What Your Admissions CRM Demo Should Include

A resource from Fire Engine RED

Fire Engine RED®

Introduction

Welcome to “What Your Admissions CRM Demo Should Include.”

Here’s how to get the most out of this valuable resource …

Let’s assume the vendor has answered “yes” to the CRM requirements listed below; that is, their CRM actually does them.

Next, you’ll want to see HOW the software actually does them.

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

Now, ask the vendor to show and tell you about …

User Permissions

Can a group of users, with the same role, be provided with the same permissions?

Can specific tasks be included/excluded from a permission group?

How would an administrator set up a new permission group?

User Interface

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?

Records & Relationships

What types of 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?

Can we define which mailing addresses, email addresses, and phone numbers are active?

Can we define the primary mailing address, email address, and phone number for a record?

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?

Search & Data Integration

What type of search capabilities does your CRM include?

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

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 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 create our own import/export packages?

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

Duplicate Management

What is the process for identifying and resolving duplicate, or possible duplicate, records?

Broadcast Email

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 receipt of test scores)?

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?

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

Can we view our delivery rate, opens, click-thrus, mobile viewership, unsubscribe requests, temporary and permanent bounce rates, and more?

Letters

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

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

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

Event Manager

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

Can we set up recurring events?

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

Web Form

Can we utilize conditional logic in our forms to ensure students only see questions that apply to them?

Applications

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

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

Reporting & Analytics

What types of reports do you provide?

Do your reports provide a funnel snapshot?

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)

The Master List of Admissions CRM Requirements