Customer Relationship Management (CRM) Specifications & Evaluation Criteria

System Pricing: 50%

Communications: 28%

- Communications channels to include print, email, tele-counseling, text, chat, and social media
- System tracking of email opens, click thru, and responses
- Ability to associate, view and store generated letters and emails
- Ability to create and edit email templates via both editor and specific source code
- Ability to modify communication campaigns while running
- HTML and WYSIWYG editor for creating communication templates
- System to address campaign errors (identify and resolve)
- Ability for functional user to build and execute communication campaigns and expressions
- Ability to customize the admission cycle stages
- Ability to mass import contacts and/or interactions processed outside the CRM
- Ability to import varied lists to include purchases, attendee lists, etc.
- Unlimited customizable data entry forms
- Personalized communications based on available data
- Tele-counseling: specific call assignment, call management, cue, tracking, and reporting, specific call rescheduling, ability to build and store scripts, email follow-up upon call completion and manage and report on call activity
- Capability to create SQL driven custom data fields to be used in a letter or email template
- Ability to create SQL rules to perform tasks within a campaign flow
- Automated and adhoc customization
- Responsive emails for mobile devices
- Ability to use product from a mobile device
- Ability to assign recruitment territories and students to advisors by territory, region, state, high school, etc.
- Ability to manage recruits by territory
- Admission application to include the ability to customize the application, receive application fees, check application status online, and the to communicate with applicants automatically
- Event management to include invitations, campus tour and event registration, collection of user defined elements, collection of payments, confirmation email capabilities ability to plan, manage, and report on events, visits, and recruiting acitivites by territory, state, etc.
- Multiple address and phone number capabilities
- Ability, through a built-in expression builder, to build a specific list of prospective students to be used in communications
• Ability to move interactions from one record to another (due to duplicate record)
• Ability to inactivate records thus removing the record from any active campaigns (ex., duplicate records)
• Ability to query on the following data fields (not limited to); test scores, address to include county code), email address, high school code, entry term, recruit type, ethnicity, purchase codes, application data
• Email opt-in/opt-out processes
• Duplicate matching routines
• Address verification
• Bi-directional bulk data update interface to include insert, update, and delete functionality, differential calculation within system, reporting tools
• Conversion services for historical data
• Ability to extract all AU data from system

Reporting: 10%

• Reporting capabilities to include: cost analysis, source analysis, funnel analysis, campaign response, tele-counseling, operational and statistical (yield and comparative), customizable reports, report scheduling, and ROI reports
• Ability to build dashboards
• Import and export capabilities to the student information system and other software applications

Technical: 10%

• Support of customization in upgrades
• Ability to administer the system by functional users
• Banner integration (automated or bridge development)
• Integration with common high school software (ex. Naviance) for data capture
• Input into upgrade schedules to ensure minimal down time and timing within the admission cycle
• Import and export capabilities to the student information system and other software applications
• Ability to be integrated into a Luminis portal
• Ability to connect between prospective student portal and event management
• Direct table access (cloud based)
• Ability to pass data to/from banner using batch file interface or existing Banner APIs
• System integration to include Banner, email (SMTP, Exchange and/or POP3), TouchNet, etc.
• Ability to configure internal data standards to AU standards and Banner configuration
• Data synchronization with banner
• Ability to update data elements in mass with system tools
• Documented security model and ability to configure detail security and ability to grant or deny permissions based on roles and functions and areas within the system
• Capability to create SQL driven custom data fields to be used in a letter or email template
• Ability to create SQL rules to perform tasks within a campaign flow
• Automated and adhoc customization
• Custom labels in prospect end-user interface
• License includes support for multiple installs (test environment)
• Inclusion of a fully integrated Warehouse Management System (in price of software)
• Support services to include a dedicated contact person, reasonable response time, support for upgrades and access to product roadmap
• Ability to extract all AU data from system

General: 2%

• Functional and technical documentation
• Extensive training opportunities to include various deliveries and a user forum