21 Crucial Questions to Ask in Your Admissions CRM RFI

A resource from Fire Engine RED

Fire Engine RED

Introduction

Looking for an admissions CRM? Sending a Request for Information (RFI) is a great way to gather information about the vendor's company culture, the CRM's core functionality, pricing, the implementation process, and support.

With all that in mind, below is a list of questions that should be included in your RFI … AND the reasons WHY you should ask them. (For your convenience, Section 2 provides the questions only, without the "reasons WHY.")

Also, to ensure that potential vendors get to the point, it's recommended that you set a 25-page limit for RFI responses.

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

Now, let's get to the questions!

Questions and WHY you should ask them.

For the questions ONLY — without our answers — go to page 15.

Culture & History

1. Please tell us about your company's values and culture.

Why it matters: It's important that a vendor's values, philosophy, and company culture align with your school's. This is because you're not just selecting a CRM, you're choosing a vendor to partner with for the long term.

2. Please tell us about the history of your CRM. What market was your CRM originally built to serve?

Why it matters: If the CRM was originally built to help Corporate America manage their sales processes (think Salesforce and Microsoft Dynamics), it's unlikely the CRM will use admissions terminology, mirror your processes, or work the way you do. (As we all know, admissions is NOT corporate sales!) Because of these differences, implementation and training will probably take longer than you expect. You'll also need to create workarounds (sometimes on a daily basis) to get your job done. And you'll likely need more internal IT resources to maintain and support the system.

3. If your CRM was NOT originally built for admissions, what problem(s) was it originally created to solve?

Why it matters: No CRM is strong in all areas. If a company says that its CRM does everything well, you should be wary – no CRM does. Typically, the functionality that was built to solve the original problem(s), is the CRM's strongest functionality.

If the CRM was created by a company whose core business is running the back office of a campus (think ERP and SIS), the CRM will probably have many of the same issues as those CRMs that were originally built for Corporate America. In other words, ERP and SIS companies typically don't "get" admissions … and the CRMs they've designed for admissions reflect that lack of understanding. To them, serving admissions was, is, and always will be, an afterthought, NOT their focus.

Ideally, you want to use a CRM with strengths that align with the priorities of your admissions department. For example, is your priority recruiting students, reading admissions applications online, moving data to your campus-wide system, or something else?

Let's say your priority is recruiting students. If the CRM was originally created to recruit students, it will likely be the best match for you. Similarly, if the CRM was originally built to help admission offices evaluate large volumes of admissions applications, and your priority is to do just that, a CRM whose core is application reading is likely to be the best choice for you.

4. If the CRM was originally created for admissions, did you build your own functionality/technology or acquire it through acquisitions?

Why it matters: If the company acquired the bulk of its CRM functionality through corporate acquisitions, it's likely that the functionality was "bolted on" to the CRM. This can lead to data integration issues and an inconsistent, confusing user experience.

Technologies

5. What technologies have you used to build your CRM?

Why it matters: It's in your best interest to use a CRM that was built using the latest and greatest tools, coding languages, and software engines, such as Laravel, Elasticsearch, Redis, PHP, MySQL, and Bootstrap.

If the CRM was built on outdated technologies, you may run into difficulty when you try to add new functionality. Think about how hard (if not impossible) it would be for you to use the newest software on your computer if you haven't updated the operating system in years.

In addition, the software should be lightning-fast, future-friendly, scalable and flexible, and easy to update/upgrade in an ever-changing technical environment. (And, no, this is not asking too much.)

Competition

6. How is your CRM different than those offered by your competitors?

Why it matters: By asking each potential vendor this question, you'll get a sense as to what areas each CRM is focused on. It's also a great way to discover which CRMs align best with your office's top priorities.

User Experience

7. What is your company's philosophy and commitment to user experience?

Why it matters: You'll benefit from working with a company that has user experience in their "DNA." A CRM should be easy to use, like the best consumer software (think Apple and Google). For example, the look and feel, the terminology, the buttons, and the menus should all be consistent from section to section. This way, you and your team will want to use it, rather than struggle to use it. The result? Increased usage and more meaningful and accurate data from your team.

Also, if a CRM is easy to use, less training will be required. This is especially important in admissions where there can be lots of turnover. You'll want to get new staff members up to speed as quickly as possible.

8. Was your CRM built to work on mobile devices? And does it use Responsive Design?

Why it matters: You'll want to know how easy the CRM will be for you and your team to use it when you're on the road. You should find out if the CRM is responsively designed, optimized for mobile, or requires an app for mobile access.

