



# ezRecruit™ CRM

Web-based CRM System for Higher Education



EDGE |

The Student Recruitment  
Solutions Company

# ezRecruit™ CRM Defined

ezRecruit™ CRM is a Web-based system that helps schools build and manage relationships and improve workflows.

Specifically, ezRecruit™ CRM automates, targets and tracks all interactions with prospects, applicants, parents, and counsellors. ezRecruit™ provides portal functionality, targeted communication, communication history, content management and reporting, as well as inquiry, collateral, school visit and event management. ezRecruit™ CRM can integrate with student information systems (SIS) in real time, and is also available to current students and alumni.

## ezRecruit™ CRM Highlights:

**Quick implementation:** ezRecruit™ is 'configured not coded' so you are up and running in weeks, not years.

**Fully Web-based system:** allows you and your team to manage on-site and off-site, 24/7.

**Easy-to-use:** technical skills are not needed to set up and maintain the system.

**Improved customer service:** deliver consistent, personalized information based on your audiences' interests and previous interactions with your school (targeted / automated communication).

**Improved staff productivity:** role-based, dashboard views will decrease human error, help avoid redundancies and increase response times.

**Increased conversion and yield ratios:** capturing all interactions builds your lead pool. Relationship-building activities encourage application and enrolment.

**Measurable results:** powerful yield reports link all your online and offline recruitment efforts to inquiries, applications and enrolments.

**Flexible license:** allows for unlimited users and support.

**Choices regarding platform:** ezRecruit™ is available in Java or .NET; hosted at EDge or on campus.

**SIS integration:** allows you to deliver full service to prospects, applicants and current students.

**Security:** secure 256-bit encryption ensures your information is safe.

**For more information or a demo, call 1-800-211-5577 or e-mail: [info@edgeip.com](mailto:info@edgeip.com)**



# ezRecruit™ Features

## Admin Tools

### Prospective Student, Applicant, Parent and Counsellor Records

- Detailed profiles and communication history
- Standard and configurable fields
- Rate / rank (when applicable)
- Create groups / segments
- Lookup, add, edit, retire
- Duplicate checking and merging
- Import leads

### Communication History

- All interactions: e-mail, phone, letter, ezFAQ™, blog, chat, package, walk-in, events, campus tours, appointments, portal sign-ins, housing / application / aid / registration status

### Alerts / Tasks

- Manage inbound and outbound communications: e-mail, phone, letter, package
- Role-based: staff, faculty, students, volunteers, alumni, others
- Dashboard view with drag and drop
- Inquiry forwarding or automated routing
- Follow-up reminders

### Targeted Communication

- E-mail (text, HTML), text message, phone, letter
- Criteria: location, school, start date, programs, application / aid / housing / registration status, previous campaigns, events, portal sign-ins, etc.
- Create segments / target groups
- Personalized
- Automated / timed
- Templates for e-mails, letters, call scripts, surveys, e-newsletters
- Real-time e-mail tracking
- Permission-based and privacy compliant

### Call Centre

- Create, assign, manage campaigns
- Script / survey builder
- Track and measure campaign results
- Record incoming and outgoing calls

### Campus Events

- Manage campus tours, open houses and

### other events

- Schedule staff
- Add, edit, remove, copy event descriptions
- Registration form builder
- Announcements, reminders, follow-up
- Track registration and participation

### Advising Appointments

- Schedule appointments
- Announcements, reminders, follow-up

### School Visits, Fairs and Trips

- Manage school visits, fairs and trips
- Schedule staff
- Announcements, reminders, follow-up
- Master calendar
- Maps and special notes
- On-the-road access
- Feedback forms

### ezFAQ™

- Natural language query
- Add, edit, remove / manage keywords

### Package Requests / Inventory

- Manage package requests and inventory
- Automatic letters and labels merge
- Enclosure codes
- Send letter / e-mail in lieu of package
- Alerts to restock inventory

### Portal Content Management

- Add, edit, remove: main and sub-navigation, pages, links, images, text, keywords and metatags
- Create mini / micro-sites
- Holding bin / approval process / audit trails
- Web forms builder
- Technical skills not required
- Push content to segments

### School (Institutional) Records

- Schools, libraries, counselling centres, faith-based institutions, employers, embassies, etc.
- Add, edit, remove
- Manage contacts: counsellors, teachers, agents, principals, etc.
- Segment by type, region, etc.

- Track inquiries and enrolments by school / institution

### Admissions Applications

- Dynamic form builder
- Integrates with SIS
- Communicate based on status
- Adjudication / review tools available

### Reporting

- Standardized and ad hoc
- Examples: funnel, conversion and yield ratios, events, e-mail / phone / letter campaign outcomes, how contacts heard about you, school visits, staff productivity
- Export, forward
- Dashboard view

### Access Levels / Security

- Define unlimited access levels and roles: master administrator, recruiter, faculty, volunteer, etc.
- Password encryption
- SSL
- Profiles/password retrieval

### Implementation

- 2 - 14 weeks
- Includes needs assessment

### Integration and Technology

- Real-time SIS integration
- Import records / export data
- Channels / RSS feeds
- Oracle or SQL database platform
- JSP, .NET or ASP language
- Microsoft Windows / Unix / Linux
- Section 508 / W3C Accessibility Compliant

### Hosting

- Hosted on-site or off-site

### Training and Support

- On-site or off-site training
- Unlimited Webinar training and phone support
- User manual and online help
- Annual user group

## Prospective Student, Applicant, Parent and Counsellor Portals

### Profiles

- Create / update profile
- Indicate interests
- Indicate communication preferences
- Password retrieval

### Personalized Content

- Greeted by name
- Interest-specific information
- Country-specific language
- Personalized correspondence

### Communication

- Mail box with all interactions recorded
- E-mail submission
- Package requests

### Social Networking

- Interacts with social networking sites
- Channels / RSS feeds
- Blogs / wikis / chat

### Events

- RSVP: campus tours, open houses, other events
- Reminders, feedback forms

### Admissions / Financial Aid / Housing Applications

- Pre-populated
- Complete over multiple sessions
- Fee payment
- View status
- Receive status-based communication
- Budget calculator

### ezFAQ™

- Immediate, on-screen response

### Portals

- Prospective student portal (undergraduate and graduate)
- Applicant portal (undergraduate and graduate)
- Counsellor portal
- Parent portal
- Continuing education portal
- Career services and employer portal
- Alumni portal



#### **About ezRecruit™ CRM**

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#### **About EDge Interactive**

EDge is the leader in Canada in providing CRM systems to colleges and universities. Since 1995, EDge has worked directly with over 700 educational institutions around the world, delivering products and services that include ezRecruit™ CRM, e-mail marketing / advertising strategy and execution, website design and development. EDge also manages its own suite of sites including: SchoolFinder.com, ScholarshipsCanada.com and StudyinCanada.com.

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