List of Community College CRM Requirements

The critical questions to ask.

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Introduction

Welcome to the List of Community College 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.)

Then make a list of any remaining questions you have and your requirements will be complete!

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

Now, let's get to the list!

Company

- What year was your company founded?
- Who owns your company?
- What year was your CRM created?
- What market was your CRM originally built to serve?
- What problems was it created to solve?
- Tell us about the members of your company’s CRM leadership team.
- How long has your company served the education market?
- How many education clients do you have?
- What distinguishes your CRM from the competition?
- In addition to CRM, does your company have other areas of expertise?

User Experience

- Tell us about your company’s overall commitment to the user experience.
- Does your CRM use admissions terminology?
- Was your CRM built using responsive design?

Technology

- Was your CRM platform developed by your company or another company (e.g. Microsoft, Salesforce)?
- What technologies were used to develop your CRM?
- Do you provide any APIs to campus-wide systems, such as Ellucian Colleague and Banner?
- What company do you use to host your CRM?

- What browsers does your CRM support?
- Do your clients have separate databases (multi-tenant) or share a common database (single tenant)?
- Describe how you keep our data secure both in transit and at rest?
- What is your system uptime?
- How do you monitor system performance?
- Describe your backup and disaster recovery policies.
- Describe your hardware redundancy set-up.
- Describe your framework or methodology for testing.
- Was your CRM designed for accessibility?
- Does your system allow for Single Sign-On (SSO)?
- Is your software SOC 2 Type II compliant?

Third-Party Vendors

- Will we need to purchase any third-party tools to use your CRM?
- What features (e.g., broadcast email, texting) do you offer through a third-party vendor?
- Will we need to contact the third-party vendor for support?

Payment Processing

- Does your CRM have payment processing capability? If yes, what types of payments (e.g., Application Fee, Deposit, Event Fee) do you accept?
- Do you integrate with a payment gateway (e.g., Paypal, Nelnet, TouchNet)? If yes, which ones?

User Permissions

- What level of technical expertise do administrators need to set up a permission group?
- Does your CRM include standard permission groups, and if yes, what permission groups are provided? (e.g., administrator, director, counselor)
- Can you create custom permission groups and assign permissions to a single user and/or multiple users? (Ask for a screenshot.)
- How would an administrator set up a new permission group?
- Can user permissions be set at the field level?
- Can specific tasks be included or excluded from a permission group? (Ask for a screenshot.)

Records

- What types of records can we create and store?
- How many records can we create and store?
- Can we archive records?
- Can we search and report on archived records?
- Can a record have multiple roles, such as "parent" and "alumni"?
- How many mailing addresses can be associated with a record? Can we define the primary address and which addresses are active? (Ask for a screenshot.)
- How many email addresses can be associated with a record? Can we define the primary address and which addresses are active? (Ask for a screenshot.)
- How many phone numbers can be associated with a record? Can we define the primary phone number and which phone numbers are active? (Ask for a screenshot.)
- How many interests can be associated with a record?
- Can we associate multiple applications (undergraduate, transfer, graduate) with a record?
- Can a record have multiple sources (e.g., inquiry form, campus visit, application)?

- Can we track the history of a student through each stage of the admissions funnel (e.g., inquiry, applicant incomplete, applicant complete, admit)?
- Can we create unlimited custom fields and values?
- Can a user customize their view of a record?
- Can we store unlimited external IDs for each record?
- Can we enter comments on a record?
- Can we attach one or more documents to a record?

Relationships

- Can we create a separate record for each relationship (e.g., sibling record, parent record, counselor record)? If yes:
  - Can we associate a record with another record (e.g., a student record with an organization record)?
  - Can we associate a record with multiple records (e.g., a student record with a parent and sibling records)?
- Can we create student records and records for each of their relationships upon import? If yes, will the student records and relationship records be also be associated upon import?
- Can we search and send communications to a student's relationships (e.g. parent, guidance counselor) based on their data and their relationship's data? For example, can we send communications to the parents of all students who are fall applicants and from New Jersey?" Here's another example: can we send communications to school counselors that have relationships with students who were accepted for the fall?
- Can we report on the effectiveness of a record's relationships? If yes, how? For example, can we run a report that tells us how many of our applicants attended a high school that offered 10+ AP courses?

Search

- Describe your CRM’s search capabilities?
- Can we perform a “wildcard” search?
- Do we need to know coding language (i.e., SQL) to build an advanced search?
- Can we conduct a SINGLE search across our entire database and view the results WITHIN the CRM?
- Can we search on every data field within a single search?
- Can a user save their custom searches?
- Can a user create a search and make the search private to them?

Import & Export

- Describe how import/export data are transferred securely?
- Do you provide standard import/export packages?
- Can we create our own import/export packages? If yes, what technical skill level does a user need?
- Can we save our import/export packages for future use?
- Can we make updates to an existing import package?
- Can we clone and edit an import/export package?
- Can you manage value conversions in imports/exports? If yes, please list available conversion types? (e.g., crosswalk, concatenate, trim)
- Does a user receive a summary of the import/export results?
- Can we schedule imports/exports?

Duplicate Management

- Describe your process for identifying duplicates or possible duplicate records. For example, how many matching rules are used to identify potential duplicates?
- Describe how you handle records who share the same contact information so that the records are not merged together. (e.g., twins who share an email address, phone number, and/or address)
- Describe your process for resolving potential duplicates? (Ask for a screenshot.)

Workflow

- Can we create workflow tasks (e.g., call students, review applications, schedule events)?
- Can we categorize tasks (e.g., communications, applicants, events)?
- Can we assign tasks to ourselves or other sta members?
- Can priority levels be set for individual tasks (e.g., high, medium, low)?
- Can deadline dates be set for individual tasks?
- Can we monitor the progress (e.g., complete, in progress, not started) of a task?
- Can we view tasks on a customized dashboard and drill-down on the details?

