

## TECHNOLOGY SOLUTIONS CASE STUDY



# Morgan State University Transitions to Ellucian CRM Recruit SaaS Platform

## MORGAN STATE UNIVERSITY

Morgan State University is a public, four-year urban research university in Baltimore, Maryland. Founded in 1867 by African American ministers, Morgan is among the nation's most diverse historically black colleges and universities (HBCUs) and is a Carnegie-classified high research activity (R2) institution. Morgan provides more than 140 academic programs leading to bachelor's, master's, and doctorate degrees, and serves approximately 9,600 students. Morgan's mission is to serve the community, region, state, nation, and world as an intellectual and creative resource by supporting, empowering, and preparing high-quality, diverse graduates to lead the world.

## TRANSITIONING TO ELLUCIAN CRM RECRUIT SAAS

Morgan State University implemented Ellucian CRM Recruit in 2016 to better understand the university's prospects and ensure the Admissions Operations team had insight into its recruitment activities and their impact. Over the years, the university leveraged CRM Recruit to optimize its admissions processes, but it eventually grew challenging to manage the customized on-premises CRM platform. Ellucian regularly rolled out upgrades to the on-premises CRM Recruit solution, but Morgan fell behind in implementing them since the upgrades required substantial time and effort from the Enterprise Services group and the Admissions Operations team.

In 2021, Morgan was ready to transition its on-premises version of CRM Recruit to the newest Software-as-a-Service (SaaS) version. Moving to the SaaS platform would enable Ellucian to deliver more seamless updates to CRM Recruit, keeping the platform and data secure and accessible without burdening Morgan's Enterprise Services or Admissions Operations teams. The updated integration between the SaaS CRM Recruit platform and Morgan's Banner Student solution would ensure prospect and student data synched properly without manual intervention from Morgan's Enterprise Services group.

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## ALIGNING BUSINESS PRACTICES WITH SAAS BEST PRACTICES

Morgan began transitioning from its on-premises Ellucian CRM Recruit solution to the SaaS version in Spring 2021 and went live on August 1, 2021. The university had a dedicated internal CRM Recruit Manager for the first half of the project, who worked with Ellucian to set up and configure the new SaaS platform. After Morgan's CRM Recruit Manager departed the university, Morgan partnered with Ellucian Professional Services, bringing on a dedicated Ellucian consultant to help them optimize their CRM Recruit functionality. The Ellucian consultant assisted with the second half of the implementation and shared the management of CRM Recruit with Morgan State University Assistant Vice President of Enrollment Management and Student Success (EMASS) Operations Dr. Ernest Brevard after going live.

Since Morgan had not been using the latest version of CRM Recruit on premises, moving to Ellucian's enhanced SaaS platform was a significant leap. To ease the transition, Morgan's CRM Recruit Manager worked with Ellucian to ensure the Admissions Operations team understood how the new SaaS platform would enable them to leverage Ellucian's latest functionality to gain deeper insights and process optimization. Early and clear communication with all staff members impacted by the transition ensured that CRM Recruit end-users supported the project and had time to prepare themselves for their required business process changes.

Ellucian worked with the Morgan Admissions Operations team as they altered their business practices to fit the SaaS CRM's native functionality. For example, Morgan had created custom data fields in the on-premises solution that they no longer needed in the SaaS version. The Morgan team members then tested the platform to ensure their processes ran smoothly before moving the setup to production. Dr. Brevard says that the Ellucian consultant provided thorough and effective training, ensuring the Admissions Operations team was ready to use the SaaS CRM Recruit solution when the university went live on August 1, 2021.

## OPTIMIZING ADMISSIONS OPERATIONS WITH THE SAAS PLATFORM

Dr. Brevard says that now that Morgan is using the latest version of Ellucian CRM Recruit, admissions operations are running smoother than ever. The Morgan team worked with Ellucian to learn how to write custom Advanced Finds in the CRM Recruit dashboards. Dr. Brevard says he and the team also appreciate how CRM Recruit provides built-in difference reports in the dashboards comparing the same point in time from the last recruitment cycle to the current cycle.

Ellucian CRM Recruit gives Morgan admissions leaders better transparency into the prospect-to-student conversion process. They can also confirm a student's university acceptance within the platform, track every confirmation, and track each student's status as they enroll. Morgan is exploring other features CRM Recruit offers that the university has not implemented, such as event management and mass messaging.

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## PARTNERING WITH ELLUCIAN FOR A SUCCESSFUL TRANSITION

Dr. Brevard continues to work with Morgan's dedicated Ellucian consultant to handle the day-to-day management of CRM Recruit and says that Ellucian's steady support has been

critical to the university's successful transition to the new platform. Partnering with Ellucian Professional Services to hire an experienced consultant ensured that Morgan used Ellucian's best practices when setting up the SaaS platform. The consultant provided a third-party, expert perspective, leveraging insight from CRM Recruit implementations at other institutions to ensure Morgan's business practices aligned with how Ellucian built the solution to work.

Dr. Brevard reports that the Morgan team has found that working within CRM Recruit's functionality has been easier than expected because the SaaS platform provides flexible configuration options. The team was happy that the Ellucian consultant was able to work with Morgan's Enterprise Services group to implement Morgan's specific wish list functions successfully. Dr. Brevard says they have implemented functionality in CRM Recruit beyond what he and his team initially expected to be possible.

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## REFERENCES

Tambellini interviewed Morgan State University Assistant Vice President of Enrollment Management and Student Success (EMASS) Operations Dr. Ernest Brevard for this research. Tambellini also used publicly available information.

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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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