CRM 101: Making Sense of CRMs in Higher Education

Contents

This guide is based on over 50 interviews with practitioners, education technology experts, and CRM product vendors. It aims to help practitioners across college departments and units build a clear and aligned understanding of the CRM landscape, differentiate between CRM products, and more accurately assess campus CRM needs and implementation readiness.

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The Ada Center in Brief
Supporting Higher Education IT Capacity

- Founded on the belief that technology is not a silver bullet to any problem, but with the right planning and implementation, software can play an important role in advancing student success and equity.

- Supports national initiatives such as the Bill & Melinda Gates Foundation's Frontier Set and Higher Endeavor, Complete College America, Achieving the Dream, State Success Centers, AACC Pathways, and others.

- Develops research-based resources for the field and works directly with colleges and states in need of technology strategy, purchasing, and implementation support.

About This Report

The CRM research included in this report was conducted by The Ada Center between 2020 – 2022 to support knowledge and insight development for the Bill & Melinda Gates Foundation. This report also references modules from a larger series of curricular resources developed in partnership with Complete College America (CCA) and with input from the Advising Success Network. The broader set of resources, aimed at supporting student success technology initiatives at Minority Serving Institutions (MSIs) can be found at www.TheAdaCenter.org/resources.

Introduction: Much Ado (and Confusion) About CRMs

What Is a CRM, Anyway?
Multiple Users and Vendors Use the Same Word to Describe Different Products

"We need a CRM," said the VP of Student Success.

"Sure, I agree," said the CIO.

"Definitely," said the Director of Admissions and Recruitment.

Little do they know, but under this easy agreement are vastly different expectations about the technology each hopes to procure. The VP of Student Success is picturing a CRM that is a student support tool, one that can help her advisors see a holistic profile of each of their students. Perhaps it might even include a student-facing application. The CIO pictures an organized contact database system, something akin to Salesforce. The Director of Admissions and Recruitment imagines a tool for outreach and marketing campaigns, something for his team to better recruit and manage prospects through matriculation.

They are, in short, picturing vastly different tools. Who's right? In truth, all of them. The term CRM, which stands for "Customer Relationship Management," is being used to refer to dozens (if not more) of technology products, product categories, and specific product features. Understandably, this wreaks havoc on campuses as teams try to "speak the same language" internally and then navigate an equally confusing CRM marketplace.

This report offers a way forward. Consider it your team's quick primer on the world of CRMs in higher education – what they are, what they can (and can't) do, and how to prepare for one on your campus.

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But first, let's answer our initial question. What is a CRM? Institutions and vendors were asked via survey to define "CRM" within the higher education context, and all coalesced around:

A higher education CRM ideally brings together contact

communication and interaction **information from different**

departments *throughout the institution to give one,* **holistic view** *of*

each **contact** *in* **real time**, *for* **relevant stakeholders** *to optimize*

communication and relationship building with those students.

However, in interviews, stakeholders – vendors and college IT leaders in particular – emphasized that they believe "CRM" is a problematically vague term, particularly given the unique evolution of the higher ed tech space.

A deeper analysis of this definition reveals why individuals who agree on it may still have very different mental models of what a CRM should look like on the ground. These differences, left unaddressed, can lead colleges to overlook key data/IT strategy and planning steps, procure products misaligned with their needs, and face frustrating battles with both vendors and internal stakeholders with differing product priorities. Let's re-examine the definition above and unpack each key word:

What Do We Actually Mean By...

"Information from Different Departments": What tools are currently being used across campus to collect information? Which departments will need to input data, and are they willing to do this?

"Holistic View": There are many audiences within institutions that could interface with a CRM. Each may want a different type of user interface display with different data fields, depending on the nature of their roles and the way they prioritize and use information.

"Contact": Who is this? Is this someone who is currently enrolled in a full-time degree program? A prospective applicant? Someone seeking a non-credit industry credential?

"Real-Time": How current does information need to be? Should it update in minutes? Hours? Days? Once a quarter? Preferences may depend on institution practices and the type of information we're talking about. And feasibility will depend on integration and interoperability realities (which IT will need to assess).

"Relevant Stakeholders": And finally, who is/are the primary users for the CRM? Different types of CRMs exist for different end users. What information do our users need to access, and what are the policies, ethical considerations, and internal structures that might influence this?

Answers to these questions can lead to completely different products, all of which may advertise themselves as "CRMs." So how do we make sense of what CRM our institution needs?

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In the following sections, this report will be your sense-making guide that can help, first, to get you and your team on the same page about what CRM(s) are needed at your institution, and, second, to provide you with some foundational insights to help you understand and navigate the CRM product landscape.

If you are interested in moving forward with CRM procurement, we recommend referencing *Module 4: How Should We Approach Buying New Technology*? This resource will provide deeper guidance around establishing procurement teams, getting the most out of product demonstrations, and writing RFPs that enable more thoughtful and differentiated vendor submissions.

Coming Up…

The following report sections explore some of the most common questions and areas of confusion around CRMs:

The Anatomy of a CRM
What are the different component pieces of technology that make a CRM a CRM? (Hint: This one helps you speak the same language as your IT team and vendors)

Higher Education CRM Market Evolution
CRMs are used in many industries. What makes higher education CRM products different? What does the higher education CRM market look like, and how is it evolving?

CRMs on Campus: Product "Snapshots" and Use-Cases
What can the most common higher education CRM (and CRM-adjacent) tools be expected to do? Take a sneak peek at some of the most highly-utilized CRM features and functions.

Challenges and Opportunities for CRM Usage
Technology tools are ultimately just that – tools. How can we set up the people-process-policy apparatus around the tool to ensure we have a positive impact (and do not inadvertently create barriers to student success and equity)?

Are We Ready? Questions to Assess Your CRM Strategy
Put your knowledge to the test! Leverage these questions to ensure you and your team are clear about the kind of CRM you need, and what you need to do to prepare for it.

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The Anatomy of A CRM

By now, we know that there is a generally agreed-upon definition for CRMs, but actual CRM products may vary. To understand how and why these products diverge, we will need to break down our CRM definition a bit further.
For those outside of IT, the easiest way to conceptualize the "anatomy" of a CRM is to see it as a tool with multiple layers. We'll outline them here, and then illustrate how they work together on the following page:

CRM Foundation: Essentially, this is the CRM "base layer," a contact information, communications and interaction tracking database. Technically, this could be done in something as simple as Excel, though that would require a lot of manual entry.

