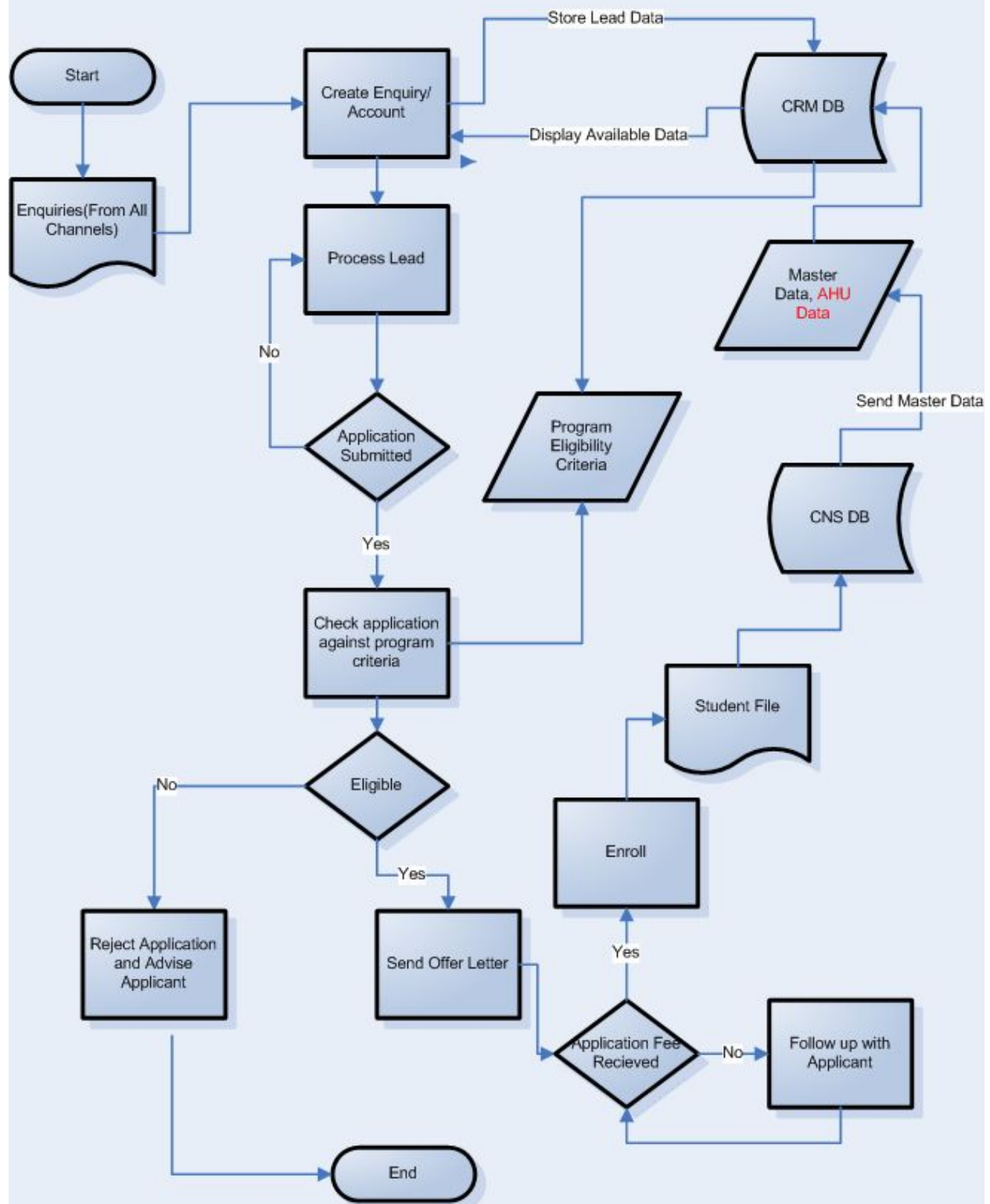# Botho University CRM Requirements

Introduction

This document intends to give the Creative Magic Group an overview of the desired functionality of the LeadSquared CRM for Botho University. Botho currently uses a CampusNexus CRM to process Leads, Applications, Enrollments and Academic Honesty Cases. This CRM is used in a total of 6 campuses currently but is flexible to include more campuses as the institution grows. The CRM has been found to have some limitations that the institution wishes to overcome while maintaining and or improving the functions of the existing CRM.

