June 24, 2015

TO: THE DISTRICT BOARD OF TRUSTEES
of Valencia College

FROM: SANFORD C. SHUGART
President

RE: CRM (Constituent Relationship Management) Software Purchase

Valencia College currently uses Ellucian's Banner ERP software for all student and employee core information systems, including student admissions, registration, financial aid, degree tracking, and student records modules. Valencia does not currently use the Ellucian CRM software systems that support and enhance student communications, tracking, and interventions for recruiting, admissions, pre-enrollment, and enrolled student processes.

The Ellucian CRM solution supports the entire recruiting and admissions lifecycle with sophisticated, personalized, and targeted communication, workflow, and tracking capabilities. The solution provides a personalized web experience for prospective students. It streamlines admissions operations and helps increase the efficiency of the entire process with advanced reporting, analytics, and monitoring capabilities.

The Ellucian CRM solution also provides sophisticated software to support students once they are enrolled to improve overall college accountability, retention, and student outcomes. The CRM solution provides a comprehensive view of students, including the ability to track all student communications, interactions, performance, and interventions throughout their Valencia experiences. The system also provides the capability for early risk-detection and alerts that can be supported through automated and tailored intervention strategies, providing faculty and advisors with critical information necessary to enhance student success.

The Ellucian CRM solution fully integrates with Valencia's core Banner ERP system and Blackboard learning management system. The solution is built upon the Microsoft Dynamics CRM software suite and has the additional benefit of providing Valencia with the ability to build additional, custom CRM solutions using the Microsoft Dynamics CRM platform.

RECOMMENDED ACTION:

The President recommends that the District Board of Trustees authorize the College to enter in an agreement with Ellucian for the purchase of a license to use the Ellucian Enterprise CRM Software

Solution (Ellucian Recruiter and Ellucian Pilot) in the amount of $491,628, which includes $255,120 for the software licensing and $236,508 for implementation and training services.

President

CRM Software Purchase

Valencia College District Board of Trustees

June 24, 2015

"Educational institutions that have not implemented an institution-wide CRM strategy and solution by 2016 will lose significant competitive advantage to peers"

– Gartner, 2014

CRM (Constituent Relationship Management)

Definition:

> Strategy, business processes, and software for managing and enhancing an institution's interactions with constituents, such as current and prospective students, alumni, faculty and staff; and current and prospective donors. – EDUCAUSE, 2014

CRM is a compilation of three primary business practices:

1. Contact Management (electronically track activities and interactions with constituents)
2. Campaign Management (designing and automating your marketing, communication, outreach, and intervention strategies)
3. Data-driven Decision Making (making smart decisions based on good data)

CRM allows an educational institution to organize, automate, and coordinate interactions with its constituents.

What will a CRM system allow us to do?

Enhance recruiting and admission processes by providing…

- Sophisticated, personalized, and targeted communications
- A personalized web experience for prospective and admitted students
- Integrated sharing of information on student interactions across the college
- A method for evaluating and measuring the success of processes, campaigns, and interventions
- Automated workflows and advanced tracking
- Configurable online admissions applications and processes to serve different student populations and requirements
- Advanced reporting, analytics, and dashboards for prospect and admissions funnel management

What will a CRM system allow us to do?

Enhance enrolled student retention, time to degree, and learning outcomes by providing…

- Faculty, advisors, and staff with a complete view of each student's progress and engagement
- The ability to track and share information regarding all student communications, interactions, and interventions
- Sophisticated tools, including dashboards and analytics to report on and measure both individual student progress and targeted college initiatives and intervention strategies
- The means to identify at-risk students (early alert notifications), enlist the people and resources to provide assistance, and coordinate a plan for success
- Deep integration with Valencia core systems, including student information systems, learning management systems, and business intelligence systems

What will a CRM system allow us to do?

