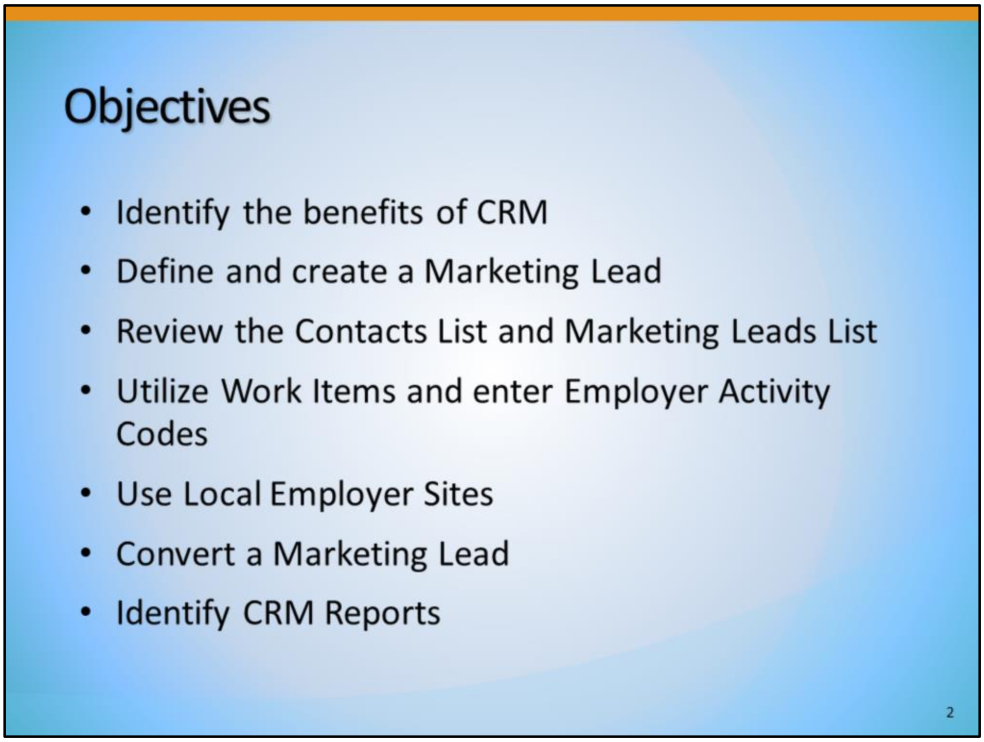
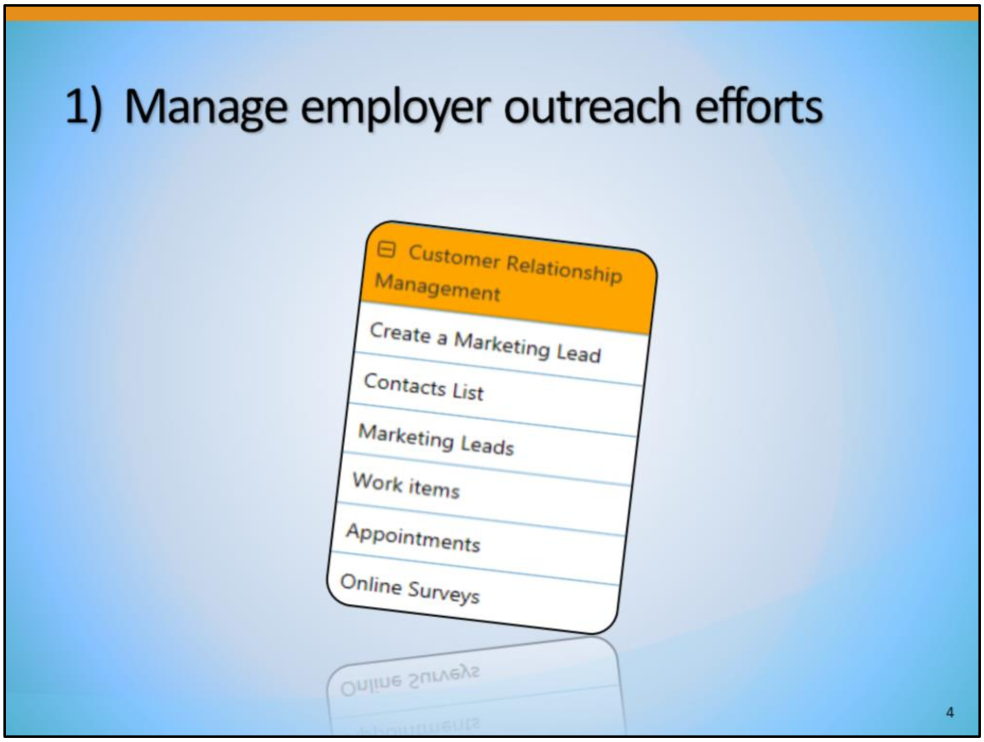
Welcome to the Customer Relationship Management (CRM) training module. The CRM feature will assist staff and partners to conduct, manage, and record employer recruitment efforts.



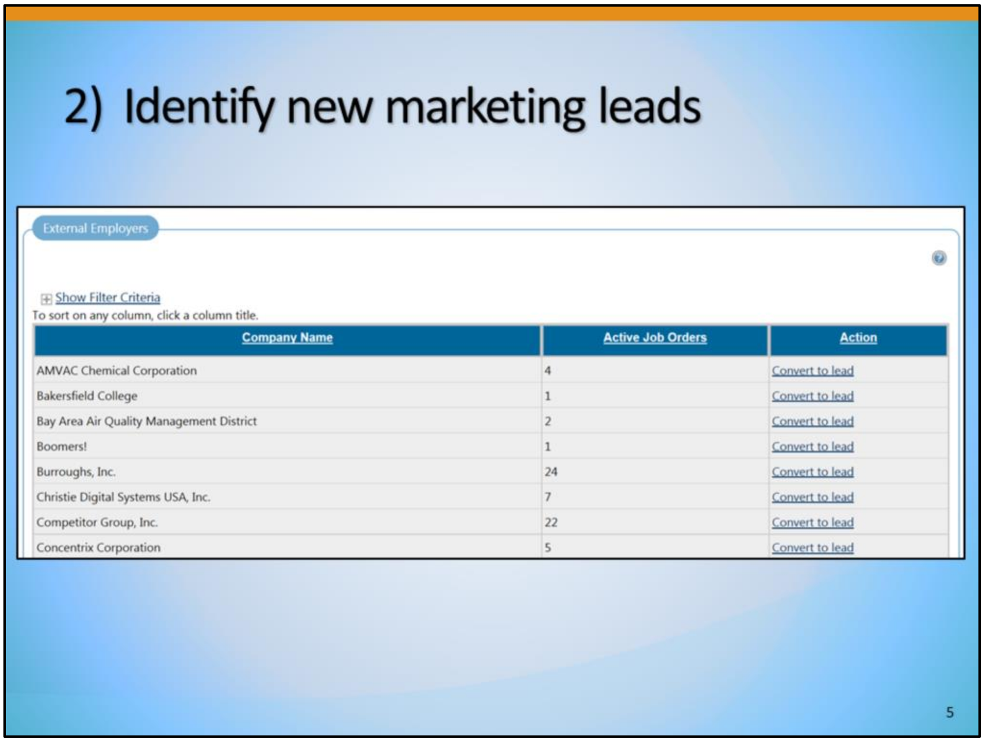
By the end of this training module, we hope that staff will be able to achieve the following objectives:

- Identify the Benefits of CRM
- Define and create a Marketing Lead
- Review the Contacts List and Marketing Leads List
- Utilize Work Items and enter Employer Activity Codes
- Use Local Employer Sites
- Convert a Marketing Lead
- Identify CRM Reports

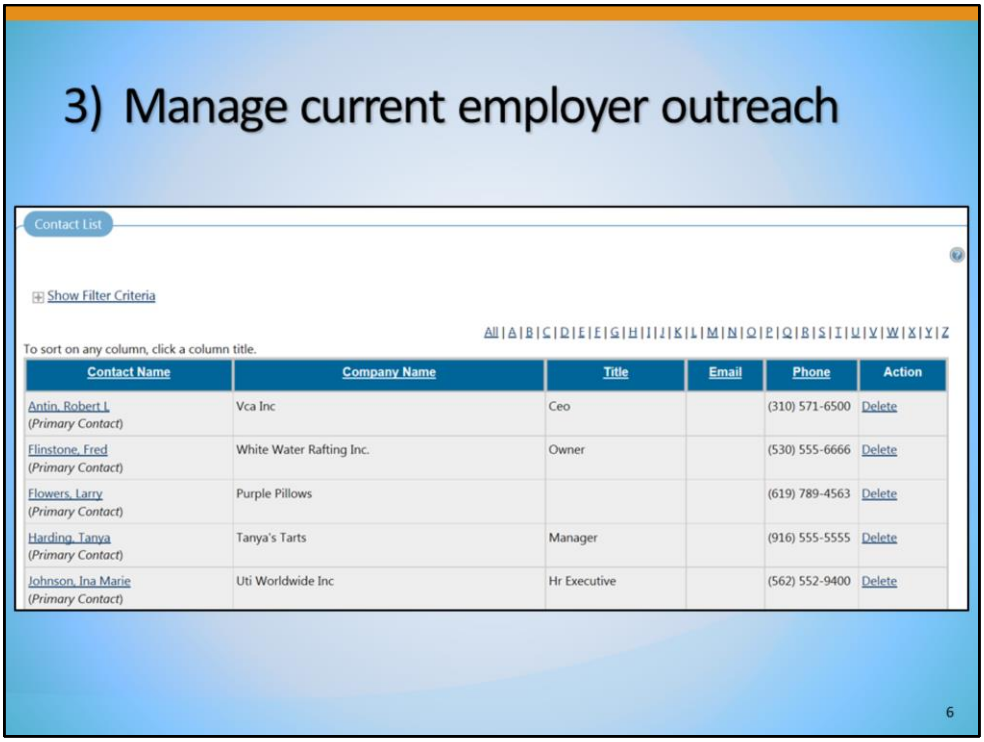
We will identify four benefits of using the CRM module.



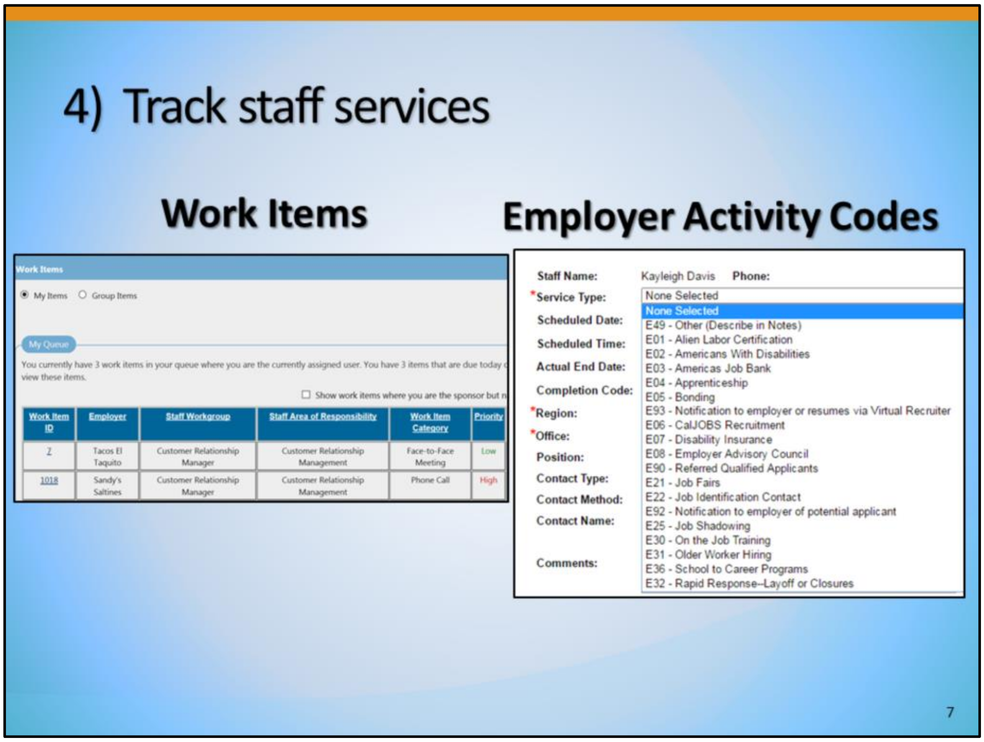
First, CRM makes it possible for employer outreach staff, business services representatives, and other staff to enter potential business customers into CalJOBS as Marketing Leads for the purpose of providing assistance to these employers and tracking those services provided.



Next, CRM allows business services staff to search for untapped employers that are not yet entered into the system and convert them to a Marketing Lead.



Next, CRM provides a central location where staff can organize and manage their employer outreach work in progress.



Finally, staff can use Work Items to track and document employer outreach tasks that they complete each day. In addition, services provided to Marketing Leads can be reported in the system, using the employer activity codes. Staff and management can run reports on employer outreach work performed.

Define and Create a Marketing Lead

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Before we cover how to create a Marketing Lead, we will first define a Marketing Lead and compare it to the other type of employer account in CalJOBS, Recruiting Employer (formerly known as "Preferred Employer").