This document presents in the first section a Process Flow Diagram that intends to communicate the current processing of a lead from initial contact to conversion/enrollment into the Student Information System(SIS). The following sections will thereafter explain the in detail each activity in the process. The sections thereafter will give detail on other requirements that the institution requires from the CRM solution Creative Magic Group intends to provide.
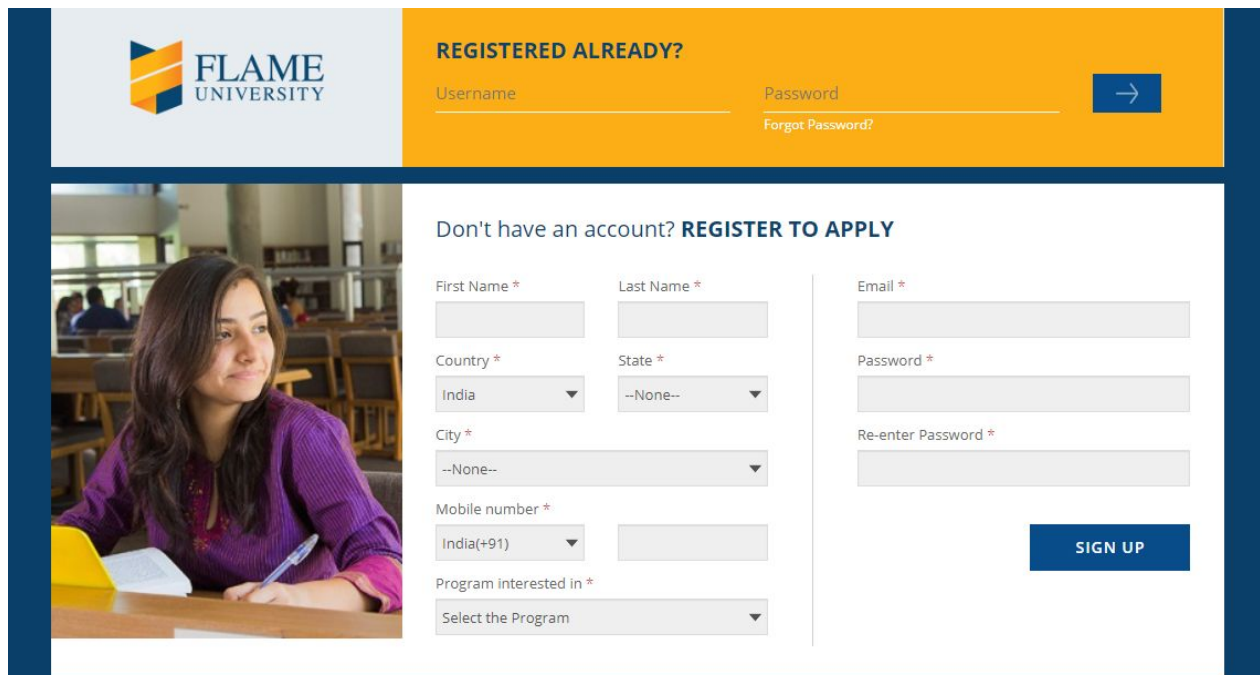
Botho University Lead Processing PFD

Start

Enquiries(From All Channels)

Create Enquiry/ Account

Store Lead Data

CRM DB

Display Available Data

Process Lead

Master Data, AHU Data

No

Application Submitted

Program Eligibility Criteria

Send Master Data

Yes

Check application against program criteria

CNS DB

No

Eligible

Student File

Yes

Enroll

Reject Application and Advise Applicant

Send Offer Letter

Yes

Application Fee Recieved

No

Follow up with Applicant

End

Requirement Specification

Enquiries

The concept of receiving enquiries from all our channels and campaigns as is already in place by LeadSquared will be adopted. The enquiry form is required to have a look and feel as per the screenshot below. For reference or a better view please visit https://application.flame.edu.in/application