Ideally, you want a CRM that was designed to be responsive. That means that it's future-friendly and will work on ANY browser or device (computer, tablet, smartphone), including devices and screen sizes that haven't even been invented yet.

Features & Functionality

9. Please describe your CRM's core features and functionality.

Why it matters: You'll need to know about the CRM's core features and functionality to know if the system is capable of solving the problems/issues you're currently facing ... as well as whether or not the CRM can adapt to your processes.

10. Is broadcast email functionality built into your CRM, or is this functionality provided by a third-party vendor?

Why it matters: Some CRMs lack core functionality within the system, such as broadcast email. As a result, their users must use a third-party vendor to provide this functionality (and support for it), which can result in an inconsistent, frustrating user experience. For example, it's likely that the third-party vendor does not understand admissions processes or speak the admissions "language." In addition, there may be integration issues between the CRM and third-party product. Even worse, it may not be clear, where one company's support begins and the other company's support ends.

Search & Data Integration

11. Does your CRM have a consistent data structure that will allow you to conduct searches across your entire database and get your results within the system?

Why it matters: If the CRM has a consistent data structure, it will allow you to conduct wide-ranging, nuanced searches across your entire database and get your results within the system.

Unfortunately, CRMs often don't work this way. The data is stored in multiple silos and it's difficult, if not impossible, to get a holistic view of your data within the system.

For example, let's say you want to compare your travel data, visit data, and Search data. You'll need to do individual searches and piece the data together manually outside of the system. If that sounds like a lot of work, that's because it is.

How does this happen? Most CRMs weren't built from the ground up for admissions. Instead, they were created to do a single or a few task(s) well, and as they grew, additional functionality was either built or acquired from other companies, and then "Frankenstein-ed" (yes, this is a real term) onto the system. Plus, data integration issues plague most of these systems because these CRMs were NOT originally designed "with the end in mind."

Implementation

12. How long does your CRM take to implement?

Why it matters: The longer your CRM takes to implement, the longer you're paying for it and not getting any value out of it. And if you're replacing an existing CRM, it's even worse: you're supporting (and paying for) your current system AND the new one … without getting the full benefit of either.

Therefore, you should ask how long your CRM will take to implement: 16 weeks, nine months, a year or longer? That's right – some admissions CRMs are so complicated to implement, the implementation process can take a year or more, and require three or more full-time IT resources. So you'll want to plan and budget accordingly.

13. When can you start our implementation?

Why it matters: Some companies don't have the resources to provide implementation according to your timeline; rather, it must be done on theirs. If the system takes a long time to implement, it may be an indication the company may be understaffed, and/or that the CRM is overcomplicated and difficult to use. It could also be a sign that the company lacks commitment to client support.

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

Why it matters: The implementation process can be difficult and overwhelming for some admissions offices. Therefore, you should ask whether the company will guide you through the implementation process step-by-step, or if your team will need to configure the software on your own, or something in between.

Important: The amount of implementation assistance you can expect to receive will vary dramatically between companies, so don't be afraid to get specific here!

Ask the company if it will:
– Set up your permissions
– Import your historical data
– Set up your imports and exports
– Build your standard queries
– Set up your communications flow (email, letters)
– Create custom reports for you
– Set up your events
– Build your admissions application
– Build your web forms (inquiry form, enrollment deposit, etc.)

If you need to do it on your own, you'll need plenty of time, expertise, and internal resources to make it happen.

15. Do your implementation specialists have admissions experience?

Why it matters: The admissions process is unique and complex. You don't want to waste your time and resources teaching your implementation lead how admissions works. Ideally, you want to work with a company whose implementation team members have worked in an admissions office AND understand the admissions process. In addition, they should share best practices with you, and protect you from introducing unneeded complexity.

Support

16. What level of internal IT resources will be needed to maintain our CRM?

Why it matters: Most admissions CRMs, and corporate CRMs that have been re-branded for admissions, require a great deal of IT support to maintain and use.

Your goal should be to empower your admissions staff to do their jobs more efficiently – without assistance from IT. Therefore, the CRM should accommodate people with minimal technology skills and not require an understanding of back-end technology. For example, you want your team to be able to run and build complex queries and reports on their own without help from your IT staff.

Most CRMs require so much IT support because they were designed and built primarily by technologists/developers who aren't experts in admissions or user experience. In addition, many CRMs were originally built for large corporations with dedicated IT resources, and not for admissions offices with minimal (or no) IT resources.

So let's say a CRM requires three or more full-time IT staff members to support it – do you have those additional resources available?

