



CATAWBA INSTRUCTION NUMBER 15-06

To:

Subject: Managing Employer Accounts in the CRM Module

Issuance Date: September 17, 2015

Effective Date: October 1, 2015

Purpose: To provide guidance on establishing employer accounts in the Customer Relationship Management (CRM) module in SC Works Online Services (SCWOS).

Background: The SC Works system has made progress in partnering with business and industry, but current data indicates an opportunity exists to enhance business engagement. As a result, the State Workforce Development Board (SWDB) has created benchmarks for engaging a greater number of businesses statewide. SC Works is responsible for tracking Employer Services Metrics, as required by the SWDB. The CRM module offers staff a full range of tools and resources to actively manage and track employer recruitment efforts.

Policy: To accurately capture information regarding engagement of the business community, all employer outreach and support must be correctly recorded in the CRM module in SCWOS. Under State Employment Services Instruction Number: 13-01 Change 1, staff was not permitted to enter employer accounts on behalf of the employer. The CRM module now allows employers to be added to the system directly by designated staff while maintaining the security and integrity of the system. Additionally, spidered or unregistered employers can be converted to Marketing Leads using a mini-registration that collects only enough data for logging and tracking purposes. This allows all employer engagement efforts to be documented regardless of registration status in SCWOS.

There are two types of employer accounts in the CRM module:

- Marketing Lead
 - A Marketing Lead is an account type that identifies potential recruiting employers that are not yet ready to utilize SC Works services. This account type is used to capture basic company information for marketing purposes, but the employer cannot access recruitment tools.
- Recruiting
 - Recruiting accounts provide full access to labor exchange functions such as managing job orders, reviewing candidate resumes, and managing virtual recruiter alerts. However, recruiting accounts must be verified at the state level prior to becoming an enabled employer account.

Serving Chester, Lancaster, Union, & York Counties

Designated staff may enter Marketing Leads as well as Recruiting accounts in SCWOS. Staff is encouraged to provide a high level of customer service by entering Recruiting accounts on behalf of employers when possible. Once a Marketing Lead employer is ready to utilize SC Works services and complete a full registration, staff must convert the Marketing Lead to a Recruiting account in SCWOS to initiate the verification process.

Recruiting accounts will have one of the following access levels:

- **Pending Verification:** All new accounts are created in this status by default for security purposes. Any account in this status will allow the employer to login, update a profile, add locations and additional contacts, but will not allow the employer to post a public job order, conduct a candidate search, or access the virtual recruiter system.
- **Not Verified:** This status indicates that state level staff has attempted to contact the employer, but have been unable to complete the verification process. The employer will continue to only have the rights and privileges as those in a pending verification status.
- **Locked Out or Revoked:** Any employer account that violates the terms of use or is suspected of suspicious activity is placed into this status. Employers in this status are unable to login and all active job orders are closed.
- **Enabled:** An account in this status has full employer access rights to the system. The employer can manage profiles, edit locations and contacts, conduct a candidate search and create a virtual recruiter. The employer can also post public job orders, accept job seeker applications, and contact job seekers using the internal messaging system.

To accurately track engagement efforts, work items must be entered for all Marketing Leads. A work item is a task that staff performs on behalf of a Marketing Lead employer. Work items can be assigned to staff and prioritized based on the importance of the work item. The work item category includes the following selections:

- Phone Call
- Site Visit
- Face-to-Face Meeting
- Webinar/Demo
- Research
- Email
- Mail

* indicates required fields. For help click the question mark icon.

Create a Work Item

• Staff Workgroup:	Customer Relationship Manager
• Area of Responsibility:	Customer Relationship Management
• Work Item Category:	None Selected
Currently Assigned to:	None Selected
• Status:	Phone Call
• Due Date:	Site Visit
Priority:	Face-to-Face Meeting
• Description:	Webinar/Demo
	Research
	Email
	Mail

Employer Name: Plugs Appliance Center

CRM Contact: Wallace, Gene [Change Contact](#)

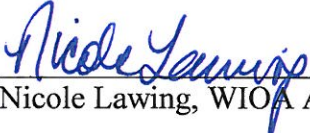
In accordance with State Instruction Number 15-02, the SWDB's employer engagement metrics only include in-person consultations. A face-to-face meeting is defined as an in-person consultation with a new business (i.e. does not have an existing account in SCWOS) to promote and discuss the range of services available through the SC Works system. Consultations must be with a company representative that has hiring authority. Large group meetings, such as Chamber events where employer services are presented to qualified representatives, are included in this definition.

All phone call, site visit (leaving informational packets and/or business cards with a company to initiate engagement), webinar/demo, research, email, and mail work items do not meet the definition of an in-person consultation as described above and are excluded from employer engagement metrics.

Marketing Leads entered without the work item section completed will not count towards the engagement goal. Additionally, work items are used to monitor outreach efforts and ensure accountability among staff. Therefore, it is imperative that staff document all recruitment tasks accurately as a work item in the CRM module. Relevant and specific details of each contact should be included in the description section of the work item to reduce duplication of effort by business services staff.

Action: Please ensure that all appropriate staff receive and understand this policy.

Inquiries: Questions may be directed to Nicole Lawing at nlawing@catawbacog.org or 803.327.9041.



Nicole Lawing, WIOA Administrator