

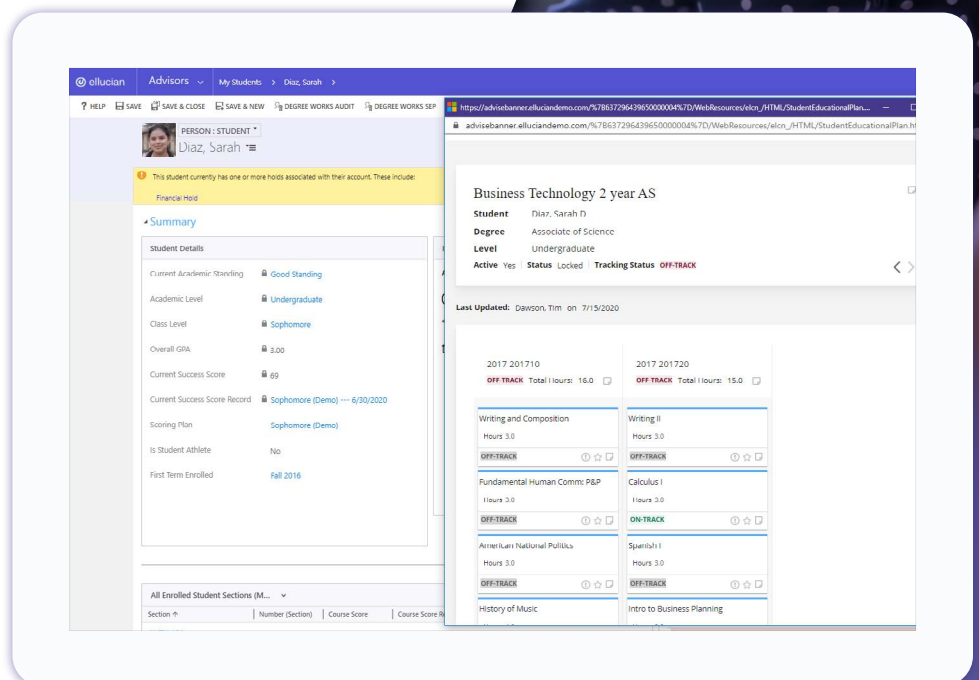
Ellucian CRM Advise

Keep your students on track with personalized, proactive support

Whether your students are remote or on campus, it's more important than ever to keep them engaged with individualized support. With data-informed insights, you can tailor your outreach and communications to reach your students where they are. Ellucian CRM Advise gives you clear, role-based views of the information you need, helping you identify and assist at-risk students more effectively and efficiently using a variety of media.



- ✔ Automated Student Information System, LMS, and degree audit integration
- ✔ Personalized, mobile engagement
- ✔ Predictive retention data with machine learning
- ✔ Holistic student view



The screenshot displays the Ellucian CRM Advise interface for a student named Sarah Diaz. The interface is divided into several sections:

- Header:** ellucian | Advisors | My Students | Diaz, Sarah
- Navigation:** HELP, SAVE, SAVE & CLOSE, SAVE & NEW, DEGREE WORKS AUDIT, DEGREE WORKS SEP
- Student Profile:** PERSON: STUDENT | Diaz, Sarah | Financial hold | Summary | Student Details | Current Academic Standing: Good Standing | Academic Level: Undergraduate | Class Level: Sophomore | Overall GPA: 3.00 | Current Success Score: 69 | Current Success Score Record: Sophomore (Demo) --- 6/30/2020 | Scoring Plan: Sophomore (Demo) | Is Student Athlete: No | First Term Enrolled: Fall 2016
- Course Tracking:** Business Technology 2 year AS | Student: Diaz, Sarah D | Degree: Associate of Science | Level: Undergraduate | Active: Yes | Status: Locked | Tracking Status: OFF-TRACK | Last Updated: Davison, Tim on 7/15/2020
- Course List:** A grid of courses with columns for 2017 201710 and 2017 201720. Courses include Writing and Composition (OFF-TRACK), Fundamental Human Comm P&P (OFF-TRACK), American National Politics (OFF-TRACK), History of Music (OFF-TRACK), Writing II (OFF-TRACK), Calculus I (ON-TRACK), and Spanish I (OFF-TRACK).

