**CRM Model Requirements:**

Student search option by last name – pulls up all associated names

CRM should have as basic features:

* Contact information page (name, email address, mailing address, phone number,whatapp# schools attended)
* Degree of interest (AA, BA, MA, Doctorate, Certificate) (drop down)
* Program of Interest (based on degree chosen, would have a drop down of programs to choose)
* Ability to track admissions documents (application, application fee, transcript #1, transcript #2, etc and date each received)
* Ability to type in notes/comments from every interaction with student to keep track of conversations, commitments, etc
* Ability (a field) to track how student heard about DKU (and the ability to report off of this)
* Ability to schedule times/dates to contact student according to **Enrollment Contact Strategy**

(This is how the admissions advisors will schedule their days of who to contact and when and about what specifically they need to contact them for)

* Ability to code students at various stages of the enrollment life cycle (we will use following statuses: lead, Valid inquiry, contact, interview, applied, app complete, admit/deny, deposit, start)

**Lead:** Every student entered into system automatically defaults to a lead

**Valid inquiry**: Meet’s education requirements, based on self-disclosed information

**Contact:** Two-way communication has been established

**Interview:** Interview is complete

**Applied:** student has submitted application and working through remaining application materials to complete file

**Application Complete:** students file is complete and has been submitted to review board and is awaiting decision

**Admitted or Denied**: Decision

**Payment:** Student has submitted a deposit or first payment to “secure their seat” in class

**Start:** Student has begun their degree program

* Ability to auto-generate and drive student through the stages based upon the completion of mandatory tasks
* Ability to run reports to track number of students at various statuses