So, to avoid some of this manual work, many CRMs are built out, adapted, and therefore differentiated in a few major ways:

Data Fields: It's one thing to say that we want to collect information, but what do we mean by that? What information? Many CRM tools cater to different industries by offering various preset data fields specific to that industry. This requires first, that the data field is built into the CRM and is labeled and defined correctly (e.g., If we want to track "age," there is a CRM field that says "age" and it is calculated in years). Second, the CRM may tool may be set up to integrate with other commonly used technology tools for that industry, ensuring they can fill the data field with current information from other parts of the technology ecosystem (e.g., If "age" is collected in an online survey, the CRM can pull that data from that source).

Specialized Features: These are built-in applications within the CRM that allow you to use the data you're collecting. For example, if I am a healthcare worker, I might have a list of "claims raised" as a data point, but without a feature to filter by claims status and send a targeted email, I can't do a whole lot. Features are usually built according to the needs within a specific role. In the private sector, those roles tend to be marketing, sales, account management. Of course, for higher education, as we will see, our roles – and therefore our features – have some areas of overlap and other areas that are quite different.

User Interface Design: Finally, the data fields and features must be accessed somehow. CRM vendors create user interfaces to make using features and seeing data fields (ideally) easy and intuitive. The user interface design includes things like the colors, fonts, buttons, navigation approach, and overall look and feel of a product. It may be adapted for a marketer, or your doctor, or whoever is using the tool.
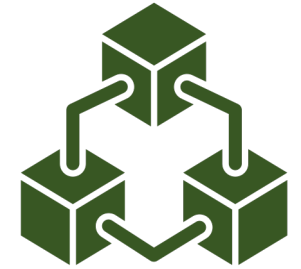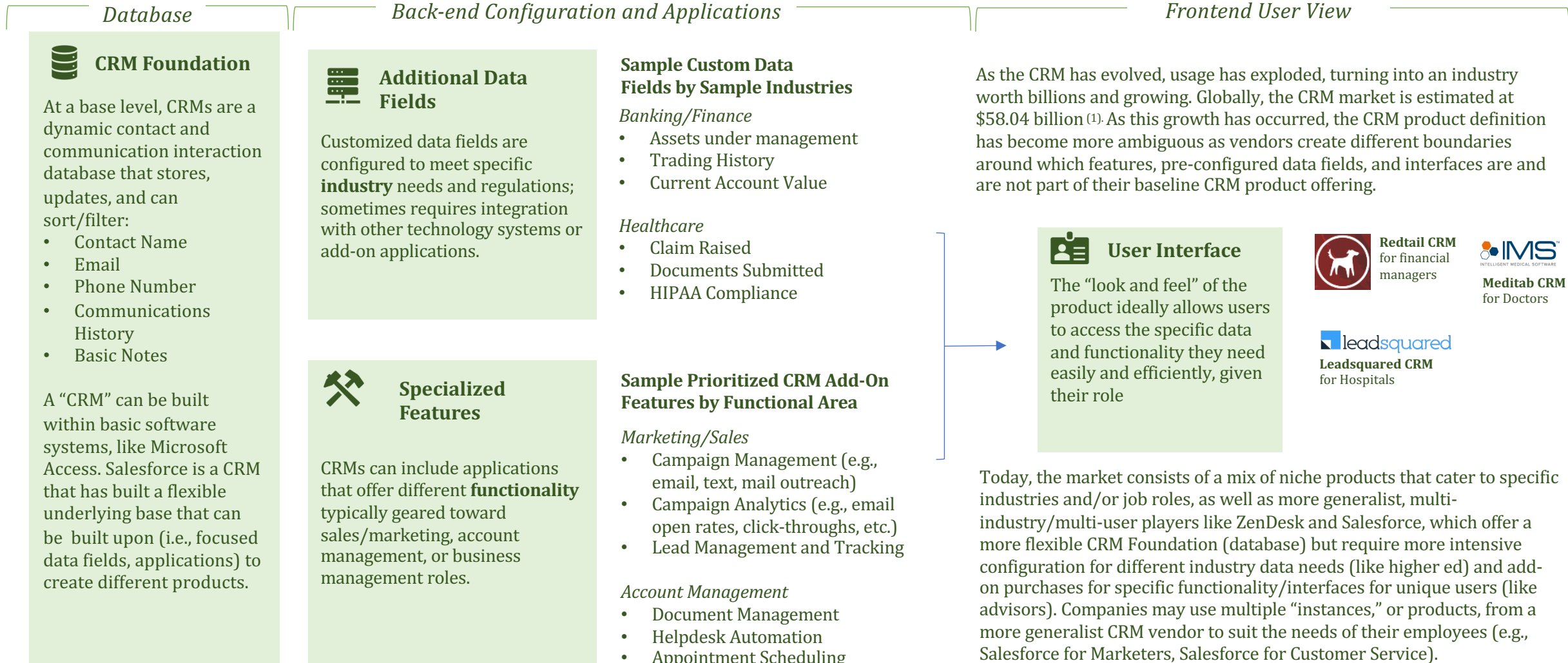
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Can we just "copy-paste" CRMs from other industries into higher education? Yes and no.

Higher education institutions essentially combine multiple functional needs and highly varied users into one entity. While a basic CRM tool can be helpful as a central repository for student contact and communication/interaction data, cross-industry, "generalist" CRM products do not come pre-configured for all the unique requirements of a typical higher education institution. This means that if an institution buys a CRM that is not designed specifically for higher education, the institution team will often need to be prepared to build in customized data fields and purchase and/or build add-on features on their own. This approach allows for greater flexibility to make the CRM look, feel and act precisely how the institution wants, but it also requires a greater degree of internal institutional IT and data expertise and bandwidth.

Data Fields Customized for Higher Ed and Institution Needs

*"So maybe the other industry CRMs can add a field for attendance. But they don't know, hey, how do you track attendance for remote versus in person? Or maybe you can add a field for enrollment, but maybe I enrolled in my degree program, but then also got this apprenticeship, and then also did a non-credit certificate. **You'd have to do a lot of configuration work to get those data fields** in a standard CRM."*

Note: Due to corporate mergers and acquisitions, several companies cited here may now go by alternate names and/or different branding. The naming conventions used here represent the company names and branding that that were active during their respective interviews in 2020 – 2022.

