NAVIGATE360 ENROLLMENT CRM

CRM Evaluation and Migration Checklist

Questions to Ask as You Evaluate Whether to Keep or Change Your Enrollment CRM

Enrollment CRM Diagnostic

Meeting Today's Enrollment Expectations: The Questions to Ask as You Evaluate Your CRM Solution

Overview

Most institutions no longer need to ask whether they need an enrollment CRM. The more urgent question is whether the CRM they have still fits the enrollment operation their VPEM now leads.

EAB's 2024 benchmarking survey of 180+ enrollment offices found that 17% of institutions were focused on adopting a new CRM system in 2024-25. With 70% of institutions managing their admissions CRM fully in-house and admissions teams averaging 1 to 2 CRM Specialist FTEs, CRM management occupies significant energy, mindshare, and time.

Thus, the question of CRM fit extends beyond technology—it impact staffing, morale, strategy, and future success.

How to use this checklist

- Complete it with your VPEM, CRM owner or administrator, and admissions operations lead.
- Rate your CRM as it functions today, not the future state you wish it supported.
- Use the final scoring page to determine whether optimization, structured review, or migration planning is warranted.

Does your CRM meet your needs?

Five Areas of Evaluation

1. **Process Fit**
2. **Cost and Capacity**
3. **Organizational Fit**
4. **Vendor Partnership**
5. **Future-State Readiness**

Does your CRM...

1. …support the workflows your team actually runs?
2. …justify the staffing and spend it requires?
3. …match your team's structure and goals?
4. …come with the support and accountability you need?
5. …adapt as your strategy and goals evolve?

Process Fit

1

Are You Designing Your Processes Around Your CRM?

1. Process Fit

A strong CRM should support day-to-day recruitment and application work without forcing staff to build shadow systems around it.

Answer the following questions to assess whether your current CRM still fits the workflows your enrollment team depends on most.

	Circle one:		
Can staff segment, suppress, and launch communications without recurring exports or hand-built exception files? *Example: Deposited students are automatically excluded from incomplete-application campaigns.*	No	Partially	Yes
Can routine exceptions be resolved inside our CRM rather than in out-of-platform trackers? *Example: Duplicate records, missing materials, etc. do not require an off-platform log.*	No	Partially	Yes
Do staff and leaders use CRM reports and dashboards as the source of truth for funnel, activity, and yield reporting? *Example: Any reports used to track prospective student funnels, territories, etc. are housed within the CRM.*	No	Partially	Yes
Does our current CRM assign students accurately by territory, population, program, and stage without manual reassignment? *Example: Counselor ownership updates correctly when geography, major, or student type changes.*	No	Partially	Yes
Can new forms, workflows, statuses, and automations be adjusted quickly without heavy IT or consultant involvement? *Example: Routine workflow changes happen when we need them and can be adjusted by any staff with the proper permissions*	No	Partially	Yes

Evaluation Notes:

Cost and Capacity

2

What Does It Really Cost To Stay Put?

2. Cost and Capacity

The real cost of a CRM includes contract price, staffing concentration, consulting dependence, and the time absorbed by workarounds.

Answer the following questions to assess whether your current CRM fits the budget, staffing model, and capacity realities of your enrollment office.

	Circle one:		
Can current staff handle routine tasks without outside help? *Example: Staff can execute list pulls, campaign edits, field updates, and report changes on their own—as long as they have the proper permissions.*	No	Partially	Yes
Is CRM administration staffed realistically for the complexity of the system? *Example: Our team is able to handle adjustments in-house or rely on our vendor for quick turnaround; the platform does not depend on just one "CRM captain."*	No	Partially	Yes
If our CRM administrator left tomorrow, could core recruitment and communications work continue with limited disruption? *Example: Documentation and cross-training are in place and we have support from our vendor.*	No	Partially	Yes
Does the CRM reduce staff effort rather than absorb scarce technical capacity? *Example: The CRM shortens cycle times for campaign launches, application follow-up, and executive reporting.*	No	Partially	Yes
Is total annual cost predictable? (Including licensing, support, integrations, add-ons, texting, and implementation or maintenance) *Example: Leaders can explain the true all-in cost at any given time.*	No	Partially	Yes

Evaluation Notes:

Organizational and Strategic Fit

3

Does Your CRM Reflect How Your Enrollment Function Is Actually Organized?

3. Organizational and Strategic Fit

The right CRM should reflect the way the enrollment division is organized now—across functions, data needs, and multiple student populations.

Answer the following questions to assess whether your current CRM matches the structure, scope, and enrollment model the VPEM is actually overseeing.