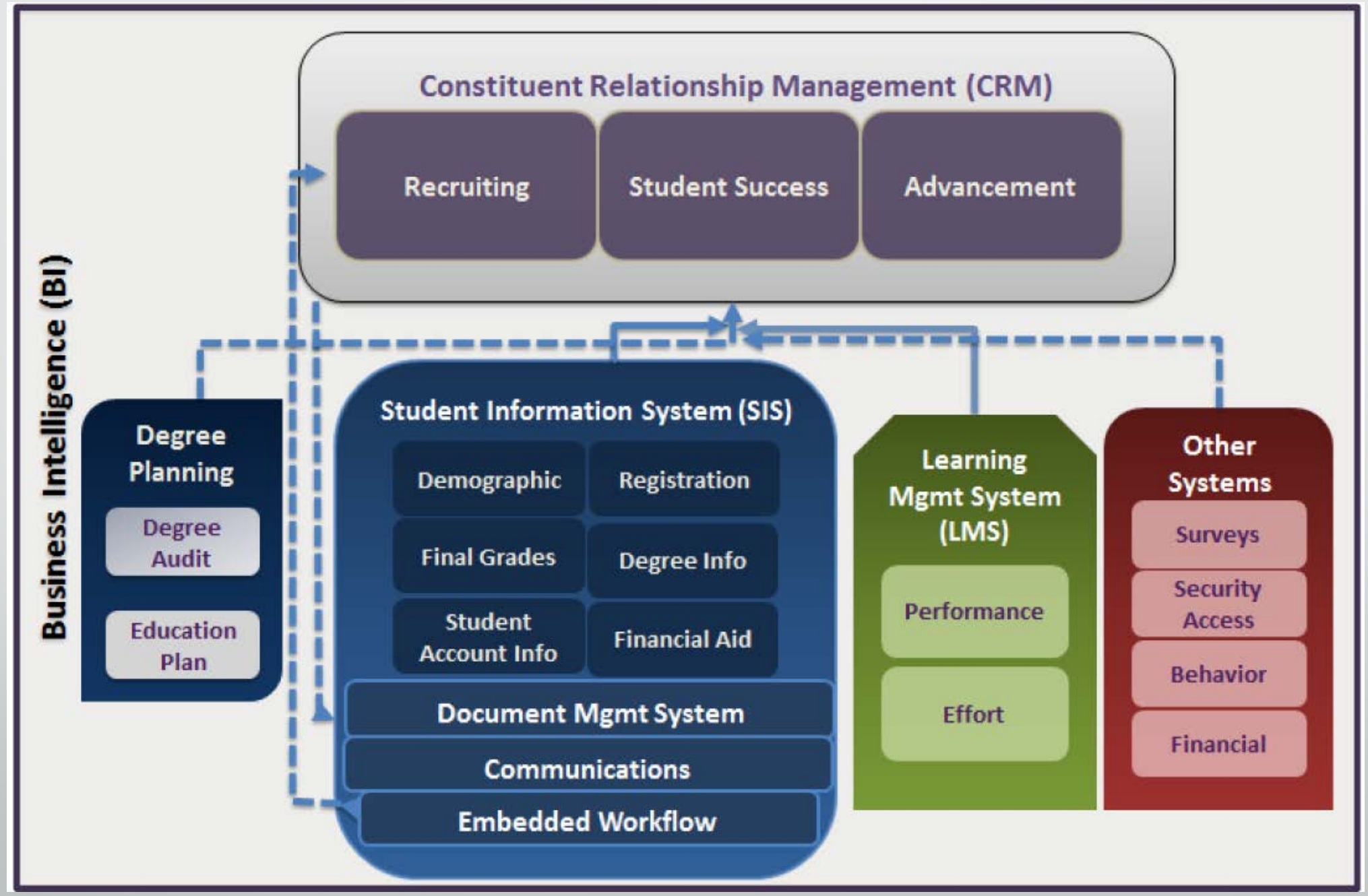
Expand and customize our CRM strategy

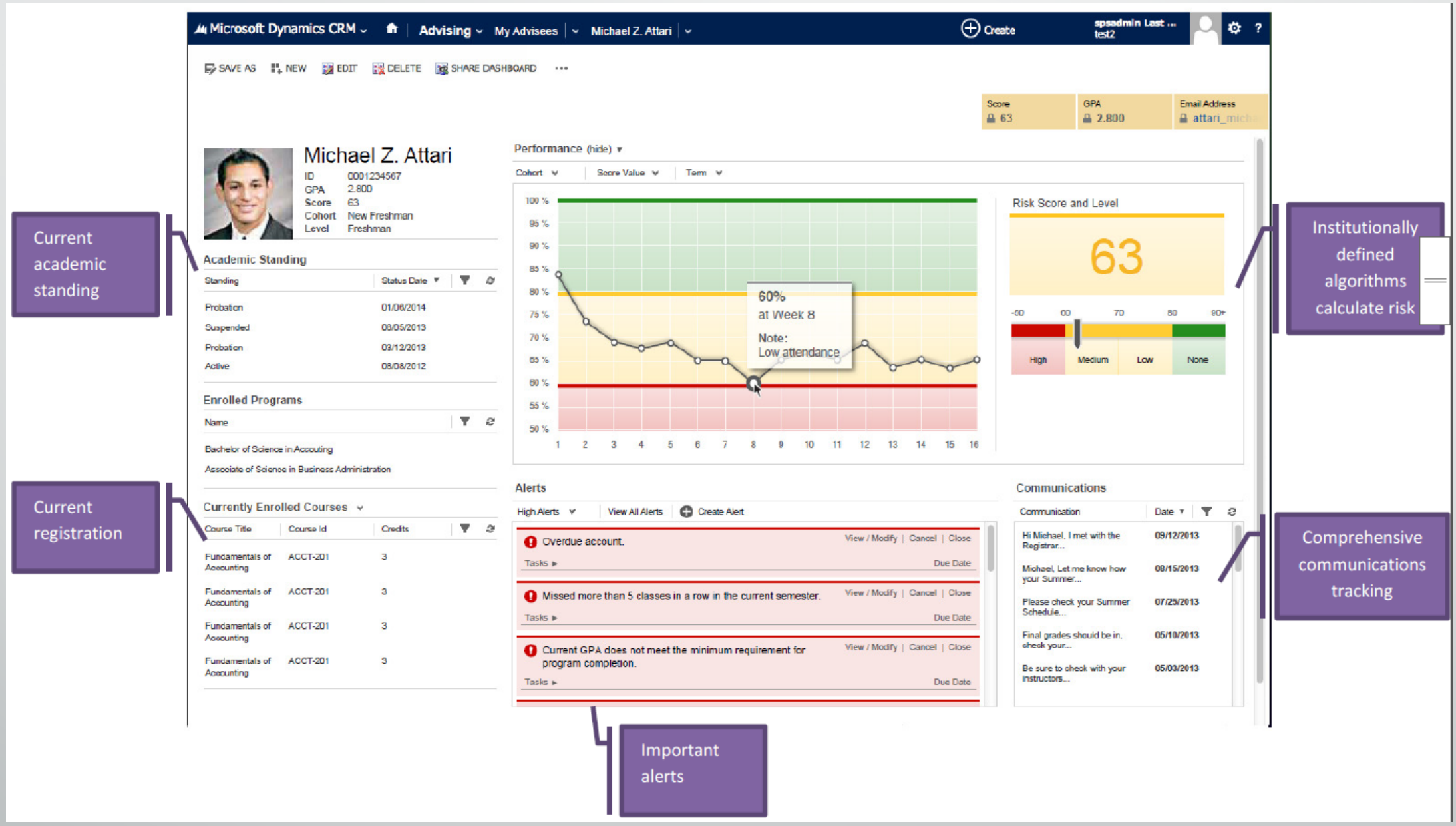
- The Ellucian CRM solution is built on the Microsoft Dynamics Enterprise CRM software platform
- Microsoft Dynamics CRM software can be used to create custom systems to support other college strategies and initiatives
- The Microsoft Dynamics CRM software can integrate with our business intelligence, predictive analytics, and other software platforms

Questions?

Sample list of Ellucian CRM Customers

- Florida Southwestern State College
- Florida Gulf Coast University
- University of North Florida
- University of West Florida
- Nova Southeastern University
- San Jacinto Community College District
- Tyler Junior College
- Texas Tech University
- Anne Arundel Community College
- Louisiana Community & Technical College System


Constituent Relationship Management (CRM)
Recruiting
Student Success
Advancement
Business Intelligence (BI)
Degree Planning
Degree Audit
Education Plan
Student Information System (SIS)
Demographic
Registration
Final Grades
Degree Info
Student Account Info
Financial Aid
Document Mgmt System
Communications
Embedded Workflow
Learning Mgmt System (LMS)
Performance
Effort
Other Systems
Surveys
Security Access
Behavior
Financial



Current academic standing

Current registration

Institutionally defined algorithms calculate risk

Comprehensive communications tracking

Important alerts