



UNIVERSITY of
LOUISIANA
L A F A Y E T T E

**Graduate
School**



From First Touch to Last:

Using Technology to Support Student Success

MARY FARMER-KAISER, UNIVERSITY OF LOUISIANA AT LAFAYETTE

LORIE M. LIEBROCK, NEW MEXICO INSTITUTE OF MINING AND TECHNOLOGY

Abstract

Customer (aka ***Constituent***) Relationship Management (CRM) systems allow universities to develop customized approaches to recruiting, advising, and communicating with graduate students. They also raise important questions such as:

- Should a graduate school develop its own system or purchase an existing product?
- What are effective strategies for implementation?
- And how can CRM's be used to their full potential?

This session will provide practical advice based on a variety of models.

What is a CRM and why have one?

What is a CRM?

- It is a tool designed to manage communications, relationships, and reporting processes through the full student lifecycle—from prospects to students to alumni and donors.

As a side note, as you undertake your research you may also learn about ERM “enterprise relationship management” or “extended relationship management” systems, which combine the functions of an ERP and CRM.

What are the benefits? A CRM can...

- improve efficiency (automation, tracking, self-service)
- engage multiple kinds of communications
- promote collaboration and accountability
- enable better data analysis and reporting (and, ultimately, improve your effectiveness)
- improve the prospect/applicant/student/donor experience by helping to ensure they don’t fall through the cracks
- other benefits?

Do you need one?

- If you don’t have recruitment, enrollment, and communication strategies, then you don’t need one!