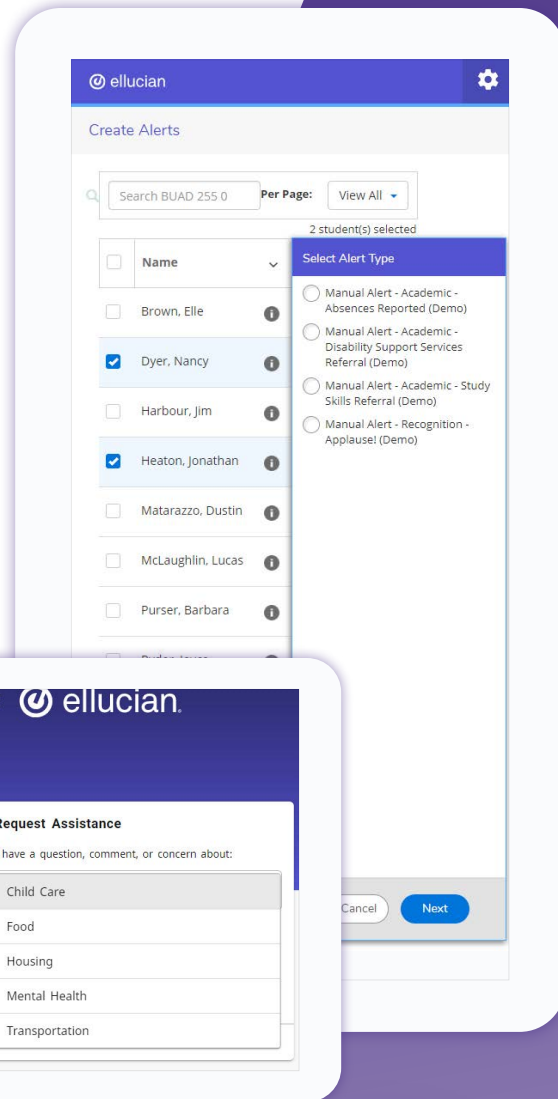
Today's students want to feel heard and understood, and they need coordinated, customized support. Meet and exceed those expectations with Ellucian CRM Advise.

Technology—and how it's used—can make all the difference for today's institutions and their students. With CRM Advise, students can self-identify a need for support or you can identify struggling students, reach out promptly, and coordinate care to get them back on track. This powerful solution helps you build real relationships with students to give them every opportunity to succeed through personalized engagement and a coordinated, institution-wide effort.

Colleges and universities are using Ellucian CRM Advise to:

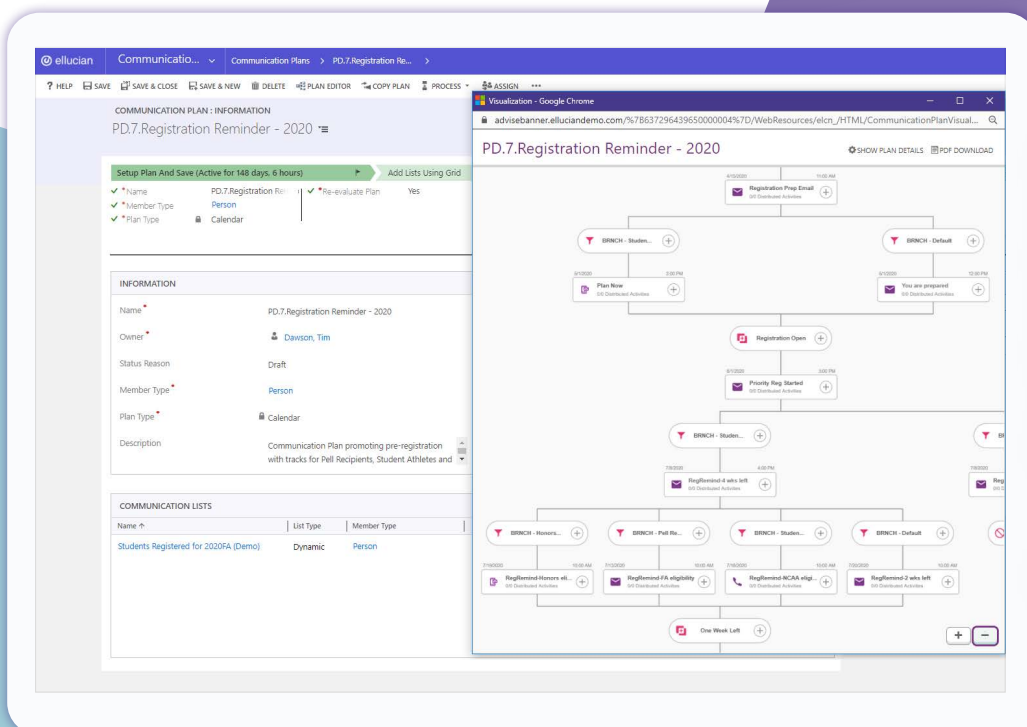
Strengthen student success and retention strategies

- Configure alerts for students to self-identify challenges that align with basic needs
- Identify student risk against configurable success benchmarks
- Prioritize and automate outreach to prevent students from slipping through the cracks
- Track academic engagement through automated LMS integration



Individualize and measure communications and outreach

- Customize communication lists, plans, and workflows
- Tailor messages to help students feel more connected
- Save time with bulk email, texting, and chat capabilities
- Track engagement over time across multiple engagement channels
- Set up dynamic or automated communication plans and nudges based on specific criteria