Create a Marketing Lead

- 5 ways to create a marketing lead:
  - CRM Widget
  - CRM Left Navigation Menu
  - Create an Employer
  - Local Employer Sites
  - Convert an External Job

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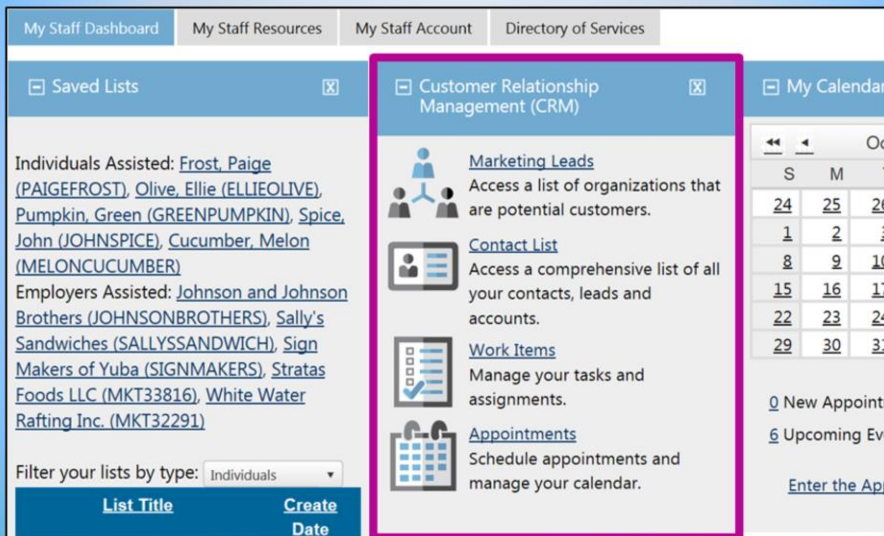
The system offers staff numerous ways to create a Marketing Lead.

CRM Widget



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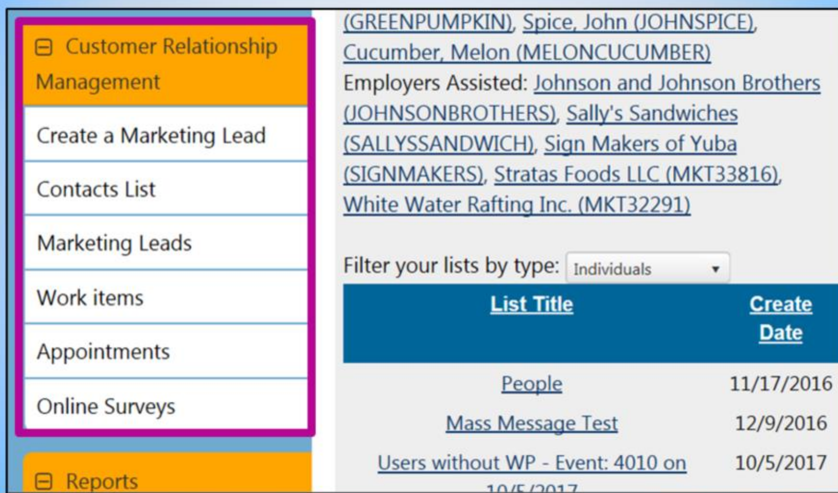
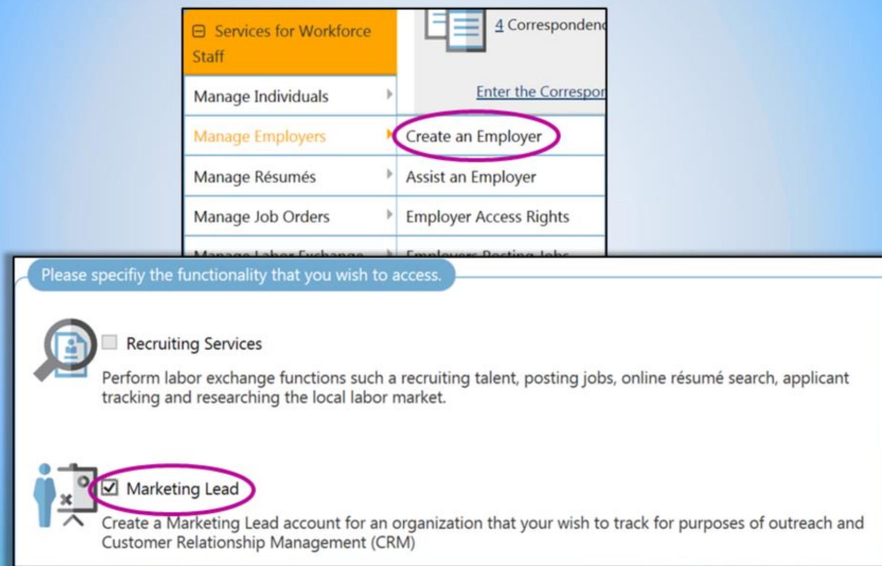
CRM Left Navigation Menu



Create an Employer



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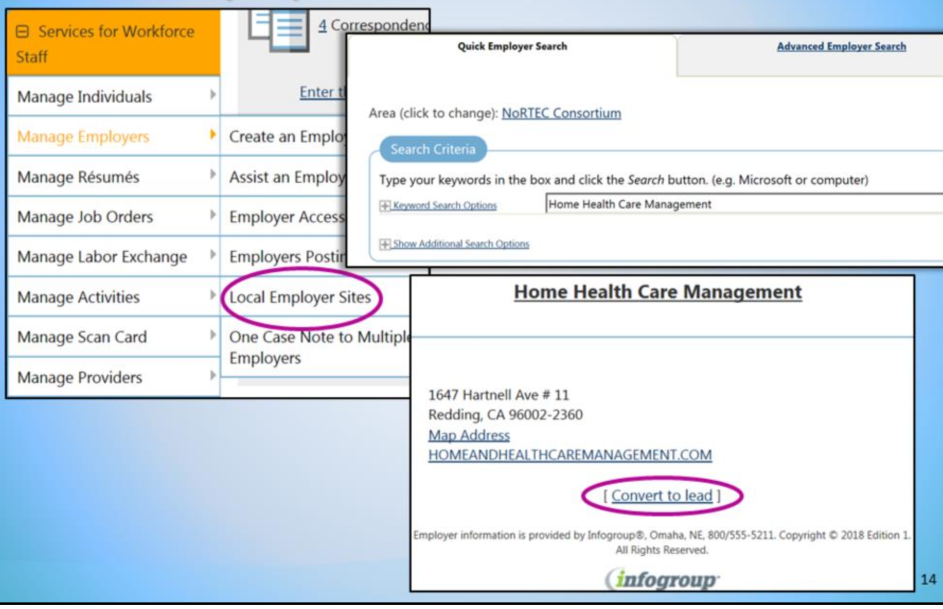
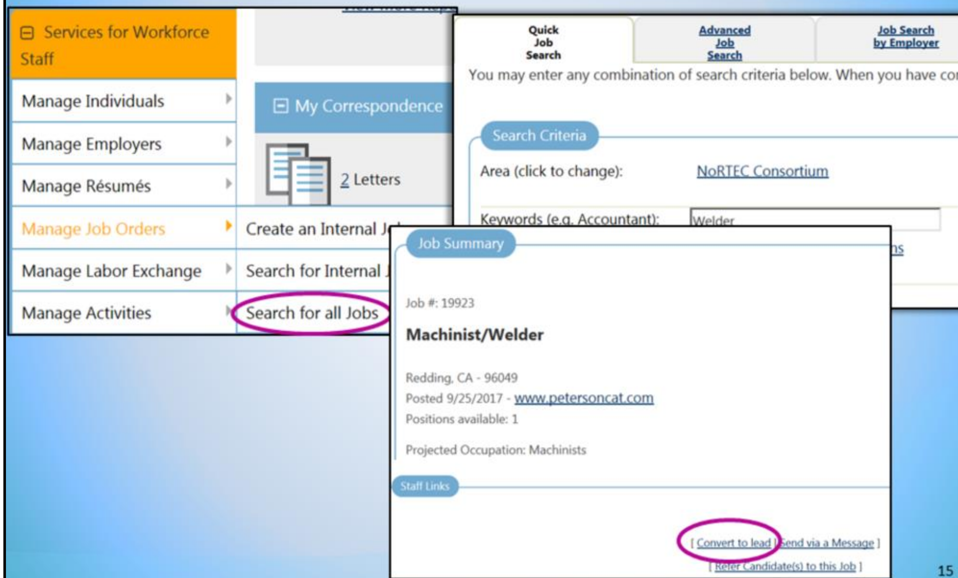
Local Employer Sites



14

Convert an External Job



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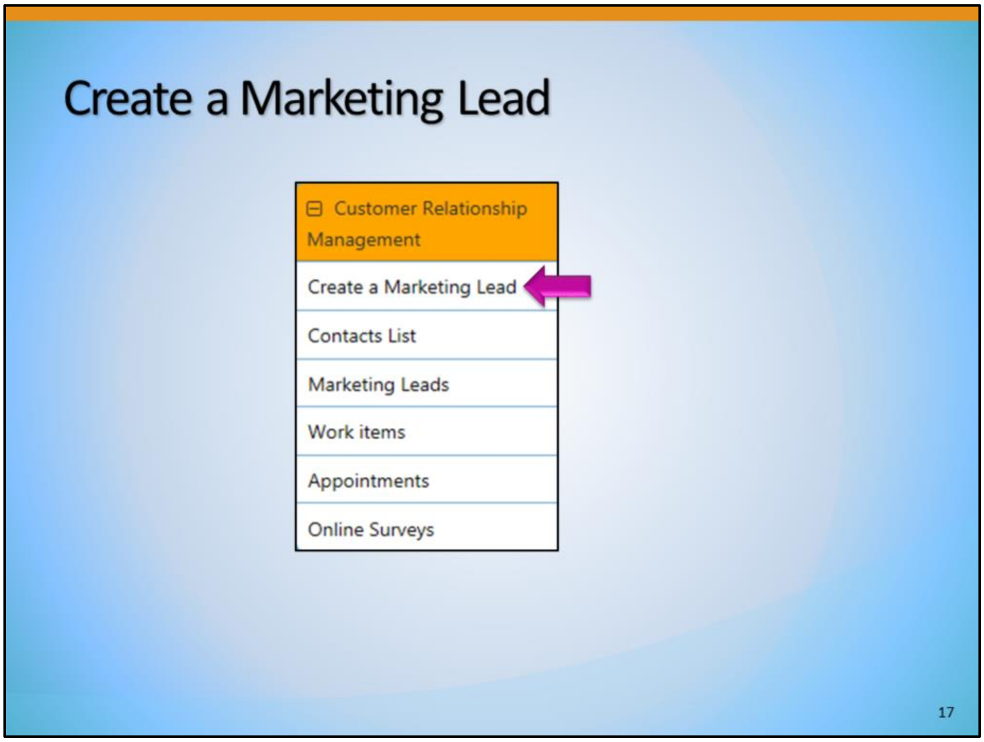
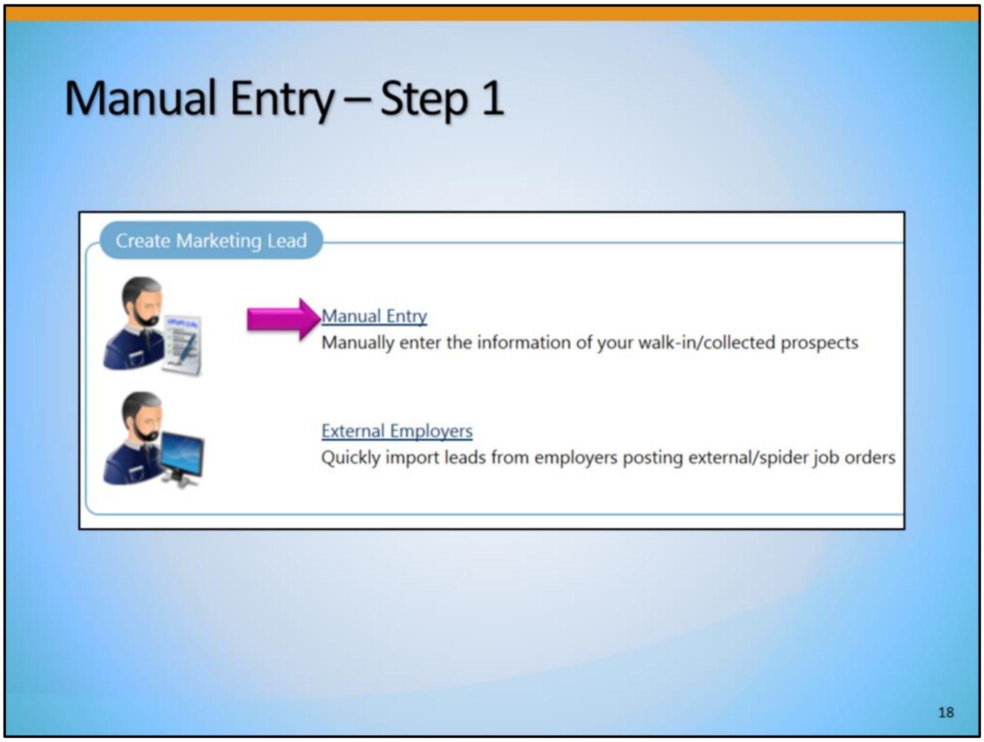
Let's take a look at how to get started with the CRM module. To access the CRM module, log in to CalJOBS with a staff account. You'll find the CRM menu about halfway down on the left. In the example shown here, the CRM menu has been moved up to the top, for convenience.

In addition, you can access the CRM module via the CRM dashboard widget, outlined in the purple box.



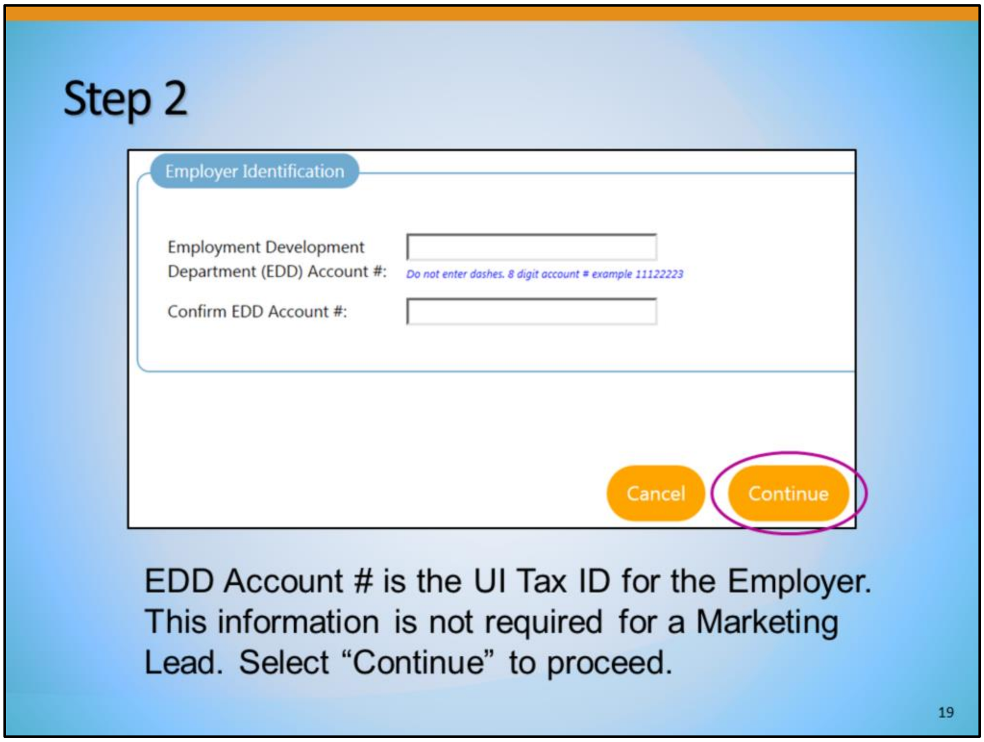
We'll begin by opening the first sub-menu of the CRM menu, **Create a Marketing Lead**. Ideally, a marketing lead should be created as soon as a staff member has made contact with an employer or business customer.



