



# Ellucian CRM

*The right tool for today's dynamic education market*



## Ellucian CRM can help you:

- Take advantage of a unified view of constituent interactions
- Identify issues and act on opportunities
- Engage constituents more deeply at any point in the relationship
- Create and execute personalized, multi-channel communication plans
- Make faster decisions with integrated and consistent data
- Focus on priorities by eliminating inefficient processes
- Manage key tasks with configurable dashboards
- Identify goals and measure progress toward them

Today's dynamic education market makes building lifelong relationships with key constituencies more imperative than ever. Competition over enrollments is fierce. Scrutiny over student outcomes is acute. And keeping the attention of your alumni and supporters in a world of competing interests gets harder every day.

To succeed, relationship building needs to engage constituents in a meaningful, personalized conversation. That conversation begins early, deepens throughout the student experience, and matures over the course of a lifetime.

## Enterprise CRM built for higher education

Ellucian CRM is a robust set of flexible constituent relationship management (CRM) solutions built on a common platform, specifically for higher education. These solutions help your institution more successfully recruit and enroll prospective students, support and retain current students, and cultivate meaningful life-long relationships with alumni and supporters.

With Ellucian CRM you can target key user groups—prospective students, enrolled students, and alumni—engaging them with personalized and relevant communications, delivering appropriate and timely support, and creating the distinctive experiences that set your institution apart. This comprehensive approach to relationship building results in higher enrollments, more successful students, and more committed alumni and supporters.

## Understand the full relationship

Your constituents' lives are multi-faceted. And so are their interactions with your institution. A student doesn't just connect with faculty members, but with academic advisors, financial aid officers, student services, or career services.

If that student is also a scholarship recipient, chances are good that the advancement office will be involved in some stewardship activity. Without a comprehensive view of all your institution's interactions with a constituent over time, engagement efforts fail to deepen the relationship at key points in the constituent's lifecycle.

With a comprehensive history of behavior patterns, engagement managers across the institution are better able to identify issues and opportunities—and take appropriate action. Recruiters can understand what motivates students to act. Advisors can aggregate prospective student data to craft better retention strategies. Fundraisers can match new funding opportunities to a graduate's past student interests and causes.

A greater understanding of constituent behavior across the institution promotes coordination and collaboration and creates a better experience for everyone involved with your institution.

## Personalize every engagement

Understanding what your constituents need or want throughout their relationship with your institution is key to superior engagement management. Ellucian CRM can help you identify when to invite a prospective student to a recruiting event, intervene to support a struggling student, or ask an alumnus to make a gift. This provides you with the data and tools you need to manage that communication and the follow-up activity.

With Ellucian CRM you can create personalized communications plans across multiple channels to reach your constituents with meaningful, timely messages.

Combining comprehensive constituent data with powerful communication tools means that everyone at your institution will be better able to engage in productive dialog with constituents who are impatient with one-sided conversations.

## Manage with insight

Knowledge is power. And in this era of instant communication, so is speed. Too often the insights you need to deliver a better experience to your constituents are too late. If important data resides in shadow databases, or key information is not accessible to the right people at the right time, taking appropriate and meaningful action is difficult.

Ellucian CRM's unparalleled integration with other core administrative systems—including student systems, learning management systems, advancement systems, and analytic tools—provides managers with the insight needed to launch smart, effective programs and campaigns. Timely action can make a significant difference—to your institution and to the community it serves.

## Work more efficiently

Engagement models differ. So do relationship managers. But both need to be supported by efficient processes and workflows. Managing prospective student funnels in spreadsheets, relying on manual alerts to flag at-

## Ellucian CRM



Ellucian CRM  
Recruit



Ellucian CRM  
Advise



Ellucian CRM  
Advance

Ellucian CRM Platform

risk students, or organizing contact reports weeks after a prospect visit is frustrating and inefficient. This can put your institution at risk. Ellucian CRM eliminates inefficiencies by providing a powerful set of automation tools for workflows, activity tracking and task management, communication, and reporting. Personalized dashboards empower users to shape their own experience and streamline access to the right tools and information. Less time manually compiling data means more time managing successful relationships.

## Support enrollment, retention, and development goals

Whether your goal is to increase enrollments, improve student outcomes, or conduct more successful fundraising campaigns, Ellucian CRM can help your institution clearly identify department-specific or institution-wide goals—and measure your progress toward the goals. With Ellucian CRM, your institution will have more clarity about how your programs are performing and the means to make adjustments rapidly to change course should you need to.

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### ABOUT ELLUCIAN

Ellucian is the world's leading provider of software and services higher education institutions need to help students succeed. More than 2,400 institutions in 40 countries rely on Ellucian to help enable the mission of higher education for over 18 million students. Ellucian provides student information systems (SIS), finance and HR, recruiting, retention, analytics and advancement software solutions. With more than 1,400 institutions subscribing to Ellucian's cloud services and SaaS offerings, the company is one of the largest providers of cloud-based solutions. Ellucian also supports the higher education community with a range of professional services, such as application software implementation, training, education, and management consulting.

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