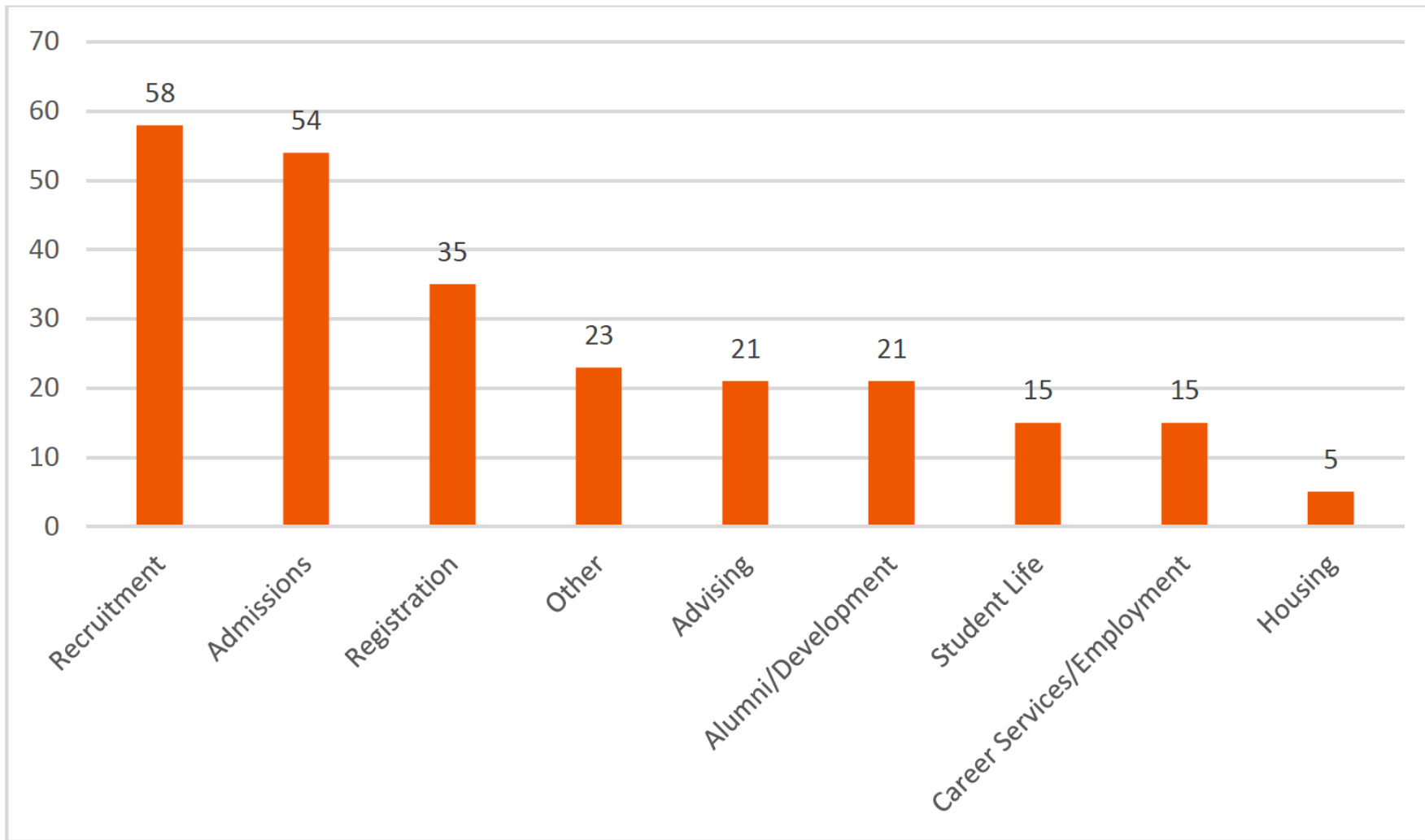


Figure 11 - Use of CRM by Department

CRM Uses

Other department uses:
 Projects and Research (1),
 Sales and Marketing (7),
 Executive Development
 Programs (1), Administration
 (1), Immigration and Other
 Student Services
 (1), Communication Services
 (2), Finance (1), Lectures (1),
 Exchange Management (1),
 Event Management (1),
 Contract Education (1),
 Newsletter (1), **PhD Process**
 (1), Uncertain (3).

Customer Relationship Management (CRM) Systems in Higher Education, by Thijs van Vugt & Mykolas Knasys, 2015

New Mexico Institute of Mining and Technology



Established in 1889 by act of Territorial Legislature

	BS	Masters	PhD
Degrees	23	17	9

Students	Full time	Part time	Total
Undergraduate	1388	181	1569
Graduate	267	299	566
Total			2135

Center for Graduate Studies responsible for (nearly) all graduate student support from recruiting to degree completion checks. CGS has part time Dean and two full time staff, and part time student help.

Many processes still on paper – 500+ paper files with manual checks needed.

New Mexico Institute of Mining and Technology

Reasons for wanting a CRM:

- New NMT president's goal to grow graduate student population to 1000.
- Track communications with and progress of students to ensure that questions are answered promptly and correctly and to document notifications (not on paper!). This is tied to the need to have simplified processes and automate them (workflow solutions that automatically document approvals and improve reporting).
- Ultimate goal: improve student success in terms of recruiting, retention, funding, productivity, graduation rate, and research impact.

Challenges for implementing a CRM:

- Our Information Technology and Communication (ITC) department has limited staff and a lot of responsibilities; It has been difficult to become high priority with ITC.
- Historically, NMT has been undergraduate focused with most resources directed to undergraduate programs. This is changing due to a change in leadership – new president and new VPAA.
- Coordinating with Admissions (undergraduate recruiting) and CGS hampered by reporting to two different vice presidents; CGS has to lead or graduate students will not be considered.



About the University of Louisiana at Lafayette



Doctoral Universities: Higher Research Activity Research

Doctoral: STEM Dominant

Carnegie Classification

17,519 | 1,521

Total Enrollment | Total Graduate Enrollment (Fall 2016)

Centralized

Administrative Model

10

Number of Graduate School Staff

Recruitment | Admissions | Progression | Commencement

Issuance of Initial and Transfer I-20s

GTA/GRA/GA Budgets and Appointments

Professional Development Programming | Graduation

Grad School Scope of Activities



Graduate Studies at the University of Louisiana at Lafayette



Doctoral Programs

10

8 PhD + 1 EdD + DNP

63 doctoral graduates in 2016-17



Master's Programs

34

447 master's graduates in 2016-2017



Grad Certificates

7





University of Louisiana at Lafayette



Reasons for wanting a CRM:

We need to grow graduate enrollment.

The University has set a strategic priority of growing graduate enrollment to 15% of our total enrollment by 2020.

Even without this goal, we could not continue with current operations.

All processes were manual in the Graduate School in 2013. Organizational inefficiencies were everywhere. Communications were not automated. We had no communications plan. Applicants had no way to check the status of their applications without calling or emailing. Our staff size was small and, worse, the Graduate School staff had completely turned over.

Broad Initial Challenges:

We too are an undergraduate-focused institution.