	Circle one:		
Does the CRM support coordinated work across admissions, recruitment marketing, and analytics? *Example: Teams are not working from separate versions of the funnel.*	No	Partially	Yes
Can the platform support the student populations your division recruits today without parallel systems? *Example: First-year, transfer, adult, graduate, online, international, or non-degree workflows can coexist in one platform.*	No	Partially	Yes
Do leaders have a connected view of inquiry, application, admit, aid, deposit, and current enrollment? *Example: Pipeline conversations revolve around trusted data.*	No	Partially	Yes
Can staff see a unified record of outreach, engagement, application progress, and next steps for a prospect? *Example: A counselor or marketer can quickly understand the full history of a prospect.*	No	Partially	Yes
Does the CRM enable you to see clear ROI on recruitment and outreach efforts with marketing attribution data? *Example: We can understand where new inquiries come from and .*	No	Partially	Yes

Evaluation Notes:

Vendor Relationship

4

Would You Choose This Vendor Relationship Again Today?

4. Vendor Relationship

A CRM decision is also a vendor decision; weak support and vague partnership can turn normal system pain points into operational risk.

Answer the following questions to assess whether your current vendor relationship still supports your teams effectively.

	Circle one:		
Is support timely and useful during the busiest parts of the cycle? *Example: Tickets do not sit unresolved until the team invents its own workaround.*	No	Partially	Yes
Are product limitations, implementation timelines, and roadmap commitments communicated clearly and candidly? *Example: The institution can tell the difference between a current feature, a workaround, and a future promise.*	No	Partially	Yes
Does the vendor demonstrate real higher education expertise rather than only general CRM knowledge? *Example: Support staff understand enrollment calendar pressure, application workflows, and critical data needs.*	No	Partially	Yes
Is training strong enough that success does not depend on a single power user? *Example: New staff can learn core tasks on their own; the CRM administrator is a guide, not a crutch that the whole team relies on.*	No	Partially	Yes
When integration or data issues arise, does the vendor collaborate effectively with institutional stakeholders and take ownership? *Example: The resolution process does not turn into a blame game across teams.*	No	Partially	Yes

Evaluation Notes:

Future-State Readiness

5

Is Your CRM Ready to Support Your Future Needs?

5. Future-State Readiness

A future-ready CRM helps the institution respond to new goals, new staffing realities, and new recruitment strategies without a major rebuild.

Answer the following questions to assess whether your current CRM is still the platform you would choose for the enrollment operation you lead today.

	Circle one:		
Does the CRM support the division's current strategic priorities? *Example: Enrollment growth, net tuition revenue, new populations, faster response, and more targeted yield work.*	No	Partially	Yes
Does the system make it practical to test new strategies, measure results, and refine tactics quickly? *Example: Leaders can pilot changes without months of setup or delays in reporting.*	No	Partially	Yes
Do automation and AI capabilities expand staff capacity in ways that feel usable, governable, and trustworthy? *Example: The platform helps staff act faster rather than creating a new layer of supervision.*	No	Partially	Yes
If the decision were being made today, would the VPEM and CRM administrator still choose this platform and vendor? *Example: We are highly likely to renew our current CRM and are advocates for it with peer institutions.*	No	Partially	Yes

Evaluation Notes:

Results and Next Steps

Interpreting Your Results

Fill in the section totals below to identify where your enrollment CRM has the greatest gaps. If your results include many "No" and "Partially" responses, you may want to consider a new approach.

Section	"No" Responses	"Partially" Responses	"Yes" Responses	Section Score
1. Process Fit				
2. Cost and Capacity				
3. Operational and Strategic Fit				
4. Vendor Relationship				
5. Future-State Readiness				
Scoring method: No = 0 points, Partially = 1 point, Yes = 2 points				**Overall Score:**

Score	Interpretation	Suggested next step
42-50	Current CRM likely remains a fit	Focus on optimization, governance, adoption, and higher-value workflow improvements.
30-41	Fit is mixed	Address priority gaps and conduct a structured market scan before major renewal or reinvestment.
0-29	Migration planning is warranted	Build a case for change around process pain points, staffing load, total cost, and next-platform requirements.

Ready to Switch?

EAB's **Navigate360 Enrollment CRM** is higher ed's most trusted CRM, built on decades of enrollment expertise. Navigate360 pairs proven workflow tools with responsible AI to streamline application management, personalize outreach, and seamlessly engage with more prospects.

EAB has helped hundreds of schools switch their CRM by leading data migration, configuration, onboarding, and training—so your team gets **up and running quickly and painlessly, often in less than 100 days.**

To learn more or request a demo, visit eab.com/Navigate360Enrollment.

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