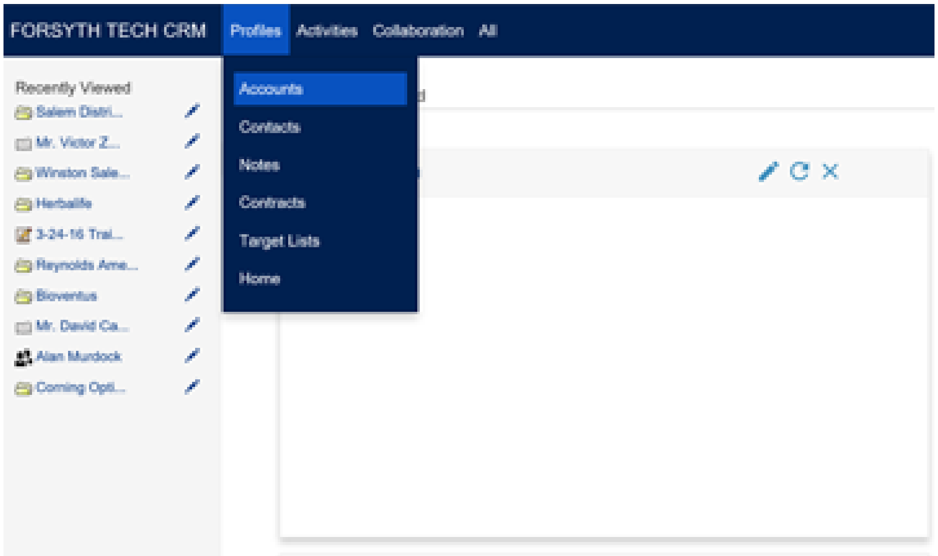
Profiles → Accounts → Advanced Search ↓ Industry "Manufacturing" → Search

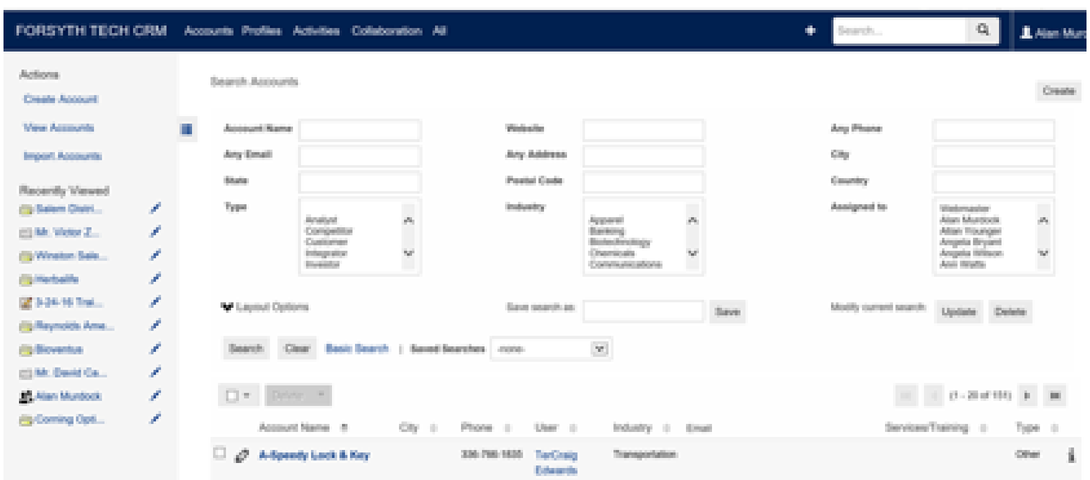


Who at the college could use a list of all the manufacturing companies that have a relationship at Forsyth Tech?