The CRM system was to be shared by Undergraduate Admissions, the Graduate School, and Distance Learning.

IT was focused on preparations for a 4-year Banner implementation.

We faced discord over the expectation that we'd be moving to the CRM that was purchased with the new "vanilla" ERP.



Group Question: Where are you?

Where is your institution in terms of CRM implementation:

- A. What CRM? We have not even begun looking.
- B. We are selecting and/or implementing one now.
- C. We have fully Implemented, but I don't think we are reaping the full benefits.
- D. We rock. We have CRM deployed across all departments with federated student interactions that help us increase student success, reduce staff workload, and analyze interaction across the full student lifecycle.

CRM Selection/Implementation Options: FIRST CHOOSE AN IMPLEMENTATION OPTION.

Start by reading a number of RFPs from other universities and watch as many demos as you can.

Consider implementation options:

- **Purchase a higher education specific CRM.**
- Purchase an off-the-shelf, generic, enterprise-class CRM.
- Develop CRM in house.
- Use an open-source CRM.

Price	IT Req.	Focus^
\$\$\$	*	&&&
\$\$\$	**	&
\$\$	***	&&&
\$	**	&

What questions do you need to answer to pick an option.

- What are your goals?
- What IT support do you have?
- What is your budget?
- What will training look like and what IT support will be required?
- What are you connecting to the CRM?
- Who will deploy, maintain, and operate the system?

^ Note focus depends on who is in charge of CRM.

CRM Listings

<http://www.uofadmissionsmarketing.com/p/higher-ed-crms.html>

Has listings for

- Higher Education CRMs
- Small Business CRMs
- Other CRMs

<http://www.capterra.com/sem-compare/customer-relationship-management-software>

Has listings, with characteristic summary, for

- Top CRMs
- Open Source CRMs











<http://landing.crmsoftwarereview.org/>

Has 2017 listing of the “Top 40 CRM Software Report”

180DegreeSolutions (AdmitGold, Goldmine)
Interactive Software (Achiever Education Software; based in the U.K.)
Admission Plus Pro (Rediker, Admissions Pros)
Admittor (based in Iceland)
Azorus (based in Canada)
Campus Management (CampusNexus, Talisma)
CollegeNET (Intelligent Connections, Prospect CRM)
Data Harvesting (DH, Student CRM; based in the U.K.)
DreamApply (based in UK, Estonia, Poland, and Turkey)
Education Systems, Inc. (EMAS Pro)
Ellucian (Banner Relationship Management, Recruiter, Datatel)
Enrollment Rx
Edge IP (ezRecruit)
FireEngineRed (Fireworks)
Full Fabric (based in UK, strong graduate focus)
Hobsons (EMT Connect, Intelliworks, Radius)
Jenzabar (Recruitment Manager, Candidate CRM, SEM CRM)
Liaison (Spectrum, Enrollment Management Platform, EMP)
Oracle (On Demand, PeopleSoft, RightNow, Siebel)
ProRetention (Enrollment CRM)
QuScient (ProRetention; based in India)
Ruffalo Noel Levitz (Enrollment Manager, Admissions Lab, Recruitment Plus [sort of])
Salesforce1 (the higher ed version)
TargetX (Recruitment CRM)
Technolutions (Slate)

www.uofadmissionsmarketing.com
2013

Top Customer Relationship Management Software Solutions

Product	Deployment	Contact Management	Customer Support	Email Marketing	Interaction Tracking	Lead Management	Marketing Automation	
 Freshsales ★★★★★ (19)	☁	✔	✔	✔	✔	✔	✔	Visit Website
 Pipedrive ★★★★★ (932)	☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 HubSpot CRM ★★★★★ (425)	☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 dapulse ★★★★★ (427)	☑ ☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 Salesforce ★★★★★ (3862)	☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 NetSuite CRM+ ★★★★★ (138)	☁	✔	✔	✔	✔	✔	✔	Visit Website
 Nutshell ★★★★★ (239)	☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 PipelineDeals ★★★★★ (99)	☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 bpm'online CRM ★★★★★ (60)	☑ ☑ ☁	✔	✔	✔	✔	✔	✔	Visit Website
 ActiveCampaign ★★★★★ (54)	☁	✔	✔	✔	✔	✔	✔	Visit Website