17. Tell us how your client support works.

Why it matters: After your CRM launches, the company's support team is the group of people you're going to have to "live with" for many years to come. They'll be your lifeline, so you'll want to know:

- Their hours of operation
- If all support is handled in-house, or outsourced to a third party. (For example, some companies use a third-party broadcast email tool and support for that tool is handled by the third party)
- If there are any limits on the number of people who can submit support requests

- How long it takes a live person (not an auto acknowledgement) to respond to a support request
- If a support request needs to be scheduled or if support is available when needed
- If there's a priority system for urgent support requests
- The cost for support (if any)

No matter how the company answers these questions, I strongly encourage you to speak with as many of the company's clients as possible about their experiences with the company's support team. Remember, the company's support team is the group of people you're going to work with, day in and day out, for many years to come.

18. Does your company also provide consultative support?

Why it matters: Ideally, you want to work with a company that provides consultative support as well as technical support. So what's the difference?

"Technical support" is about resolving a specific issue, while "consultative support" is about stepping back and asking the right questions. It's about understanding admissions and understanding your enrollment processes and goals. It's about sharing best practices and providing a big-picture solution to your issues.

Also, if the company provides consultative support, you should ask when it's available. Do you need to schedule a call ahead of time, or is support available any time an issue arises? And of course, be sure to ask if there's a cost.

Pricing

19. What's your pricing structure and cost?

Why it matters: It's important that you understand the total cost of ownership upfront. That way, you won't encounter unpleasant surprises down the road, like many of your colleagues have.

For example, is the CRM priced as an annual subscription fee? If so, how much is it ($30,000, $70,000, $100,000+?) and what does it include (implementation, training, support, software updates, user licenses, and so forth)? And, are there "hidden" costs – let's say you end up needing to hire outside consultants to help implement/run the CRM. Such an expense may not be part of the vendor's "official" price, but the cost will certainly come out of your budget.

Don't forget to ask about broadcast email messages. Chances are, you'll be using a lot of them. How many broadcast email messages are included with your subscription fee? What if you exceed your allotment? How much will you be charged?

Also, be sure to ask how many user licenses are included. Many CRMs charge by the license and that can add up quickly, making it expensive for you to have alumni interviewers, student workers and others use the CRM. For example, if you're looking at a CRM that was built on a Salesforce platform, you'll most likely need to purchase Salesforce licenses that can cost as much as $350 per license (and that's including their discount for educational institutions).

And how about training and support? Are they included? Is so, are they unlimited? If not, will you need to purchase support time in "blocks" or will you be billed by the hour?

Third-Party Tools

20. Will we need to purchase any third-party tools?

Why it matters: Third-party tools and services most often come with an additional cost. For example, if you’re looking at a CRM that was built on a Salesforce platform, you may need to purchase additional applications from the Salesforce Exchange (such as Conga for letter writing). And of course, that’s in addition to the licenses you’ll need to purchase directly from Salesforce.

Development Roadmap

21. What is your company’s development roadmap for the next 12 months?

Why it matters: A good CRM is a work in progress. It should never be “done.” It should always continue to evolve.

So if you like the company, and the CRM, but the CRM doesn’t currently meet all of your priorities and requirements, ask the company what’s on their development roadmap for the next 12 months.

Keep in mind that you can’t implement everything (even your top-priority items) at once. Implementation takes time. It can take months, and in many cases, a year or two. So find out what functionality the company is planning to release as your “go-live” date approaches.

Remember, you’re going to have to live with your CRM choice for the next five years or so … and that’s a long time to be unhappy. Here’s how you can ensure you’ll be happier in the long-term: If the CRM you prefer has the core functionality that meets your highest priorities, but doesn’t currently have all of the bells and whistles you’d like, continue to favor that CRM. You’ll be better off implementing the CRM that has the fundamentals right than implementing a CRM that has much more functionality but has critical usability and integration issues. (Remember, the first version of the iPhone didn’t have copy and paste.)

Questions Only.

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5. What technologies have you used to build your CRM?
6. How is your CRM different than those offered by your competitors?
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10. Is broadcast email functionality built into your CRM, or is this functionality provided by a third-party vendor?
11. Does your CRM have a consistent data structure that will allow you to conduct searches across your entire database and get your results within the system?
12. How long does your CRM take to implement?
13. When can you start our implementation?
14. How much of the implementation will your company handle for us?
15. Do your implementation specialists have admissions experience?
16. What level of internal IT resources will be needed to maintain our CRM?
17. Tell us how your client support works.
18. Does your company also provide consultative support?
19. What's your pricing structure and cost?
20. Will we need to purchase any third-party tools?
21. What is your company's development 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

What Your Admissions CRM Demo Should Include

The Master List of Admissions CRM Requirements