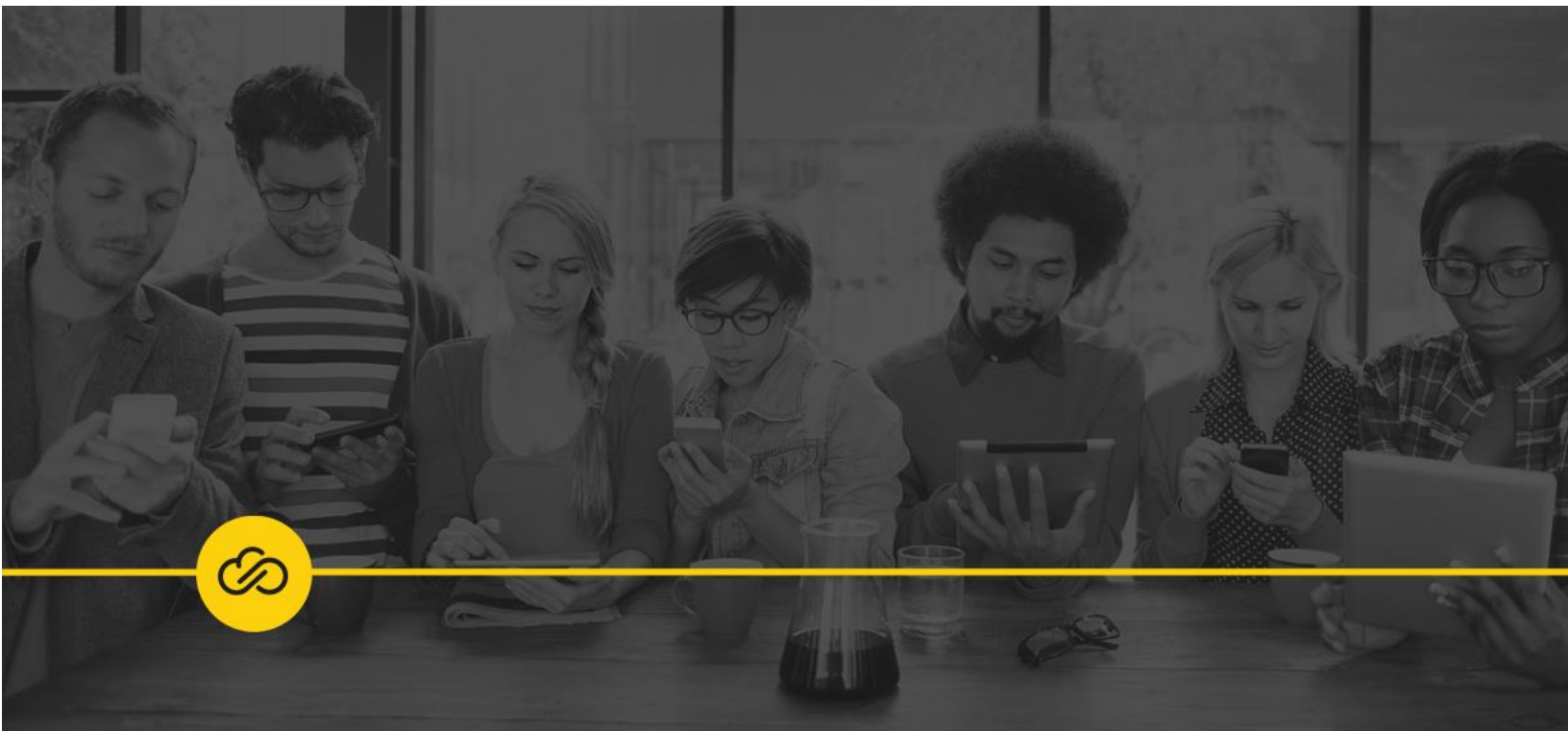




UNIFYED ADMIT: DISCOVERY DOCUMENT



Questions?

Contact us at engage@unifyed.com


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Unifyed Admit Discovery Document 2

Unifyed Admit Discovery Document

The purpose of this document is to provide Unifyed with a clear understanding of your Customer Relationship Management (CRM) requirements, critical applications and key objectives/goals. The information you provide will allow us to scope the project and address key areas during a subsequent one-on-one session, which will assist us in meeting your desired objectives/goals.

 Date: _____

 School Name: _____

Unifyed ADMIT Discovery – Prospect

Unifyed ADMIT Discovery - Prospect	
1. Do you have an Admission Management System or a CRM currently in use today? If so, what is its name?	
2. What are the problems you are facing that have caused you to investigate a new CRM?	
3. Will the data be migrated from the current CRM?	
4. Does your Institution have a Native Mobile App?	
5. Do you need or currently have any 3rd party integrations with your CRM, either inbound or outbound?	
a) Do you have Event Management functionality within your existing CRM? If no, do you have any event management software in place? If so, what product are you using? If not, do you require an event management solution?	
b) Do you need E-Mail Integration with your CRM? If so, what E-Mail system are you using?	
c) Do you need Payment Gateway integration? If so, what payment gateway are you currently using? Would you consider changing payment gateway providers?	
d) do you have a reporting system?	
6. Which Enterprise Relationship Management (ERP) or Student Information System (SIS) do you use?	

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e) Are there any API's to push your data into SIS?	
7. What is your current Financial Aid system? IF you need to integrate to Financial Aid, what specifically do you wish to accomplish with that integration?	
8. Do you have a workflow/flowchart for each distinct population being recruited? If yes, can you provide that?	
9. Is there a current email marketing solution aside from your institutional E-Mail system? If yes, then please specify.	
10. What is the anticipated number of Emails and SMS being sent out on Monthly basis?	
11. What is the current authentication system in use? Do you have a single sign on solution in place?	
12. Do you have any existing integration for Test scores and / or Transcripts?	
13. Typically, what is the average number of Prospects every year?	

Unifyed ADMIT Discovery – Applicant

Unifyed ADMIT Discovery - Applicant	
1. Are you integrating with Common App, Royall App Etc.; or any similar application portals/ platform?	
2. Do you automate application decisions? If not, do you need to?	
3. Do you post, text or e-mail application decisions?	
4. Do you have any Documentation on the existing Workflow?	
5. What is the average number of admissions applications per year?	