Institutions Require Specialized Features Beyond Marketing/Sales Functions

*"Zendesk will help you make appointments, sure, but it's **built to integrate with things like Slack, when what you really need is the integration with Starfish/EAB**."*

CIO, Community College in the Midwest

*"They can track a customer journey and record from website to purchase point. But how do you translate that to a student prospect? They need the **application portal, the financial aid application, all that stuff you then have to build on to the CRM because it wasn't designed for you**."*

Users Have More Differentiated and Complex Needs

*"The dashboard for a recruiter is going to look very different from the case management dashboard that an advisor might need, which is also different than the kiosk interface being used in by the tutors in the tutoring center…You have to **design for each of them individually**."*

*"For most CRM users, a customer-facing 'portal' is an online shopping cart. In education, **the student lifecycle is much more intensive, and the stakes are so much higher**. A student-facing tool is designed with far more features and collects far more data. This is not the front-end that CRM vendors are used to working with, never mind developing themselves."*

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Even within higher education, CRM data fields and features can vary widely, shifting for different end-user needs on campus.

Zooming In: What Is A CRM Expected to Be For...

While private sector CRM products may each serve 1-3 user types in a given industry (e.g., salesperson, account manager), a typical institution may contain multiple "industries" (e.g., Admissions, Advising, Financial Aid, Advancement), unique functionality needs, and 7-10+ unique users across the campus, including:

Advisors & Student Support Staff

Data Fields:
- Student Grades
- Course Progress
- Faculty Notes

Prioritized Features:
- Holistic Student Profile
- Early Alert
- Nudging Capabilities
- Appointment Management

Enrollment Managers

Data Fields:
- Prospect Name
- Contact Info
- Application Progress

Prioritized Features:
- Automated admissions workflow tools
- Prospect Campaigns

Are Prospects or Students CRM Users?

Vendors note that student needs are "more complex" and designing for them requires an appreciation for the "higher stakes" involved in the student experience of the tool, particularly for racially minoritized, first-generation, and lower-income student populations.

Customer View/Features vs. *Student View/Features*

Customer View/Features	Student View/Features
• Shopping Cart	• Application Portal
• Checkout Screen	• Financial Aid Status
• Chatbot	• Onboarding Checklist
• Basic Dashboard	• Academic Plan
	• Schedule
	• Appointments
	• Messages

Given these robust requirements, many vendors have packaged student or prospect-facing tools as separate products.

Understanding the Vendor Perspective:

From a business perspective, the higher education sector presents a variety of challenges:

- **R&D Lift**: Intensive user research to understand institution processes and design for multiple unique end users.

- **Long Sales Cycles**: Collective decision-making and complex procurement processes slow sales, particularly for higher dollar purchases.

- **Limited Resources**: Institutions, particularly access-focused colleges, have tighter budgets than private-sector CRM customers.

- **Implementation Lift**: Limited data governance and poor data hygiene paired with dated and disconnected technology ecosystems require more hands-on implementation guidance.

Consequently, **major CRM vendors historically focused on other industries** that were seen as less complex and more lucrative. Meanwhile, **ed-tech vendors chose to segment the institution**, designing products for specific departments/users or portions of the student lifecycle, as we will see in the next section.

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Higher Education CRM Market Evolution

How Did We Get Here? Where Are We Going? Can We Have "One CRM to Rule Them All," or Are the Product Demonstrations Too Good to Be True?

Because of the unique needs within higher education, the entry and evolution of the CRM in our space has looked quite different than it has in other industries.

This market evolution is why, in part, you may see a simple text messaging application advertised as a CRM. And then, perhaps in the same day, you may come across an incredibly robust student lifecycle management system also referred to as a CRM.

Many vendors in the latter camp are increasingly resisting the title "CRM" for their products. They note that their tools have come to include so many bells and whistles, basic CRM functionality is now only one of many features their products offer. These vendors may instead refer to their products as "case management systems" or "holistic student lifecycle" products that "happen to also include CRM functionality."

Marketing language aside, it is important to understand a bit about what the current CRM market looks like, why it is the way it is, and where it is heading. Equipped with this knowledge, your team will be more prepared to enter and navigate this landscape with a greater sense of clarity (and a nose for false promises).

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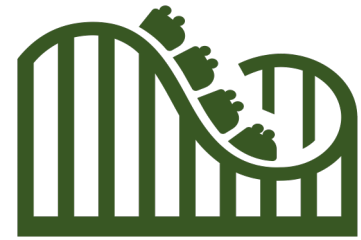
Higher education technology vendors initially evolved to serve different needs within the institution: Student Enrollment (prospect) or Student Success (enrolled students). Both vendor types have added functionality over time:

Where We've Been   *How We Evolved*   *Where We're Going*

1990s – Early 2000s | Mid - 2000s - 2010s | 2010 – 2019 | 2020s+

1990s – Early 2000s	Mid - 2000s - 2010s	2010 – 2019	2020s+
Institutions rely on manual efforts and rudimentary systems to support and communicate with students. Tools include: • Pen and paper • Database Applications (e.g., Microsoft Excel, Access) • Student Information System (SIS) • Email • Website	Admissions offices evolve to compete for enrollments (and associated funding) and adopt private sector-inspired sales and marketing strategies, including database **CRM products and admissions tools:** • Prospect Pipeline CRMs • Application Portals/Tools In parallel, student success-oriented reforms push companies to develop tools for various student support stakeholders that draw on institution data. Some also create student-facing tools to generate new student interaction data. Some of **these success tools are standalone CRM products, others are designed as success tools with limited CRM features**. These new tools included: • Early Case Management Systems • Student-Facing Portals • Targeted CRMs (e.g., Tutoring, Career Services) • Other Success Tools (e.g., Early Alert, Analytics)	*From CRM to CRM+* Facing post-recession enrollment drops, the recruitment and enrollment field balloons. Prospect pipeline tools begin to **build out more advanced feature sets beyond what is typically included in CRMs,** such as: • Recruitment event management • Integrated application tools • Financial aid optimization/AI *From Student Success to Student Success + CRM Features* Student success-oriented tools **increasingly add or improve existing CRM-like features** (i.e., those focused on communication and interaction tracking) and/or forge partnerships with prospect pipeline CRM vendors (i.e., Slate – EAB partnership)	Colleges' initial excitement about ed tech gives way to a more wary perspective. The COVID-19 pandemic emphasizes the promise and importance of technology, while advancements in AI stir questions about the future of ed-tech products. Vendors begin to jostle to meet the "holistic student lifecycle management" vision colleges demand: • Acquisitions increase as vendors attempt to buy and stitch together tools across the student lifecycle • Product and category definitions evolve, with Prospect Pipeline CRMs moving into the Student Success space and vice versa • Vendors seek to ingest new sources of data from LMS, Chatbots, social media, etc. • Focus on integration and interoperability increases • Advances in AI raise questions about what comes next in ed-tech

Today, there are roughly four categories of technology products that you may see associated with the term "CRM."