Account Search

Profile ⟶ Accounts ⟶ Left Click





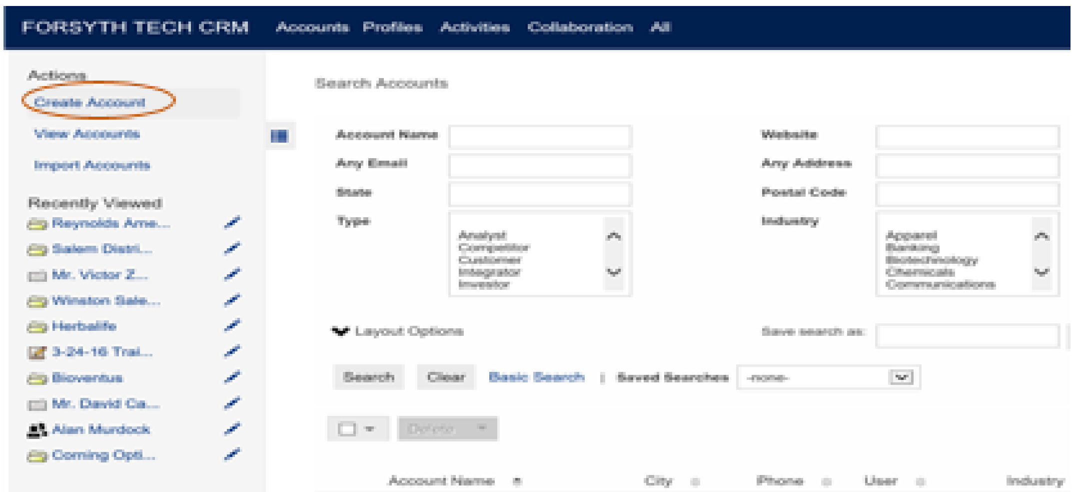
Enter Account name and press Enter

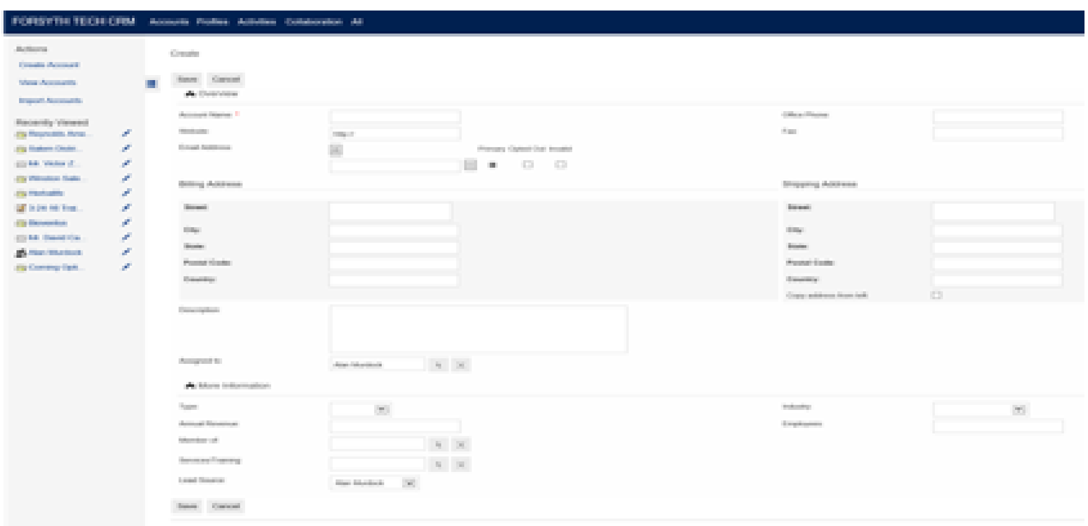
Recommendation - Use a partial name such as "R"

Add an Account

First – Preform search to make sure the company does not already exist.

Select Create Account on the left hand side.





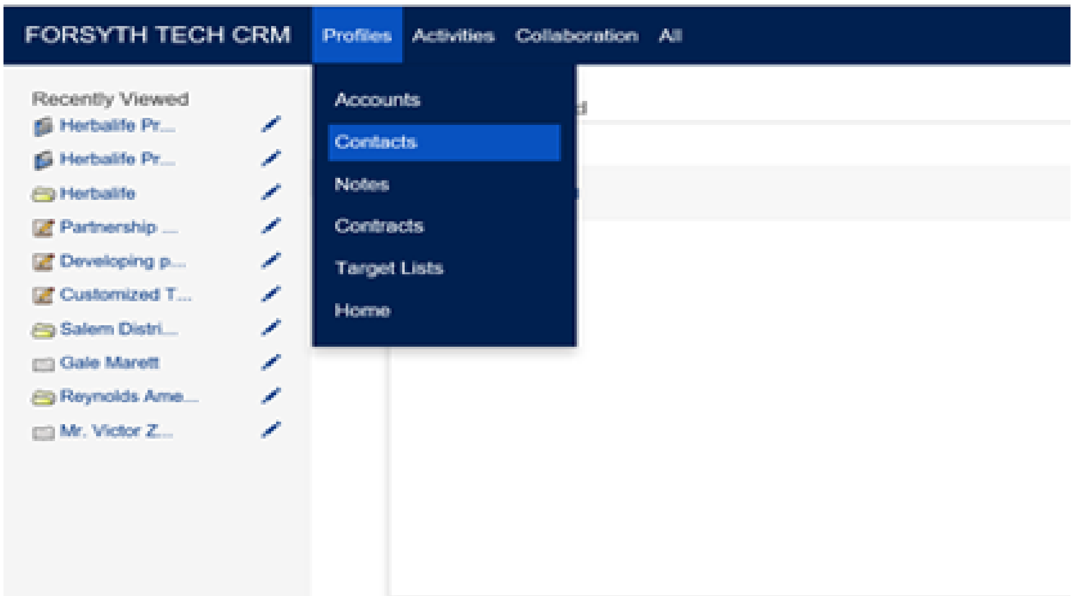
Enter all the information that you have available.