The 10 Best Free and Open Source CRM Software Solutions



	Free Contacts	Free Users	Free Storage	Free Support	Email Marketing Capabilities	Cloud-based	Self-hosted	Upgrade Fee
 suiteCRM	Unlimited	Unlimited	Unlimited	Online Community	✓	✓	✓	
 capsule	250	2	10 Mb		✓	✓	✓	\$12/user/mo
 insightly	2500	2	200 Mb	Online Community	✓	✓	✓	\$12/user/mo
 Really Simple Systems	Unlimited	2	100 Mb	Full Service	✓	✓	✓	\$14/user/mo
 FreeCRM	1000000	100	Unlimited		✓	✓	✓	\$29.95/user/mo
 Bitrix24	Unlimited	12	5 Gb		✓	✓	✓	\$39/user/mo
 RAYNET	150	2	50 Mb	Full Service	✓	✓	✓	\$19/user/mo
 vtiger	Unlimited	Unlimited	Unlimited	Online Community	✓	✓	✓	\$30/user/mo
 Zoho CRM	Unlimited	100	1 Gb	Full Service	✓	✓	✓	\$12/user/mo
 Zurmo	Unlimited	Unlimited	Unlimited	Online Community	✓	✓	✓	\$35/user/mo
 HubSpot	Unlimited	Unlimited	Unlimited	Full Service	✓	✓	✓	\$10/user/mo
 InStream	100	1	None	None	✓	✓	✓	\$10/user/mo
 AgileCRM	1,000	10	Unlimited	Email Support	✓	✓	✓	\$8.99/user/mo

May 2017 freemium and open source CRM

Note these are all enterprise, not academic.

www.capterra.com

★ THE TOP 20 MOST AFFORDABLE CRM Software



CRM software helps businesses of all sizes manage current and potential customers, striving to ensure their happiness and maintaining strong relationships. Since there are so many CRM systems out there, we wanted to find those that offer “the best bang for your buck”. Below is a snapshot of the most affordable options as measured by the average monthly cost, total number of features offered for that cost, and customer reviews. To see a comprehensive list, please visit our [Customer Relationship Management Software Directory](#).

^ Hide All Data

AFFORDABILITY SCORE 

 COST

✓ FEATURES

★ REVIEWS

Rank	CRM Software	Affordability Score	Cost	Features	Reviews
1	Apptivo CRM	97	\$\$\$\$	12/12	★★★★★ (99)
2	HubSpot CRM	95	FREE	11/12	★★★★★ (212)

www.capterra.com	Range (per month) FREE	<input checked="" type="checkbox"/> Contact management <input checked="" type="checkbox"/> Interaction tracking <input checked="" type="checkbox"/> Calendar/Reminders <input checked="" type="checkbox"/> Task management <input checked="" type="checkbox"/> Pipeline view <input checked="" type="checkbox"/> Mobile access	<input checked="" type="checkbox"/> Email integration <input checked="" type="checkbox"/> Social media integration <input checked="" type="checkbox"/> Mkt auto integration <input type="checkbox"/> Quotes/Proposals <input checked="" type="checkbox"/> Document storage <input checked="" type="checkbox"/> Custom reporting	Functionality ★★★★★	Overall Quality ★★★★★	Value ★★★★★
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Top 40 CRM Software Comparison by CRM Software Review

