Session 3 - Student: CRM –Prospect/Recruiting

Date: Monday, March 28, 2022
Time: 1:00pm – 3:00pm
Ellucian

Evaluator's Name:____

	Functionality	Comments
Student		
1.	Demonstrate the end-to-end process for the recruiting and application process -- from both a College perspective and a constituent perspective.	
4.	Show how a prospective students can request information via the web – and then how that person is added to a personalized communication plan	
7.	Show how the CRM solution captures the prospective student's communications preferences (e.g., subscribe, unsubscribe, contact preferences) and delivery mode (e.g., email, automated phone call, text message)	
10.	Demonstrate how a prospect could interact with a chat bot from the College home webpage that automatically answers questions, or walks them through the application steps, or directs them to the appropriate department	
11.	Demonstrate event registration functionality.	
12.	Show how, after a student registers for an event, and automated (personalized) sequence of communications is sent – e.g., confirmation, reminder 24 hours prior, QR code for check in, and post-event follow-up	
8.	Show that text messages can be sent with embedded URL to view information in a browser	
16.	Show the admissions checklist functionality and the new student self-service pages Show a detailed timeline of what will happen next regarding onboarding should be displayed. For example, send high school transcripts, attend orientation, meet with a counselor, etc.	

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13.	Show how a recruiter/counselor creates a high school visit (face-to-face event on campus) and is able to mark in the CRM system that a student has attended. Also highlight how to capture new prospects in the high school visit process.	
3.	Demonstrate how web traffic for a prospective student gets logged and what the subsequent reports/data look like.	
5.	Demonstrate the ability to add cookies and track the prospective student from this point.	
6.	Demonstrate how a specific counselor gets automatically assigned and a task gets generated for the counselor (or Outreach department, or student success team) to call/text/e-mail the student.	
15.	Show a "dashboard" that highlights where students are in the process – e.g., sent an inquiry, attended an event, applied, etc. Show drill-down functionality to see individual students.	
14.	Demonstrate how special communications are triggered given a prospective student's unique qualifications. Contact with prospective student might be made via a telephone call, event, email, or chat box. Show how this action would still be invoked.	
9.	Demonstrate how the CRM would automatically send monthly or quarterly predetermined communication (email and text) that is relative to their grade/age/career/program until the point of application, then removed from the pre-application communications.	
2.	If the CRM is a separate product, discuss how data moves between the CRM and the ERP – including integration methods, frequency, and direction	

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	Functionality	Comments
Student Back End Processing		
18.	Demonstrate how to create a prospect record and what is the minimum information needed to create a record in the system	
22.	Show how a contact may have multiple owners – e.g., student ambassador, counselor.	
20.	Demonstrate how to add a document to a student's record. This should satisfy the checklist item either upon submission or if attached to a recruit it should then satisfy the item when the student applies.	
21.	Show how all contacts with prospects/students logged including phone calls, in person meetings, texts, etc. Demonstrate how users can create reports based on population, application, and population demographics and how to share those reports.	
19.	Demonstrate how to load (both automatically and manually) SAT/ACT/GRE or TOEFL scores. Show that it will create inquiry records for those students who are not in the system.	
17.	Demonstrate how to load in a file of prospects from a purchased source such as gradschools.com, Carnegie, EAB, local unified school district spreadsheets, or other third-party source.	
Communication Outreach		
25.	Demonstrate how to build a population for a one-off email or text messages. Need to be able to generate distinct population groups for advising and communication. For example: flagged groups like Umoja, or college-wide student groups based on GPA	
29.	Demonstrate how to build a population for a campaign.	

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24.	Demonstrate the ability to sort campaigns by various factors including demographics and psychographics	
35.	Show how text messaging is utilized	
23.	Demonstrate the communication campaign capabilities of the CRM. These questions should be asked for each base of constituents in the system (i.e., Prospective Students, Applicants, Current Students, Attended, Alumni, Employees, Parents, geographical location, etc.)	
28.	Show how to send the communication and schedule for a future date and distinguish between email sender and email approver privileges	
27.	Show how to build a template for a one-off communication.	
30.	Show how to build a template for campaign communication including merge fields.	
31.	Show how to use variables in a template and how to use variables such as interest area, high school, counselor, etc.	
32.	Show key metric tracking for messages including finding metrics on (Sent, Delivered, Opens, Clicks, Unique Opens, Unique Clicks, Bounces, Opt Outs, and skipped or repressed emails).	
26.	Show if there is a maximum number of emails/texts that can be sent	
36.	Show how posts to social media are made	
33.	Show branding capabilities for external pages in the CRM. Show how they can be imbedded into the College web site	
38.	Show how referrals can be made along services recommended (e.g., tutoring, seeing an advisor, dropping the class)	

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37.	Show how a PDF or other attachments can be included in outgoing communications. Can the attachments be personalized to the recipient?	
39.	Demonstrate how the system allows a staff member to communicate to a student with tracking of conversations.	
34.	Show how the CRM integrates with Outlook for email, calendar, and texts	

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Evaluation Form
Name of Evaluator:
Perceived Strengths of Vendor Solution:
Perceived Weaknesses of Vendor Solution:
Additional Comments:
Acceptability of Vendor Solution: ___ Yes ___ No