No Contact information is entered here.

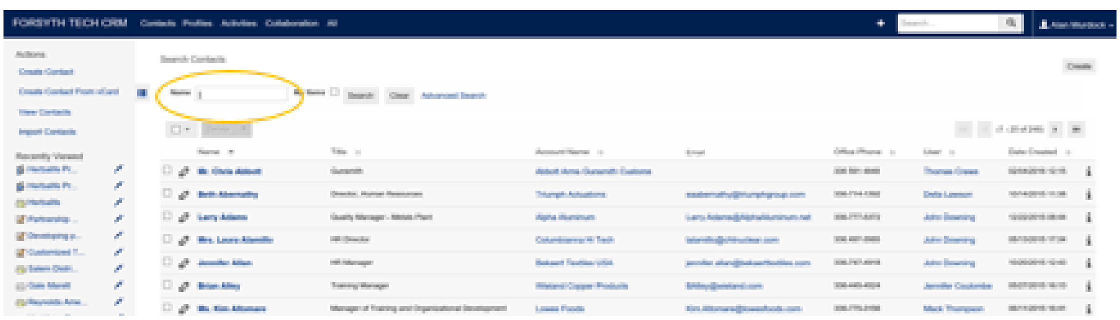
Remember to hit Save

Find a Contact

Profile ⟶ Contacts ⟶ Left Click



Enter full name or partial to search

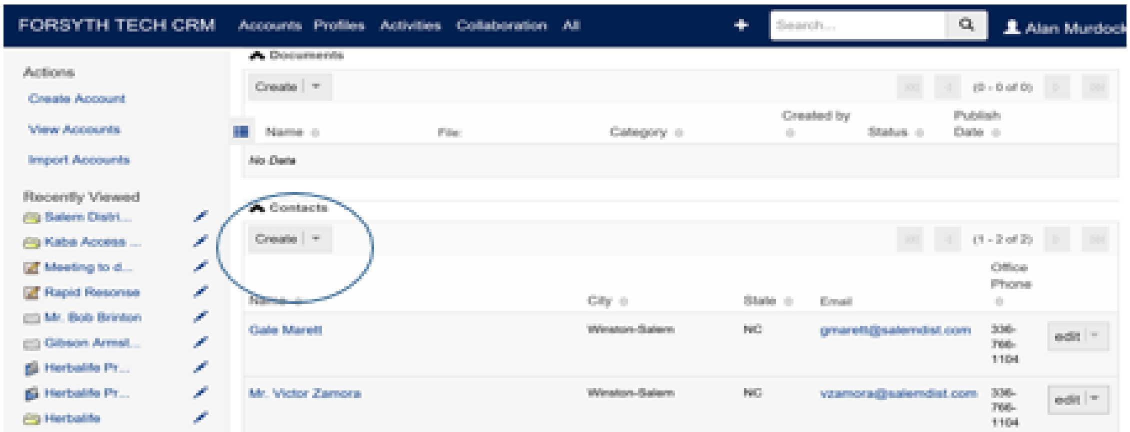


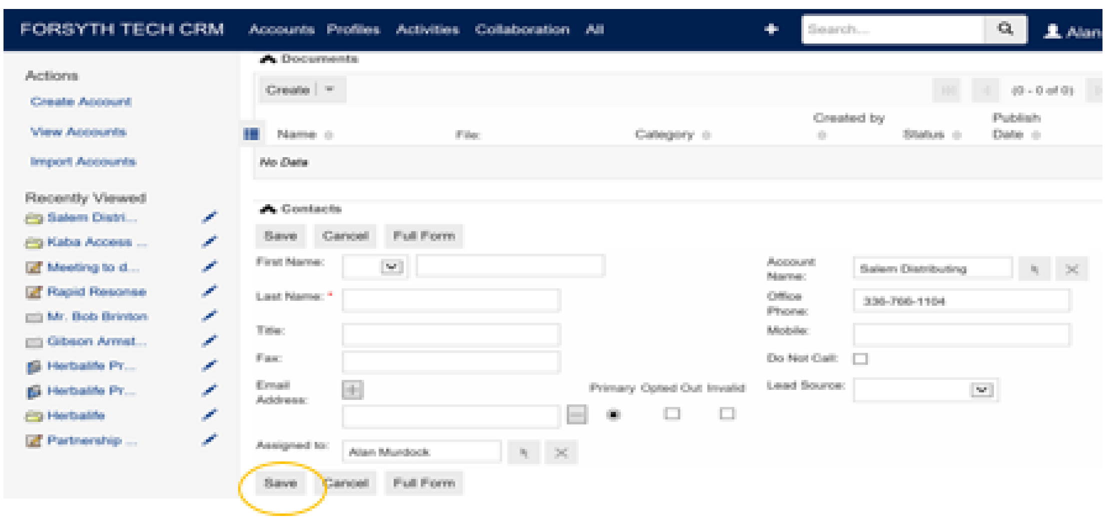
Add a Contact

Open the Account you wish to work with.

Scroll down to the Contact section

Left Click on Create





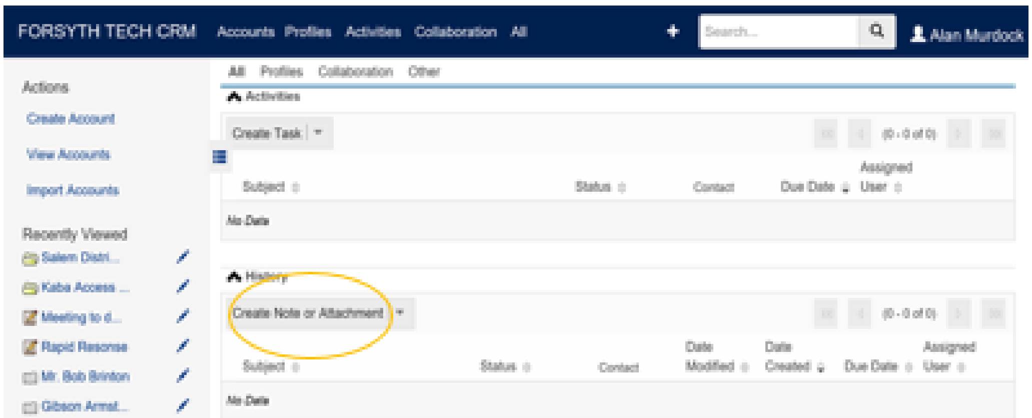