Features & Deployment Key

Data importing

Analytics

Email integrations

Mobile accessible

Email marketing

Multichannel support

SaaS platform

On-premise platform

SaaS and on-premise

salesforce	ORACLE + NETSUITE	CRM	infor	sage
Ideal for: Businesses looking for a platform that provides forecasting, analytics and real-time updates.	Ideal for: Companies seeking a solution with integrated order management.	Ideal for: Businesses that want a solution with advanced marketing and relationship management functionality.	Ideal for: Any size company looking for a software solution with advanced customization capability.	Ideal for: Smaller companies that would benefit from Outlook and Exchange integration.
Business size S M L	Business size S M L	Business size S M L	Business size S M L	Business size S M L
\$\$\$\$	\$\$\$\$	\$\$\$	\$\$\$\$	\$\$\$
Key Features 	Key Features 	Key Features 	Key Features 	Key Features
Additional Features <ul style="list-style-type: none"> Manage and track campaigns across multiple channels Securely share files Email and calendars Real-time updates on contacts and accounts 	Additional Features <ul style="list-style-type: none"> Competitor tracking Real-time sales forecasting Quote and order management Commissions management 	Additional Features <ul style="list-style-type: none"> Sales management includes all areas under relationships Sales force automation Customer service tracks post-sales activities 	Additional Features <ul style="list-style-type: none"> Standard open APIs & integration options Seamless integration with back office systems Advanced customization capabilities 	Additional Features <ul style="list-style-type: none"> Relationship management graphs Customizable graphical workflow Create accurate quotes Quickly execute marketing campaigns
Select Customers NBCUniversal, Siemens, Dr. Pepper Snapple, HP	Select Customers AMPRO, Oakland Athletics, Document Sciences	Select Customers Verizon Wireless, Dean Foods, Douglas Machines	Select Customers Amica Life Insurance, Uni-First, Meridian Bioscience	Select Customers Panasonic, Armstrong, Caber Sure Fit, NYSE
Deployment SaaS	Deployment SaaS	Deployment SaaS	Deployment SaaS	Deployment SaaS

<http://landing.crmsoftwarereview.org/top-40-crm-software-vendors-v7>

ENROLLMENT MANAGEMENT

Lead Aggregator Solutions



Integrated Recruiting & Enrollment Management Solutions



Constituent Relationship Management (CRM) Platforms



Enrollment Analytics Platforms



Social Recruitment & Engagement Platforms



Higher Education Technology Landscape 2017, by EDUVENTURES

Integrated Recruiting & Enrollment Management Solutions



Constituent Relationship Management (CRM) Platforms



Enrollment Analytics Platforms



After you decide on a type, consider:

How does the CRM integrate with your existing and future technology?

Is the system configurable to your unique business processes?

How will your organization deploy a CRM system?

How will your organization manage the change?

Who will use the CRM (graduate students or will it be used more broadly, i.e., undergraduate, continuing education, professional programs, administrative departments, academic departments, etc.) and for what?

Do's and Don'ts of Selection

- DO** carefully evaluate your current processes and communications before you begin an RFP.
- DO** contact current users of CRMs with the same Student Information System before purchase.
- DO** watch YouTube videos from other schools in addition to demos on company websites.
- DO** look at the RFPs from other schools, e.g., peer institutions.
- DO** read manuals and spec sheets, watch product demos, and call current clients to confirm.
- DO** be careful how you ask questions, e.g.,
 - **DON'T** ask “Can your CRM integrate with Banner?”, Do ask “Describe how your CRM integrates with banner and how much institutional effort is needed to do this?”

Do's and Don'ts of Selection (continued)

- DO** decide what matters for your needs (that matches your resources) and prioritize that in the RFP.
- DO** remember that reporting is a critical function for strategic enrollment management.
- DO** make sure your security requirements are in the RFP before it goes out.
- DON'T** believe everything a vendor says – they sometimes stretch the truth.
- DO** ask to use a demo site/version – don't trust a vendor that won't provide one.
- DON'T** weigh cost too high; have a strong negotiator on your team.



University of Louisiana at Lafayette



Our CRM Systems:

Hobsons Connect

- interest pages
- VIP portal
- trackable email campaigns
- event management

We were brought into the shared CRM system (along with Distance Learning) that Undergrad Admissions had been using for years.

Hobsons, of course, has moved away from this CRM to its Radius product and, since our purchase of the Banner ERP, UL is not planning to upgrade.

Ellucian Recruit 4.7

We are implementing this CRM (and application system) now. Indeed, we're doing testing this week with the hope to "go-live" next week.



CRM Implementation

CHALLENGES

- Building and cultivating buy-in
(from both inside and outside the Grad School ... we were truly starting from scratch)
- Communication Plan

CRM Implementation

COMMUNICATION PLAN

Audit your existing communication plan. What are your areas of strength? Where are the critical gaps?

Develop a sustained communication flow that...

- fits your recruitment cycle(s)
- addresses key prospective grad student priorities: (1) quality of program, (2) cost/affordability/funding/ROI, and (3) the pathway forward or careers available
- includes multiple contact strategies (e.g., email, direct mail, live chat, phone, SMS text messages, social media)
- starts not at the applicant stage of the funnel but rather with prospects and inquiries
- ends not with a decision but continues through to registration and beyond (many use CRMs to update alumni databases and to support fundraising efforts)
- provides information most relevant to each stage and does not overwhelm with everything at once

Think through consistency, frequency, timing.

