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YOUR GUIDE TO CRM UPKEEP

Never miss a step in your annual cycle prep with Spark451's convenient guide!

Cycle prep runs from summer to early fall. However, your exact timing will vary based on your institution's unique needs and processes. When planning your cycle prep schedule, weigh what changes are necessary for the upcoming admissions cycle against all wish-list items you have in mind for your CRM.
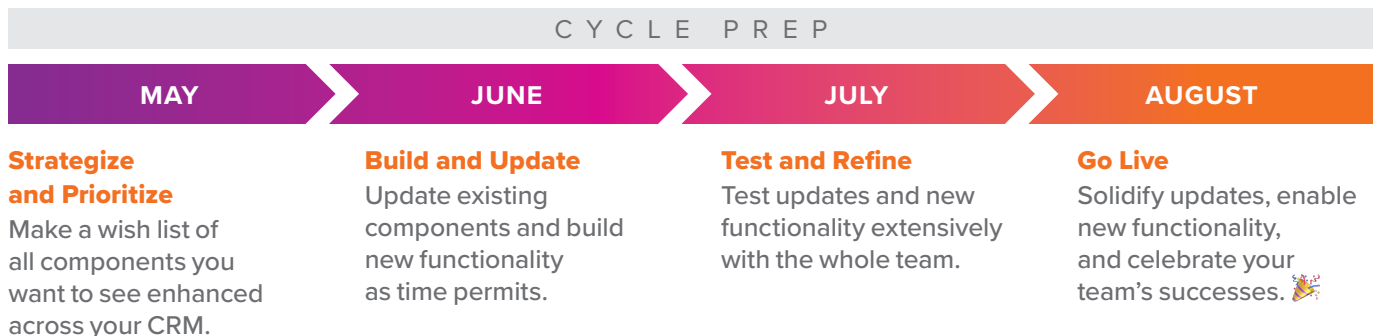
What Is Cycle Prep?
Cycle prep is the annual process of making updates to your CRM before the next admissions cycle begins.

Why Is It Important?
Cycle prep lets you evaluate your current processes, fix issues, and craft a road map for the cycle ahead.

WHAT SHOULD YOUR TIMELINE LOOK LIKE?

CYCLE PREP

MAY	JUNE	JULY	AUGUST
Strategize and Prioritize Make a wish list of all components you want to see enhanced across your CRM.	**Build and Update** Update existing components and build new functionality as time permits.	**Test and Refine** Test updates and new functionality extensively with the whole team.	**Go Live** Solidify updates, enable new functionality, and celebrate your team's successes. 🎉

WHO SHOULD BE ON YOUR TEAM?

Planners and Strategists
CRM Admins and members of your Operations and Marketing teams.

Stress Testers
Student workers, counselors, tour guides, coaches, and admissions representatives.

External Insights
Don't forget: students and parents are also stakeholders!

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ANNUAL CRM UPKEEP
Perform these tasks to get ready for the upcoming cycle

Item	Difficulty	☑
Update Counselor Assignment Automations	🔥🔥🔥	
Audit Material and Checklist Items	🔥🔥🔥🔥	
Update Decision Letters	🔥🔥	
Review Document Import Processes	🔥🔥🔥	
Review and Minimize Duplicate Records	🔥🔥🔥🔥	

APPLICATION PREP
Maintain a top-notch application

Item	Difficulty	☑
Update Term Start Dates and Structure	🔥	
Update Application Forms	🔥🔥🔥🔥	
Streamline Application Questions	🔥🔥	
Application Portal/Microsite Updates & Additions	🔥🔥🔥🔥	
Application Testing	🔥🔥🔥	
Review Application Review Processes	🔥🔥	
Move Defers Forward	🔥	
Withdraw Old Applications	🔥	
Update Third-Party Applications	🔥🔥🔥🔥	

DATA HYGIENE
Crucial items for maintaining queries, reports, and overall database health

Item	Difficulty	☑
Update Queries/Segments/Reports	🔥🔥🔥	
Turn Over Scheduled Exports and Reports	🔥🔥	
Review and Test Integrations	🔥🔥🔥🔥	
Automate Existing Imports	🔥🔥🔥	
Update Mappings on Imports	🔥🔥	
Audit Custom Fields	🔥🔥🔥	
Troubleshoot Automation Errors	🔥🔥🔥	
Modernize Existing Exports	🔥🔥🔥🔥	

IN-DEPTH REVIEW
Identify next steps and mark them complete

Item	Difficulty	☑
Update High School Contacts	🔥	
Audit Automation Performance	🔥🔥🔥	
Audit Telecommunication Settings	🔥🔥	
Web Analytics Review	🔥🔥🔥	
Review Lead Generation Sources	🔥🔥	
Create New Event Forms and Pages	🔥🔥🔥	
Update Current Event Forms	🔥🔥	

MAILING CAMPAIGNS
Enhance your communications

Item	Difficulty	☑
Review Scheduled Campaigns	🔥🔥🔥	
Update Email Templates	🔥🔥	
Update Recipient Lists	🔥🔥🔥	
Personalize Campaign Language	🔥	

USER PERMISSIONS
Confirm all users are seeing what they need to see

Item	Difficulty	☑
User Security Audit and Cleanup	🔥	
Create New User Accounts	🔥🔥	

PROACTIVE MEASURES
These additional steps will help you make big gains

Item	Difficulty	☑
Enable New Features	🔥🔥	
Enhance Application Review Procedures	🔥🔥🔥	
Hire Spark451 to Help	🙌	