Add information

Left click Save

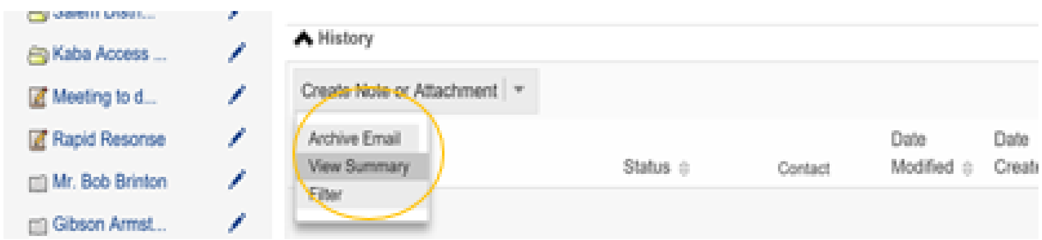
<u>Read History</u>

Go to Account

Scroll down to History



Click on the down arrow then click on the View Summary button

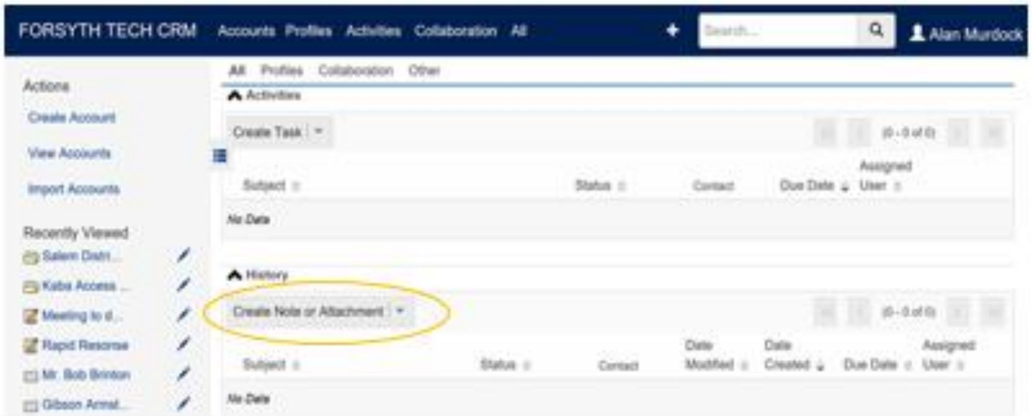


This is where we capture our history with an Account. This information is used to prepare for additional meeting, leverage for partnerships and mining for similarities.

