The Master List of Admissions CRM Requirements:

200+ Questions to Ask in Your Request for Proposal

A resource from Fire Engine RED

Introduction

Welcome to the Master List of Admissions CRM Requirements!

Here's how to get the most out of it:

- Go through the list of questions below, and choose the ones that apply to your CRM needs. We've also indicated when you should ask for a screenshot. (You'll likely find 80 percent of the questions you'll need for your RFP.)
- Make a list of any remaining questions you have.
- Combine the lists and your requirements will be complete!

For additional resources on choosing a CRM, see the last page of this document.

Now, let's get into the list!

Company

What year was your company founded?

How long has your company served the education market?

How many education clients do you have?

Please tell us who (or what company) owns your company?

Please tell us about your company's leadership team for CRM.

What is the name of your CRM?

What year was your CRM created?

Are you selling a CRM that was developed by another company?

What market/industry was your CRM originally built to serve?

What problem was your CRM originally built to solve?

In addition to CRM, does your company have other areas of expertise?

IT

Is your CRM web-based?

Can users reset their account passwords/edit account information?

Was your CRM designed for accessibility?

What operating systems and browsers does your CRM support?

What technologies did you use to develop your CRM?

Will our data be kept separate from other clients' data?

How do you monitor system performance?

Explain your backup and disaster recovery policies.

Do you have a hardware redundancy set-up? If yes, describe.

Do you have a framework or methodology for testing?

User Permissions

Can a group of users, with the same role, be provided with the same permissions? (Ask for a screenshot.)

Can specific tasks be included/excluded from a permission group? (Ask for a screenshot.)

What level of technical expertise do administrators need to set up a permission group?

How would an administrator set up a new permission group?

User Interface

What is your company’s philosophy on, and commitment to, user experience?

Are your CRM’s screens consistent from section to section?

Are your CRM’s labels consistent from section to section?

Does your CRM use admissions terminology?

Does your CRM work well on a mobile device?

If so, was your CRM built using responsive design or can it only be accessed using an app?

Records and Relationships

What types of records can we create and store in your CRM?

How many records can we create and store in your CRM?

Can we link any record to any other record, such as "student" and "organization"?

Can we link any record to multiple records, such as "student" to a "parent" and a "sibling" and a "high school"?

Can a person record have multiple roles, such as "parent" and "alumni"?

How many mailing addresses, email addresses, phone numbers, actions, etc. can we link to a record? (Ask for a screenshot.)

Can we define which mailing addresses, email addresses, and phone numbers are active? (Ask for a screenshot.)

Can we define the primary mailing address, email address, and phone number for a record? (Ask for a screenshot.)

Can we link multiple applications to a record, such as undergraduate, transfer, graduate?

If so, can we link different data fields to different applications?

For each student record, can we track the search source(s)?

For each student record, can we track the inquiry source(s)?

For each student record, can we track the student's statuses, such as inquiry, applicant, admit, etc.?

For each record, how many custom fields and values can we create?

Can we enter comments on a record?

Can a student's funnel status be automatically adjusted based on existing data? ***For example***, *if a student's test score is greater than "x," would the student's status would be automatically updated to "desirable inquiry"?*

Does your CRM provide the ability to batch edit and delete records?

Does your CRM provide an audit trail that details the edits made to a record?

Search and Data Integration

What type of search capabilities does your CRM include?

Do users need any technical expertise to build an advanced query?

Does your search functionality rank results in order of relevancy?

How accessible is the data in your database? Can we search on every data field in the database and receive the results of our search within the system? ***For example,*** *if we wanted to find out how many of our deposited students came from Student Search AND visited campus, could we run a single query and receive the results within the CRM? Can we assess the impact of our need-and merit-based scholarship expenditures from within the CRM?*

Can your CRM accommodate unlimited external IDs to ensure accurate data integration with external systems?

Can a user save his/her searches?

Can a user create a search and make the search public (available to all users)?

Import/Export

How is data imported/exported to/from your CRM?

Can we import our Student Search names?

Do you provide standard import packages?

Do you provide standard export packages?

Can we create our own import/export packages?

Can we save our import/export packages for future use?

Does your CRM provide us with an import summary that includes the results of an import?

Does your CRM provide us with an export summary that includes the results of an export?

Can we schedule imports/exports?

Duplicate Management

What is the process for identifying and resolving duplicate, or possible duplicate, records? (Ask for a screenshot.)

Broadcast Email

Can we select from multiple email address types (e.g., home, school, etc.)?

