

Anthology Reach/Apply

Business Process Requirements Client Questionnaire

Table of Contents

[Introduction 3](#_Toc81998941)

[Purpose 3](#_Toc81998942)

[Structure 3](#_Toc81998943)

Accounts & Contacts [4](#_Toc81998944)

[Dashboards & Views 5](#_Toc81998945)

[Inbound Interests & Lifecycles 6](#_Toc81998946)

[Record Assignments & Dynamic Ownership Model 7](#_Toc81998947)

Marketing Lists [8](#_Toc81998948)

[Marketing Application 9](#_Toc81998949)

Reach Portal & Online Forms [10](#_Toc81998950)

[Application Management 11](#_Toc81998951)

[Events & Trips 12](#_Toc81998952)

[Case Management & Campus Surveys 13](#_Toc81998953)

[Security: 14](#_Toc81998954)

# Introduction

To best prepare for your Business Discovery Sessions, This Business Process Requirements Client Questionnaire is a set of questions aimed at providing important knowledge for your Implementation Consultant and Anthology team.

## Purpose

This Business Process Requirements Client Questionnaire provides the ability for your team to answer some important questions that are pertinent to Anthology Reach Implementations. Answering each question in detail provides important pre-discovery information to your Anthology team that will expedite knowledge transfer and help scheduled discovery meetings progress at a more efficient pace.  
  
Please keep in mind that you do not need to answer each question if it does not apply. Also, shorthand answers are ok but please explain in detail when possible. Yes/No answers may be appropriate but providing as much context will help your Anthology team ask more informed questions during discovery sessions. Lastly, if there is any supporting documentation you can provide, please note the name of the document in an answer and submit the documentation with this completed form.  
  
When this form is completed, please upload it and any supporting documentation to the Project Site in Client Documents->Client Pre-Discovery.

## Structure

This document is composed of questions within each of the following categories:

* Accounts & Contacts
* Dashboards & Views
* Inbound Interests and Lifecycles
* Record Assignments/Dynamic Ownership Model
* Marketing Lists
* Marketing Application
* Reach Portal & Online Forms
* Application Management
* Events & Trips
* Case Management & Campus Surveys
* Security

Accounts & Contacts

1. Do you have request for information form(s)?
2. How many forms do you have, and what is the purpose for each one?
3. Do you plan to consolidate them or have multiple?
4. Will you plan to use questions on the current form(s), or will fields be added/deleted?
5. What functionality for an RFI form is required but not currently available?
6. Do you receive lists of prospects/leads? What sources?
7. Do you plan to import prospects/leads into CRM?
8. Do you manually create prospects/leads in your current CRM?
9. Do you collect and load test scores? Which scores?
10. Do you collect prospects/leads in paper form, excel sheets, etc. outside of vendor provided lists?
11. Do you have a core set of info requirements for leads (Ex: First name, last name, email, phone)?
12. Can you provide any weblinks for any of the questions above?
13. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 13.**

Q1) Jo – Yes We have request for information forms for undergrad and grad programs.

MES – Yes we use an MES External Inquiry form

Q2) MES – We have 1 form for external inquiries that prospective students fill out

* We have 1 form for internal inquiries that recruiters fill out on behalf of prospective students

Q3) Jo – We may have multiple forms.

MES – We plan to maintain both the external and internal inquiry forms

Q4) Jo – Yes we will be using questions from our current forms and maybe adding new questions.

MES – Yes we plan to use the current form and do not plan to add new questions at this time.

Q5) Jo – Need to discuss this in more detail

MES – The ability to exclude birthdates for matching purposes within the Radius system. It is too easy to create duplicate records of inquiries without the birthdate.

Q6) Jo – Yes – We received undergraduate lists from College Board, CBSS, CTCL,

MES – Yes MES receives lists of prospective leads from conferences and graduate fairs we have attended for recruitment purposes. We have also purchased lists in the past from ETS the GRE testing service.

Q7) Jo – Yes – we will be importing leads (purchased names) as well as prospect (inquiry) lists for undergrad and graduate programs

MES – Yes we plan to import leads we have purchased as well as prospective inquiries for MES

Q8) Jo – Yes – we do occasionally manually create prospects (inquiries)- currently I have created unique internal new contact forms.

MES – Yes we occasionally create new prospect inquiries using the Internal Inquiry form in MES, but we have done this less often as it is challenging to ask for birthdates in remote recruitment settings which was mush easier in the past.

Q9) Jo – Yes – We load test scores for undergraduate and graduate students

MES – We collect and load GRE test scores for graduate students who provide them when they apply to our program. We also collect and load TOEFL scores if international applicants provides them.