Track student performance

- Monitor key performance indicators that signal student engagement and success levels
- Detect when students are at risk and need support through student self-reporting and/or faculty input
- Identify student challenges early and take swift action using automated tools
- View risk analysis, configurable dashboards, and workflows to streamline support

The screenshot shows the ellucian interface for a student named Caleb Byers. The top navigation bar includes 'ellucian', 'Advisors', and 'My Students > Byers, Caleb'. The main content area is divided into several sections:

- Student Details:** Lists 'Current Academic Standing' as 'Good Standing', 'Academic Level' as 'Undergraduate', 'Class Level' as 'Under', 'Overall GPA' as '2.75', and 'Current Success Score' as '47'.
- Indicators:** Shows 'ACTIVE' (Inactive: ALL), 'No LMS Activity' (10/20/18), 'STEM Scholarship Eligible' (5/20/18), and 'Is Confidential' (Advisor).
- Success Score Performance:** A line graph showing the student's success score over time, with a current score of 47 highlighted in a red box. The graph has a scale from 20 to 100.
- Alerts:** A list of alerts including 'Student Not Registered for Next Term' (10/20/18), 'Absences Reported (Dem)' (5/20/18), 'Scholarships, Financial Aid, or Help with Tuition and Books' (5/20/18), and 'Students Submit Fall Term Status' (5/15/18).
- Current and Future Enrolled Student Section:** A table listing courses with columns for Term, Name, Section, Course Status, and Course Score.



Coordinate holistic student support

- Track and manage interactions with students from multiple support offices
- Streamline case management and student outreach
- View real-time progress of students on support plans
- Provide unified views to improve team integration

The screenshot shows the 'Student Success Dashboard (PD7)' in the ellucian system. It features several data visualization components:

- Metrics:** A 'Student Risk Level' section with a horizontal bar chart showing the number of students out of 575. The risk levels are: Low (309, 53%), Medium (17, 3%), and High (9, 2%).
- All High-Risk Students:** A bar chart showing the number of high-risk students by advisor. The data points are: Danson, T... (4), Rogers, J... (4), Yearfeto, S... (4), Farmer, Sa... (2), and Fisher, Kl... (2).
- Open Alerts by Severity, Per Advisor (Demo):** A bar chart showing the number of open alerts by advisor, categorized by severity (Low and High). The chart shows a distribution of alerts across various advisors, with some having significantly more high-severity alerts than others.



Measure performance and results

- Customize with fully configurable retention factors, scoring algorithms, communication plans, performance indicators, dashboards, and reporting
- Track key performance indicators signaling student engagement and success levels
- View trends and progress over time
- Monitor and manage high-priority issues, progress of student cases, and communication across student success teams

The screenshot displays the 'Advising Dashboard' in the Ellucian system. It features a navigation bar with 'ellucian', 'Advisors', and 'Dashboards'. Below the navigation, there are utility buttons for 'NEW PERSON', 'OPEN ASSOCIATED GRID...', 'BULK DELETE', 'CHART PANE', 'RUN REPORT', 'EXCEL TEMPLATES', and 'EXPORT PEOPLE'. The main content area is titled 'Advising Dashboard' and includes a dropdown for 'My Assigned Advisees' and a search bar. A table lists the following data:

| Full Name | Success Score | Score Color | ERP ID | Email Address |
|-------------------|---------------|-------------|-----------|----------------------|
| Byers, Caleb | 61 | Red | N00048219 | caleb.byers@ell... |
| Ransom, Mia | 71 | Yellow | N00040639 | mransom@rd2.t... |
| Ruiz, Ann | 72 | Yellow | N00024027 | Ann.Ruiz@elluci... |
| Flores, Cole | 78 | Yellow | N00024007 | larry.flores@ellu... |
| Yoss, Nicole | 79 | Yellow | N00026929 | nvoss1@ssport... |
| Baker, Beverly | 82 | Green | N00024015 | Bunny.Baker1@... |
| Hoskins, Kimberly | 84 | Yellow | N00024011 | KimberlyRHoski... |
| Lee, James | 86 | Green | N00024023 | JamesELee@rhy... |
| Kaiser, Dan | 96 | Green | N00048203 | dkaiser@ssport... |
| Leary, Richard | 96 | Green | N00024019 | RichardALeary... |
| Wallis, John | 96 | Green | N00024003 | JohnBWallis@rh... |

To the right, the 'Student Risk Level' section shows a chart for 'All Students' with a total of 805 students. The risk levels are: Low (green), Medium (yellow, 80 students, 10%), and High (red, 16 students, 2%). Alerts at the bottom list three students not registered for the next term: Wallis, John; Lee, James; and Leary, Richard, all dated 10/2/2017.



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