Since there is currently not one unified product that can manage the entire student lifecycle, institutions may invest in two or more of these tool types. For example, an institution may use a Prospect CRM for Admissions & Recruitment as well as a Case Management System for advisors.

Prospect Pipeline Management

Prioritizes outreach and tracks communications with **prospective** students. Profiles focus on contact interaction and admissions progress, used and maintained within a single department or a few closely related units (e.g., recruitment and admissions). These products are often most similar to existing marketing/sales CRMs in other sectors.

Pricing: $$ - Moderate
• Depends on feature set and # of users
• Cost usually includes Initial Implementation and annual subscription
• Implementation may take 4-6 months or longer

Sample Vendors:

Slate (Technolutions), TargetX (Liaison), Ellucian Recruit, Element451

Enrolled Student Case Management & Support

While some college staff may call these systems "CRMs", those closest to IT strategy, including CIOs, institution IT implementation leads, and vendors themselves, note that a more accurate descriptor might be "**student success/retention tools with CRM features" or "case management tools**." These systems are optimized for coordination across departments for student intervention. The functionality of these products varies widely. A basic case management tool might include an advisor dashboard view, appointment scheduler, and basic CRM functionality. A more robust system might also bundle in advanced analytics, multiple user view options, and a companion student tool.

Pricing: $$- $$$ - Moderate to High

• Depends on feature set and users
• Cost usually includes initial implementation and annual subscription
• Implementation may take up to 1 year or longer

Sample Vendors:
• EAB Navigate
• Watermark (Aviso)
• EduNav

Generalist CRMs (Category Incumbents)

These are standard CRM databases that are used across industries. They include contact storage and communication/interaction tracking and management. Configuration and feature add-ons are needed to adapt these tools to the college context. These CRMs can be used across prospect and enrolled student categories, but their current pricing structure, which rises exponentially with scale and user type, rarely allows institutions to leverage these tools across the entire student journey and/or multiple units/departments.
Pricing: $ - $$$$ Highly Variable, Very High at Scale

• Depends on # users and variability of user types
• Add-ons for customization, features

Sample Vendors

Salesforce
Microsoft Dynamics
ZenDesk

Targeted CRMs (Specialized for Specific College Units or Use Cases)

Some products offer CRM capabilities that are geared toward smaller departments or offer very specific functionality (e.g., an AI chatbot). These companies remain largely focused on providing best-in-class products for a very limited or specialized set of features. Some are designed to integrate with other more robust platforms, including other CRMs.

Pricing: $ - $$ - Low to Moderate

• Depends on range of functionality

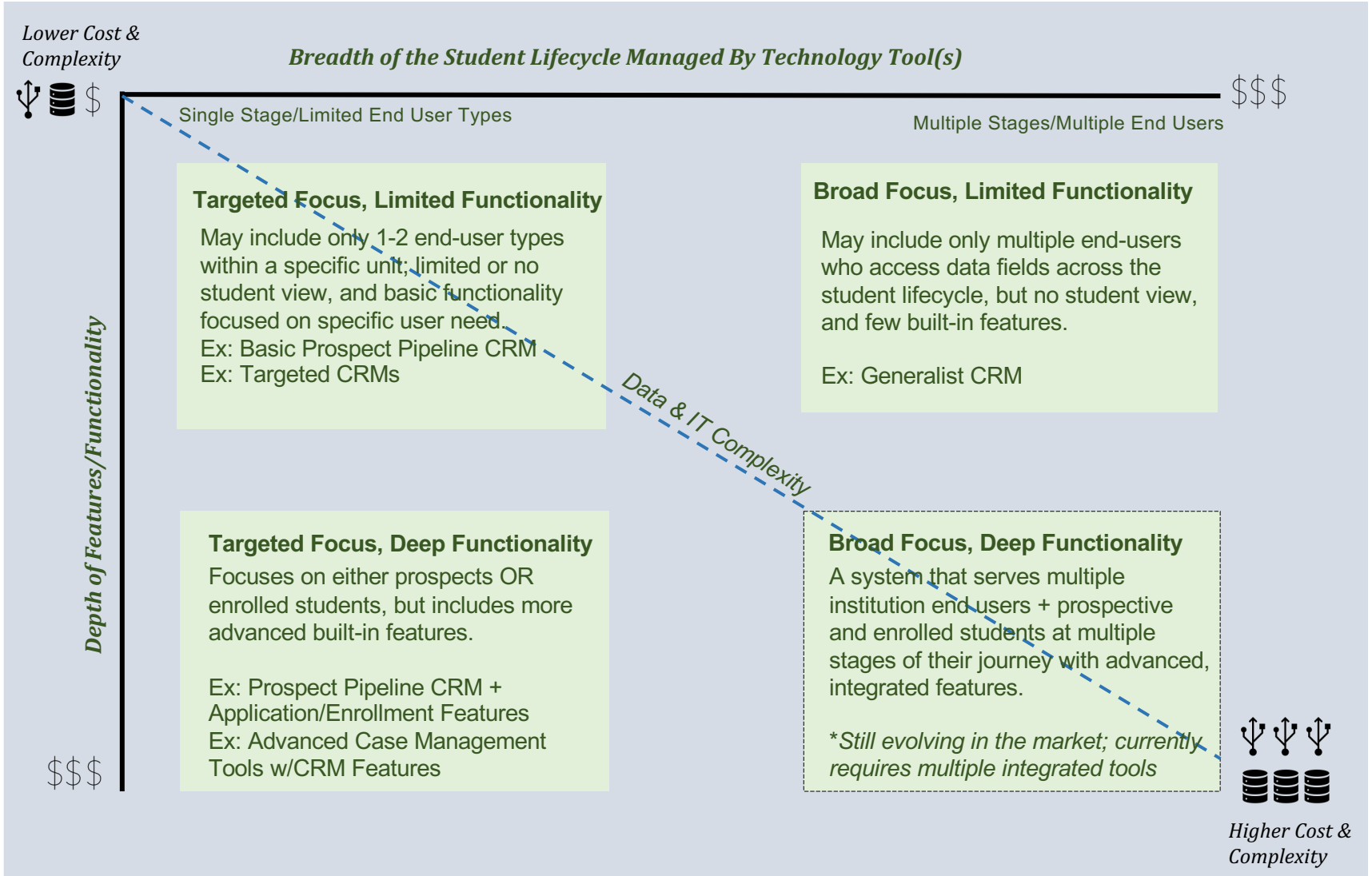• Implementation usually 3 – 6 months, depending on tool complexity

Vendors
TutorTrac
SignalVine
CampusLabs (now Anthology)

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Institutions often make tradeoffs and/or procure and integrate multiple tools, as there is not one, affordable tool that can currently "do it all."