After selecting **Create a Marketing Lead** from the left menu, we can choose from the two methods shown here:

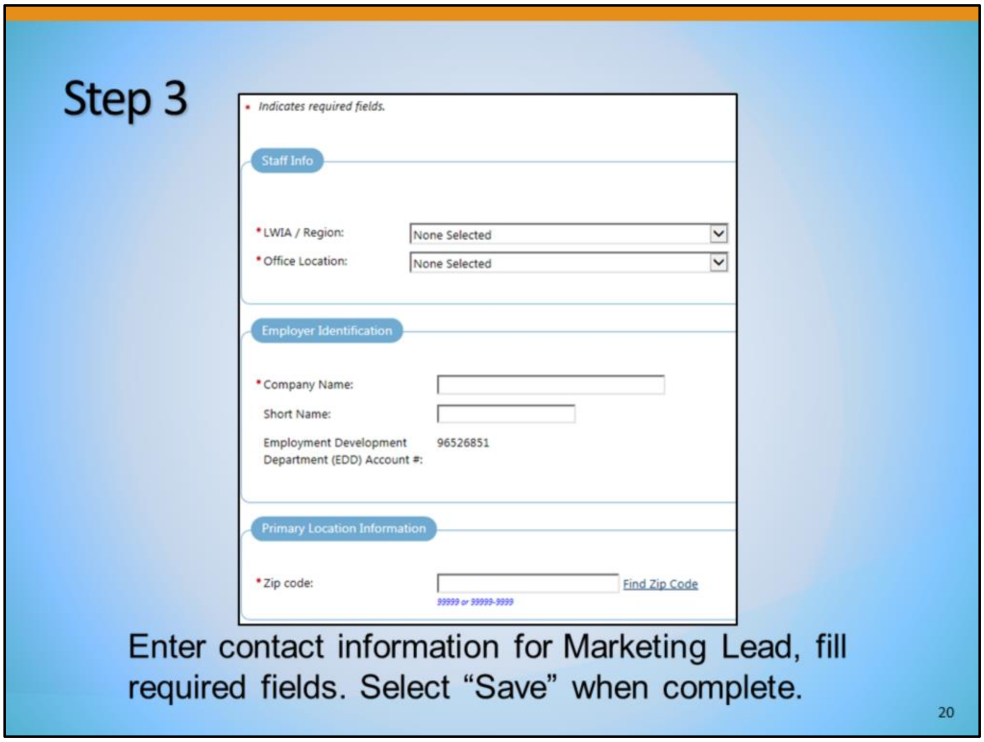
- Manually enter the information of an employer you're working with, or plan to work with, or,
- Select from a list of external employers -- those employers whose jobs are gathered and "spidered" into CalJOBS by the system.

First, let's select Manual Entry.



Which brings us to the **Employer Identification** screen.

The EDD Account Number, also known as the employer tax ID #, are not required fields for marketing lead employers. You may enter the EDD Account Number if you have it, or just select the "Continue" button.

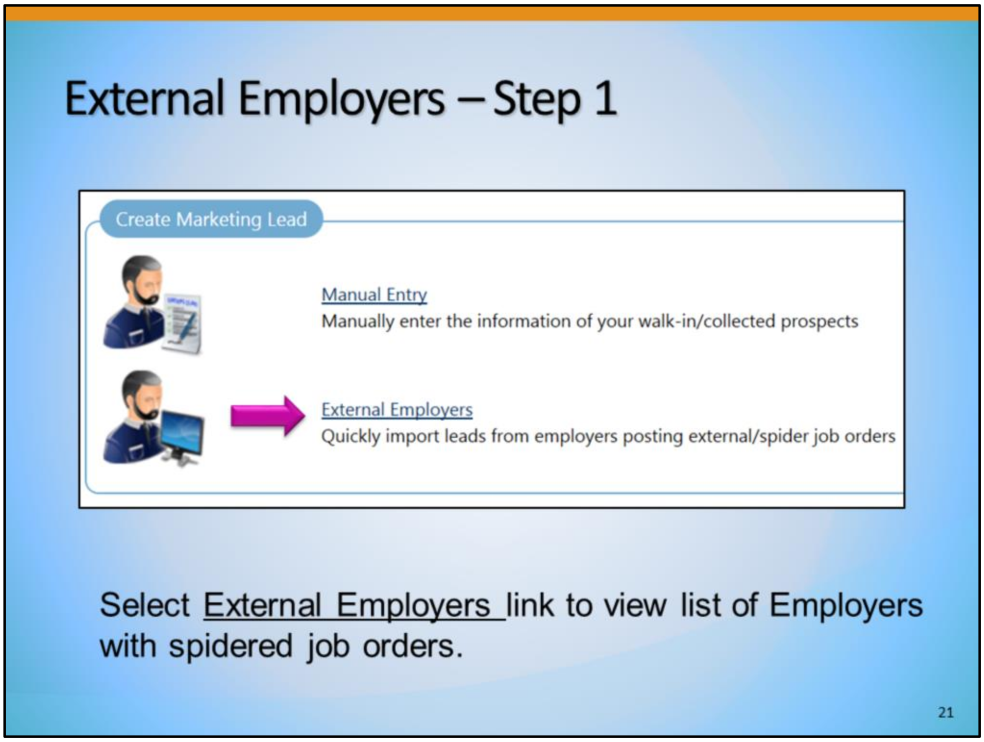


The next page is used to create the marketing lead. Select the appropriate **LWIA/Region** and **Office location** in the **Staff Info** section.

Next, in the **Employer Identification** section, enter the **Company Name**.

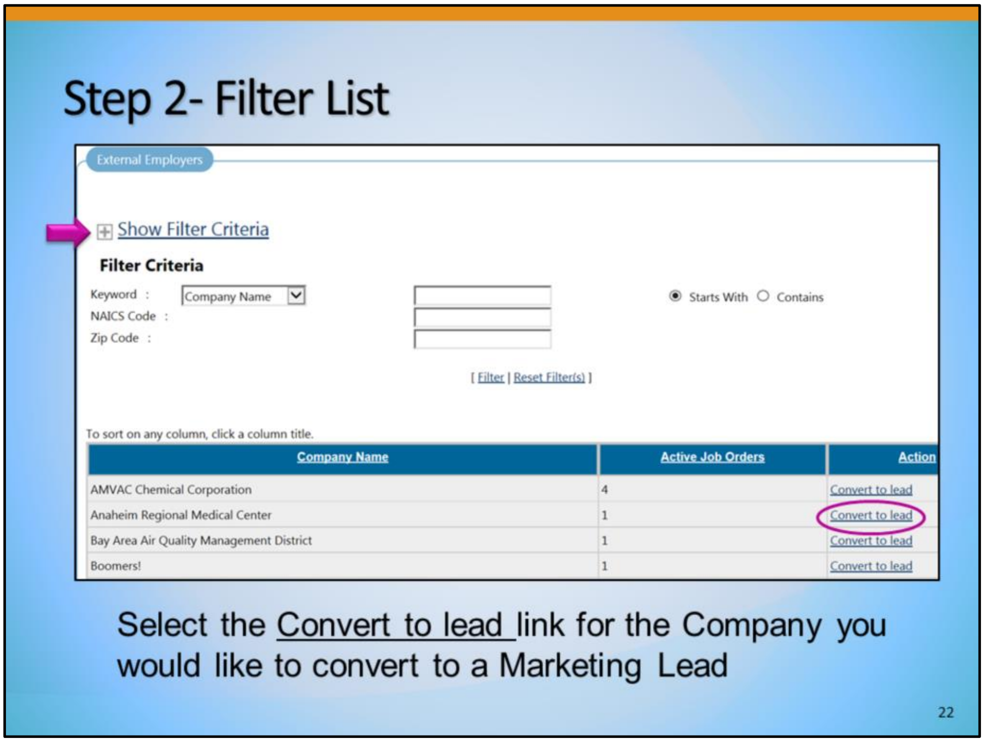
If you know the zip code of the employer's main, or primary, location, enter the **Zip code** first. Then you will be prompted to enter the Street Address. Continue by completing the **Mailing Address** and **Contact Information** sections not shown on this slide.

Select "Save" when complete.



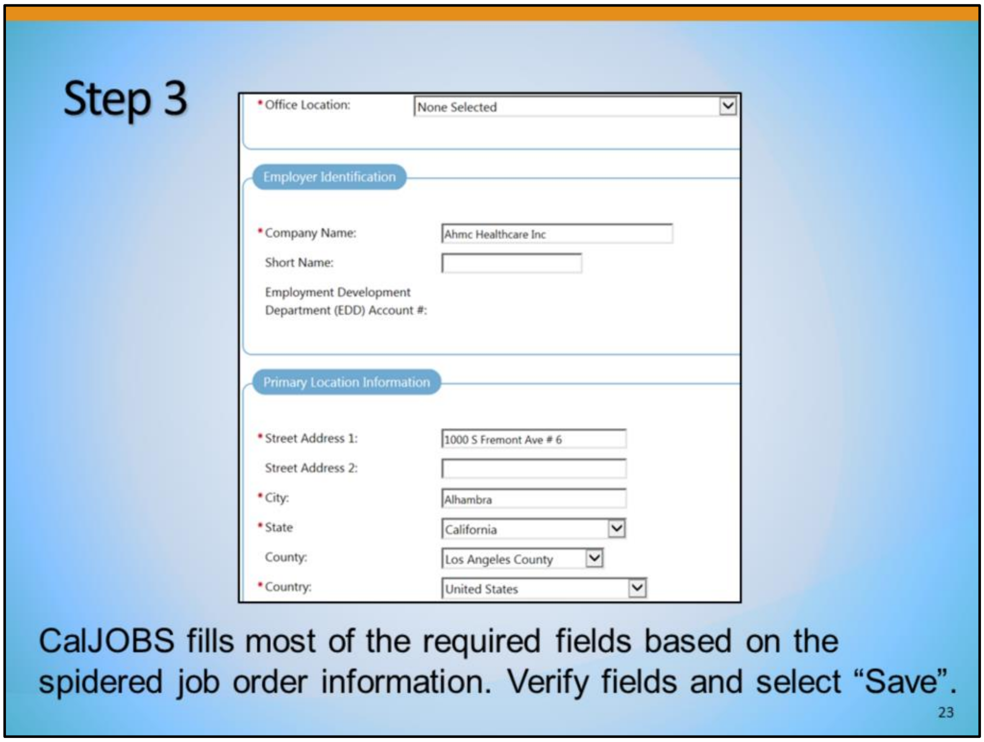
Now let's go back and create a marketing lead for an External Employer, or, any employer whose job postings have been "spidered" into CalJOBS.

Again, on the CRM menu we select **Create a Marketing Lead**. Then, select the External Employers link.



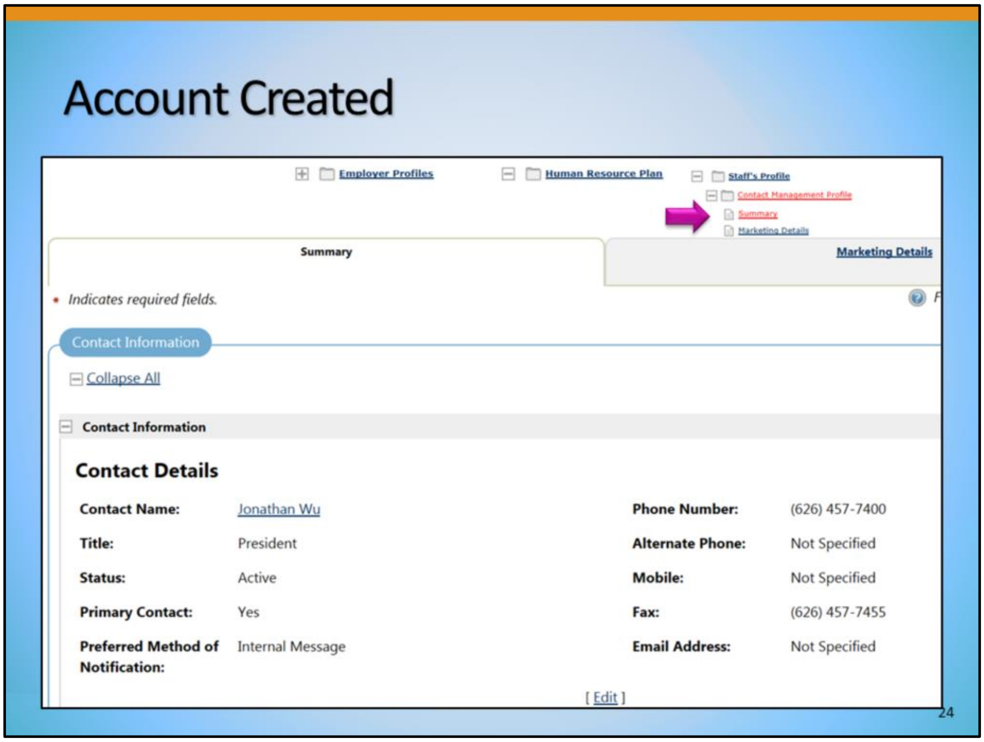
Here you will see a list of all the spidered employers currently in CalJOBS. This list can be sorted by Company Name, or by Active Job Orders. Or, we can expand the Show Filter Criteria link and filter the search.