Broadcast Email

- Can we send messages to purchased lists?
- Can we send messages to an unlimited number of recipients at one time?
- 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 use merge fields (e.g., first name, major) to customize a message?

- 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?
- Can we copy a previous HTML message and 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?
- Do you provide email templates? If yes, were they created using responsive design? Note: Responsive design ensures that your messages dynamically adapt to the device (smartphone, tablet, or computer) on which they’re viewed.
- Can we store images to use in our messages within the CRM? If yes, how much storage is included?
- Can we include attachment(s) in our messages?
- Can we send messages on demand/immediately?
- Can we schedule messages to be sent on a specific date and time?
- Can we view our communication plan in a calendar format?
- Can we exclude certain days (e.g., Thanksgiving, Fourth of July) from automated communication plans?
- Can we test our messages – within the CRM – in multiple email clients (e.g., Gmail, Outlook) and on multiple mobile devices (e.g., iPhone 11, Samsung Note 10) to see how they’ll render?
- Does your CRM identify words, phrases, and other items that are likely to trigger an Internet Service Provider’s (ISP) spam filter? If yes, will it suggest how to improve deliverability?
- Does your CRM provide URL and HTML code validation?
- How does your CRM support CAN-SPAM compliance?
- Can we be notified that a scheduled campaign has been sent?
- What metrics (e.g., opens, click-thrus) are provided for a campaign? (Ask for a screenshot.)

Texts

- Did you develop your texting tool or do you offer it through a third-party product?
- Can we send two-way texts?
- Are recipients required to opt-in to receive text messages?
- Are recipients automatically unsubscribed if they choose to opt-out?
- Can we view the full conversation within the CRM?
- Can we send messages on demand/immediately?
- Can we schedule messages to be sent on a specific date and time?
- Can we view our communication plan in a calendar format?
- Can we exclude certain days (e.g., Thanksgiving, Fourth of July) from automated communication plans?
- Can we be notified that a scheduled text message has been sent?
- Can we see who did not receive the text message and the reason why they did not receive it?

Chat

- Does your CRM include a tool that will enable us to chat 1:1 with visitors while they're visiting our website?

Print

- Do you provide letter and label templates?
- Can we create our own templates?
- Can we copy a letter and then modify it?
- Can we use merge fields (e.g., first name, major) to customize a letter?
- Can we view our communication plan in a calendar format?
- Can we exclude certain days (e.g., Thanksgiving, Fourth of July) from automated communication plans?
- Can we be notified that a scheduled letter has been run?

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 record information we already have?
- Can we utilize conditional logic in our forms to ensure individuals only see questions that apply to them?
- Can we utilize conditional logic to personalize the thank-you screen the individual sees?
- Can we utilize conditional logic to personalize the confirmation message an individual 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.)?

Events

- 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 individuals 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.)?

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 noti es 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 & Analytics

- What technical skills do users need to run reports?
- What technical skills do users need to build reports (e.g., Access, SQL, unique coding languages)?
- What types of reports (e.g., dashboards, pivot tables, lists) do you provide?
- Does your CRM include standard reports? If yes, what standard reports do you include (e.g., Funnel, Top Feeder Schools)?
- Do your reports provide year-over-year comparisons?
- Can we build custom reports?
- Does your CRM calculate admit and yield percentages (i.e. calculations)? If yes, are you able to apply historical data to future terms and project potential enrollment?
- Does your CRM include dashboards? If yes:
  - Are they dynamic?
  - Do they provide users with the opportunity to drill-down on specific populations (e.g., gender, ethnicity, race)?
- Can you visualize data in different ways (e.g., Pie, Bar, Line)?
- Can we build a report that measures our return on investment (e.g., college fairs, purchased lists, high school visits)?

Implementation

- When can we start the implementation process?
- Approximately how long will it take to implement your CRM?
- Will we be assigned a dedicated implementation lead? If yes, did they previously work in an admissions office?
- Do you offer consultative support as part of the implementation process?
- Do you have an implementation guide? If yes, please describe.
- As part of the implementation process, will you:
    - ☐ Set up our permissions?
    - ☐ Prepare our data for import (e.g., cleanse, de-duplicate, apply best practices)
    - ☐ Import our historical data?
    - ☐ Set up our imports and exports?
    - ☐ Build our standard queries?
    - ☐ Set up our communications flow (.g., email messages, text messages, letters)?
    - ☐ Set up our events?
    - ☐ Build our web form(s) (e.g., inquiry form, enrollment deposit)?
    - ☐ Build our admissions application(s)?
    - ☐ Create our custom reports?
- Will we need to purchase any third-party tools to implement your CRM? If so, what tools?

Training

- Please describe your training process.
- Is there a cost for initial training?
- Do you provide ongoing training? (e.g., new features, new functionality, new sta) If yes, is there a cost for ongoing training?

Support

- What are your support hours?
- Do you provide unlimited support?
- What are the ways in which users can submit a support request?
- Do you limit the number of users who can submit a support request or can any user submit a request?
- How long will it take a live person (not an auto acknowledgment) to respond to a support request?
- Do you have a priority system for urgent support requests? If yes, please describe.
- Describe the level of internal IT resources that will be needed to administer and maintain our CRM.
- Does your company provide CRM consultative support?
- Is your support provided by a third party vendor?

Pricing

- How much does your CRM cost?
- What does the cost include?
- How many user licenses are included?
- Are there any variable costs (e.g., emails, text messages, licenses) that need to be considered?

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

- 21 Crucial Questions to Ask in Your Recruitment and Admissions CRM RFI
- What Your Admissions CRM Demo Should Include