$ Cost

Data Complexity

IT Complexity

That said, vendors are shifting across this map to respond to demands for a full student lifecycle management system. Prospect Pipeline vendors are adding features and modules for enrolled student management. Case Management vendors are integrating with prospect tools, acquiring smaller vendors with complementary features, or building that functionality themselves. Targeted CRMs continue to push for better integration avenues, while generalized CRMs continue to evolve their product positioning and configuration options.

Still, to date, there is no single product that offers advanced, integrated features across the entire student journey. Instead, colleges must make tradeoffs between the "breadth" of a student journey that a product may cover and the "depth" of the features the product includes (i.e., how many features are included, and how advanced those features are). Also, as products add features and extend across the student journey, they become more complex and expensive to implement and maintain as they often require additional data sources and integration instances.

Lower Cost & Complexity

$

Breadth of the Student Lifecycle Managed By Technology Tool(s)

$$$

Single Stage/Limited End User Types

Multiple Stages/Multiple End Users

Depth of Features/Functionality

Targeted Focus, Limited Functionality

May include only 1-2 end-user types within a specific unit; limited or no student view, and basic functionality focused on specific user need.
Ex: Basic Prospect Pipeline CRM
Ex: Targeted CRMs

Broad Focus, Limited Functionality

May include only multiple end-users who access data fields across the student lifecycle, but no student view, and few built-in features.

Ex: Generalist CRM

Data & IT Complexity

Targeted Focus, Deep Functionality

Focuses on either prospects OR enrolled students, but includes more advanced built-in features.

Ex: Prospect Pipeline CRM + Application/Enrollment Features
Ex: Advanced Case Management Tools w/CRM Features

Broad Focus, Deep Functionality

A system that serves multiple institution end-users + prospective and enrolled students at multiple stages of their journey with advanced, integrated features.

Still evolving in the market; currently requires multiple integrated tools

$$$

Higher Cost & Complexity

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CRMs on Campus: Product "Snapshots" and Use-Cases

A Peek Behind the Curtain…

As we have learned, CRMs are a tricky tool to categorize and define. Vendors continue to add features and shift product marketing language, while individuals within an institution may have widely varying "mental maps" of what a CRM might include.

Perhaps the most widely confused and conflated products in the CRM space are CRMs for Prospect Pipeline Management and Case Management tools that often have CRM features. While, as we have seen in the prior section, vendors in each of these spaces are continually adding functionality to bridge and connect Prospect Pipeline and Enrolled Student Case Management tools, they remain distinct products within most vendor portfolios.

In this section, we provide generic "snapshots" of each of these tools. These snapshots should provide a general sense of the kinds of users each tool serves, as well as a sampling of feature types that each product may include (though, of course, individual product packages vary). We recommend leveraging these snapshots to help your team differentiate between these products and to establish a baseline understanding around what each product's general capabilities.

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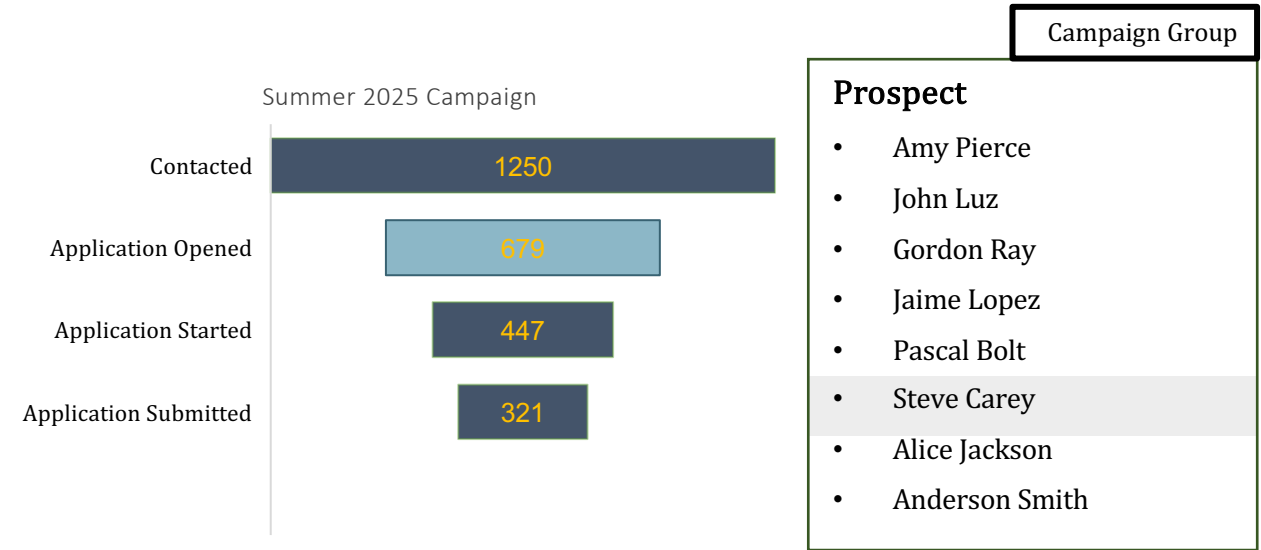## Product Snapshot #1: Prospect Pipeline Management CRM

Pipeline management helps staff prioritize outreach and track communication efforts and outcomes within a campaign. Contact profiles tend to focus on contact interaction history and tend to be used and maintained within a single department or few closely related units (e.g., recruitment and admissions) at the institution.

Main Users

- *Enrollment/Recruitment Offices:* Used to manage prospect leads and prospect interaction; may be paired or integrated with application management tools.

- **Prospects:* Some products will also include a prospect portal with features such as: Application management, admissions inquiry/helpdesk, recruitment event sign-up, etc.

Sample Features

- Contact Profile and Engagement History

- Prospect Inquiry and Tracking

- Campaign Management (e.g., filter/sort contacts, automated outreach via email, phone, text, etc.)

- Campaign ROI Data and Analytics (e.g., open rates, click-throughs, etc.)