You can filter by keyword, by industry code, or zip code of the employer location. After we've chosen or identified an employer that we plan to contact, from the right hand side, under the Action column, select the Convert to lead link.



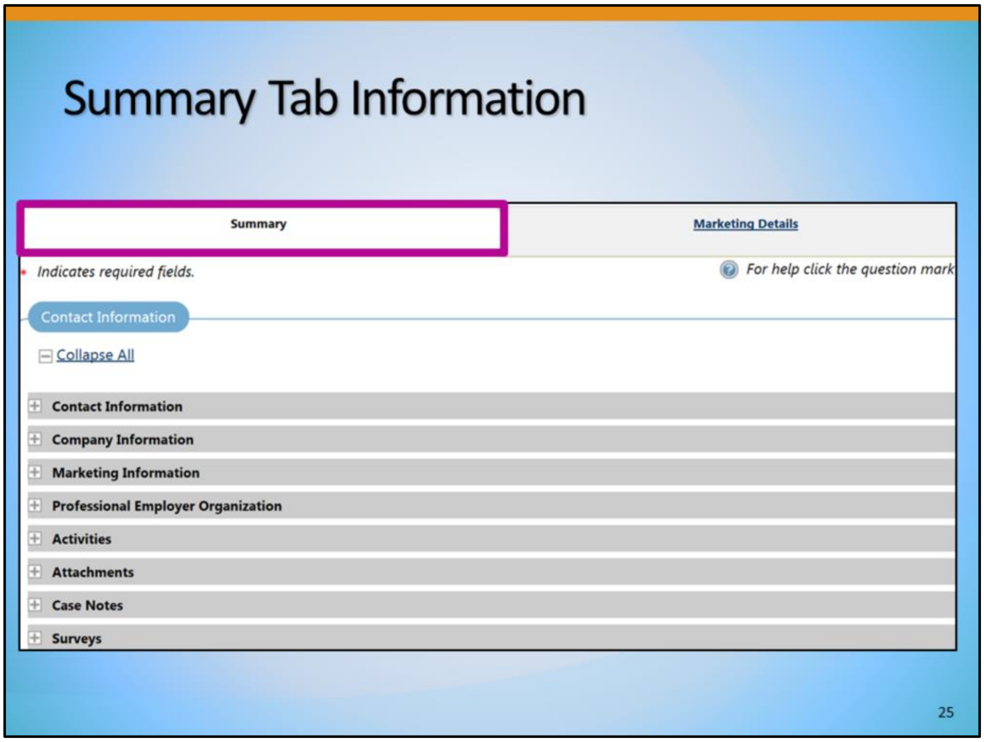
The next screen you will see is the same information entry screen that we saw when completing a Manual Entry. However, this time, most fields will be pre-filled with the profile information that the system has retrieved.

When the required fields are completed, select the "Save" button.



After selecting "Save", the external employer Marketing Lead is created.

The system will automatically route you to the **Staff's Profile** folder, **Contact Management Profile** subfolder, Summary section.



The Summary tab contains the following sections that are useful in the management of the Marketing Lead:

Contact Information- Edit login information
Company Information- Add Locations and Contacts, View Account Type
Marketing Information- View Marketing Lead Owner (The staff person who currently manages the employer's needs)
Professional Employer Organization- Select a Professional Employer Organization to associate to the Lead
Activities- View and add Work Items for the Lead
Attachments- Upload and associate important documents, for example, business license, with the account profile
Case Notes- View existing and add new case notes
Surveys- Not used by California

Contacts List and Marketing Leads List

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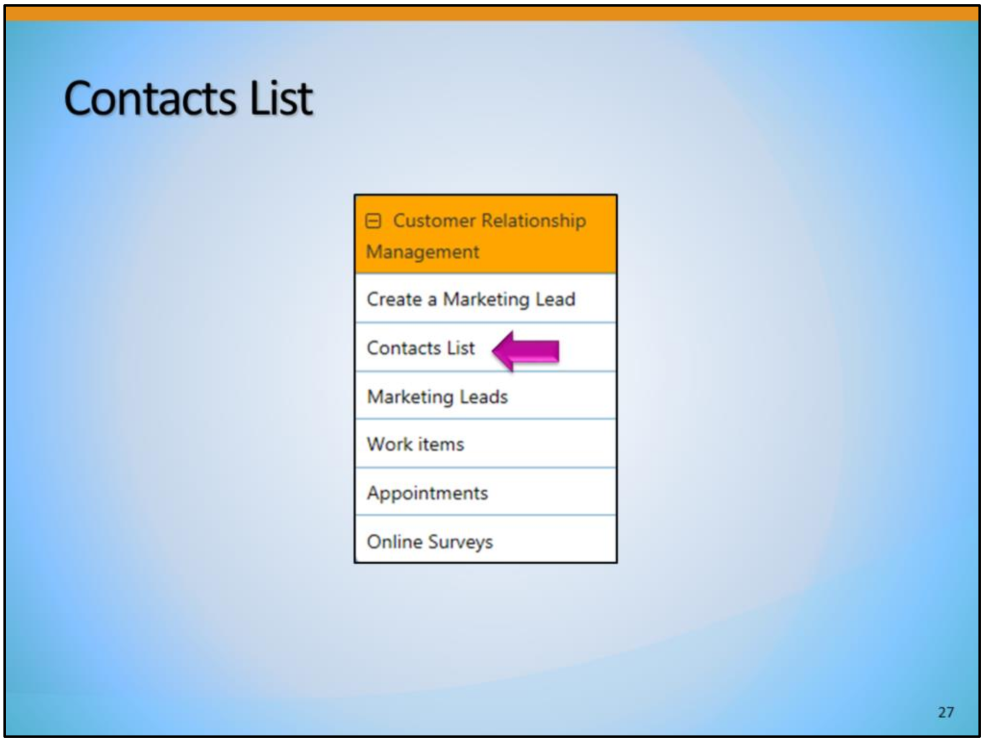
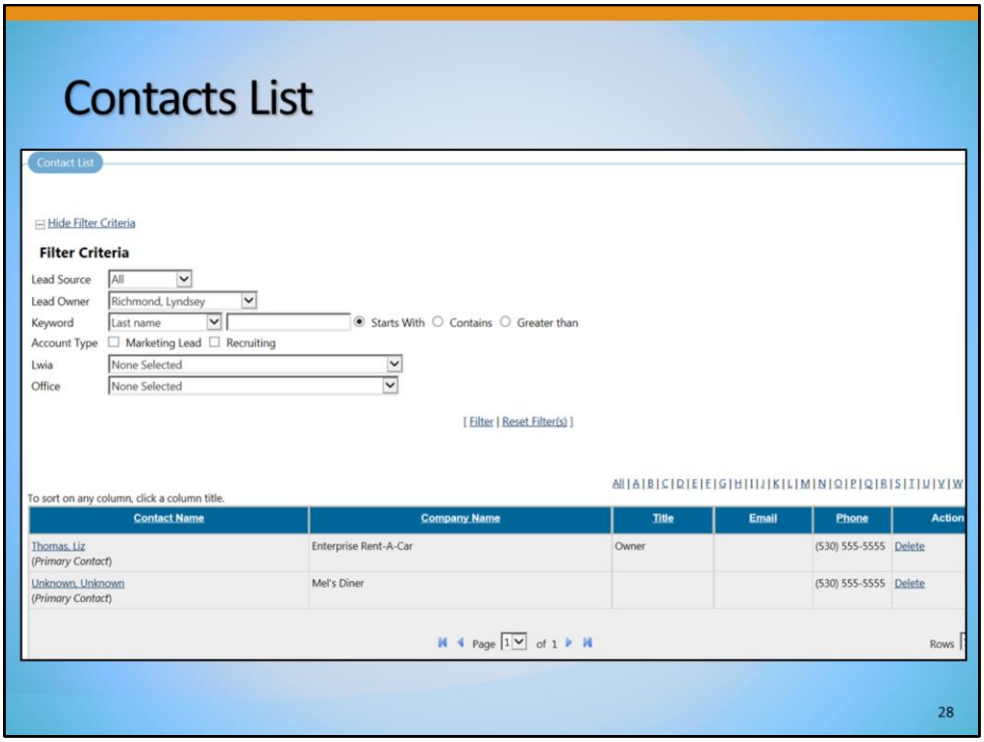


Next, we will review the Contacts List within CRM. Navigating to the left menu for CRM, select the second sub-menu: **Contacts List**.

The **Contact List** displays all primary and secondary contacts for a Marketing Lead.

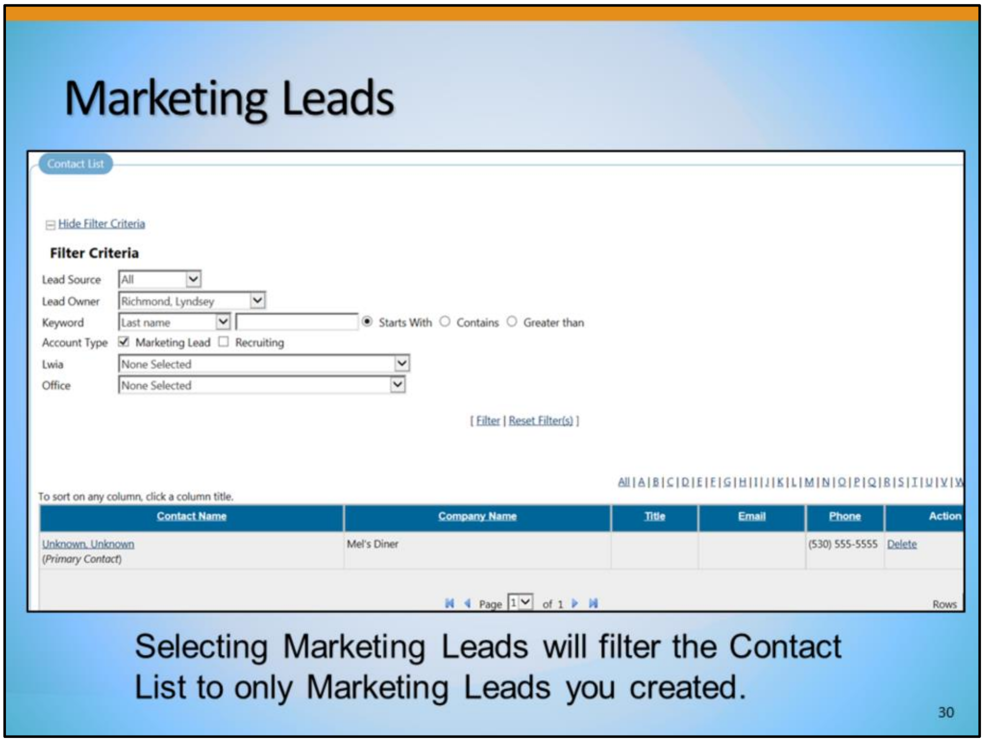


The **Contact List** will default to your name in the **Lead Owner** filter. With this filter applied, this is a directory of contact names and company names of marketing lead employers that you created. In addition, employers that you created as marketing leads, but later converted to a Recruiting Employer will appear on this list as well.

This directory is very useful when you are creating additional marketing leads, because it can be used to search for possible duplicate contacts. It's important to avoid creating duplicate marketing leads or contacts. If you reset the **Lead Owner** field to "All", this list will show *all* Marketing Leads and Recruiting Employers that were originally created as Marketing Leads by other CRM staff.

This means that Marketing Leads created by CRM staff are accessible and available to *all* CalJOBS staff who use the CRM module.

Back to the main menu for CRM, we'll look at the third sub-menu: **Marketing Leads**.



The **Marketing Leads** list is identical to the **Contact List** screen. The slight difference is that the Marketing Leads list defaults to having the "Marketing Lead" box checked in the **Account Type** filter. Because of this, the list defaults to only the Marketing Lead account types that you have created.