Understand each communication piece, its intended audience, message and timing, and call to action.



Communication Template

University of Maine Graduate School

MODEL Communication Plan – Key Messages

<https://umaine.edu/graduate/communication-template/>

Converting Prospects to Applicants:

1. Send thanks for inquiry/send application/program fact sheet (Graduate School).
2. Send applicant a note with supplementary forms/program information such as listing of faculty with research interests (program coordinator).
3. Follow-up message after several weeks – positioning program (program coordinator).
4. Assign graduate students to email prospective students offer to answer questions.

Timeline: June to January

Encouraging Completed Applications:

1. Acknowledgment of receipt of application (Graduate School).
2. Call student to discuss application and possible funding (program coordinator).
3. Send applicant a timeline for making admissions decisions (program coordinator).
4. Contact from potential faculty advisor(s).
5. Email reminder to complete application (Graduate School).
6. Acknowledgment of completed application (Graduate School)

Timeline: October to January

Converting Acceptances to Enrollments:

1. Admission letter/ setting up FirstClass account (Graduate School)
2. Congratulations and financial award letter (program coordinator).
3. Call applicant to talk about research project, length of funding (program coordinator or faculty advisor).
4. Welcome letter from department chair or college dean.
5. Email from graduate student to talk about student life.
6. Invitation to visit campus (program coordinator).
7. Invitation to orientation program (Graduate School).
8. Call from alumnus to discuss graduate program/opportunities.

Timeline: January to April

CRM Implementation

CHALLENGES (continued)

- Building and cultivating buy-in
(from both inside and outside the Grad School ... we were truly starting from scratch)
- Communication Plan
- Resources
- Time and timeline
- Multi-office implementation and use
- Communication
- Data quality
- Building, testing, and perfecting filters
- System readiness and testing
- Training

Do's and Don'ts of Implementation

DON'T go into implementation without preparation.

Know your business processes and your communication plan, think through your filters (intended audience), and have content and images ready to go.

DON'T implement in a vacuum.

Include current / potential users from the start and do so in more than a token way.

DON'T waste time with your consultant.

Be prepared with questions, examples, and scenarios.

DON'T expect the implementation to be perfect on day one.

It'll take time to identify and fix the “bugs” and to refine.

DON'T overthink it.

Keep your goals focused, your content tight, and continue to see the CRM as a “living” system.

Do's and Don'ts of Implementation

DO be realistic about your timeline.

DO be ready to compromise.

This is especially true if your implementation is dependent upon IT and/or the CRM is intended for use by multiple offices.

DO communicate.

Keep your staff updated. Ownership and inclusion goes a long way toward the successful adoption of new systems, processes, and procedures.

DO develop a naming convention for folders, filters, emails, etc. that everyone working in the CRM uses.

DO spend time building your filters and getting them right.

DO perform testing before going “live.”

You simply cannot test enough.

Discussion

Pick your group's top one or two questions for focus in each section — selection, implementation, and effective use — and provide written notes for your group.

As we discuss, we will ask a group or two to discuss their responses, but we'll also compile all of the notes for a summary to be share with participants following the conference.

Group leaders, please email your written notes to jkent@cgs.nche.edu, graduate@nmt.edu, and kaiser@louisiana.edu. We encourage you to answer as many of the questions in your individual email responses.

Discussion: Selection Best Practices

What type of CRM are you considering and why (in-house development, enterprise, open source, higher-education specific)?

What are your top three requirements for your CRM?

What are your top three recommendations for others who are beginning the search for a CRM?

What functions do you use or plan to use in the CRM? (recruiting, retention, etc.)

If you have a CRM:

- What do you use?
- How well does it work for you?
- What was your top reason to choose it?
- What are the features that you like/use most?
- If you could only change one thing, what would it be and how would you change it?
- What are the upfront, maintenance, and “hidden” costs (e.g., requires Salesforce)?

Discussion: Implementation Best Practices

Who needs to be on your implementation team?

Who should lead it?

Who needs to be brought into the implementation as you move toward training and “go-live”?

How do you balance implementation with day-to-day operations?

What’s an ideal initial Graduate School communication plan look like?

What are the key consistency, frequency, and timing issues that need to be considered?

Who should develop and/or approve the content?

If you’ve gone through a CRM implementation, what’s the one thing you wish you would have done differently?