- *(Add-Ons)* Prospect-facing portal, application management, event management

Summer 2025 Campaign

Contacted	1250
Application Opened	679
Application Started	447
Application Submitted	321

Campaign Group

Prospect
- Amy Pierce
- John Luz
- Gordon Ray
- Jaime Lopez
- Pascal Bolt
- Steve Carey
- Alice Jackson
- Anderson Smith

Steve Carey
Steve@email.com   [Email]   [Text]

Email History
- 4 Messages
- 2 Opened

- Attended Informational Session? __Y__
- Last Contact: 5/26/2025
  - Mr. Admissions Staff

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Product Snapshot #2: Case Management System + CRM Features

Case Management Systems often come with built-in CRM functionality and a range of more robust student success-focused features. These tools are typically used by advisors and student support staff, and some products may also offer a student-facing portion of the platform. These systems often pull data from across other institution tools, including (most commonly) the SIS and LMS.

Meeting Requests

Students

- Amy Poehler o
- John Legend o
- Gordon Ramsay o
- Jennifer Lopez o
- Usain Bolt o
- Steve Carell o
- Alice Munro o
- Anderson Cooper o

Steve Carell
A.A. Business Admin.
101056179

Message

- Success/Risk Factors
- Attendance
- Notes
- Referrals and Appointments
- GPA and Course Grades
- Documents
- Tags: First Generation

Success Team

Jane Goodall
Academic Advisor

Alexander Hamilton
Success Coach

Create Alert

View Pathway

Clearly **assigned "success team"** serve as central points of contact for student needs

Ability to **trigger alerts** for early intervention when a student goes off-track

Ability to manage and view progress along **academic plan*** (Not always included or integrated)

Case management tools help advisors prioritize student outreach and schedule meetings

A **comprehensive student profile and notes** help to keep faculty, advisors, and student support staff coordinated around student needs and next steps

Analytics and insights that can be leveraged by advising deans, VPs of Student Success, or other administrators to inform student success and equity strategy

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Challenges and Opportunities for CRM Usage

A Tale of Two Colleges:

Once, there was a college that invested in a case management/CRM tool. Their president aimed to leverage the tool – and the new data and analytics it could generate – to proactively intervene with students that most needed support, thereby allocating the institution's resources more strategically while boosting student success and equity. It worked. Georgia State University saw double-digit percentage increases in student retention and completion, with the largest gains for non-white students and lower-income students.

Years later, another institution used the same kind of tool. Only this time, the president sought to use the data outputs from the tool to "screen" for students he believed were destined for failure. Targeted students were then encouraged to drop out before the institution would need to "count them" towards official retention metrics. Thankfully, this strident ethical trespass was discovered, the president ousted, and the institution began a process of deep internal interrogation and systems reform.

CRM Success Requires More Than Just Buying the Right Tool:

One technology, two very different uses and outcomes. As dual narratives, they illustrate an important fact: Technology is a tool. It can be deeply impactful in all the best ways, or it can cause intractable harm. Or, more commonly, it can support student success and equity, or it can be another expensive investment that fails to live up to its promise. The difference-makers include a combination of the people and processes that undergird and orbit the CRM technology.

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A Hope for the Future: How could the student experience look with a full student lifecycle solution/ecosystem?

The following illustration captures what many higher education leaders and students envision as an ideal state in which technology supports (rather than impedes) student success and equity goals. In this hypothetical ecosystem, CRMs help to streamline student information across the student journey, allowing for institutions to offer more proactive, personalized, and holistic support. Again, note that achieving this level of breadth and functionality requires multiple product investments and a strong people-process apparatus.
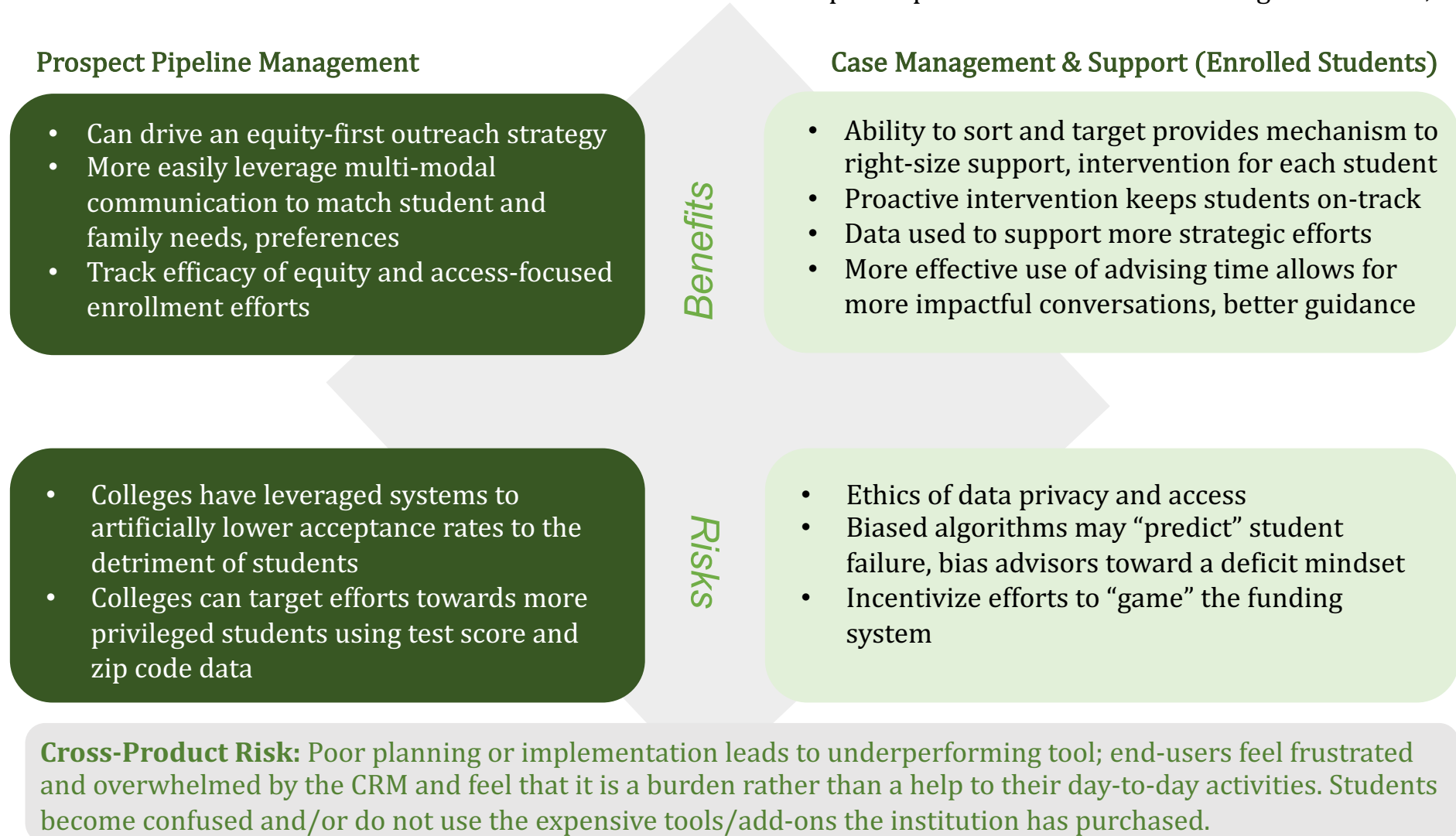
Javi Suarez
Prospective Student