CRM Work Items

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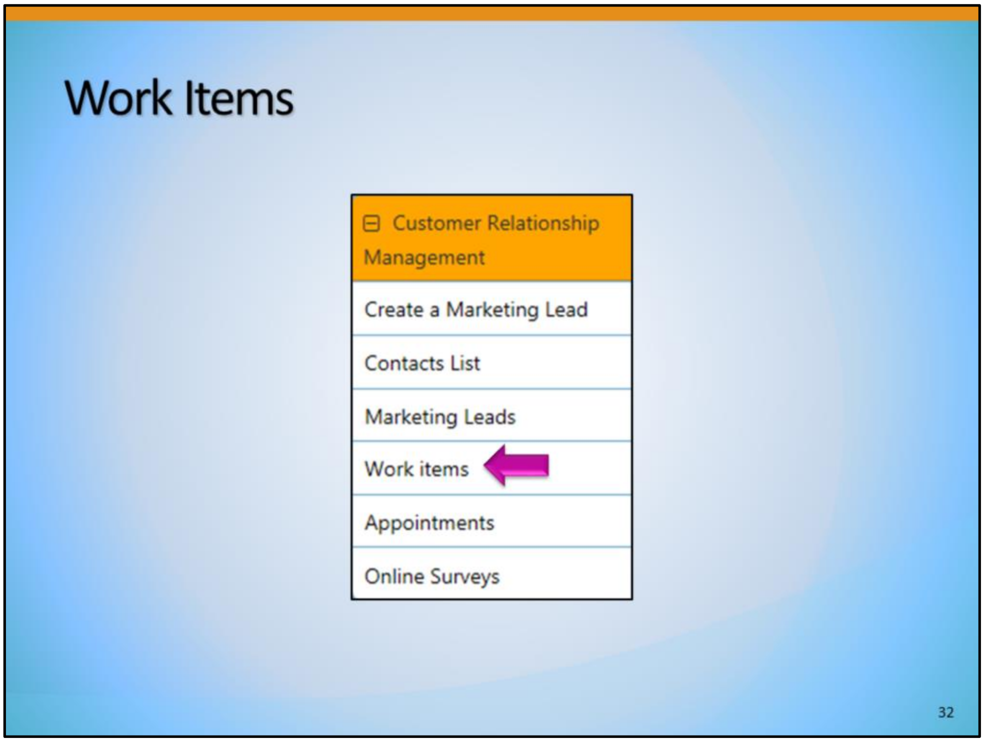
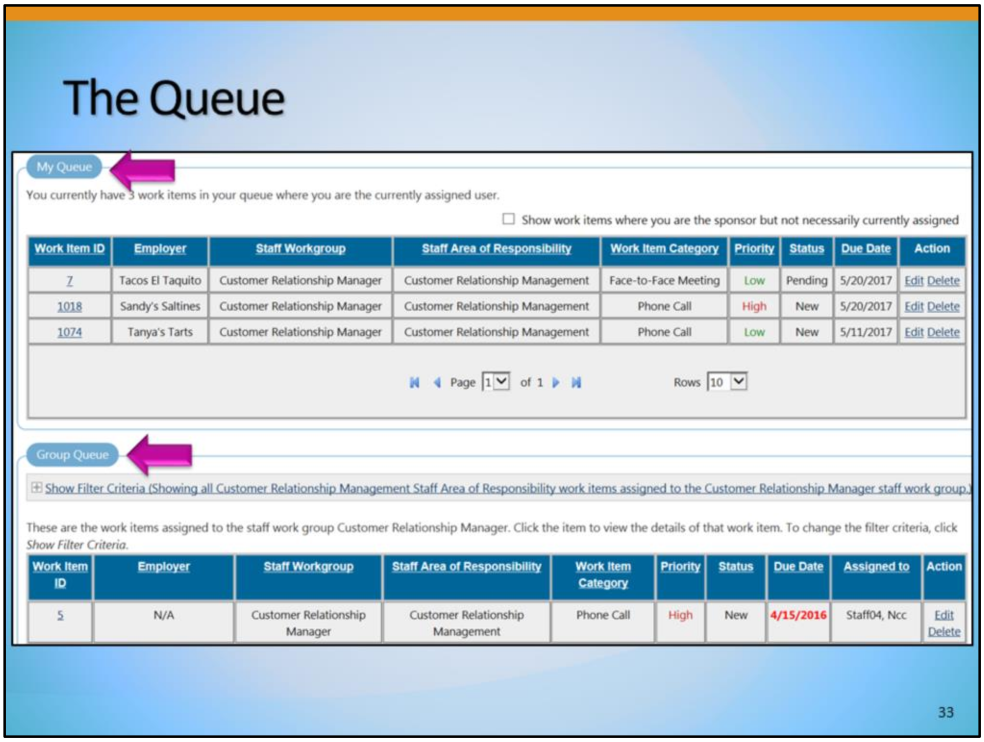


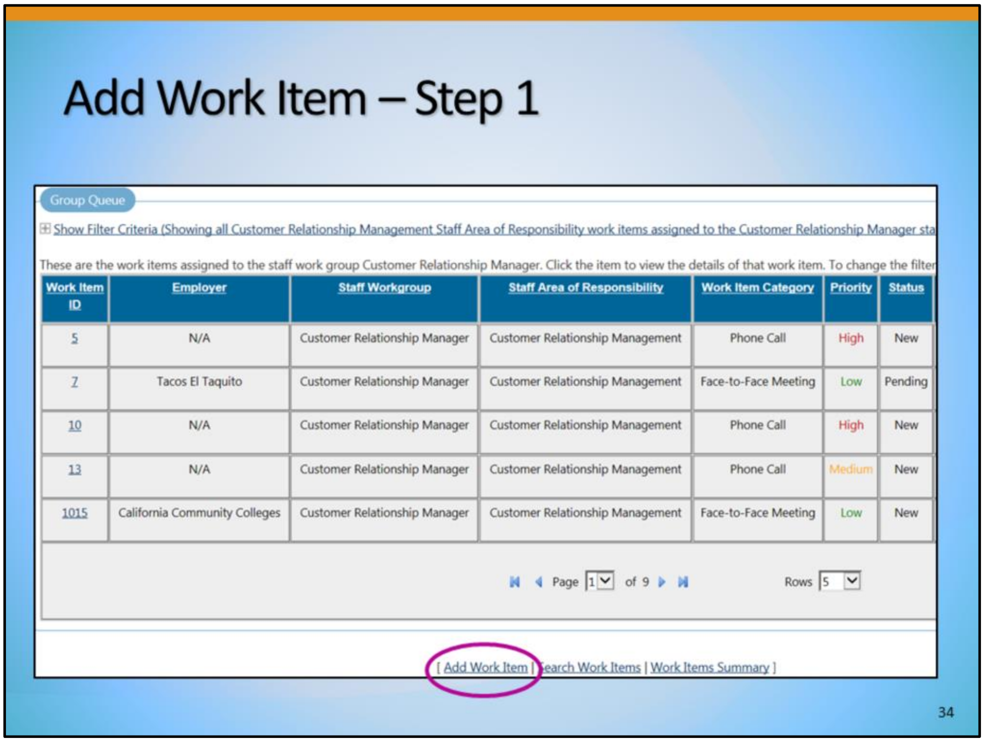
The next sub-menu is **Work Items**. A work item is a task that staff must perform on behalf of a Marketing Lead employer. Work items can be assigned, and re-assigned, to staff and can be prioritized based on importance.

Staff can use work items as a “to-do” list to organize and manage all of their their employer outreach activities. When used in this way, it also provides a record of their daily and weekly work activities for managers to view, as needed.

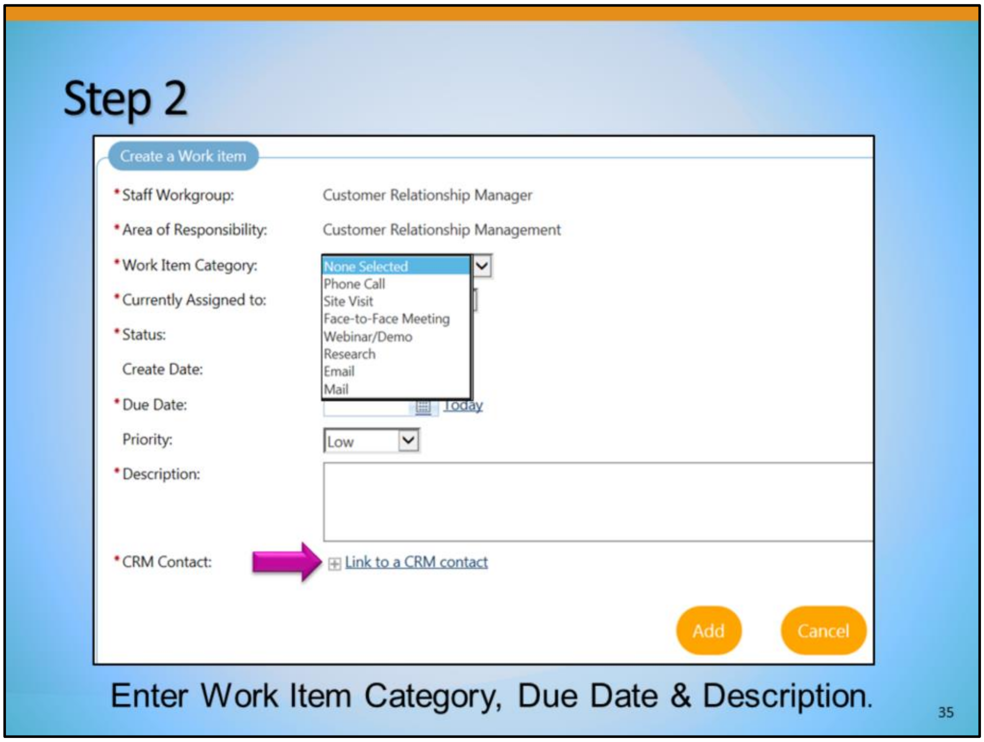


The **My Queue** section on top shows the work items assigned to you,, if any.

The **Group Queue** section shows all the work items assigned to the entire CRM work group. There is only one CRM work group in CalJOBS. Everyone who is using the Work Items feature is in the same group.



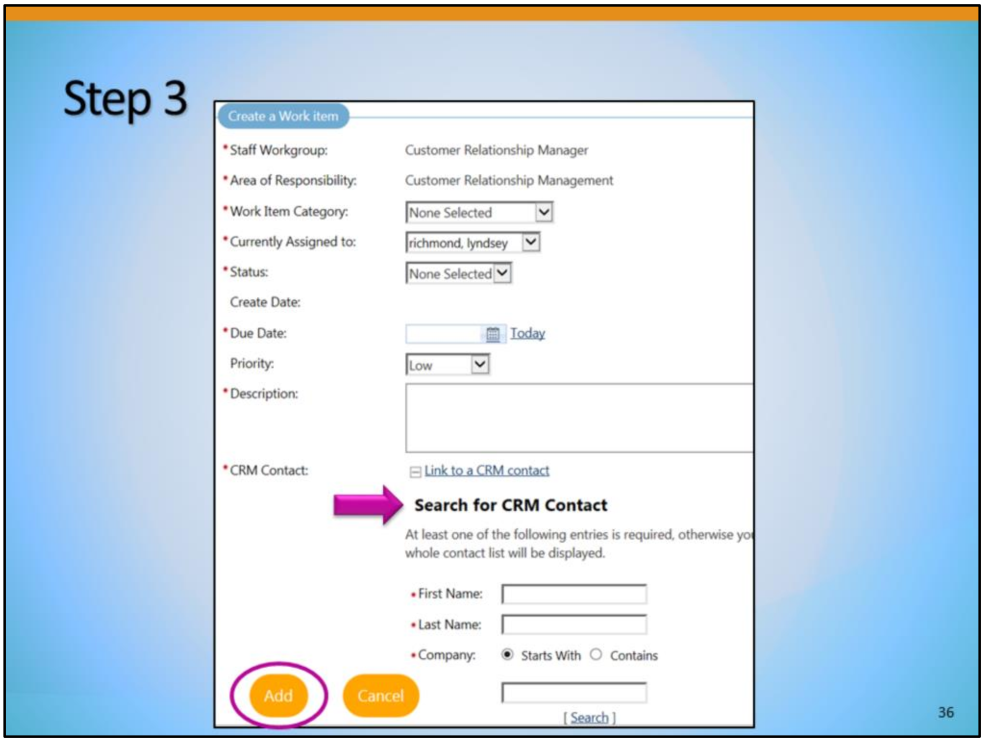
Below the Queues, there are three links. CalJOBS uses Add Work Item and Search Work Items. The third one is not applicable to California. Let's click on Add Work Item.



On this screen, staff with appropriate privileges can add a new work item for themselves, or assign a work item to another staff. First, select the **Work Item Category** from the drop-down.

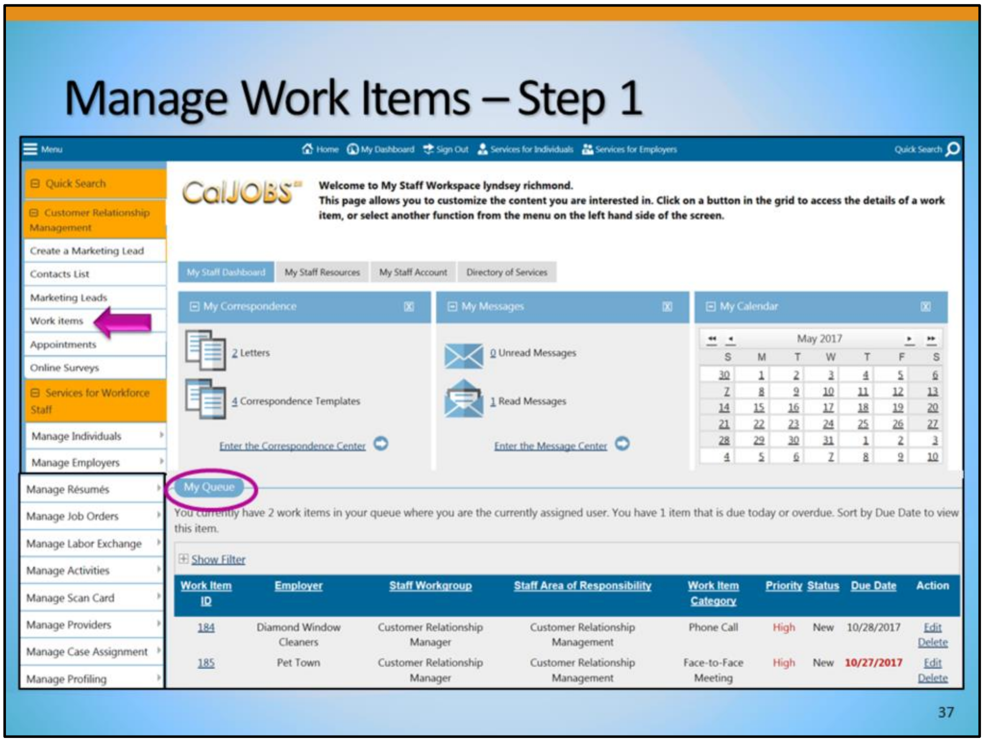
The **Currently Assigned To** dropdown will only show names of those staff who have been designated as part of the CRM staff workgroup. Contact your MIS Administrator or CalJOBS SPOC if your name does not appear on this list.

Next, complete the **Status**, **Due Date**, **Priority**, and **Description** fields. Finally, click on the <u>Link to a CRM contact</u> link shown at the bottom to link a Marketing Lead to the work item.



After selecting Link to a CRM contact, use the simple search screen to link to the appropriate employer for this work item. This link ensures that the Work Item will be included in CRM Reports.