If you’ve implemented a non-higher-education-specific CRM, what are the implementation benefits/challenges that come with (a) an off-the-shelf enterprise-class CRM, (b) an in-house CRM, or (c) an open-source CRM?

Discussion: Effective Use Best Practices

How many times do you communicate at each stage? What are the key touchpoints? When is communication most critical? How much is too much and/or too little communication?

What kinds of communication do you use? What do you use beyond email (e.g., direct-mail, SMS text messages, live-chat, social media, phone)? Which are most effective? How do you track all forms of communications and their effectiveness?

How do you engage others – e.g., academic departments and program coordinators, distance learning, international affairs, financial aid, housing – in your communication flow? What is communicated by whom?

How often do you audit of your content and/or update your content?

What is the most innovative thing you do with your CRM?

Are you using your CRM beyond recruitment and admissions? Are you using it for events management? to track post-graduation activity? to engage donors?

CRM Discussion Recap

Please don't forget to email your comments to jkent@cgs.nche.edu and graduate@nmt.edu and kaiser@louisiana.edu so we can integrate responses and make them available.

Thank you for your thoughtful input and participation.

References and Resources

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http://www.aacrao.org/docs/default-source/PDF-Files/state-of-crm-use-in-higher-education-report_bw.pdf?sfvrsn=2
- Buying a CRM Solution in 2016
http://resources.idgenterprise.com/original/AST-0169130_CRM_Buyer_s_Guide.pdf
- A Buyer's Guide to Customer Relations Management Solutions: Industry-Driven Solutions, Value, and Evaluation Criteria
<http://www.netsuite.com/portal/pdf/crm-buyers-guide.pdf>
- CRM Buyers Guide: A Comparative Analysis of the Top CRM Vendor Solutions
<http://www.crmsearch.com/crm-report.php>
- CRM Buyer's Guide for 2017
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<http://www.uofadmissionsmarketing.com/2013/07/crm-in-higher-education-secret-guide.html>
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<https://www.studyportals.com/blog/the-importance-of-customer-relationship-management-crm-systems-in-higher-education/>
- Industry Solutions Guide: Selecting a CRM Vendor in the Higher Education Market (Competitor Focus)
<https://www.slideshare.net/ReportLinker/industry-solutions-guide-selecting-a-crm-vendor-in-the-higher-education-market-competitor-focus>
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<https://www.business-software.com/offer/top-40-crm-software/>

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- The 10 Best Free and Open Source CRM Software Solutions <http://blog.capterra.com/free-and-open-source-crm/>
- Top 6 Open Source CRM Tools for 2016 <https://opensource.com/business/16/2/top-6-open-source-crm-tools-2016>
- The 3 Cardinal Rules of Cause Marketing
<http://www.destinationcrm.com/Articles/Editorial/Magazine-Features/The-3-Cardinal-Rules-of-Cause-Marketing-100531.aspx>
- 7 Questions to Help You Choose the Right CRM System for Your University
<https://www.studyportals.com/blog/7-questions-to-help-you-choose-the-right-university-crm/>
- Before You Invest in a CRM System, Ask these 5 Questions: A CRM Primer for Savvy CIOs
<http://www.ellucian.com/eBooks/5-questions-before-you-invest-in-CRM/>
- Contextual Relevance is Critical to Capturing Customers
<http://www.destinationcrm.com/Articles/Columns-Departments/Customer-Experience/Contextual-Relevance-Is-Critical-to-Capturing-Customers-119152.aspx>
- Is CRM a Tool or a Mind-Set?
<http://www.destinationcrm.com/Articles/Columns-Departments/The-Next-Step/Is-CRM-a-Tool-or-a-Mind-Set-116595.aspx>
- Marketing Needs a Story to Tell: Brand Storytelling has become an Essential Element of Company Success
<http://www.destinationcrm.com/Articles/Editorial/Magazine-Features/Marketing-Needs-a-Story-to-Tell-116079.aspx>
- Required Reading: Cooking Up Marketing's Secret Sauce
<http://www.destinationcrm.com/Articles/Columns-Departments/Insight/Required-Reading-Cooking-Up-Marketings-Secret-Sauce-116096.aspx>
- Schools Need to Rethink their CRM Approaches
<http://www.destinationcrm.com/Articles/Editorial/Magazine-Features/Schools-Need-to-Rethink-Their-CRM-Approaches-91513.aspx>
- Studying CRM Software in Higher Education
<http://www.crmsearch.com/higher-education-crm.php>