The Fields we would like to have captured in the enquiry are as follows:

#	Field	Comments
1.	Firstname	(Mandatory)
2.	Lastname	(Mandatory)
3.	Country	Selection List from a master. (Mandatory)
4.	State	Selection List Filtered based on Selected Country.
5.	City	Selection List Filtered based on Selected State.
6.	Mobile Number	2 Blocks. 1st block for Country Code (Filtered based in Selected Country), 2nd block for the telephone number. (Mandatory)
7.	Email	(Mandatory) – Used as a login ID for Applying.
8.	Password	Standard Password Validations.
9.	Confirm Password	Standard Password Validations.

10.	Campus Interested In	Selection List of Campuses from a Master. Current Data (Distance Learning, Gaborone, Francistown, Maseru, Manzini, Windhoek) (Mandatory)
11.	Programme Interested In	Selection List of Available programmes in the selected campus from a master. There should be a selection for "Other", which leads to an open text field that allows typing in a programme that may not be on the list. (Mandatory)
12.	How did you hear about Botho University?	Selection List from a Master.

Lead Distribution and Lifecycle Tracking

The lead distribution and lead lifecycle tracking will be adopted as was shown in the demo.

Application Processing

Leads should turn into Prospects/Applicants as soon as they have completed the application form. The application form should follow the look and feel of the Flame University Application form. Refer to https://application.flame.edu.in/application.

Provide the application progress bar as the applicant completes the different sections of the form.

A user should be able to save a form in between and return to complete it later. The system should send reminders for saved applications to be completed and submitted.

The application form contains fields as shown in the table below. Fields that were already completed at enquiry/lead creation stage should be pre-filled with the information provided therein.

#	Field	Comments
Level of Study		
1.	Level of Study	Selection (Undergraduate, Postgraduate) (Mandatory)
Personal Information		
1.	First Name	(Mandatory)
2.	Middle Name	
3.	Surname	(Mandatory)
4.	Date of Birth	(Mandatory)
5.	Gender	Radio Button Select (Mandatory)
6.	ID/Passport Number	(Mandatory)
7.	Nationality	Selection List from a Master (Mandatory)
8.	Country	Selection List from a Master (Mandatory)
9.	State/Province	Selection List Filtered based on Selected Country
10.	City	Selection List Filtered based on Selected State/Province (Mandatory)
11.	Physical Address	(Mandatory)
12.	Postal Address	(Mandatory)
13.	Mobile Number	2 Blocks. 1st block for Country Code (Filtered based in Selected Country), 2nd block for the telephone number. (Mandatory)
14.	Cell	2 Blocks. 1st block for Country Code (Filtered based in Selected Country), 2nd block for the telephone number. (Mandatory)
15.	Fax	2 Blocks. 1st block for Country Code (Filtered based in Selected Country), 2nd block for the telephone number. (Mandatory)
16.	Email Id	(Mandatory)
17.	Physical Disability	Radio Button Select (Mandatory)
18.	Specify (If Disabled)	(Conditional Required based on selection above)
Qualification Details (Should allow several qualifications per application)		
1.	Qualifications Obtained	Selection List (Bachelors/Masters/Certificate/Diploma etc.)
2.	Name of Institution	
3.	Year of Completion	
Subject Details (Only for Undergraduate Applications)		