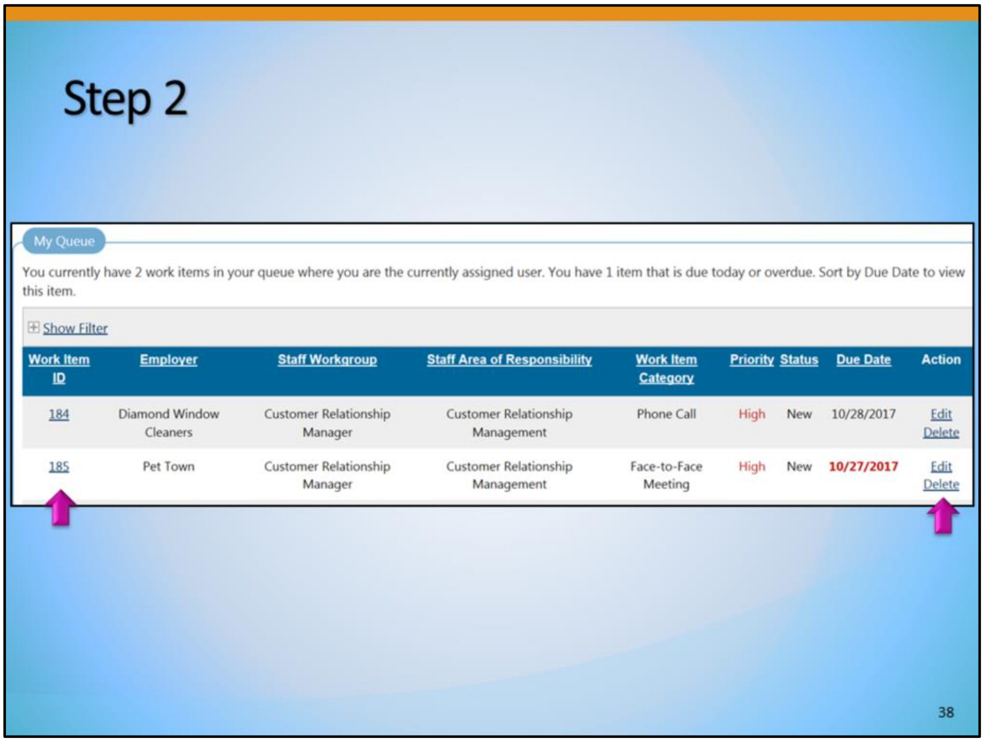
Finally, select the "Add" button to finish creating the Work Item. After selecting "Add", you will be directed to the Activities section of the Leads Summary tab, where your work item now populate.



Now that we reviewed how to add a Work Item, let’s address how to manage a Work Item.

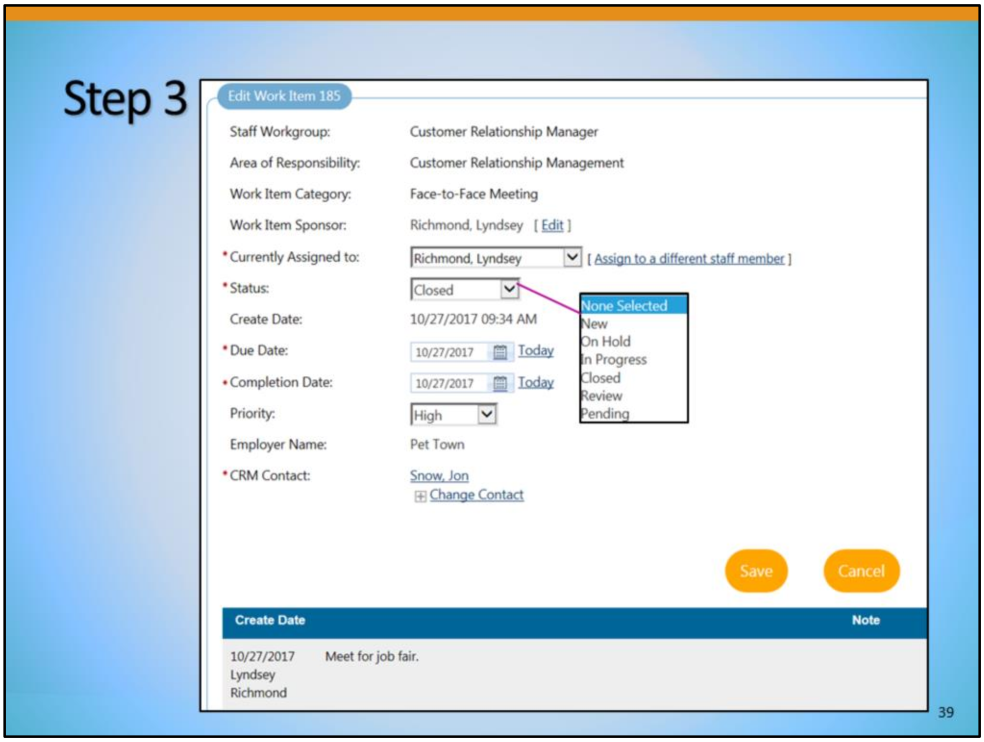
When you login to CalJOBS, a message notification may pop up and show any Work Items that were created with a due date of today. To open the Work Item from the pop-up notification, simply click on the underlined number link.

In addition, when staff log in, they will see the Work Items queue widget at the bottom of the staff dashboard. Finally, staff can also access their Work Items by using the CRM menu. We will access Work Items using the CRM menu.



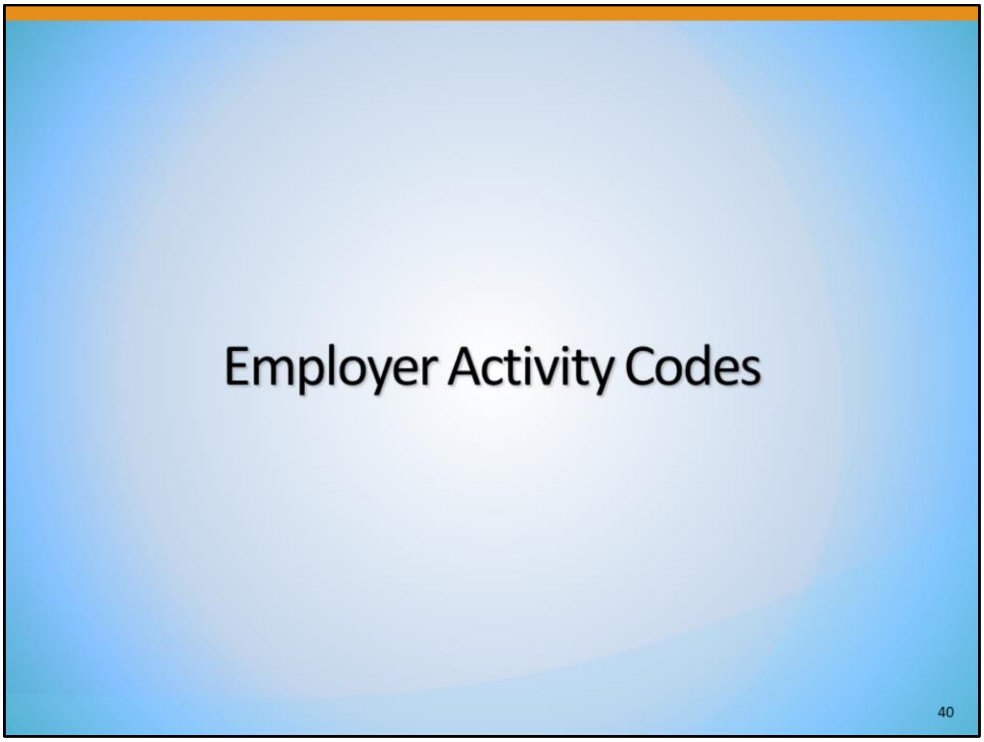
Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status	Due Date	Action
184	Diamond Window Cleaners	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New	10/28/2017	Edit Delete
185	Pet Town	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	High	New	**10/27/2017**	Edit Delete

To select a work item and it's details from the queue, simply click on the Work Item ID in the first column. Or, you can edit or delete the work item from this screen in the far right "Action" column.

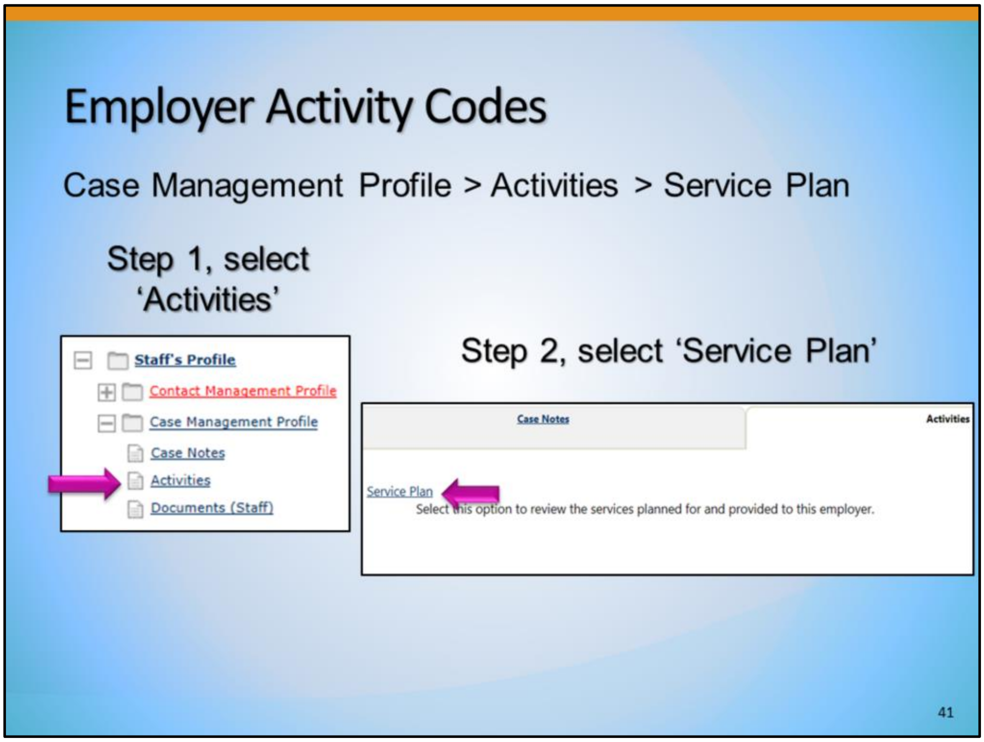


On their own work items, staff can change the status from New to In Progress or Closed, and add Notes at the bottom.

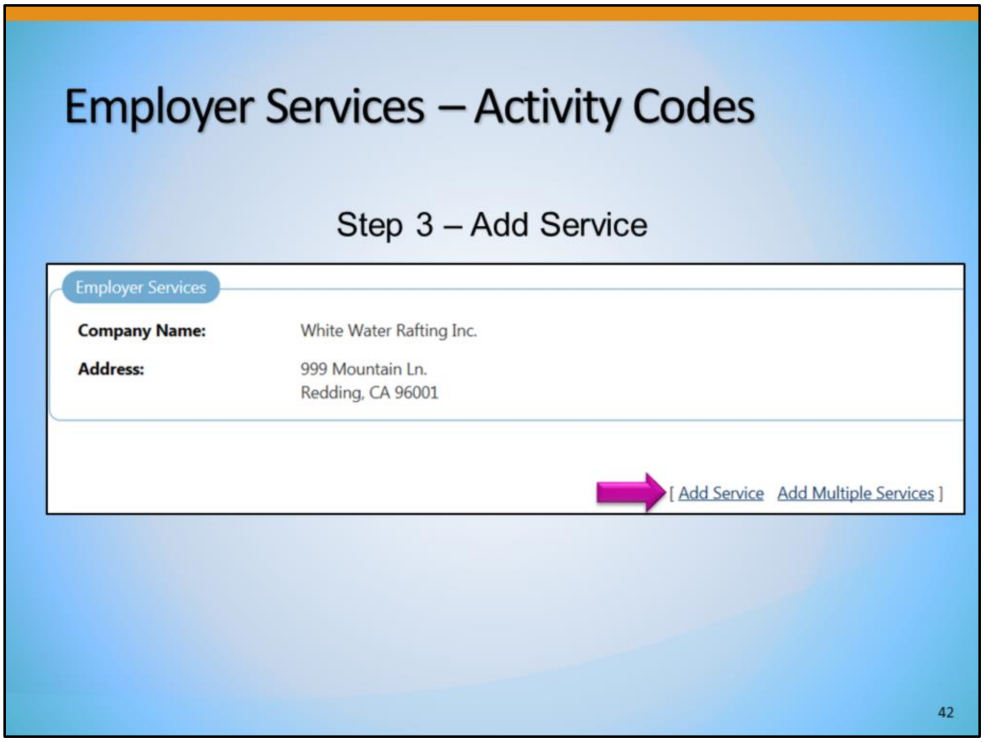
Select the “Save” button when you are done working on the Work Item. If you closed the Work Item, it will be removed from your Queue.



It is important that staff enter Employer Activity Codes (E-Codes) to track all services they provide to Marketing Leads. Staff can refer to **WSIN17-09, Attachment 2** for guidance and definitions for each E-Code.

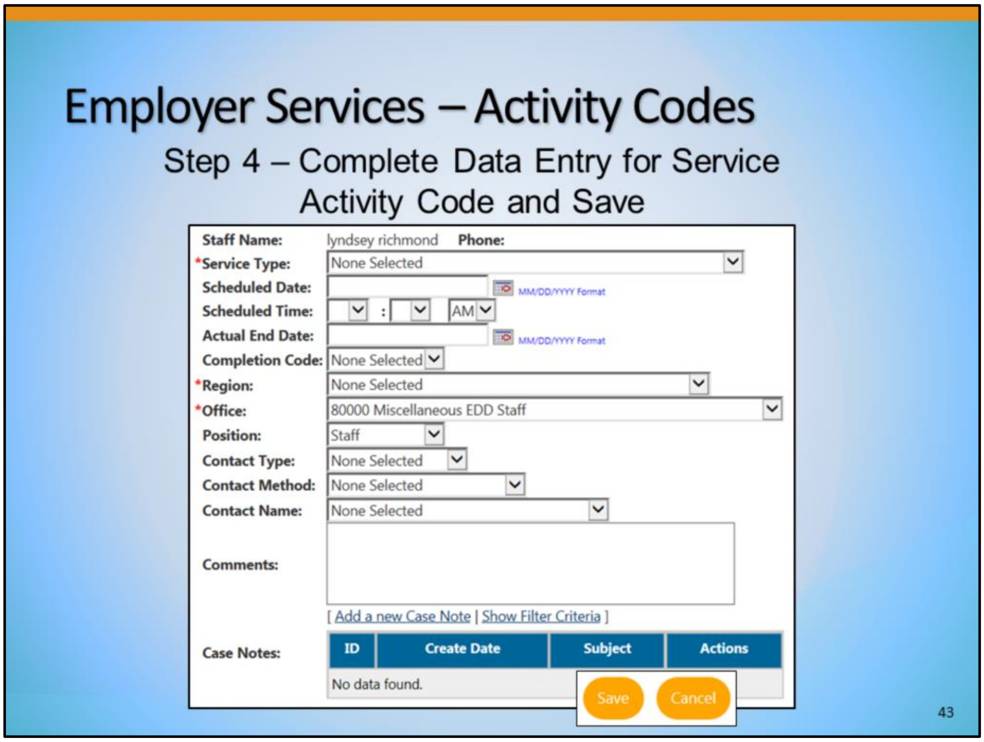


To add an activity for a service provided, while Currently Managing the Employer, under the **Employer Profile**, find the **Staff's Profile** folder, **Case Management Profile** subfolder, select the Activities link.
While in the **Activities** tab, select the Service Plan link.



