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Student Manager and CRM

An overview

The Student Manager package was designed to meet the needs of schools who offer non credit professional, workforce development and/or community education classes and events. While it does not offer all the features of a dedicated CRM package, it does provide a functional set of customer tracking features to handle most of your CRM needs.

Coupled with its flexible course/class development system, its robust registration and payment transaction handling and the extensive student/client demographic tracking, you end up with an integrated program development, program management, and prospect tracking system.

Some of the special CRM related features include:

- **A log of all your customer interactions**... the quick log feature allows you to identify whether the interaction was by email, mail, phone, or other, automatically stamps the current date (which can be changed if needed) and gives you a note field to list the reason for contact.

  (This is an excellent tool for noting generic or bulk contacts like thank you cards, phone messages and document deliveries.)

- **Bulk note space**... the CRM feature includes a detailed note space to enter as much detail about various contacts as you need. Use it to supplement the log to capture more detailed information. For the convenience of the user, there is a special wizard to pre-load base information into notes.

- **Assign callbacks and reminders**... assign a reminder to yourself (or assign it to a staff member) and reference a future date for a callback. On that future date when you (or the designated staffer) start Student Manager, the name of the person to contact (along with any notes or instructions) will popup!

- **Reports**... the reporting area is one of the strengths of Student Manager and our CRM reports are no exception. Run reports to show contact notes for customers, last contact, and who made the last contact. Take any report and customize it to the look you want and the information that is important to you.. The reporting system also includes a very functional integrated statistical reporting tool.

- **Quick F5 search** (name finder)... using our powerful F5 search tool you can quickly find customer information using custom on-the-fly queries or filters. This is most helpful when you quickly need a nugget of info for a phone call and you don't want to write a report.

- **Mass Email Tool**… while it is simple to export emails to a third party system of your choice (Constant Contact, Mail Chimp, etc), you also have a built-in tool set to send mass emails. The mass email tool can also be extended to do personalized (think Mail Merge Letter) emails, and even be set to reference upcoming classes that are individually matched up with the interests of the specific person.

- **Report to log**… this is a great time savings feature! When running a report, you can make a bulk log entry for all the customers that show up in the report. A great example of the power of this feature would be with a call back report. If you ran a report listing all customers who have not been contacted in the last six months, you can have Student Manager automatically make a log entry noting a callback. Of course, it's now up to you to follow thru and get those calls made!

The advantage to your program of having built-in CRM capabilities in your student registration system is that you gain a wealth of data about your customers that most CRM packages would not have. You can easily review classes that have been scheduled for your customers, class attendees and upcoming events. You can pull up demographic information about your customers; sorting your reports by city or region, or even by customer size, you can check purchases by firms and even list names, classes and the dollar value of each.

If you have additional questions about ACEware System’s Student Manager Student Registration and Class Management Solution, contact us at 800-925-2493, email sales@aceware.com, or download a copy at www.aceware.com.