Tool #26: Vendor Selection Scorecard

The vendor selection scorecard is intended to help members conduct an objective evaluation of a short list of final candidates. The tool, which helps members focus their assessment on a collection of attributes, can be used during vendor meetings or after the fact. The Scorecard can also be used in the early stages of CRM consideration to help determine your CRM needs or to prime a list of questions for courting vendors.

> **Implementation Note**: This scorecard is not meant to be exhaustive. Instead, it should be customized to suit your CRM goals and preferences (see Tool #22: Guide to Understanding You CRM Needs for more assistance).

	Vendor 1 _____	Vendor 2 _____	Vendor 3 _____
Track Record			
Has experience with Higher Education			
Has experience with continuing/online/professional education units			
Is willing to share references			
References are positive about their overall experience with vendor and product			
Custom:			
Integration			
Has integrated with my SIS at other institutions			
Can integrate (or anticipates being able to integrate) with my SIS			
Other institutions that integrated the same systems describe the process positively			
No third party (middleware) necessary for integration with SIS			
Data import/export will be sufficiently smooth			
Integrates with my knowledge base (e.g., repository of FAQ answers used by enrollment advisors)			
Integrates with my legacy system			
Integrates with my application and admissions software			
Custom:			
Custom:			
Custom:			
General Features			
Saas (Software-as-a-Service) Delivery			
Interface is simple and intuitive			
Preferred platform (web-based, Mac, Windows, etc.): _____			
Marketing Automation Features			
Email marketing tool tracks responses and calculates ROI; is robust in terms of managing email volume, design customization, and analytics			
Can manage mailing list			

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	Vendor 1	Vendor 2	Vendor 3
Can track referrals			
Can manage territories			
Can track the source of inquiries from initial click			
Recruitment Automation Features			
Can present contact history			
Can serve as a contact scheduler			
Provides a prospect database			
Can manage leads (i.e., can assign stages and score, route, and assign leads)			
Includes activity tracking and history features			
Outbound phone calls are easily loaded into system			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Custom:			
Collaboration Features			
Chat			
Mail merge			
Mobile access			
Remote tracking			
Workflow rules and management based on prospect status, prospect action, or time elapsed			
Customization Features			
Forms and data fields are customizable			
Features are customizable			
User interface is customizable			
Miscellaneous Features			
Can consolidate data from multiple, potentially non-SQL sources			
Includes an event management tool that can handle invitations, registrations and reminders			
Forms can still be hosted or appear to be hosted on my site's .edu domain via full HTML or embedded iframes that feed into the CRM (as opposed to running forms from CRM's domain)			
Integrates with social media platforms like Facebook			

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	Vendor 1 _____	Vendor 2 _____	Vendor 3 _____
Contact management portion of software is robust and intuitive			
CRM's built-in data translation/data matching options is adequately mature. (An ideal matching tool includes criteria for finding student data and de-duplicating records.			
Reporting			
Can produce advanced charts			
Can build custom reports			
Can produce customizable forecasting			
Contains easy-to-use dashboards (overall)			
Dashboards are customizable			
Can array multiple dashboards on homepage			
Dashboard can organize opportunities by lead source			
Dashboard can visualize sales pipeline			
Can arrange pre-built reports			
Can arrange scheduled reports			
Can arrange SQL reports			
Costs			
Per-User-Per-Month			
Are there additional costs for xxx,xxx/unlimited emails?			
Preferred fee structure: _____			
Required hardware			
Add-On (feature) pricing			
Additional storage costs			
Projected total cost			
Custom:			
Custom:			
Custom:			
Vendor Service			
Provides robust assistance during implementation (e.g., onsite representative)			
Provides continued service post-implementation			
Customer service and company representatives are friendly and available during the exploration phase			
Customer service and company representatives consistently have solid answers to questions and when they don't, they are not evasive or vague			
Custom:			
Custom:			
Custom:			

Notes