1.	Subject 1	**School Level** (Selection List from a Master) **Subject** (Subject 1 is always English pre-selected) **Grade** (Select List from a Master, Filtered on Selected School Level) e.g BGCSE|English|A+
2.	Subject 2	**School Level** (Selection List from a Master) **Subject** (Subject 2 is always Math's pre-selected) **Grade** (Select List from a Master, Filtered on Selected School Level) e.g A LEVEL|Mathematics|B
3.	Subject 3 upto 10 selection	**School Level** (Selection List from a Master) **Subject** (Selection List from a Master) *If Double science is selected, the same grade should be captured twice.* **Grade** (Select List from a Master, Filtered on Selected School Level) e.g NSC|Physics|4
4.	Year of Completion	(Mandatory)
Programme Choice Selection		
1.	Mode of Learning	Selection (Distance Learning, Campus Learning) (Mandatory)
2.	Location of Study	Selection List of Campuses from a Master Filtered on selected Mode of Learning. (Mandatory)
3.	Programme Choice (Allows up to 3 choices)	Selection List from a Programme Master Filtered on Selected Location of Study/Campus. (At least 1 Choice Mandatory)
Sponsorship Details		
1.	How will You be sponsored?	Selection from a List (Self, Government, Employer, Other)
2.	Sponsor's Name	
3.	Physical Address	
4.	Postal Address	
5.	Telephone	2 Blocks. 1st block for Country Code (Filtered based in Selected Country), 2nd block for the telephone number. (Mandatory)
6.	Contact Person's Name	
7.	Contact Person's Designation	
Employment Details		
1.	Employer's Name	

2.	Physical Address	
3.	Postal Address	
4.	Telephone	Have 2 blocks; one Selection List country code e.g. Botswana (+267) based on the country the applicant selected. Second Block to add the number
5.	Fax	Have 2 blocks; one Selection List country code e.g. Botswana (+267) based on the country the applicant selected. Second Block to add the number
6.	Email Id	
Guardian Details		
1.	Parent/Guardian/Next of Kin	(Mandatory)
2.	Guardian Physical Address	(Mandatory)
3.	Guardian Postal Address	(Mandatory)
4.	Guardian Telephone	Have 2 blocks; one Selection List country code e.g. Botswana (+267) based on the country the applicant selected. Second Block to add the number (Mandatory)
5.	Guardian Fax	Have 2 blocks; one Selection List country code e.g. Botswana (+267) based on the country the applicant selected. Second Block to add the number
6.	Guardian Email	
Marketing Survey		
1.	How did you hear about Botho University? (Allow up to 3 choices)	Selection List from a Master. Should Include "Other" and If "Other" is selected there should be an open text field to specify. (At least 1 Choice Mandatory)
Attachments		
1.	Photograph	Option to Upload Images (JPEG, BMP)
2.	Documents	Upload Supporting Documents (Certificates, ID Copies, etc.)
Declaration		
1.	Declaration	The user needs to accept the declaration before allowing submission. The declaration will be provided during implementation.

Application Eligibility Checks

Each Campus has a given eligibility criteria. On top of the campus eligibility criteria there are specific programmes with further specified eligibility requirements. Each application should be updated for

eligibility for the selected Programme. There needs to be a flexibility to update the eligibility rules. Please some of the eligibility criteria specifications for Botswana campuses as a sample.

General Admissions Criteria

1) Applicants are expected to have successfully completed secondary schooling. The typical entry requirement is BGCSE or IGCSE (in Botswana or other equivalent secondary school qualification. BGCSE or IGCSE (in Botswana) candidates are required to achieve a minimum grade of 'D' in five subjects.

2) Applicants must have 10 points in English and Mathematics combined or 32 points in the top 5 subjects.

3) Applicants in possession of a Diploma or Higher Diploma in related field may be given exemptions based on the credit point equivalency.

New Venture Creation - Admissions Criteria

Senior secondary school leaving certificate such as BGCSE, LGCSE or equivalent with pass in English and Science subjects (Chemistry/Physics/ Maths/Computer Science/Biology). Candidates above 25 years with at least 5 years of work experience, of which at least 2 years must be at Level 4 equivalent may be considered under mature entry criteria.

Certificate in Electrical Installation and Maintenance Admission Criteria

Junior Secondary school leaving certificate such as JCE or equivalent. Mature Age entry criteria: Candidates above 20 years with at least 5 years of work experience, of which at least 2 years must be at Level 2 equivalent may be considered under mature entry criteria

BSc (Hons) in Business Management,Finance and Accounting Admissions Criteria

1) Applicants are expected to have successfully completed secondary schooling. The typical entry requirement is BGCSE or IGCSE (in Botswana), LGCSE (in Lesotho) or other equivalent secondary school qualification. BGCSE or IGCSE (in Botswana), LGCSE (in Lesotho) candidates are required to achieve a minimum grade of 'D' in five subjects.

