



# CRM Advise

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## Creating Clear Pathways

Tim Dawson, Solutions Consultant

# Student Success

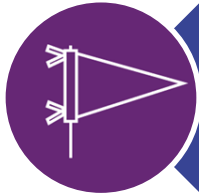
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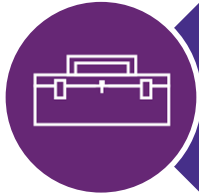
Retention



Graduation

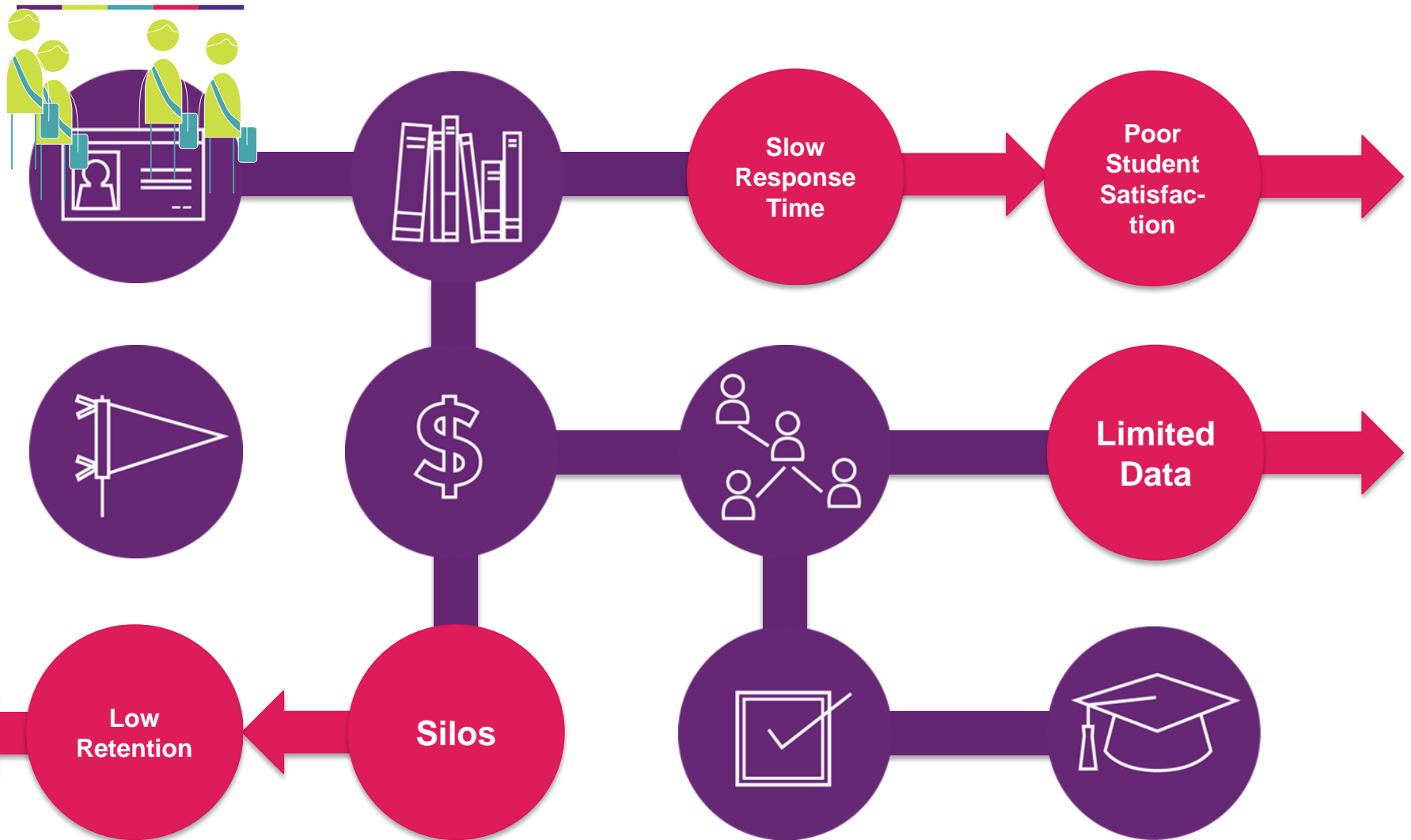


Participation

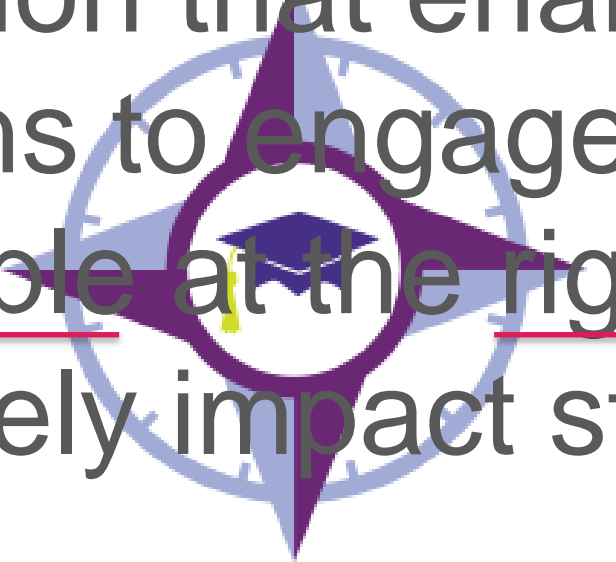


Job Placement

# Roadblocks to Success



...a solution that enables institutions to engage the right people at the right time to positively impact student success.