Can we send a message to multiple email addresses for the same contact?

Can we send an unlimited number of email messages at one time?

Can we send messages to purchased lists?

Can we send messages to a group of records based on specific attributes (e.g., registered for visit, clicked on a link, completed an inquiry form, or received test scores)?

Can we exclude contacts from receiving a particular message?

Can we launch a campaign immediately or schedule it for a future date or time?

Can we schedule multiple campaigns for delivery?

Can we allow recipients to view our message on the web if they have trouble viewing it in their email client?

Can we preview our messages in different email clients within the CRM?

Can we pre-populate a message with variable data (e.g., first name, preferred name, first and last name)?

Can we preview a pre-populated message within the CRM?

Will your CRM identify any words, phrases, and other items that are likely to trigger an Internet Service Provider's (ISP) spam filter?

Does your spam testing feature provide scores and specific suggestions on how to improve deliverability?

Do you comply with the CAN-SPAM act?

Can we customize the message header, including the “To,” “From,” “Subject Line,” and “Reply-to” fields?

Can we customize the look and feel of our messages using an HTML “What You See Is What You Get” (WYSIWYG) editor?

Can we create HTML templates with editable areas for use by our staff?

Can we copy a previous HTML message, then modify it for a new campaign?

Can we customize the copy of the unsubscribe footer?

Can we create a plain-text version of our message?

Can we include responsively designed templates, which ensure that our email messages dynamically adapt to the device (smartphone, tablet, or computer) on which they’re viewed?

Can we view our delivery rate, opens, click-thrus, mobile viewership, unsubscribe requests, temporary and permanent bounce rates, and more? (Ask for a screenshot.)

Can we generate detailed reports and analyze our campaign results using one or more field values?

Can we see the percentage of students who viewed our message on a mobile device?

Letters

Can we create letter templates and run labels for those letters?

Can we create letters and labels using templates of different sizes?

Can we customize the text, layout, and images of a letter?

Can we copy a letter and then modify it?

Can we copy and paste a letter that was created in another program?

Can we select from multiple address types (e.g., home, school, etc.)?

Can we pre-populate a letter with variable data (e.g., first name, preferred name, first and last name)? (Ask for a screenshot.)

Can we preview a pre-populated letter within the CRM?

Event Manager

Can we manage our on-campus and off-campus events?

Can we manage interviews?

Can we customize the look and feel of our Event Pages (e.g., event calendar, registration forms, landing pages, confirmation messages, etc.)?

Can we set up recurring events?

Can we build our event calendar using responsive design?

Can we drive students to different events based on an attribute or set of attributes (e.g., prospective student versus admitted student, biology major versus English major, etc.)?

Can we create an unlimited number of registration forms?

Can we use conditional logic in our registration forms to ensure that visitors only see those questions that apply to them?

Can we set guest limits?

Can we move a registration from one time slot to another time slot (e.g., from a morning session to an afternoon session of the same event)?

Can we set registration deadlines?

Can we track attendance?

Can we define when a registration form times out?

Can we allow a visitor to make changes to their registration?

Can we accept online payments for events?

Can we allow individualized fees, based on data collected in the event registration (e.g., person type, selected event elements, etc.)?

Can we automatically send an event confirmation message to an event registrant?

Can we use conditional logic to personalize the text of the event confirmation message?

Can we send an automated message about an event to attendees?

Can we send an automated message about an event to the parents of attendees?

Can we print custom PDFs with registration data one-by-one or in batches (e.g., name tags, visitor agendas, rosters, etc.)?

Web Forms

Can we create an unlimited number of web forms?

Can we customize the look and feel of our web forms?

Can we pre-populate our web forms with the student information we already have?Can we utilize conditional logic in our forms to ensure students only see questions that apply to them?

Can we utilize conditional logic to personalize the thank-you screen the student sees?

Can we utilize conditional logic to personalize the confirmation message the student receives?

Applications

Can we create customized applications that allow students to apply online?

Can we apply our branding to our application?

Can we update our application any time we wish using self-serve editing tools?

Can we pre-populate our application with the student information we already have?

Can we use conditional logic in our application to ensure that students only see those questions that apply to them?

Can we include “tooltips” to help explain questions to applicants?

Can we allow students to save their application and complete it over multiple sessions?

Can we accept online recommendations from teachers, coaches, alumni, etc.?

Can we allow students to upload documents such as essays, personal statements, and resumes?

Can we see which students have started, but not completed, our application?

Can we waive our application fee for all, or select, students?