2) The applicant should have passed in a minimum of five BGCSE, LGCSE or equivalent subjects including English and Mathematics with a minimum of a C in Mathematics.

3) Applicants in possession of a Diploma or Higher Diploma in related field may be given exemptions based on the credit point equivalency.

BEng (Hons) in Electrical Engineering and Computer Engineering Admissions Criteria

1) Applicants are expected to have successfully completed secondary schooling. The typical entry requirement is BGCSE or IGCSE (in Botswana), LGCSE (in Lesotho) or other equivalent secondary school qualification. BGCSE or IGCSE (in Botswana), LGCSE (in Lesotho) candidates are required to achieve a minimum grade of 'D' in five subjects.

2) The applicant should have passed in a minimum of five BGCSE or equivalent subjects including English, Mathematics and either one of Physics, Double Sciences, or PC (Physics and Chemistry).

3) Applicants in possession of a Diploma or Higher Diploma in related field will be given exemptions based on the credit point equivalency

Offer Letter Processing

There should be a provision for Offer Letters to be processed in the system. The offer letter content differs for the following categories; Distance Learning Undergraduate, Distance Learning Postgraduate, Professional Accounting, DTVET and the general Campus Learning Offer Letter. The Offer Letter contains information that needs to be merged from the Student Information System, thus Program Information and Fee Structure details. The content of each offer letter will be provided.

A Student who qualifies should have a provision to have an offer letter printed/emailed based on Mode of Learning. Printing will apply for applicants who have applied for Campus Learning while Emailing will apply for applicants who have applied for Distance Learning.

An applicant may not qualify based on the stipulated eligibility criteria but may qualify based on some special reasons e.g. exemptions. The system should allow offers and enrollments to be processed for such applicants provided the Authorization is provided, and the reasons are specified in the system.

Further there are students who apply for repeat or re-instatement, a provision to auto create and update formats for such cases is required.
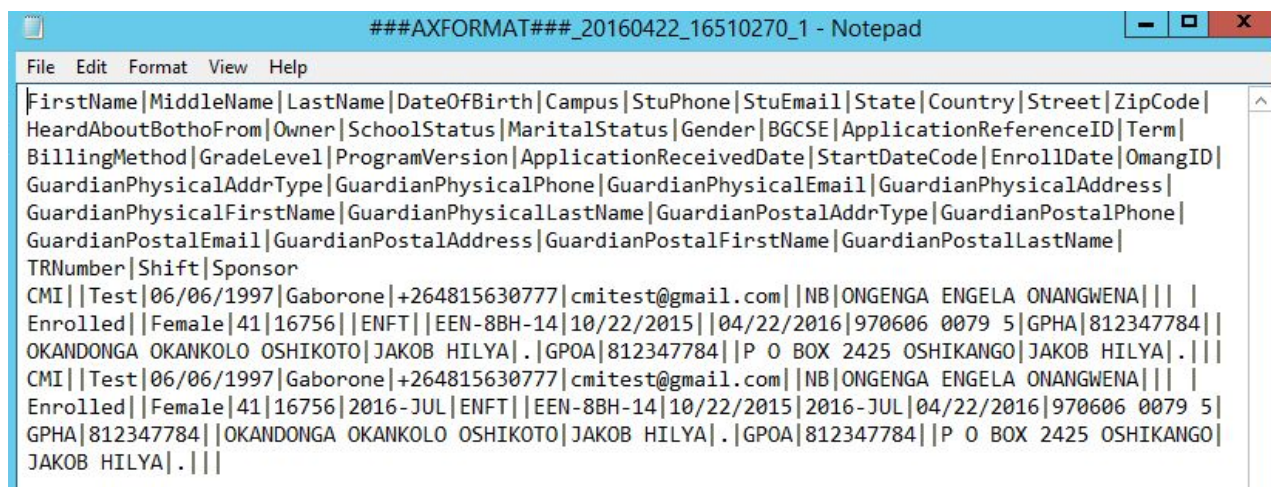
Payment Processing

All students who apply into the institution for the first time are required to pay an admission fee of a specified amount and currency per campus. At current, these rules are defined in the SIS and all payments are processed in the SIS. A multi currency payment gateway It is required for all revenue to be to be reflected in the Student Information System.