# Ellucian Enterprise CRM



Recruit



Advise

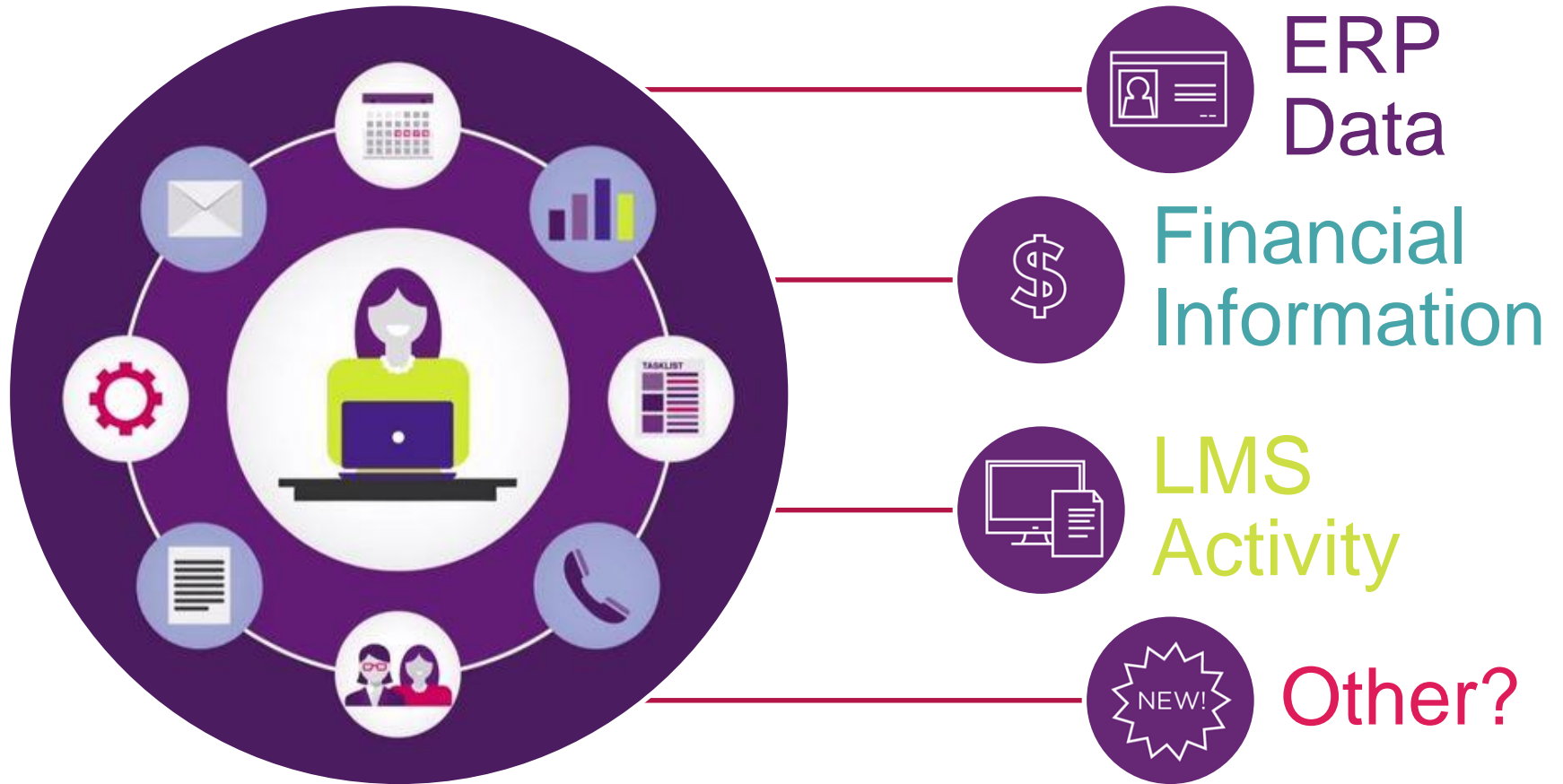


Advance

## Constituent Relationship Management