Can we display different application fees based on different criteria (e.g., applicant type)?

Can we utilize conditional logic to personalize the thank-you screen the student sees?

Can we utilize conditional logic to personalize the confirmation message the student receives?

Can we print custom PDFs of our completed applications one-by-one or in batches?

Can we store application data from third-party vendors (e.g., Common Application, LSAC Common Application, etc.)?

Payment Processing

Does your CRM have payment processing capability?

If so, what types of payments do use accept?

Do you integrate with payment gateways? If so, which ones?

Group Chat

Do you offer group chat?

Can we hold chats with groups of students (or parents, or guidance counselors) any time we wish?

Can we apply our branding to our chat interface, introductory screens, landing pages, and registration form?

Can we pre-register students to encourage attendance?

Can we host chats of any size and duration?

Can we create as many chat rooms as we wish?

Can we add, delete, and edit our chat rooms any time we wish, even during a live chat session?

Can we use our response library to respond to frequently asked questions?

1:1 Chat

Do you offer 1:1 chat?

Can we chat 1:1 with visitors while they're visiting our website?

Can we apply our branding to the chat window?

Can we customize the look of our "Chat Now," "Available," and "Unavailable" icons?

Can we chat privately with multiple visitors at the same time?

Can we determine how our chat messages are distributed to counselors (priority order, random, or round robin)?

Can we transfer an active chat session from one counselor to another?

Email Response

Does your CRM include email response capability?

Can we respond to our incoming email messages in a quick, customized, and consistent way?

Can we automatically sort and route our incoming messages to the appropriate staff member for handling?

Can we create a customized response library that includes answers to frequently asked questions?

Can we use the response library to suggest the best response to a message?

Can we view a student’s email history with our office and personalize our response?

Can we define the individuals or departments that automatically receive a blind carbon copy of a response message any time it is sent?

Can we search old incoming or outgoing messages using any keywords, names, or addresses?

Can we track how often a response message is used?

Can we set a reminder that notifies you when a response message needs to be reviewed and/or updated?

Can we select a date to automatically deactivate or temporarily deactivate a response message?

Reporting and Analytics

Do users need any technical expertise to run reports?

What types of reports do you provide?

Please describe your reports.

Does your CRM include standard reports?

Are reports fully customizable?

Do your reports provide a funnel snapshot?

Do your reports provide year-over-year comparisons?

Can we use your reports to measure our return on investment (ROI)?

Implementation

Approximately how long will it take to implement your CRM?

When can we start implementation?

Will you provide us with an implementation guide? If so, please describe.

How much of the implementation will your company handle for us?

As part of the implementation process, will you:
– Set up our permissions?
– Import our historical data?
– Set up our imports and exports?
– Build our standard queries?
– Set up our communications flow (e.g., email messages and letters)?
– Create custom reports for us?
– Set up our events?
– Build our web form(s) (e.g., inquiry form, enrollment deposit, etc.)?
– Build our admissions application(s)?
– Will we need to purchase any third-party tools to implement and/or maintain your CRM?

Have your implementation specialists previously worked in admissions?

Does your company provide consultative support?

Will we need to purchase any third-party tools to implement and/or maintain your CRM?

Training

How much training will be required to use your CRM?

Please describe your training process.

Please describe how we'll learn to use new features, functionality, and other updates.

Support

What is your commitment to client support?

Can any user submit a support request?

What are your support team's hours of operation?

What are the ways in which users can submit a support request?

How long will it take a live person (not an auto acknowledgement) to respond to a support request?

Do you have a priority system for urgent support requests? If so, describe.

What is your company's escalation process?

Identify which components of your CRM (if any) are supported by third-party technology partners (e.g., broadcast email).

Pricing

What is the pricing model for your CRM?

How much will we pay for your CRM and what does it include?

How many user licenses come with your CRM?

Development

Please tell us your roadmap for the next 12 months.

Additional Resources

Be sure to check out these blog posts and resources for more information on how to choose an admissions CRM.

Blog Posts

5 Binge-Worthy Admissions CRM Blog Posts (PLUS 3 Time-Saving Resources!)

Understanding The Problems with Admissions CRM RFPs

3 Things to Do BEFORE Writing an Admissions CRM RFI or RFP

Why You Should Use an RFI to Choose an Admissions CRM

Getting the Best Outcome from Your Admissions CRM RFP

Resources

21 Crucial Questions to Ask in Your Admissions Request for Information (RFI)

What Your Admissions CRM Demo Should Include