Employer Engagement CRM – Requirements and Evaluation Rubric

Last updated 8/1/19

A. Employer/Contact Information Management

ID	Requirement	Notes	Score*
A1	Ability to create employer profiles with standard RFI details like: • Address • Sector(s) • Website • Phone • # of employees	Will require protocols for users, e.g., naming conventions, etc.	
A2	Employer profiles have a place to collect/view related sector(s)	List is customizable Sectors are multi-select on employer profile	
A3	Employer profiles have a place to collect/view which colleges have relationship with employer	Perhaps college + types of engagement/activities with each college Also include who at each college the employer communicates with (name, role, and contact info)	
A4	Employer profiles have a place to collect/view types of engagement offered.	From a multi-select list including areas such as jobs, internships, classroom presentations, job shadows, etc.	
A5	Employer profiles have a place to collect/view the owner and rules of engagement for that employer.	Shows the individual's name, role, association (e.g., "DSN" or the college affiliation), and contact info and then narrative on how that employer relationship is handled (e.g., all communication goes through the owner or employer may be contacted by colleges) (Could use a Notes field for this)	
A6	Matching on a unique ID to prevent duplicates being created	Need to limit the number of duplicative records by building in tools to support users locating existing employers. When a user does not find the employer, the system matches on a field (e.g., company website) or combination of fields to identify potential matches before creating a new record	

ID	Requirement	Notes	Score*
A7	Lead Management- Ability to input and track employees/contacts associated with organizations (with their contact info)	Associate employees with employers or vice versa; searching to locate either orgs or people	
A8	Ability to note particular sector(s) that a contact represents (when an employer has multiple)		
A9	Open fields for notes on employer and contact records		

B. Differentiated Access

ID	Requirement	Notes	Score*
B1	Dashboards	Types of data frequently needed for meetings and reporting requirements (e.g., # and types of engagements, etc.) Different types of users have different views; e.g., WBLC and JPCM: open opportunities and info about students vs. regional overview/counts Custom dashboards by data entered/supervisor data or by sector (nice to have for custom built)	
B2	Limit access to employer/contact records until the record owner is ready to share	Ability for the owner of an employer profile or contact record to hide that record from others' view until a status change "releases" it to view by others. (Related to C6)	

C. Process Management

ID	Requirement	Notes	Score*
C1	Tasks/Follow Up	Create tasks with timelines and people responsible Associated with organizations and leads, events	
C2	Email Tracking	Ability to log an email to an org or person record via BCC (nice to have: match on email address to find associated record in the system)	
C3	Meeting/Appointment Tracking	Dates, who did what (standard options for reporting) Might also want to store interactions with students: case management tools to track student meetings, phone calls, etc. (need	

		campus staff to weigh in on existing tools and what's needed) Set follow-up tasks	
C4	Call Tracking	Dates, who did what (standard options for reporting)	
C5	*Activity tracking (WBL, etc.)*	*Documenting what the employer engaged in (e.g. presented at XYZ on Date); might be handled in Jobspeaker*	
C6	Ability to move employers through a sales process	Categories/status for an employer that relate to where they are in their engagement. For example: • Lead • Prospective • In communication • Active + Ability to customize the terms	

D. Notifications/Messaging

ID	Requirement	Notes	Score*
D1	Campaign Management/ functions like Constant Contact	Create campaigns, designate recipients, and send from within the same system (as robust as campaign tools like Constant Contact and MailChimp). *Nice to have.*	
D2	Send Alerts	Connected to tasks; reminders about timelines; outside of the system (email or app alerts) that doesn't require logging into the system	
D3	MS Outlook Integration	Related to the email tracking	
D4	Shared Calendar	Events, appointments integrated with calendar (export to iCal/Google/etc.)	

E. Other

ID	Requirement	Notes	Score*
E1	Reports	Activity reports on all types of data Sector reports Ability to design and run custom queries Canned reports for easy running (especially for metrics TBD)	
E2	Mobile App	*Nice to have*	

ID	Requirement	Notes	Score*
E3	Data Share (both directions) with current system(s)	Depends on use of multiple systems, e.g., a separate CRM + a job placement site (if not the same system) • Jobspeaker: import/export employer records; opportunities; contacts • SWP: share jobs with their Salesforce system • EDC's system If it communicates both ways, notifications in CRM about status of sending and receiving	

*** Scoring Guide:**

0.0 = required feature not present
0.5 = required feature somewhat present but missing some functionality
1.0 = required feature fully present
1.5 = required feature has enhanced elements