Q10) Jo – Yes – occasionally we receive names via paper as well as excel and csv

MES – We have not collected paper names for a long time, since the pandemic we collect excel forms as well as the external inquiry forms.

Q11) Jo – Yes We have a minimum set of fields for a new record: First name, last name, DOB, email address, state, county, country (if outside US). This also needs to be discussed to determine if more data points are needed.

MES – Yes we use first name, last name, DOB, email address as the minimum required fields, we would like to eliminate DOB as it is a hinderance to recruiting external inquiries.

Q12) Jo – Possibly

MES External Inquiry - <https://evergreenstatecollege.radiusbycampusmgmt.com/ssc/iform/G00x72c08670x6700kEB00l.ssc>

MES Internal Inquiry - <https://evergreenstatecollege.radiusbycampusmgmt.com/ssc/iform/KC686Rc0kk0kx6700oB00l.ssc>

Q13) Jo – TBD

MES – Documentation for what?

Dashboards & Views

1. Do you currently have any dashboards in any of your legacy CRM systems?
2. What dashboards are required or would be critical to perform business processes, reporting, or maintenance?
3. Do you currently have any view/reports in any of your legacy CRM systems?
4. What views/reports are required or would be critical to perform business processes, reporting, or maintenance
5. Do you currently have graphs/charts that are being used in your legacy CRM systems?
6. What graphs/charts are required or would be critical to perform business processes, reporting, or maintenance?
7. Can you provide any weblinks for any of the questions above?
8. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 8.**

Q1) Jo – Radius provides a basic home screen with workspace/widget options

MES – Do they mean the home dashboard for recruiters?

Q2) Jo – Potential Dashboards:

Q3) Jo – Yes – We have created numerous views/reports in Radius within multiple modules.

MES – Current application cycle views, all MES inquiries views, brochure request views, open task views.

Q4) Jo – Required/needed views/reports are:

Q5) Jo – I don’t believe that any of the users have created graphs or charts within Radius

Q6) Jo – We would like the following graphs and/or charts:

Q7) Jo – No

Q8) Jo – No

Inbound Interests & Lifecycles

1. What sources do your inbound interests come from?
2. Is every inbound interest automatically a prospect, or are there sources that are considered “suspects” or “cold leads” that need more activity before being considered a prospect or “warm lead”?
3. When a student submits an RFI form, are they automatically qualified as a “warm lead”?
4. What are the funnel stages in your “lifecycle” Example: Prospect->App Started->App Submitted->App Complete->Admit->Deposit->Enrolled
5. What are the requirements for each funnel stage in order to move to the next?
6. What is your process when a student is no longer interested in your institution?
7. What is your process when a student no longer wants to be considered for admission?
8. Can students have more than one inbound interest that converts to an application, meaning can one student apply for and be accepted to one or more programs?
9. Can you provide any weblinks for any of the questions above?
10. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 10.**

Q1) Jo – This is a relatively long list. I will provide that in separate documentation. Others please list some specifics, especially graduate programs.

MES – MES External Inquiry form, MES Internal Inquiry form, MES Started Application

Q2) Jo – No, not every name is considered an inquiry (prospect). Some are considered leads which do receive additional contact.

MES – Every inbound interest is considered a prospect

Q3) MES - Yes

Q4) MES - Inquiry->App Started->App Submitted->App Complete->Admit->Deposit->Enrolled

Q5) MES –

1. Inquiry – Submitted contact information
2. App Started – Created a login to work on the application
3. App Submitted – Submitted electronic application
4. App Complete – Submitted outstanding admissions materials such as transcripts and letters of recommendation to complete the application requirements and move forward to the review stage
5. Admit – Reviewed by the Admissions Committee for MES and determined eligible for admission. Offered an admission decision letter from the program and processed by Graduate Admissions in the system as a new admit.
6. Deposit – Paid the $100 tuition deposit to secure seat in the program or requested a deposit waiver in order to meet this requirement which was approved by the program Director
7. Enrolled – The admit matriculates into the program by registering and attending the first year, first quarter core course in MES

Q6) MES – Assistant Director receives or requests written consent from the admitted student to be withdrawn from the program and notifies Registration and Records to formally withdraw them from the cohort they have applied for.

Q7) BAO-Student notifies admissions, we initiate a withdrawal process through banner.

MES – Student notifies Assistant Director or Graduate Admissions office of their written request to withdraw their application from MES, Graduate Admissions then withdraws the application so that it no longer appears as in progress.

Q8) BAO-Student can apply for more than one program, but only be accepted for one per term.

