Service Offerings

IMPLEMENTATION

The largest portion of our work is CRM implementations. We may be brought in from the very beginning, or midway through a stalled implementation. Our approach includes CRM strategy and roadmap sessions to design the future state, then the technical configuration of the tool and development of integrations with the SIS or other key systems.

CUSTOMIZATION & ENHANCEMENTS

Our customization and enhancement offering includes configuring complex customizations to expand system functionality (e.g. workflows, rules, custom fields and objects), performing system upgrades, and building integrations with external tools.

AUDIT & ASSESSMENT

Kennedy & Co. may be asked to perform a system audit of an existing CRM that is live, but not working well for the client. In the audit, we assess current configurations, system health, data integrity, integrations, staff adoption, and governance in place. We document our findings and work with the client to recommend next steps and priorities for system improvements.

COMMUNICATIONS

Within our communications work, we offer strategic planning of communication flows (including recommended content topics and schedule of touchpoints), creation of email templates and recipient lists, and development of email analytics reports. Typically the client develops the content themselves, but we can offer this service if desired.

TECHNOLOGY STRATEGY & SELECTION

When a school is seeking a new CRM, we can assist in requirements gathering, RFP creation, and assessment of vendor proposals. Kennedy & Co. is CRM agnostic in the selection process. We will provide analyses of different systems that may be a good fit for our client, but we do not make specific recommendations.

COACHING & SUPPORT

Whether at the culmination of a new CRM implementation, or as a standalone initiative, Kennedy & Co. offers ongoing coaching & support for CRM administrators, power users, and end users. This may include knowledge transfer after an implementation, custom documentation, or live training sessions. The goal across all of these is to increase user adoption.