21 Crucial Questions to Ask in Your Admissions Recruitment CRM RFI

Fire Engine RED

Introduction

Looking for an admissions recruitment 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 14.

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 and mirror your processes. (As we all know, admissions is NOT corporate sales!) Because of these differences, implementation and training will probably take longer than you expect. You may 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 originally built for admissions and recruitment, 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. Ideally, you want to use a CRM with strengths that align with the priorities of your admissions department. 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. Did you build your own CRM or are you "white labeling" another company's CRM, software products, or modules?

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

Technologies

5. What technologies did you use to develop 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, 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 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 admissions office's top priorities.

User Experience

7. What is your company’s commitment to the 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, 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 using responsive design?

Why it matters: You’ll probably be using your CRM on the go so you should find out if the CRM is responsively designed or requires an app for mobile access. Ideally, you want a CRM that was designed to be responsive. If the CRM was designed to be responsive, it means that you’ll be able to access the CRM from ANY browser or device (computer, tablet, smartphone), including devices that haven’t even been invented yet. This is because a responsively designed CRM interface will adapt to whatever device it’s being viewed on.

On the other hand, most apps provide a limited user experience. Therefore, if you’re on the go, the chances are good that you won’t have access to all of the CRM’s features and functionality.

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. Are broadcast email AND texting built into your CRM, or is the functionality provided by a third-party vendor?

Why it matters: Some CRMs lack core functionality within the system, such as broadcast email and texting. 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, the third-party vendor may not understand admissions processes and terminology. In addition, there may be integration issues between the CRM and the 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 enable us to conduct a SINGLE search across our entire database and view the results WITHIN the CRM?

Why it matters: Unfortunately, many CRMs store data in multiple silos, making it difficult, if not impossible, to get a holistic view of your data within the system. If a 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 CRM as opposed to running multiple queries and cobbling the results together on a spreadsheet outside the system.

Implementation

12. When can we start our CRM 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.

13. 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’ll be 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, the CRM can take up to two years to fully implement.

14. Will our implementation lead have admissions experience?

Why it matters: You want to work with a company whose implementation leads have worked in an admissions office AND understand the admissions process. That’s because the admissions and recruitment processes are unique and complex. You don’t want to waste your time and resources teaching your implementation lead how these processes work.

15. What implementation tasks will you 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 their 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
- Cleanse, de-duplicate, and import your historical data
- Set up your imports and exports
- Build your standard queries
- Set up your communications flow (email, letters, texts)
- Create custom, responsively designed, broadcast email templates for you
- 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.

Support

16. Describe the level of internal IT resources that will be needed to administer and maintain our CRM.

Why it matters: Many admissions CRMs require several dedicated IT resources to implement and support. If you're like most admissions offices, and have minimal IT resources available, you'll want to know if you can get your job done with minimal assistance from IT. So let's say a CRM requires two 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
- 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)

IMPORTANT: You should also speak with as many of the company's clients as possible about their experiences with the support team.

18. Does your company provide CRM 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, asking the right questions, and resolving your issues by sharing best practices and providing holistic solutions.

Pricing

19. How much does your CRM cost and what's included?

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.

Is the CRM priced as an annual subscription fee? If so, how much is it and what does it include: implementation, training, support, user licenses, and so forth?

For example, 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.

Third-Party Tools

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

Why it matters: Third-party tools 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).

Development Roadmap

21. What is your company's development roadmap for the next 6 to 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 6 to 12 months.

Keep in mind that you can't implement everything (even your top-priority items) at once. Implementation takes time. So find out what functionality the company is planning to release near your "go- live" date.

Remember, you're going to have to live with your CRM choice for many years and you don't want it to be a struggle. Here's how you can ensure you'll be happy in the long-term: You'll be better off implementing the CRM that has the fundamentals right than implementing a CRM that has all of the bells and whistles but underlying foundational issues that require additional IT resources to navigate.

Questions Only.

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5. What technologies did you use to develop your CRM?
6. How is your CRM different than those offered by your competitors?
7. What is your company's commitment to the user experience?
8. Was your CRM built using responsive design?
9. Please describe your CRM's core features and functionality.
10. Are broadcast email AND texting built into your CRM, or is the functionality provided by a third-party vendor?
11. Does your CRM enable us to conduct a SINGLE search across our entire database and view the results WITHIN the CRM?
12. When can we start our CRM implementation?
13. How long does your CRM take to implement?
14. Will our implementation lead have admissions experience?
15. What implementation tasks will you handle for us?
16. Describe the level of internal IT resources that will be needed to administer and maintain our CRM.
17. Tell us how your client support works.
18. Does your company provide CRM consultative support?
19. How much does your CRM cost and what's included?
20. Will we need to purchase any third-party tools to use your CRM?
21. What is your company's development roadmap for the next 6 to 12 months?

Additional Resources

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

Blog Posts

- Three Binge-worthy Admissions Recruitment CRM Blog Posts
- The Top Five Reasons Why the CRM RFP Process Often Fails
- The Advantages of Using an RFI Instead of an RFP
- Six Tips to Help You Avoid the Pitfalls & Unpleasant Surprises Often Associated With RFPs (Assuming You're Required to Use One)

Resources

- RFP Requirements List for a Recruitment and Admissions CRM
- What Your Admissions CRM Demo Should Include