MES – Students can apply for more than one program, but can only be accepted for one program and must decide before their admissions status is entered into the system

Q9)

Q10)

Record Assignments and Dynamic Ownership Model

1. Do you have recruiters?
2. Do you have recruitment territories?
3. What is the assignment logic for your recruitment territories?
4. Do you have issues with assignment logic?
5. Do you have application processing assignments?
6. Do you have other assignment criteria for other users and for what purpose?
7. What fields are required to assign students appropriately?
8. Are you currently missing any fields that would allow you to better assign students?
9. Can you provide any weblinks for any of the questions above?
10. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 10.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Q8)

Q9)

Q10)

Marketing Lists

1. Do you currently have lists within your current CRM with defined query criteria to perform business processes or outreach to students?
2. What types of lists are required or would be critical to perform business processes, reporting, or maintenance?
3. What is the purpose or intended purpose of lists with defined query criteria?
4. Are you currently relying on external reporting to perform required or critical business processes, reporting, or maintenance?
5. Do you have marketing lists and their query criteria that you can provide?
6. Can you provide any weblinks for any of the questions above?
7. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 7.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Marketing Application

1. Do you have email templates already created?
2. Do you have communication plans already created or drafted?
3. Do you have criteria to build marketing lists of students to contact?
4. Do you have email content created?
5. Do you currently send or plan to send text messages?
6. What purpose would your text messages serve?
7. What communication is required for your business processes? Example: Application complete email
8. Do you have phone call activities that are required for business processes?
9. Do you have task activities that are required for business processes?
10. Do you have other touchpoints that are required for business processes?
11. Do you send both a mix of text and html-based emails?
12. Have you experienced any issues with communication content, delivery, or complaints from students?
13. Can you provide any weblinks for any of the questions above?
14. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 14.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Q8)

Q9)

Q10)

Q11)

Q12)

Q13)

Q14)

Reach Portal and Online Forms

1. Do you currently have a portal for prospective students?
2. Do you currently have online forms (RFI, Application)?
3. Do you have duplicate detection on any of your forms?
4. What required functionality do your portal or online forms lack?
5. Do you have any issues with your portal or online forms?
6. What requests have you received from students about lacking portal or form functionality?
7. Can you provide any weblinks for any of the questions above?
8. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 8.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Q8)

Application Management

1. How many application sources do you currently have?
2. How many total separate applications do you currently have?
3. How many total separate applications do you envision?
4. Do you envision all applications reside within the Reach Portal?
5. What is required to submit an application?
6. Do you have application submission issues?
7. What requirements exist per application?
8. How can requirements be submitted?
9. What is the process flow for application management? Do you have support staff, reviewers, decision makers, etc.?
10. What processes need to be performed on applications?
11. What constitutes an application ready for decision?
12. What decisions are there for applications?
13. How are decisions communicated?
14. Can students apply for multiple programs at a time?
15. Can students be accepted to more than one program at a time?
16. Can students dual major/dual degree at a time?
17. Is there communication other than decision during the application process?
18. Do all applications get created in CRM and sent to SIS/ERP, or are there cases where the application is created in the SIS/ERP directly?
19. Do you have paper applications?
20. Can you provide any weblinks for any of the questions above?
21. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 21.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Q8)

Q9)

Q10)

Q11)

Q12)

Q13)

Q14)

Q15)

Q16)

Q17)

Q18)

Q19)

Q20)

Q21)

Events & Trips

1. Do you host events?
2. Do you have reoccurring events?
3. Are your events on-campus, remote, or both?
4. How do students register for events?
5. Is there communication for events?
6. Do you record event attendance?
7. Do staff attend recruiting trips?
8. Do staff record information from trips?
9. Do staff need approval before taking trips?
10. Can you provide any weblinks for any of the questions above?
11. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 11.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Q7)

Q8)

Q9)

Q10)

Q11)

Case Management & Campus Surveys

1. Do you perform any type of case management in an enrollment context?
2. Do you have enrollment case managers in any sense?
3. Do you send surveys to your prospective students during the admissions process?
4. Do you send surveys to student for events?
5. Can you provide any weblinks for any of the questions above?
6. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 6.**

Q1)

Q2)

Q3)

Q4)

Q5)

Q6)

Security

1. Does your admissions environment allow every staff member to have the same access, or do you currently have distinct security roles?
2. If you have distinct security roles, what buckets would they fall into and what would be the intended roles? Example: Role – Director, Security Role – See everything, Role – Application processor, Security Role – Only see and edit applications but nothing regarding decisions.
3. Can you provide any weblinks for any of the questions above?
4. Can you provide documentation? If you have documentation, please remember to submit with this document and note the documentation in the questions above.

**Provide answers below for questions 1 – 4.**

Q1)

Q2)

Q3)

Q4)