It is desirable to have admission fee paid for First time enrollments through the CRM for the specified Currency and Amount as a prerequisite for sending the student file to the SIS.

Enrollment

Students who qualify, are offered and have accepted and have paid admission fees are finally pushed into the Student Information System. The data moves through a flat file integration, the file needs to be created and sent to a specified location. The following fields in the following format need to be added.

Integration

There are several integrations required to run between the SIS and the CRM. Master data required for lead and application processing is supposed to be sent to the CRM. This data includes but is not limited to the following:

1. Programme
2. Programme Financial Information
3. Program Availability Per Campus, Term and Intake/Start Date
4. Lead Source
5. Admission Officers, their login should be linked to Active Directory as well.

The CRM provides for email campaigns and customer interaction which are very useful for Academic Honesty Disciplinary management and Alumni engagement. Customer Interaction management is used for Academic Honesty Disciplinary Case Management and Email Campaigns play a large role in Alumni engagement. The data required to be integrated into the CRM from the SIS for this purpose includes but is not limited to the following:

1. Student ID
2. Current Module Enrollments
3. School Status
4. Student Current Email ID

Data integration from the CRM to the SIS moves during the enrollment process where the applicant data get moved into the SIS. Please refer to the Enrollment section above for the data required in the integration as well as the format it needs to be in.

Rules and Workflows

There is need for provision of rule and or workflow building to allow users to perform certain functions. The LeadSquared CRM seems to provide this facility which will be adopted.Further to this, there are standard Emails and SMS's that need to be built into the general lead/application workflows e.g when an offer letter is ready for collection and email and an sms should be sent to the customer. Flexibility to create and change rules and workflows as processes evolve is important.

Exemption Processing

The process in place
Exemptions are what a student may qualify for an enrolled programme based on their previous qualifications.

During the initial admission process, an applicant can specify the modules that they have completed which will make them eligible for exempting from certain modules in their enrolled programme.The decision whether the exemptions that they applied for qualifies is entirely with Botho Faculty office.Based on the outcome, the offer letter given to the student gets affected.

Currently, the offer letter contains a section where the Exempted modules are specified and the duration of the programme that changes in such cases are all addressed manually.

What is required from LeadSquared solution

From LeadSquared solution, we expect an easier approach for this and removing the manual intervention.We want a provision where the exemptions can be provided and the system to calculate and make effect the duration changes so that the offer letter picks these fields correctly.

Audit Trails

The Audit trail for every activity in the Leadsquared system is expected. This is required for effective tracking of the admission process with details on the time, when and who was part of the activity. Activities to name would be right from the Enquiry Capture > Lead Conversion > Engagements > applications and finally Enrolment.

Should need arise for reporting on such detailed audit tracking, the system is required to provide an easy and accurate result.

Analytics

There are standard report requirements that the different teams using the CRM require. The system needs to be able to allow generation of all such reports. The system needs to allow flexible report creation and user self service in the analytics. Reporting needs grow and evolve and the power of flexible and analytics is highly required. Below are some standard reports required for Botho University.

1. Counts of Prospects, Leads, Opportunity,offered and Enrolled at any point of time.The details should also specify the programme enrolled, their nationality, country etc.
2. Nationality or country wise reports on enquiries/applications/enrolled.
3. Marketing efficiency of the various medium in place ; e.g: enquiries received through Facebook or Twitter or Chat etc.
4. Enquiries or Leads received for certain Faculty office.Currently this is addressed by creating filters based on the program versions offered by the respective faculties.
5. Turnaround time for the lead to opportunity to enrollment conversion.The time taken will have to be presented in hours or days based on the requirements.
6. Counts of every stage during a particular intake.For e.g number of students enquired or applied or enrolled in Jan intake /Mar Intake/May intake etc.

Import of Existing Data

The transition from CampusNexus CRM to Leadsquared CRM carries an implication for data migration for existing records.