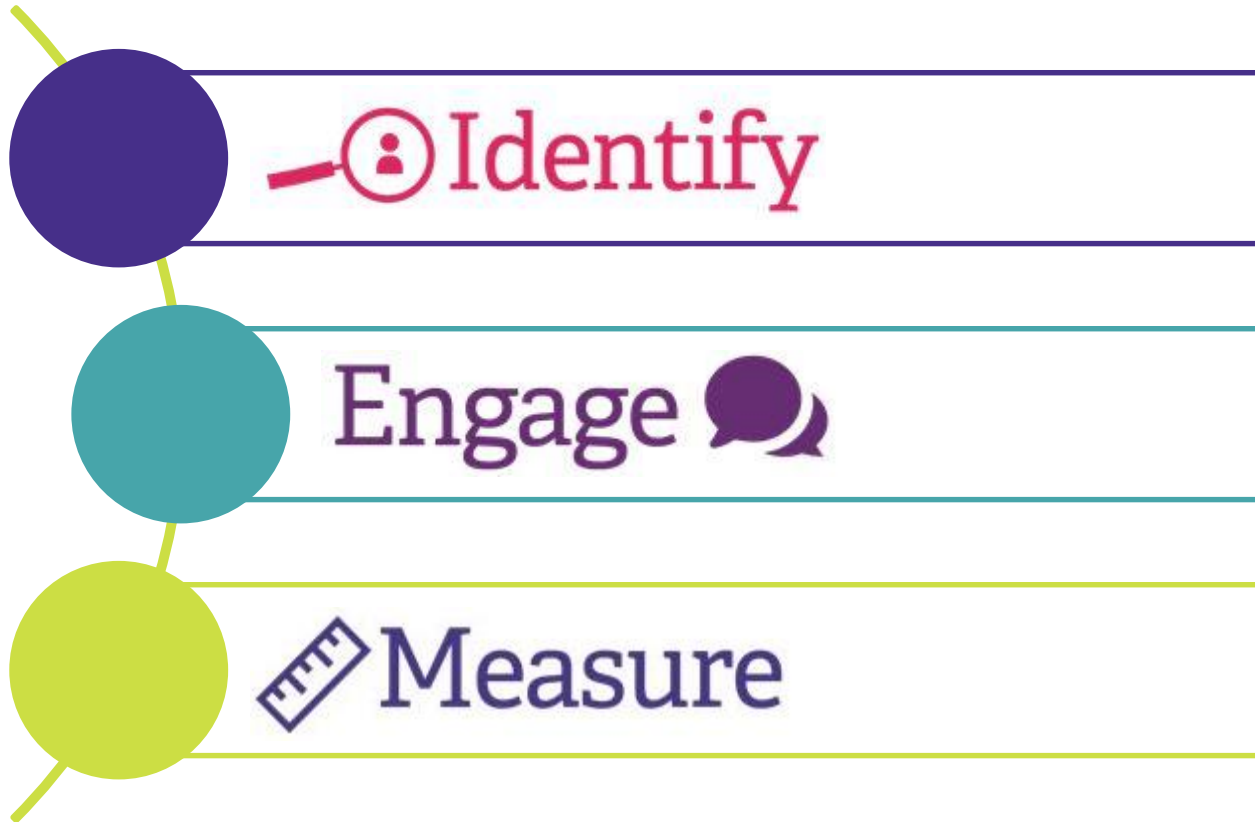
- Built on Microsoft Dynamics CRM
- Tailored for higher education
- Supports the entire constituent life-cycle