If applicable, here is where the existing activity codes will be listed for this employer. In our example, no services have been added.

To add a single service, select the Add Service link. To add multiple services, select the Add Multiple Services link. Here, we will add a single service.



In the next screen, select the appropriate activity code in the **Service Type** drop-down field. Complete the remaining required fields and any optional fields as desired. If you enter a **Completion Code**, be sure to enter an **Actual End Date.**

Once complete, select the “Save” button.

Local Employer Sites

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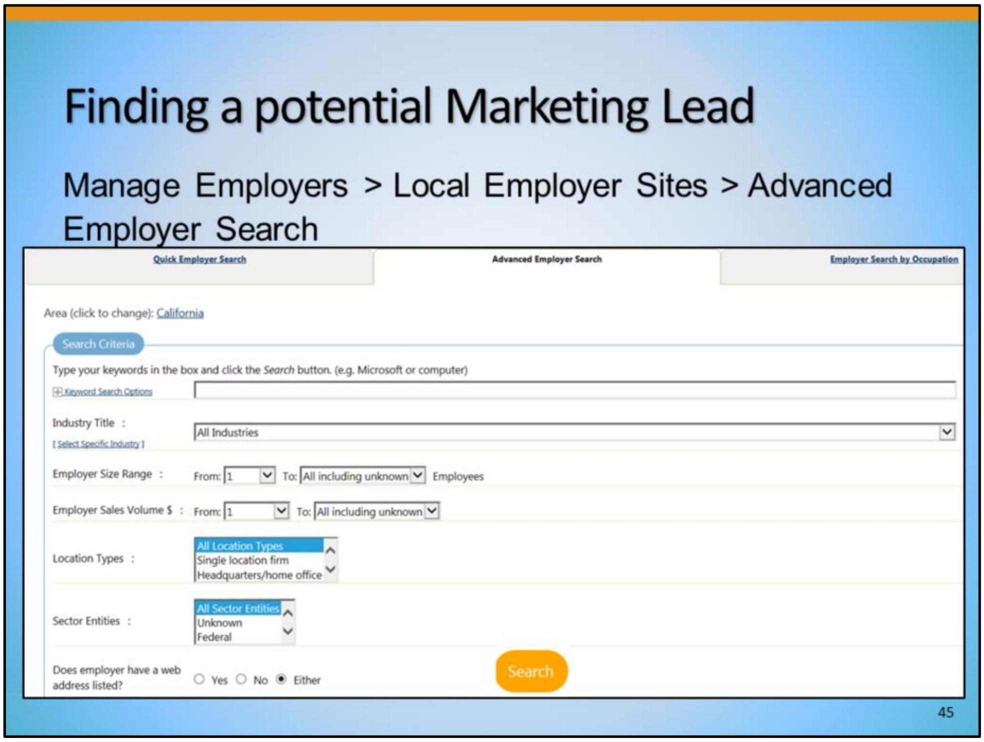
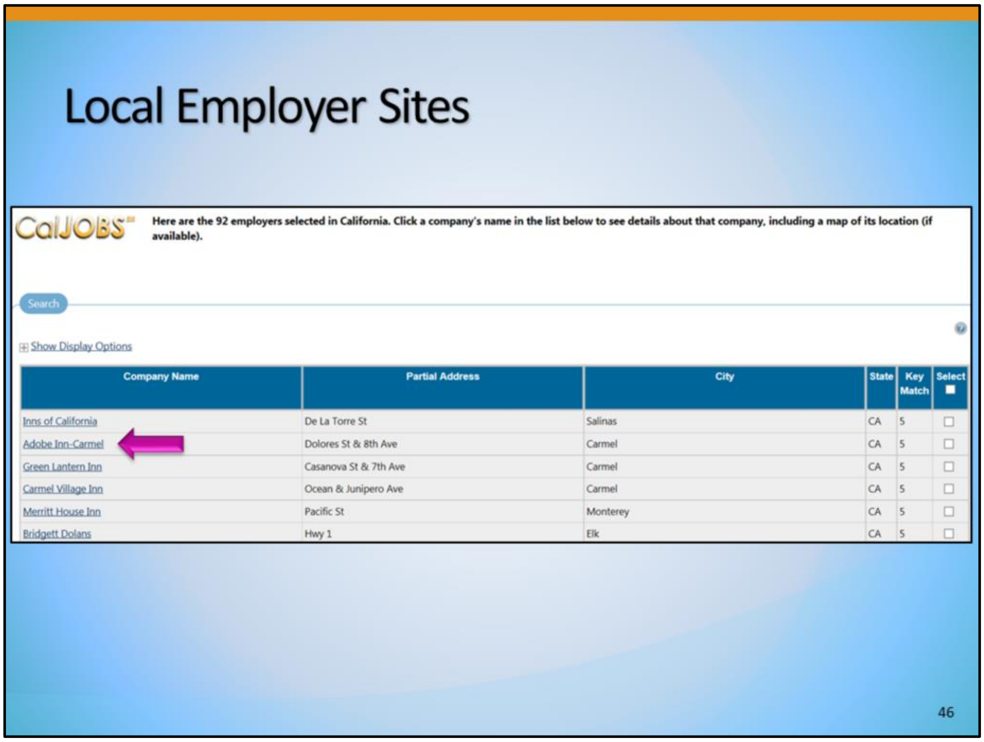


One resource to find potential Marketing Leads is the use of the **Local Employer Sites** feature.

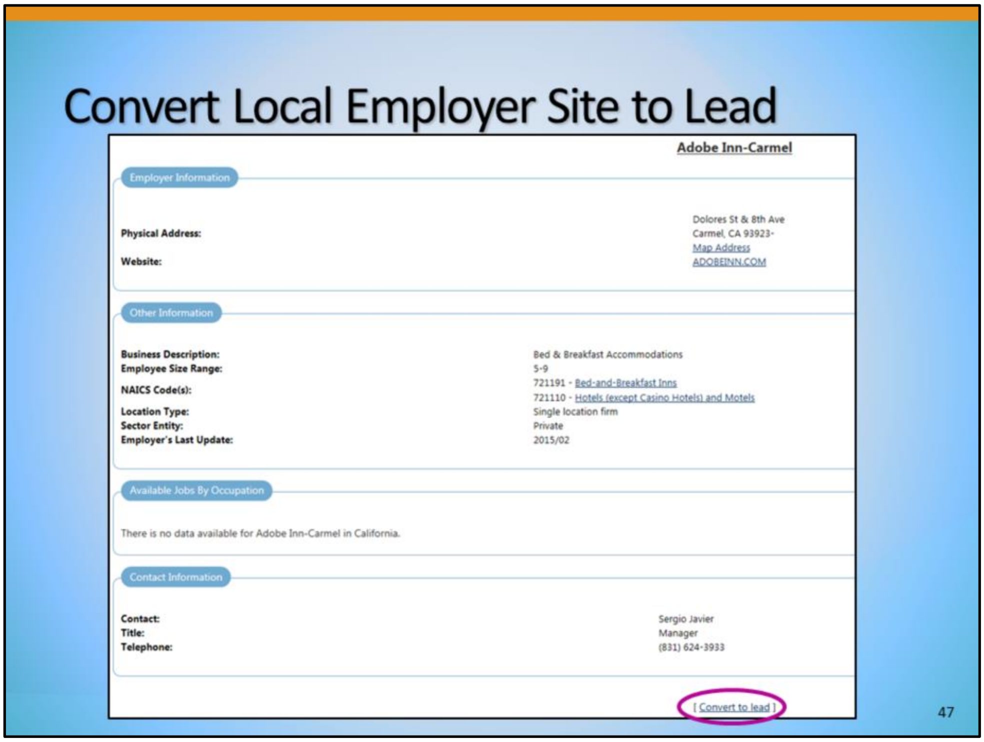
The Local Employer Sites menu option opens the Employer Search screen. Staff can use any of the Employer Search tabs (Quick Search, Advanced Search or Search by Occupation) to find detailed information about employers, regardless of whether the employers have current job openings. The system will search for employers listed in the InfoGroup® database that are located within the selected geographic area.

After staff enter the desired search criteria, select the "Search" button.



After selecting the “Search” button, staff will be routed to the list of employers that match their selected search criteria. If you do not receive any results, adjust your search criteria.

Select the Company Name of the employer you wish to review.



To convert this employer into a Marketing Lead, select the Convert to Lead link at the bottom of the page. When creating the Marketing Lead, some information may be auto-filled. Complete the required fields and save the Lead.

Convert a Marketing Lead

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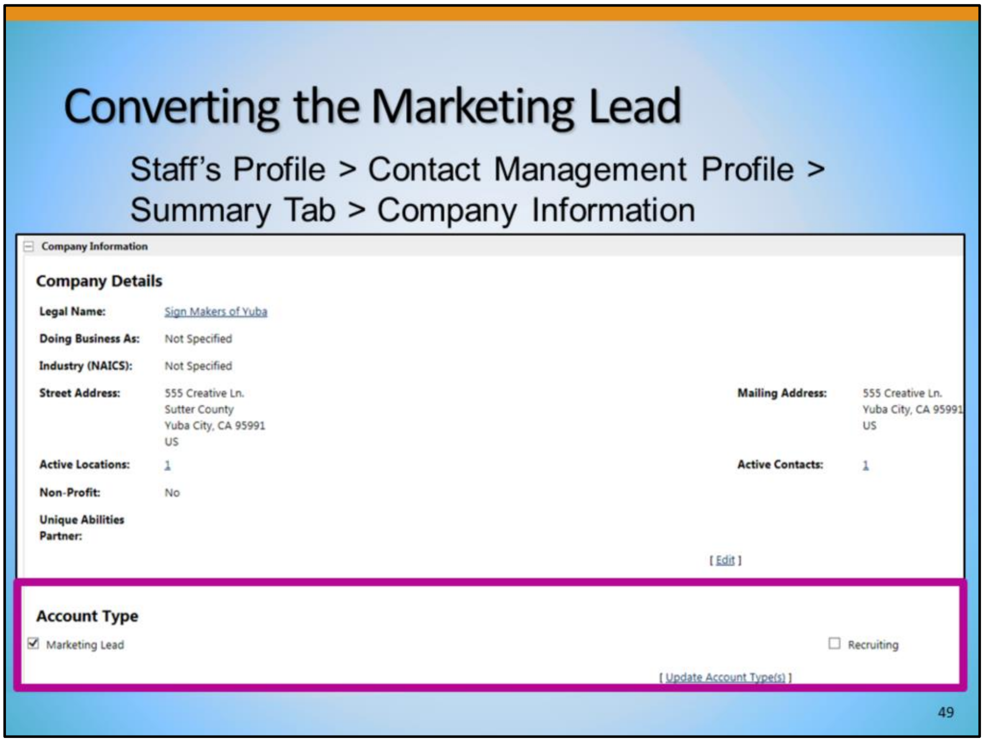
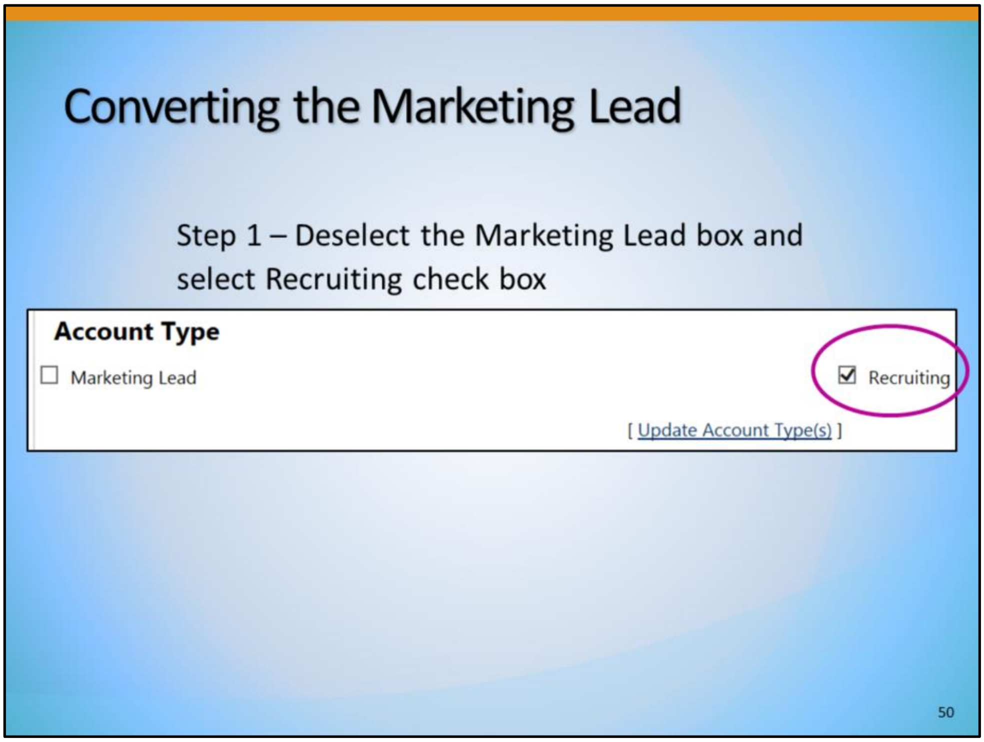
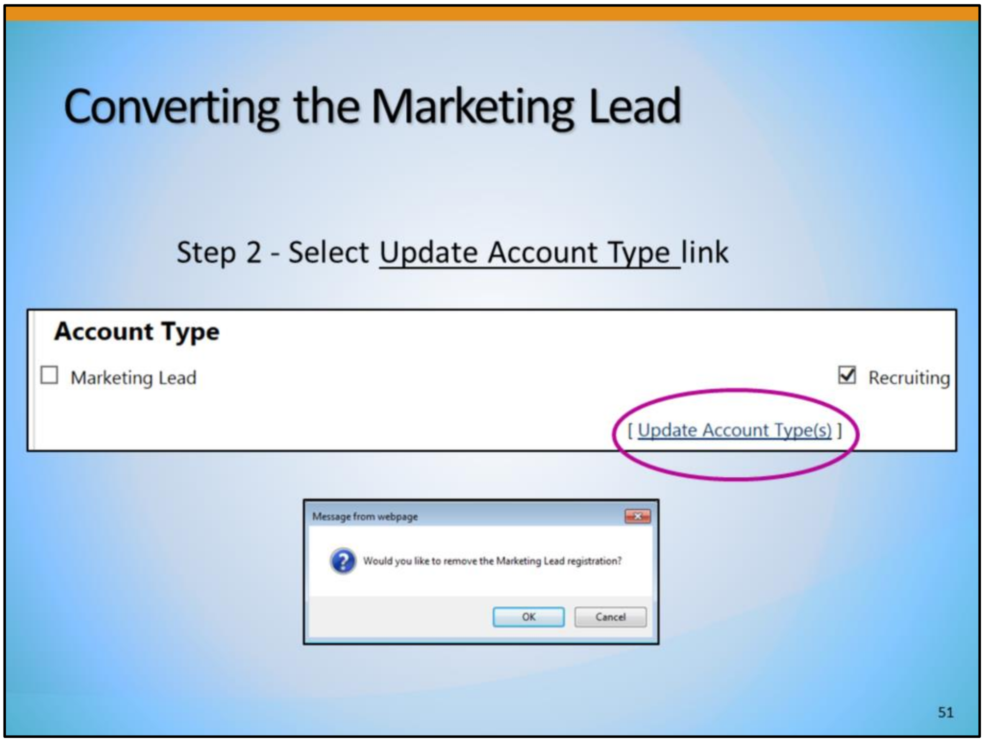