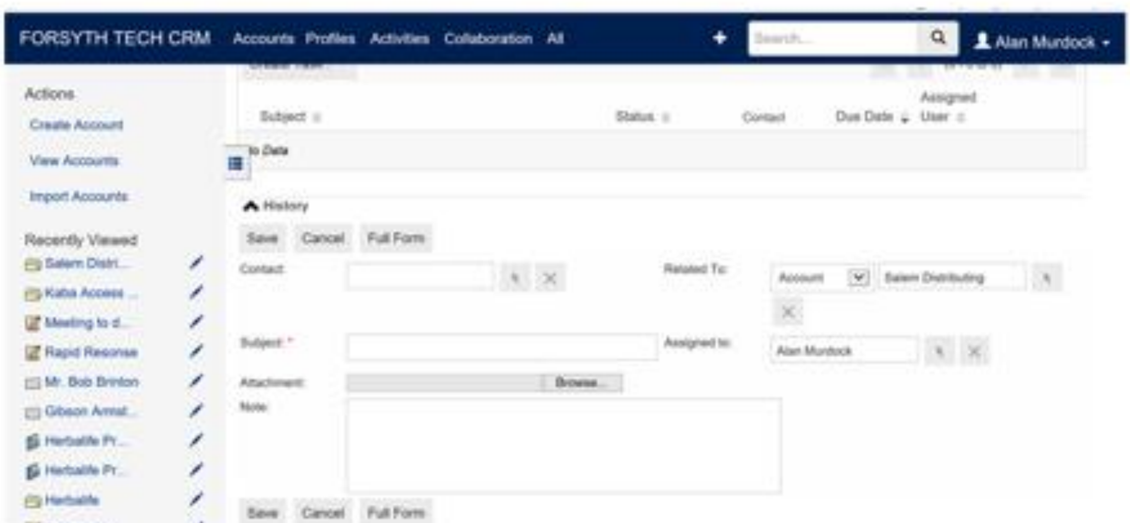
Add History

Go to Account

Scroll down to History



Left click "Create Note or Attachment"



Insert all available information

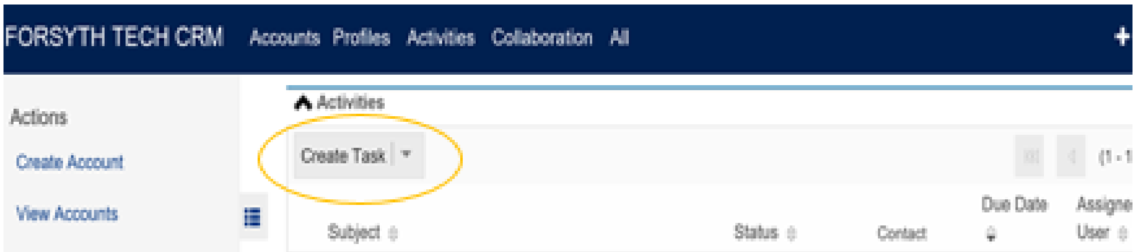
Select "Save"