# Data Integration



# Stages of Student Success

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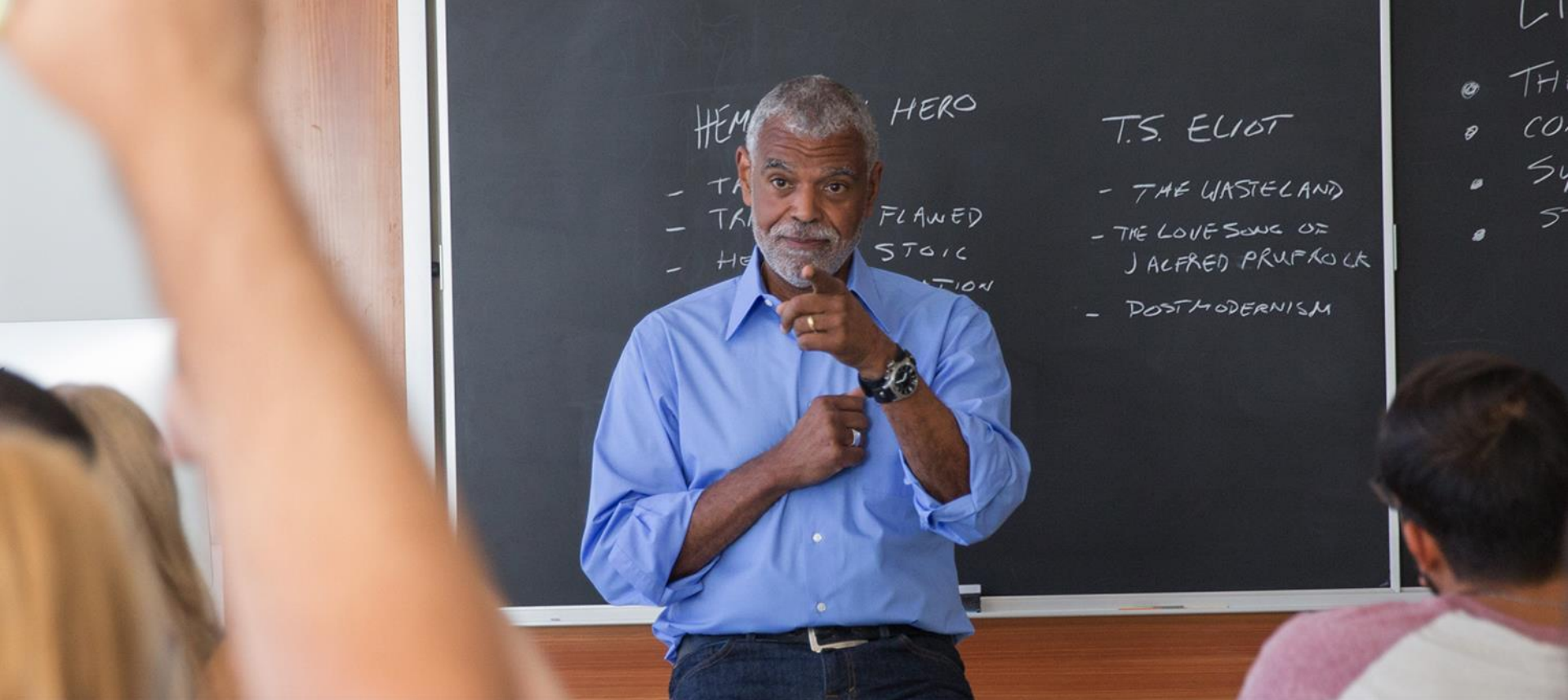


# Identify

**Centralized Student Profiles**

**System Generated Success Scores**

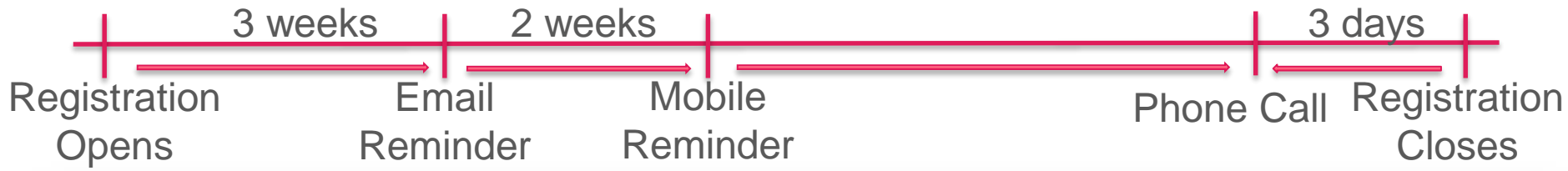




Engage 

Automated Actionable Alerts

Comprehensive Engagement Plans



ENGAGEMENT PLAN : INFORMATION

## Fall Registration Reminder

The screenshot shows a mobile CRM interface. At the top, a dark blue navigation bar contains the text "ADVISORS", "Tasks", and "New Phone Call". Below this is a toolbar with icons for "HELP", "SAVE", "MARK COMPLETE", "SAVE & CLOSE", "SAVE & NEW", and "FORM".

