

# WORKFORCE SERVICES INFORMATION NOTICE

Number: WSIN15-21

Date: December 30, 2015  
Expiration Date: 01/30/18  
50:dic:kd:17887

TO: WORKFORCE DEVELOPMENT COMMUNITY

SUBJECT: IMPLEMENTATION OF THE CalJOBS<sup>SM</sup> CUSTOMER RELATIONSHIP MANAGEMENT (CRM) MODULE

The Employment Development Department (EDD) is pleased to announce the addition of the Customer Relationship Management (CRM) module in CalJOBS<sup>SM</sup>. The module will be available for use by the Local Workforce Development Areas and the EDD staff on December 31, 2015.

The CRM module meets the business needs of managing, recording, and conducting employer recruitments actively. Currently, CalJOBS<sup>SM</sup> uses "Preferred Employer" as the only employer account type. CRM will offer "Marketing Lead" as a second employer account type where staff can convert a business contact into an active recruiting employer. Marketing Leads can be created by staff in two different ways: (1) by manual entry, or (2) by converting an external (spidered) employer. Staff should exercise caution when selecting either option as each method will differ in how the marketing lead is completed:

- Creating Marketing Leads by manual entry will require staff to provide employer contact information.
- Creating Marketing Leads by using an external (spidered) employer will allow staff to populate employer contact information from employers who have active job orders in CalJOBS<sup>SM</sup>.

Ideally, a Marketing Lead should be created when staff establish initial contact with any potential employer and/or business customer.

With the additional options that CRM provides for creating employer recruitments, staff should be aware of, and conduct, the following check points prior to converting a Marketing Lead into a Preferred Employer account:

- Check if the employer is already in CalJOBS<sup>SM</sup>.
- Verify the employer account type before recording employer service codes or completing any other tasks on behalf of the employer. The indication of account

*The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.*

type can be found in two places: (1) the “Employer Profile,” under “General Information,” or (2) “Case Management Profile,” under “Marketing Details.”

- Follow current practices for creating job referrals. Job referrals are created for Preferred/Recruiting employers only – not for Marketing Leads. Marketing Lead employers do not have access to post job orders or search for candidates.
- When converting a “Marketing Lead” account to a “Preferred Employer” account, the employer’s username (generated by CalJOBS<sup>SM</sup>) will remain the same, including the “MKT” prefix. It is recommended that staff remove the “MKT” prefix.
- The traditional employer vetting process will occur when a “Marketing Lead” account is converted into a “Preferred Employer” account type. Employer information will be verified by the WSB staff before the employer is provided CalJOBS<sup>SM</sup> access.
- CalJOBS<sup>SM</sup> allows staff to search for employers by “Marketing Lead” or “Preferred Employer” account types. Detailed employer reports also give staff the ability to run reports by “Marketing Lead” or “Preferred Employer” account type.
- EDD and Local Area staff are recommended to continue following the current procedures for employer outreach in respect to other Local Areas.

CRM will also offer “Work Items” as a feature that will allow assigning tasks to staff for completion on behalf of Marketing Lead employers. Detailed CRM reports will be available for the tracking of Work Items and activities provided to Marketing Lead employers. Work Items tasks are not region specific and may be accessed by any staff. Staff with CRM have access to all active marketing leads with no separation between Local Areas.

For further and detailed information on Customer Relationship Management, please refer to the *Staff Services User Guide*, Chapter 28 linked below.

Questions regarding this Information Notice can be directed to Kayleigh Davis, CalJOBS<sup>SM</sup> Operations Unit, at 916-653-0202.

JOSÉ LUIS MÁRQUEZ, Chief  
Central Office Workforce Services Division

Attachment is available on the internet:

1. [Staff Services User Guide, Chapter 28](#)