Adding Tasks

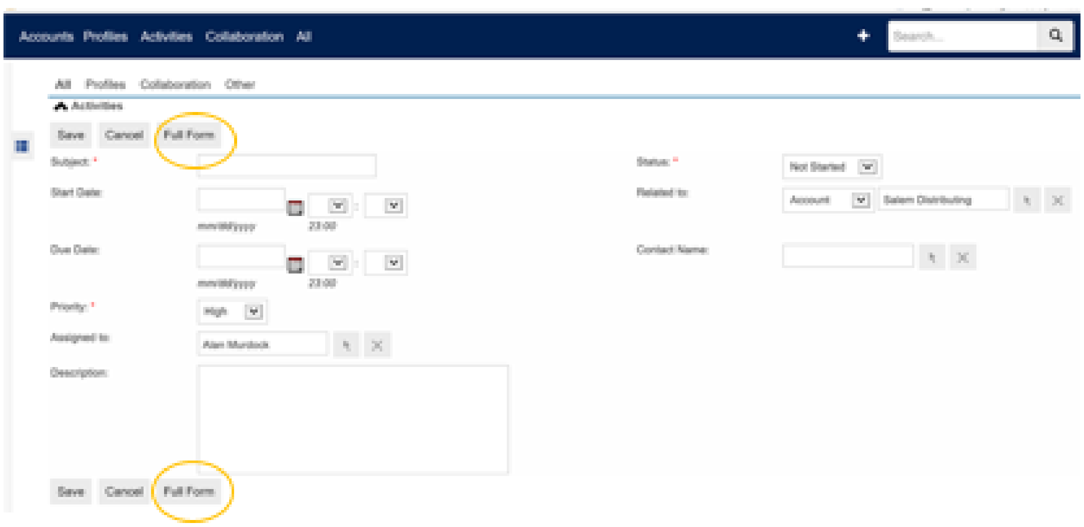
Go to Account

Scroll down to Activities

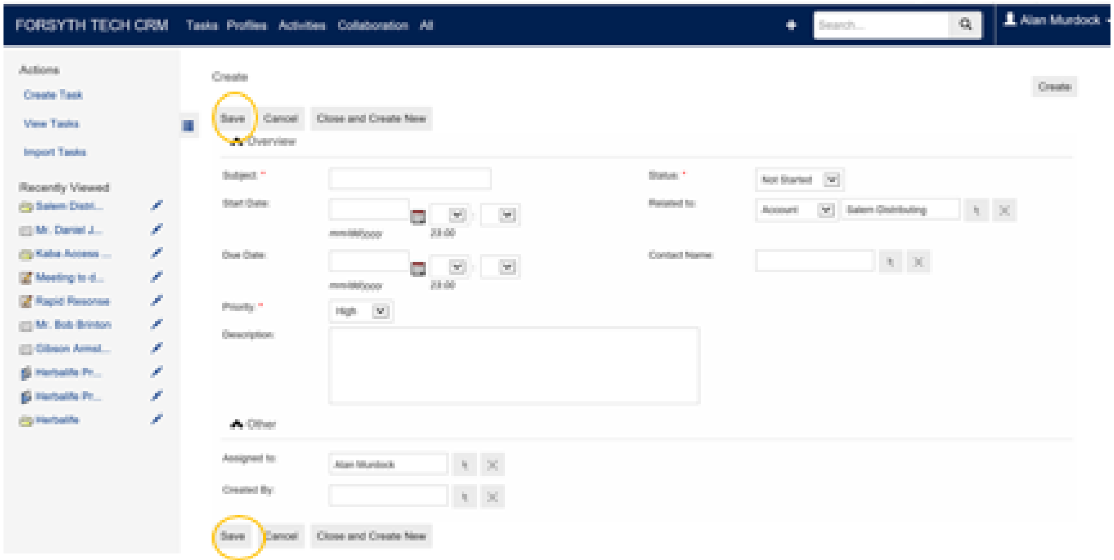
Left click "Create Task"



Select "Full Form"



Selecting "Full Form" lets you assign a task to someone.



Enter all information.

Select Save

Etiquette

- The data within the CRM is the property of Forsyth Tech.
- Do not use it for personal benefit.
- Before contacting someone from the CRM, clear it with the Account User – it's just good manners. They may be able to share some additional information or introduce you to the Account.
- Place as much information as possible into the CRM, it benefits the college and students.
- Use your best judgement when entering Accounts and Contacts, not everyone needs to be included.

What's In It For Me (WIIFM)

- Opens up opportunities for the College/Business
    - Work Based Learning
    - Jobs for students
- Leveraging history to avoid pitfalls and secure support
    - Assist the Foundation
    - Tells a better story

Next Steps

1) Complete remaining training dates
2) Analyze questions and concerns raised during training
3) Develop a team of people to determine:
    a. Reports to create
    b. Share best practices
    c. Sales funnel naming convention
    d. Required entries (BoT)
4) Communicate

APPENDIX E: EMAIL WITH SURVEY LINK

From: Alan Murdock
Sent: Wednesday, October 19, 2016 7:13 AM
To: Employees - Full time <employeesft@forsythtech.edu>
Cc: alallen@email.wcu.edu
Subject: Partnership Study

Hello,

As some of you may know, I am pursuing an Ed.D at Western Carolina University. I have come to the point in my studies that I need to begin collecting data. I ask that you please read the consent form below, and if you agree, please click the link to an anonymous three question survey. I estimate the survey will take less than 1 minute to complete.

Western Carolina University

Consent Form to Participate in a Research Study

Project Title: Leveraging Technology to Develop Partnerships

Principal Investigator: Dr. Ann Allen

Description and Purpose of the Research: This action research is designed to gauge the interest level in developing and maintain external partnerships.

What you will be asked to do: Each participant will be asked to answer three click or drag questions. Completion of the survey should take less than 5 minutes.

Risks and Discomforts: We anticipate that your participation in this survey presents no greater risk than everyday use of the Internet.