Message

➢ High School
➢ Recruitment Event Participation
➢ Application Progress
➢ Financial Aid Application Progress
➢ Recruiter Notes (e.g., intended major)
➢ Documents
➢ Communication History and Preferences
➢ Tags: First Generation

Javi Suarez
A.S. Chemistry
101056179

Academic Advisor:
Jane Goodall

Message   Academic Plan

➢ Success/Risk Factors
➢ Attendance
➢ Notes (including pre-enrollment notes)
➢ Referrals and Appointments
➢ Alerts
➢ GPA and Course Grades
➢ Documents
➢ Communication History and Preferences
➢ Tags: First Generation; Student Employee

Javi Suarez
Hiring Manager, Systems Inc.

Message

➢ Graduation Year
➢ Program of Study
➢ Communication History and Preferences
➢ Tags: Honor Society; Alumni Mentor

▪ Javi attends a recruitment event and fills out an interest card; he receives a follow up text later that day and an email later in the week encouraging him to apply to the college.

▪ When Javi gets stuck and stalls on part of the application, the college proactively reaches out to offer to help with any of his questions.

▪ When Javi inquires about financial aid, he is automatically connected with an AI chatbot or, if his questions are more complex, support staff to walk him through the process; an online appointment scheduler makes it easy for him to find a slot that works for him.

▪ Javi's academic advisor is notified of Javi's enrollment and by consulting information collected across his enrollment process, can proactively reach out to connect Javi to the appropriate onboarding resources and faculty contacts.

▪ Javi's advisor and support team personalize conversations with him based on his interests and experiences; advising appointments are no longer consumed by his advisor navigating multiple systems and screens to find key information.

▪ Javi only has to "tell his story" once, the college supports him even as he transitions majors and moves across departments.

▪ Javi and his advisor are able to map out and adjust his academic pathway to align with his educational goals and life circumstances.

▪ As Javi enters and moves up the career ladder, career services helps to connect him to other alumni from similar backgrounds who serve as career mentors.

▪ Javi is invited to connect with rising new graduates that he can hire for open positions at his company.

▪ Javi receives relevant opportunities to upskill at the college throughout his career.

▪ College leadership can analyze the activities and experiences of students like Javi to understand the interactions most closely tied to positive outcomes for different student populations.

▪ These analytics can also be used to guide personalized outreach and support to future students like Javi, such that Javi and his peers don't fall through the cracks.

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Equity In Focus: How might a CRM support or impede student success?

While the vision for a seamlessly managed student experience is appealing, like all technologies, CRMs come with a host of caveats. The chart below details some of the most common risks and benefits associated with Prospect Pipeline CRMs and Case Management CRMs, respectively.

Prospect Pipeline Management

Benefits

- Can drive an equity-first outreach strategy
- More easily leverage multi-modal communication to match student and family needs, preferences
- Track efficacy of equity and access-focused enrollment efforts

Case Management & Support (Enrolled Students)

Benefits

- Ability to sort and target provides mechanism to right-size support, intervention for each student
- Proactive intervention keeps students on-track
- Data used to support more strategic efforts
- More effective use of advising time allows for more impactful conversations, better guidance

Risks

- Colleges have leveraged systems to artificially lower acceptance rates to the detriment of students
- Colleges can target efforts towards more privileged students using test score and zip code data

Risks

- Ethics of data privacy and access
- Biased algorithms may "predict" student failure, bias advisors toward a deficit mindset
- Incentivize efforts to "game" the funding system

Cross-Product Risk: Poor planning or implementation leads to underperforming tool; end-users feel frustrated and overwhelmed by the CRM and feel that it is a burden rather than a help to their day-to-day activities. Students become confused and/or do not use the expensive tools/add-ons the institution has purchased.

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Mitigating challenges and risks while maximizing the many opportunities that come with CRM implementation relies on not only the technology itself, but also the people and processes around it.

People/Resourcing

- **Leadership:** Ensures resourcing and messages commitment to the end-state vision

- **IT and Data Team:** Critical to CRM readiness and actively involved in implementation

- **End-Users**: Weighs in on end-state vision and product configuration given needs and preferences; pilots and (hopefully) uses tool effectively at scale

Process

- **Data Governance:** Policies and processes ensure data input, accuracy, and hygiene over time

- **IT Approach/Prioritization:** Ensures IT project has the focus and resources for implementation; team is not distracted by multiple technology projects at once

- **Stakeholder Engagement Planning**: Includes CRM usage mapping/protocols, communications around product implementation and launch, and product training plans

