

CRM & ERP · CHECKLIST

Admission CRM & ERP Evaluation Checklist

Most CRM demos are built to impress in thirty minutes, not to survive daily use by a front office and a telecalling desk. This checklist is the set of questions worth asking any vendor — including us — before signing anything.

Pipeline & Automation

- Does the system support a visual pipeline (e.g. New → Contacted → Visit Scheduled → Admitted) out of the box, or does it need custom development to get there?
- Are new enquiries auto-assigned to a telecaller by rule (source, campaign, round-robin) — or does someone have to assign them manually first?
- Is call logging built into the same record the enquiry lives on, or does it require a separate telephony integration to reconcile afterward?
- Can follow-up reminders be set automatically, so an assigned enquiry can't silently go stale without anyone noticing?
- Can the system handle more than one pipeline running in parallel — multiple programs, intakes, or branches — without enquiries mixing?

Reporting & Visibility

- Does reporting show source-wise ROI and telecaller-level conversion, or only raw enquiry counts?
- Can a manager see the whole pipeline across every telecaller on one screen, in real time?
- Are reports exportable on demand, or only available through the vendor's own dashboard?

Data & Migration

- Is there an actual plan for migrating existing enquiry data, or will your team be re-entering everything by hand after go-live?
- Can your data be exported at any time, in a usable format, without needing the vendor's permission?
- Who owns the data if the contract ends — you, or the vendor?

Support, Access & Cost

- What is the actual timeline from signed contract to a live, usable pipeline — not the marketing timeline, the real one?
- Is support a named contact with a response-time commitment, or a ticket queue with no SLA?
- Is access role-based (admin, manager, telecaller) without paying full price per seat for view-only users?
- Does pricing scale with enquiry volume and seat count, or is it a flat fee regardless of how much the system is actually used?

Want a system that already checks every box on this list? Talk to Foxtrot about the Admission CRM & ERP — foxtrot.in/contact