Benefits: There are no direct benefits to you for participating in this research study. The study may help us better understand how informed Forsyth Tech is regarding our CRM and our appreciation level for partnerships.

Privacy/Confidentiality/Data Security: All data collected will be anonymous.

Voluntary Participation: Participation is voluntary and you have the right to withdraw your consent or discontinue participation at any time without penalty. If you choose not to participate or decide to withdraw, there will be no impact on your employment status. Data is collected via anonymous survey and does not link to your email.

Compensation for Participation: No Compensation

Contact Information: For questions about this study, please contact Dr. Ann Allen, the principal investigator and faculty advisor for this project, at (828) 227-3311 or alallen@email.wcu.edu

If you have questions or concerns about your treatment as a participant in this study, you may contact the Western Carolina University Institutional Review Board through the Office of Research Administration by calling 828-227-7212 or emailing irb@wcu.edu.

I understand what is expected of me if I participate in this research study. I have been given the opportunity to ask questions, and understand that participation is voluntary. Accessing the survey indicates that I have seen this consent form; I agree to participate and am at least 18 years old.

Survey Link

Thank you,

Alan M.

Alan Murdock

Vice President of Economic and Workforce Development

Forsyth Technical Community College

2100 Silas Creek Parkway

Winston Salem, NC 27103

(P) 336.734.7757

amurdock@forsythtech.edu

APPENDIX F: FORSYTH TECH CRM

Reynolds American International (RJR)

Subject	Status	Contact	Date
Follow up meeting and Tour w/ Hudspeth, McWilliams	Note	Clemente McWilliams	Modified: 11/09/201
In attendance: Forsyth Tech: Jennifer Coulombe, Carolyn Milliron, John Downing RAI: Mike Hudspeth, Clemente McWilliams Other: Carolyn Brigmon, Cathy Beeson (NCCCS) Toured VUSE and cigarette factory areas. Discussed upcoming training needs as they related to potential spending of the capital campaign commitment. Needs around building content for presentation skills, cre learning (content development AND delivery). We mentioned that some CRC tests are being sunsetted, and this was their first hearing of this. Will meet in January 2017 to determine how they want to move forward regarding CRC.			
New Machines	Note	Ms. Nancy Hawley	Modified: 10/20/20
Transitioning in the next 8 years, discover new technology			
Basic Pneumatics and Troubleshooting customized class at OTT in Tville taught by Fusion TPM	Note		Modified: 09/07/20
Ran first Pneumatics class as a "pilot".It was well received, and second class was quickly scheduled. Production schedules are demanding and "cutting loose" employees is difficult.			
Project Profile attached (index.php?entryPoint=download&id=80d180a2-f1b1-62b4-d754-57d0731da2ed&type=Notes)	Note	Clemente McWilliams	Modified: 09/07/20
NCSU customized collobrative classes for RAI/RJR	Note	Clemente McWilliams	Modified: 09/07/20
Several upcoming classes through NCSU for RAI/RJR will be held at IQ			
Computer classes	Note		Modified: 09/07/20
RAI/RJR has moved upcoming classes from the RJR Plaza to IQ			
RJR Project Profile (index.php?entryPoint=download&id=7e539296-b011-24c7-cac0-57d012c62d47&type=Notes)	Note		Modified: 09/07/20
RJR Project Profile			
Gift tracking	Note	Ms. Nancy Hawley	Modified: 09/06/20
Met with Nancy Hawley today just before the Ft Foundation Board meeting. She would like to get together to discuss training via the CTP profile as well as the 100k annu for training. I will need to track these monies and report quarterly.			
Scheduled over 53 computer and coaching classes	Note	Clemente McWilliams	Modified: 05/18/20
We have scheduled over 53 computer and coaching classes out to September. We are working on Maintenance training and LPS training for production workers at their Tobaccoville plant.			
3-24-16 Training Room for RAI	Note		Modified: 03/29/20
Provided training room at IQ for off site training session			

3-23-16 Fusion TPM / RJRT course content	Note		Modified: 03/29/20

Met with Bobby Edwards, President, Fusion TPM
Topics:
Capability, expertise, customization for RJRT project
Requested that Fusion TPM collect and forward anecdotal and hard data as courses are developed and delivered

3-11-16 Training specification(s) /customization meeting	Note	Michael Hudspeth	Modified: 03/29/20

Meeting on 3-11-2016 with (RJRT) Michael Hudspeth, Dusty Pratt, Darrell Dixon, Roger Davis, Andy Hjort and (Fusion TPM) Bobby Edwards, Budd Midkiff, Terry Hughes (FTCC) John Downing, Barry Self, Carolyn Millron, Dianne Mounce.
Topics: Customizing content to RJRT needs, SWE (Simulated Work Environment)/LPS (Lean Production Systems), Confidentiality agreements, training dates