The main content area displays a "New Phone Call" record with the following details:

- Priority:** Normal
- Due:** 11/21/2014 12:00 AM
- Status:** Open
- Owner:** Joe Advisor

Below this is a "Phone Call" form with the following fields:

- Subject:** Registration Reminder
- Call From:** Joe Advisor
- Call To:** Karen Denton
- Phone Number:** (814) 735-1256
- Direction:** Outgoing
- Activity Code:** --
- Description:** --
- Status:** Open

At the bottom of the screen, a system message reads: "the sender and delete this email from your system. Thank you."



# Measure

Dashboard Metrics

In-depth Analytics Capability

# Student Success Reports

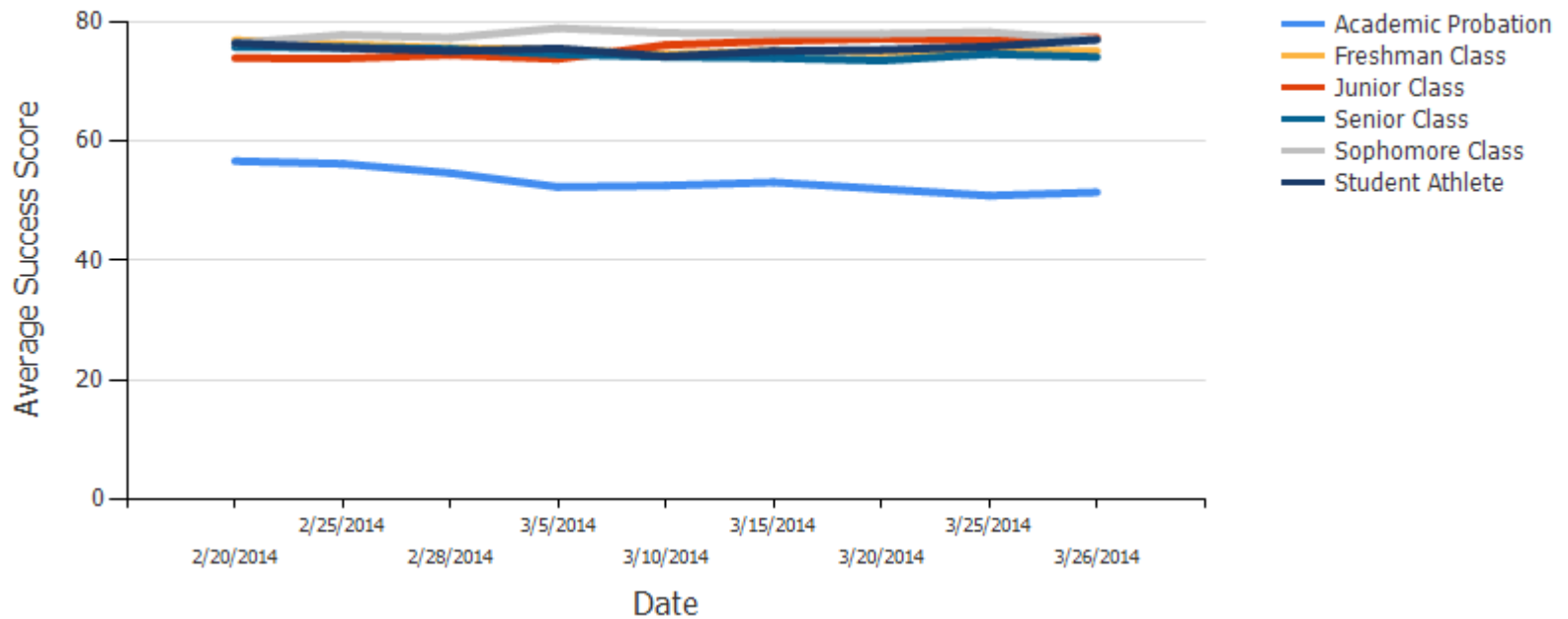
➔ Student Success - All Reports ▾

## At Risk Students -vs- All Students

### Current Student Risk Breakdown Report

At Risk  
Total Students

### Success Scores Over Time by Cohort



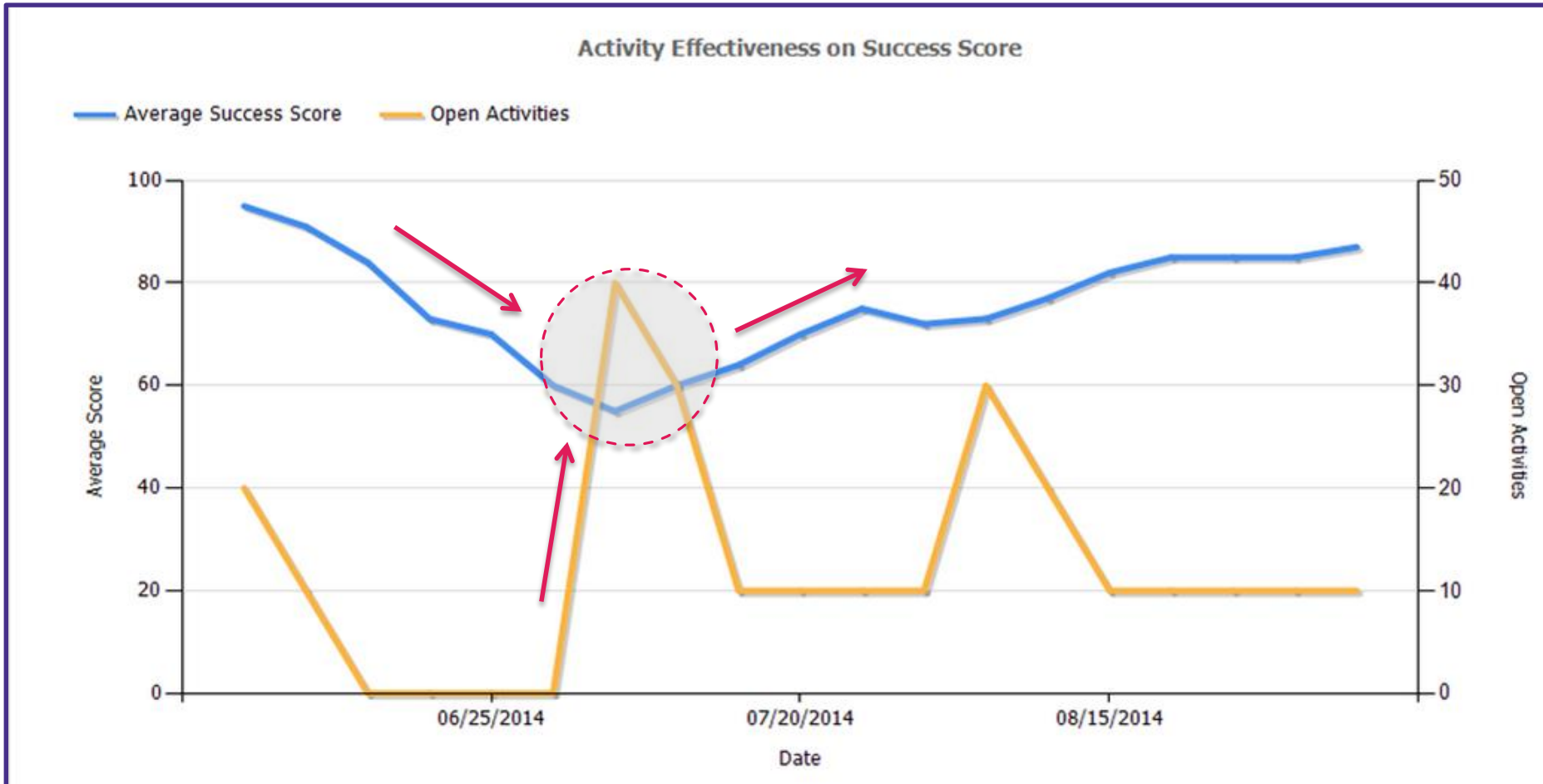
Communications

10

8

80.00%

# Student Success Reports





## CRM Advise

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# Creating Clear Pathways





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