

# SDAA Customer Relationship Management (CRM) Survey

Does your college use prospective student information?  
 Does your college use Prospect Summary (PRSP) in Colleague?  
 Does your college use a CRM?

#	Q1	Q3	Q5
1	YES		
2	YES	NO	NO
3	NO	NO	NO
4	YES	NO	
5	YES	NO	YES
6	YES	YES	
7	YES	NO	YES
8	NO	NO	NO
9	YES	NO	NO
10	YES	NO	NO
11	YES	NO	YES
12	NO	NO	NO
13	YES	NO	NO
14	NO	NO	NO
15	YES	NO	NO
16	NO	NO	NO
17	YES	NO	YES
18	YES	NO	NO
19	YES	NO	NO
20	NO	NO	NO
21	YES	NO	YES
22	YES	YES	NO
23	YES	NO	NO
24	NO	NO	NO
25	YES	NO	YES
26	YES	NO	NO
27	YES	YES	
28	YES	NO	NO
29	YES	NO	NO

# Q2: If yes, how do you collect, store and track this data?

1

2 Google or Wufoo forms

3

4 MS CRM System

5 We have implemented Fire Engine Red (Fireworks)

6 Through the Prospect Summary (PRSP) mnemonic in Colleague

7 We use a CRM. This is new for us within the last 6 months.

8 We have a google form that we use at recruiting events. And, of course, the student who start a CFNC application but fail to finish.

9 Interest cards (physical & electronic); a shared Google doc to store and track

10 -collect data from website contacts, emails, calls, campus visits, and community/school events;  
-stored in self-made database.

11 We currently collect in Hubspot. This was initially started as a way for our marketing firm to calculate number of applicants for their yield calculations. We saw it as a way to identify prospects. It doesn't integrate with Colleague which is painful and tedious for tracking but does have a drip communication feature which is nice.

12

13 Manually

14

15 We have an online form that is entered into a database and we have cards that are collected at off campus events that are manually entered into a database. The information collected is forwarded to the program chairs for further follow up.

16

17 We use Fireworks by Fire Engine Red

18 Manually, via an Excel spreadsheet

19 Survey form linked to website prior to the application process.

20 N/A

21 Microsoft Dynamics CRM (cloud based)

22 PRSP in Colleague

23 Internal spreadsheets; Starfish, Colleague

24 We will begin this year using Ellucian Recruit

25 CRM - Radius

26 Collection: index cards, email, phone calls; Store and Track: Paper-based

27 Colleague

28 Excel

29 Colleague and Excel

# Q4: If yes, what do you do with the information collected?

1

2 N/A

3

4

5

6 We use an Informer report to collect the data. A report is distributed monthly to the appropriate faculty department head for follow-up purposes.

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22 Targeted messaging; We have added numerous customized fields to be able to pull from.

23 N/A

24 I did not know that feature existed.

25

26 N/A

27 Recruiting

28

29

# Q6: If yes, what is the name/vendor?

1

2 N/A

3

4

5 Fireworks (Fire Engine Red)

6

7 Vendor is Fire Engine Red. Product is Fireworks CRM.

8

9

10

11 Hubspot

12

13 N/A

14

15

16

17 Fireworks by Fire Engine Red

18

19

20

21 Microsoft Dynamics (cloud-based)

22

23 N/A

24 We will purchase Ellucian Recruit this year

25 Radius (by Campus Management)

26 N/A

27

28

29

# Q7: Please provide the pros and cons of the CRM

1

2 N/A

3

4

5 Hard to say - we are still in the implementation phase

6

7 New tool for us. Very happy thus far

8

9

10

11 Pros - allows for a webpage based landing page for collecting contact information and offers a drip communication email campaign feature that we like; Cons - doesn't integrate into Colleague and so calculating number of prospects converted to applicants or converted to enrolled for FTE calculations is VERY difficult and time consuming and requires a lot of manpower.

12

13 expense

14

15

16

17 It is a decent product with outstanding customer support.

18

19

20

21 Challenge: Does not read back and forth to Colleague to see if applicant has applied; Pros: Easy to use, good reports, easy to modify fields and forms, cheap ( : )

22

23 The connectivity of prospective students from the first inquiry all the way to credential completion.

24 It's multifaceted and our IT dept feels more comfortable with a product designed for Colleague.

25 +Texting Add-on; Mongoose; Two-way Communications

26 N/A

27

28

29

# Q8: If your college uses a CRM, what features can it perform?

	Send Texts	Send Emails	Integrates with CFNC	Integrates with Colleague/Datatel	Reporting & Analytics	Other?
1						
2						
3						
4						
5	YES	YES	YES	YES	YES	
6						
7	YES	YES	YES	YES	YES	Campus tour sign up, open house registration, communication plans...We use for recruitment and admissions. We have not explored integrating with CFNC yet. I'm sure it could though.
8						
9						While we don't have a "formal CRM" we use School Messenger to send texts, emails and calls. We simply upload prospective student contact information into that system.
10						
11	NO	YES	NO	NO	YES	
12						
13						
14						
15						
16						
17	YES	YES	NO	NO	YES	
18						
19						
20						
21		YES	NO	NO	YES	
22						
23						We do no use a CRM
24	YES	YES	NO	YES	YES	
25	YES	YES	NO	YES	YES	
26						N/A
27						
28						
29						

Q9: If you would like to share your institution's experience using a CRM/or other processes to manage prospective students at our SDAA Summer Drive-In, # please enter your name, institution, and contact information below.

1			
2			
3			
4			
5	Joanne Ceres	Cape Fear CC	(910)362-7040 <a href="mailto:jceres@cfcc.edu">jceres@cfcc.edu</a>
6			
7	Jeremy Gibbons	Cape Fear CC	(910)362-7054 <a href="mailto:jgibbons@cfcc.edu">jgibbons@cfcc.edu</a>
8			
9			
10			
11	Jennifer Nichols	Gaston College	(704)922-6482 <a href="mailto:nichols.jennifer@gaston.edu">nichols.jennifer@gaston.edu</a>
12			
13			
14			
15			
16			
17			
18			
19			
20			
21	Lisa Bush	A-B Tech	(828)398-7202 <a href="mailto:lisafbush@abtech.edu">lisafbush@abtech.edu</a>
22			
23	António Jordan	Davidson County Community College	(336)249-8186 <a href="mailto:antonio_jordan@davidsonccc.edu">antonio_jordan@davidsonccc.edu</a>
24			
25	Paula Dibley	Rowan-Cabarrus Community College	(704)903-2738 <a href="mailto:paula.dibley@rccc.edu">paula.dibley@rccc.edu</a>
26	N/A		
27			
28			
29			