If an employer would like to become a Recruiting Employer, staff can easily convert the employer's Account Type from Marketing Lead to Recruiting Lead.

To make this change, while assisting the employer, expand their Staff's Profile folder. Next, expand the Contact Management Profile folder and select the Summary link. Here, scroll down to the Company Information section (seen in this screenshot).



In the Account Type section, select the Recruiting box and *deselect* the Marketing Lead box.



Next, select the Update Account Type link.

If you did not deselect the Marketing Lead box, you will receive a pop-up message asking if you would like to remove the Marketing Lead registration. Select "Ok", and the Lead will be deselected and you will be directed to create the Recruiting Employer. **Do not** select "Cancel", as both account types will be selected, which is not acceptable in the CRM module.

After completing the required fields to convert the Marketing Lead to a Recruiting Employer, the additional information is reviewed through the CalJOBS vetting process. This includes entering the employer's EDD Account number. If the additional information does not match the information CalJOBS uses to vet the employer, the employer's account will be locked out and the employer will receive and email or call from the CalJOBS Employer Help Desk to attempt to resolve the discrepancy.

CRM Reports

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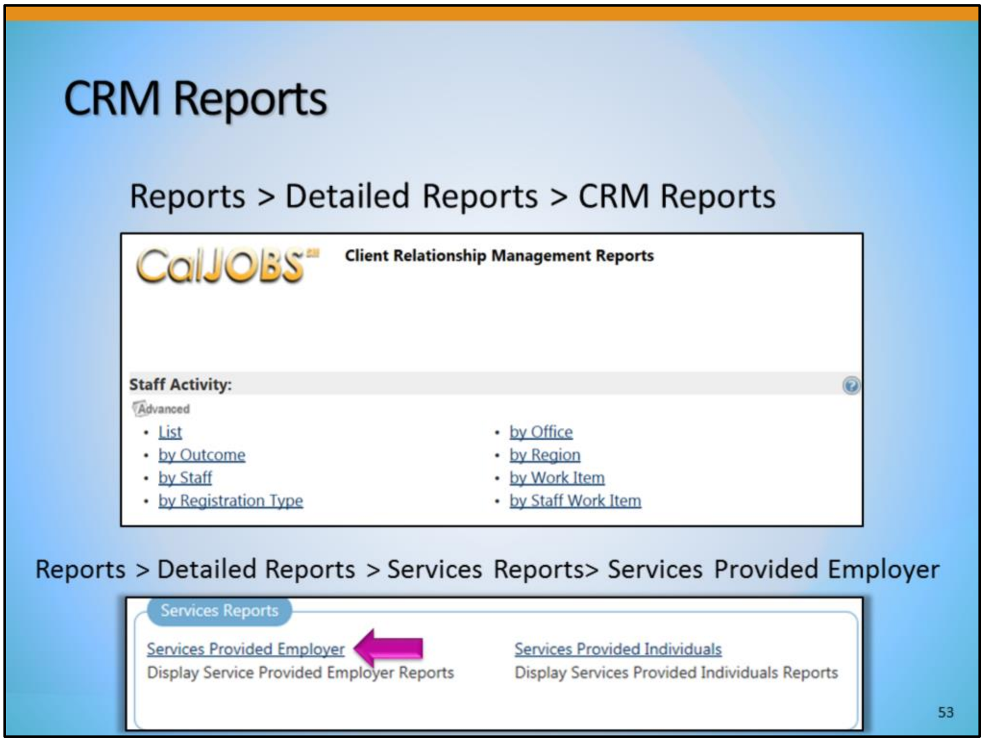
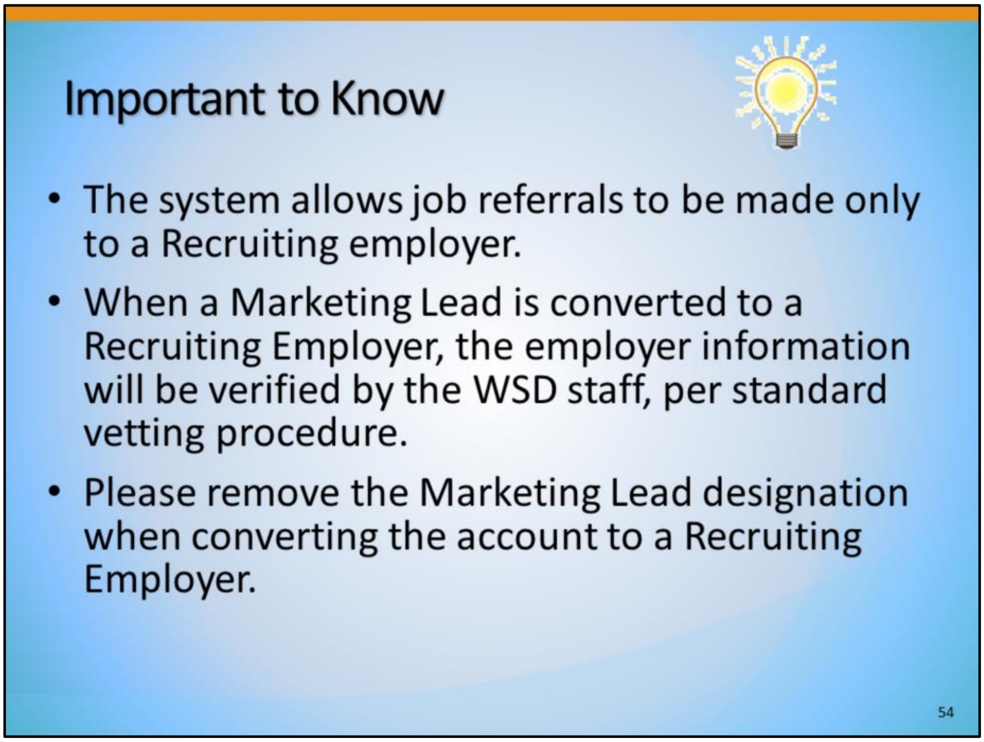


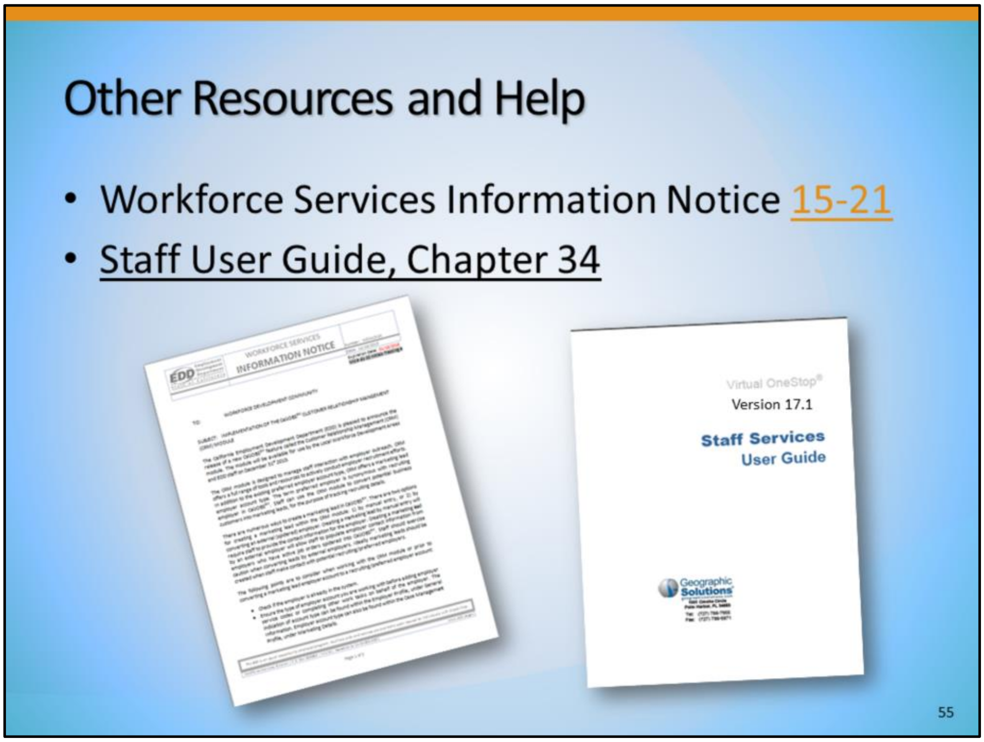
Detailed CRM Reports are available for the tracking of Work Items and activities provided to Marketing Lead employers. These reports can be useful in tracking and determining the effectiveness of the employer recruitment efforts. You can see the filters here by which you can determine what information will show in a report.

In addition, the Services Provided Employer report can be used to track employer activity codes entered for Marketing Leads.

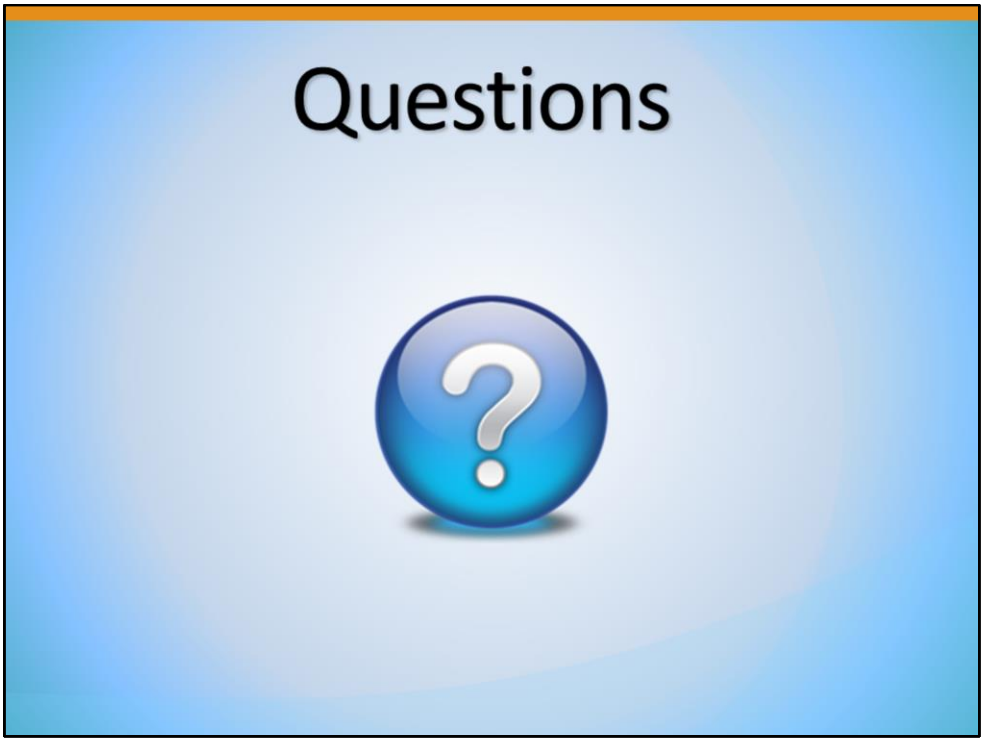


Here are some important points to know:

- Job referrals can still only be made to recruiting employers.
- When a Marketing Lead is converted to a Recruiting Employer, the employer information will be verified by the WSD staff, per standard 72- hour vetting procedure.
- Deselect the Marketing Lead box when converting to a Recruiting Employer. When you search for employers, you will choose between marketing lead or recruiting employers.



These resources will give further, detailed information about using the CRM module. Please reference the WSIN 15-21 for more detailed information and instructions on the CRM module in CalJOBS. In addition, refer to Chapter 34 of the Staff User Guide.



For any questions concerning this module, please contact the CalJOBS Education and Development Unit at **CalJOBSTrainingTeam@edd.ca.gov**.