3-14-16 Training customization/training dates	Note	Clemente McWilliams	Modified: 03/29/20

Meeting with Clemente McWilliams, John Downing, Carolyn Millron
Topics covered:
Registration processes for 2000 employees of RJRT
Initial course schedules/locations
CBT (Computer Based Training)
SWE/LPS
NC State course content

Discussing New Customized Training Project	Note	Clemente McWilliams	Modified: 11/13/201

Proposing New Customized Training Project:
Latest meeting to discuss Customized Training Project 10/16/15 with Clemente McWilliams.
John Downing is also working with Michael Hudspeth and has a SWE scheduled with Reynolds on 12/21/15.
Working on finishing Customized Training project in Datatel.
They have a SWE scheduled on December 21 and two NEC update classes in the 2nd week of December.

Susan Cameron	Note		Modified: 10/28/20

Susan will be the keynote speaker for the Goodwill Industries banquet on 11/4/2015

APPENDIX G: CONSENT FORM

Western Carolina University
Consent Form to Participate in a Research Study

Project Title: Leveraging technology to develop partnerships

Principal Investigators Dr. Ann Allen & Alan Murdock

Description and Purpose of the Research: This action research disquisition plans to determine if the intervention of providing professional development for intended users of Forsyth Technical Community College's (FTCC) Customer Relationship Management (CRM) software results in increased usage of the CRM software.

What you will be asked to do: After attending the required professional development session regarding the CRM usage**,** each participant will be asked to complete a Plus/Delta form as an exit survey. Completion of the form should take less than 5 minutes.

Benefits: There are no direct benefits to you for participating in this research study. The study may help me understand my strengths and weakness when it comes to delivering professional development. It may benefit future attendances by improving the delivery of information or clarity of the presentation.

Privacy/Confidentiality/Data Security: All data collected will be anonymous. A designated colleague will collect the responses and deliver them to staff associate who will convert the data to type written form and destroy all originals prior to sharing the data collected with Mr. Murdock.

Voluntary Participation: Participation is voluntary and you have the right to withdraw your consent or discontinue participation at any time without penalty. If you choose not to participate or decide to withdraw, there will be no impact on your employment status. Because of the anonymous collection process it will not be possible to determine who participated in the Plus/Delta feedback.

Compensation for Participation: No Compensation

Contact Information: For questions about this study, please contact Dr. Ann Allen as the principal investigator and faculty advisor for this project, at (828) 227-3311

If you have questions or concerns about your treatment as a participant in this study, you may contact the Western Carolina University Institutional Review Board through the Office of Research Administration by calling 828-227-7212 or emailing irb@wcu.edu.

I understand what is expected of me if I participate in this research study. I have been given the opportunity to ask questions, and understand that participation is voluntary. Submitting a completed Plus/Delta form indicates my consent in the research study.

Customer Relationship Management Training Date_11/9/2016

Consent – The completion of this form is anonymous and voluntary. Responses from the completed forms will be tabulated by the Staff Associate of Economic and Workforce Development. Results will be used to guide the content and presentation standards of subsequent professional development involving the CRM.

PLUS

What did you like about the training?

1)

2)

3)

DELTA

What are some things you would change about the training?

1)

2)

3)

APPENDIX H: CRM ADVANCEMENT EXECUTIVE SUMMARY

To: President, Gary Green

RE: CRM Advancement

Alan Murdock

2/11/2017

To this point the college's CRM contains 223 accounts and 348 contacts. By 12/31/2017 I would like to see the CRM contain 350 accounts and 600 contacts. To do so will require some planning on behalf of the college and some internal resources. Before you are the short-term plans for advancing the CRM in 2017. The internal resources are time and effort from the College's Information Technology division to restructure the CRM.

1. Correct immediate concerns (February–April, 2017)
    a. Open access granted to all employees. Part time employees have access to the database. Forsyth Technical Community College does not differentiate part time employees, so all of them have access. An employee that works twenty hours a week has the same access as an employee that works three hours annually. The CRM access should be limited to full time employees and appropriate part time employees.
    b. Develop hierarchy of control for the CRM
2. Reorganize CRM interface (April – June, 2017)
    a. Redevelop drop down menus to better capture pertinent information
    b. Change the color scheme so that it is easier to navigate for end users
3. Work with upper management to train and educate their staff on the CRM (April–July, 2017)
    a. Develop a training calendar
    b. Add missing information from existing partners
        i. Board of Trustees
        ii. Forsyth Technical CC Foundation Board members
        iii. Advisory board members