People

Process
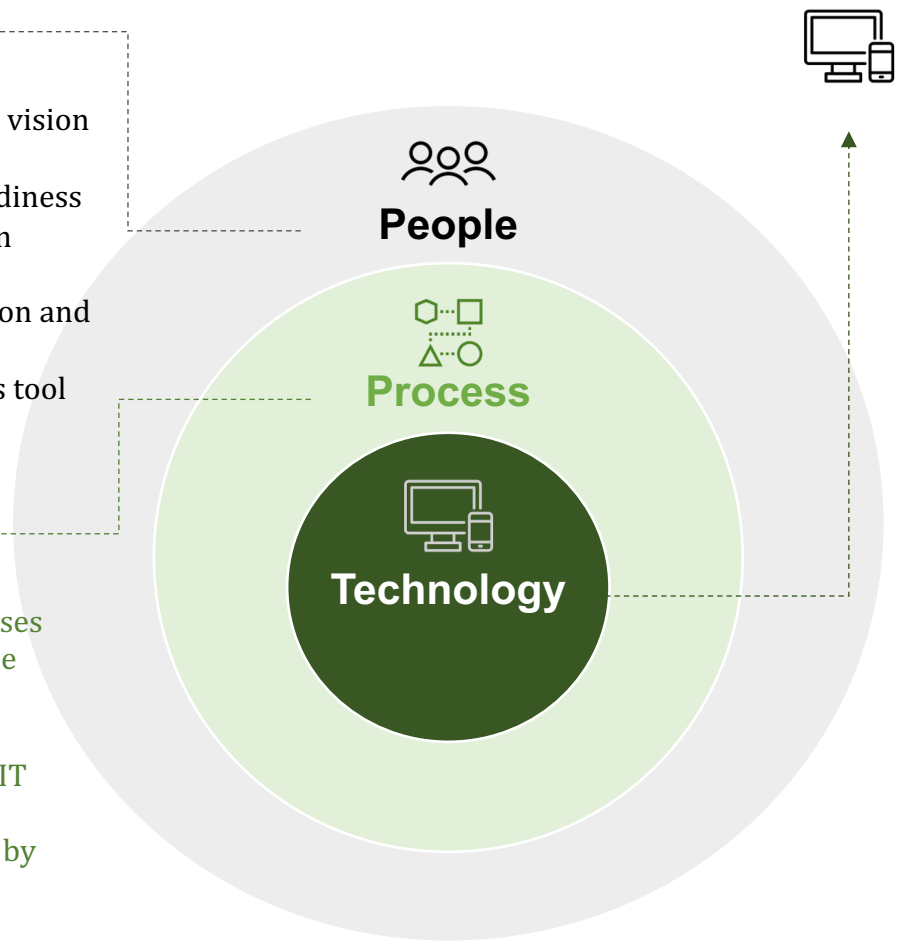
Technology

CRM Technology

- **Foundation/Data Fields:** Baseline product, key Integrations, and data fields/access are all functional

- **Features:** Specific capabilities are aligned with institution needs and workflows

- **User Interface:** Intentional and effective UX (User Experience) is embraced by end users

Technology Adoption Without People & Process Components Often Fails

"We dove into Salesforce not realizing that our data was a mess and we'd need to buy a bunch of add-on instances…"
-CTO, Regional Public

"We bought Starfish but didn't map out how it would work with our advising re-design. Now, everyone is confused and angry and we've wasted all this time while our students continue to struggle."
-VP Student Success, Community College

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Are We Ready? Assessing Your CRM Strategy

Do We Have the Right Team In Place to Manage Procurement and Implementation?: CRM procurement and implementation require input from multiple individuals across the institution, including end users, IT, IR or those involved in managing institution data, etc. It also requires close communication, negotiation, and coordination with potential or chosen vendors. For this reason, institutions with the strongest CRM implementations typically assemble a dedicated team for procurement and implementation. Within these teams, institutions often appoint a technical lead (e.g., from IT) and non-technical lead (e.g., from a unit or department representative of end users) lead.

- *See Building a Procurement Team* within Module 4.1 for more on how to assemble

What Do We Really Need?: Do we know which features, and therefore which *kind* of CRM we want? Procurement teams should speak with your end-users to develop a prioritized list of features. Within this discussion, you may discover that you need more than one type of CRM. If this is the case, we recommend thinking carefully about how you might want to sequence your technology procurement and implementation strategy; **we strongly recommend against attempting to procure and implement two major tools simultaneously.** This tends to strain institution bandwidth, fragment team focus, and rarely sets either tool up for sustained, long-term success.

- See *Creating User Stories to Guide* Procurement within Module 4.2, as well as Module 4 more broadly, for a more robust set of procurement guides and resources.

Note: Throughout this section, we have referenced a larger body of work that includes five curricular modules that contain more robust insights and resources around technology strategy, planning, procurement, and implementation. You may find these resources at theadacenter.org/curriculum

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Are We Ready? Assessing Your CRM Strategy (Continued)

How Will It Be Used?: Effective CRM implementation requires having a deep, concrete, and specific understanding of how workflows and day-to-day operations will change once the CRM is in place. Consider:

- Which processes and roles/positions will be impacted by the CRM? How will they change? Consider mapping these process changes from the student journey lens. Also consider: Who should be responsible for entering data into the CRM? Who will be utilizing the data within the CRM? What policies and processes that should govern each of these activities?
- Are there any restrictions or considerations that must be put in place to ensure the ethical use of the CRM? Consider data privacy standards and ethics around if, when, and with whom student information should be shared.

Is Our Data/IT Infrastructure Ready?: CRMs are only as good as the information that is fed into them. Consider the features and data fields your end-users need and want. How will that information get into your CRM? Specifically, work with IT/IR to consider:

- Do you need to move data from other tools to the CRM? If so, how will you make sure the CRM can integrate with those tools and/or otherwise access that data?
- Does your institution currently capture all the data inputs you need, and is that data accessible? For example, you may want student profiles to include a field for say, "scholarship status." CRM vendors can create that field, but if "scholarship status" is not recorded anywhere, or is formatted in a way that is not accessible, they cannot fill that field in accurately. Consider what new procedures may need to be implemented for data collection and storage.
- Finally, how will you ensure data integrity over time? Robust data governance protocols are critical to ensuring the information in your CRM remains accurate, robust, and reliable over time.

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Are We Ready? Assessing Your CRM Strategy (Continued)

What Is Our Plan for Communication, Training, and Roll-Out? A CRM can be implemented, but it is not useful if people do not leverage it. CRMs falter when the broader campus community is not aware that they exist, do not understand why they are useful, or are not sure how to use them. Communications and training efforts must therefore raise awareness about the project, offer clear case-making around why the institution is investing in a particular CRM and how it will ultimately help end users, and finally, help end users feel at-ease using the CRM in their day-to-day work. Consider:

- What is our messaging around why we are investing in this CRM and how it will help our institution and our students?
- Who (or which groups) needs to be bought in to the CRM initiative, and how to ensure we proactively bring them along in the procurement and implementation process?
- How do we ensure training prepares users to use the new CRM responsibly, effectively, and with an equity-forward mindset?
- What resources will we require for this training and support, both initially and over time?

What Internal Resources and Potential External Support Will We Need? Given the answers to the questions above, do you have a sense of what it will take – in terms of funding, staff capacity and skill, and team bandwidth – to procure and implement a CRM? Consider:

- What kind of planning, implementation, and training support to CRM vendors offer? (Note: This will vary widely from vendor to vendor and may come at an additional cost)
- Do we have the internal skill and capacity to focus on a CRM implementation? (Note: Often, institutions must temporarily set aside other technology initiatives to ensure the team can fully focus on a successful CRM implementation. See *Module 4.4: How Can I Prioritize Competing Technology Needs?* for more guidance on this topic.)
- Might we need external support to successfully implement a CRM. If so, what specific kind of support is needed, and how might we plan and budget for this service? (Note: See *Module 5.2: How Can We Augment Our Implementation Support Capacity*)

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