References and Resources (continued)

Best Practices in Graduate Recruitment Marketing

http://www.agr.org.uk/write/Documents/Briefing%20Papers/Best_Practice_in_Graduate_Recruitment_Marketing.pdf

Best Practices in Graduate Student Recruitment

<http://www.hanoverresearch.com/media/Best-Practices-in-Graduate-Student-Recruitment-1.pdf>

Best Practices for Integrating Your Marketing Efforts for Graduate Students: #CarnegieConf

<http://www.carnegiecomm.com/blog/best-practices-for-integrating-your-marketing-efforts-for-graduate-students-carnegieconf/>

Back from the Brink: Bringing Graduate Admissions into the 21st Century

<http://consulting.aacrao.org/publications-events/publications/back-from-the-brink-bringing-graduate-admissions-into-the-21st-century/>

Ten Enrollment Roadblocks for Graduate and Professional Programs

<http://blogem.ruffalonl.com/2011/10/25/ten-enrollment-roadblocks-graduate-professional-programs-part/>

Best Practices for Successful Graduate Student Recruitment

https://graduate.asu.edu/sites/default/files/node_files/GradRecruitmentBestPractices-feb2017.pdf

Lesson 3: Graduate Admissions (“The University as Mentor: Lessons Learned from UMBC Inclusiveness Initiatives,” in CGS Occasional Paper Series on Inclusiveness)

<http://cgsnet.org/cgs-occasional-paper-series/university-maryland-baltimore-county/lesson-3>

FROM FIRST TOUCH TO LAST: USING TECHNOLOGY TO SUPPORT STUDENT SUCCESS

Pick your group's top one or two questions for focus in each section — selection, implementation, and effective use — and provide written notes for your group. As we discuss, we will ask a group or two to discuss their responses, but we'll also compile all of the notes for a summary to be share with participants following the conference.

Group leaders, please email your written notes to
jkent@cgs.nche.edu, graduate@nmt.edu, and kaiser@louisiana.edu.

We encourage you to answer as many of the questions as possible in your individual email responses.

Discussion: Selection Best Practices

What type of CRM are you considering and why (in-house development, enterprise, open source, higher-education specific)?

What are your top three requirements for your CRM?

What are your top three recommendations for others who are beginning the search for a CRM?

What functions do you use or plan to use in the CRM? (recruiting, retention, etc.)

If you have a CRM:

- What do you use?
- How well does it work for you?
- What was your top reason to choose it?
- What are the features that you like/use most?
- If you could only change one thing, what would it be and how would you change it?
- What are the upfront, maintenance, and “hidden” costs (e.g., requires Salesforce)?

Discussion: Implementation Best Practices

Who needs to be on your implementation team? Who should lead it?

Who needs to be brought into the implementation as you move toward training and “go-live”?

How do you balance implementation with day-to-day operations?

What's an ideal initial Graduate School communication plan look like?

What are the key consistency, frequency, and timing issues that need to be considered?

Who should develop and/or approve the content?

If you've gone through a CRM implementation, what's the one thing you wish you would have done differently?

If you've implemented a non-higher-education-specific CRM, what are the implementation benefits/challenges that come with (a) an off-the-shelf enterprise-class CRM, (b) an in-house CRM, or (c) an open-source CRM?

Discussion: Effective Use Best Practices

How many times do you communicate at each stage?

What are the key touchpoints? When is communication most critical?

How much is too much and/or too little communication?

What kinds of communication do you use?

What do you use beyond email (e.g., direct-mail, SMS text messages, live-chat, social media, phone)?

Which are most effective?

How do you track all forms of communications and their effectiveness?

How do you engage others – e.g., academic departments and program coordinators, distance learning, international affairs, financial aid, housing – in your communication flow? What is communicated by whom?

How often do you audit of your content and/or update your content?

What is the most innovative thing you do with your CRM?

Are you using your CRM beyond recruitment and admissions?

Are you using it for events management? to track post-graduation activity? to engage donors?

Please don't forget to email your comments to
jkent@cgs.nche.edu and graduate@nmt.edu and kaiser@louisiana.edu
so we can integrate responses and make them available.

Thank you for your thoughtful input and participation.