

ellucian

Ellucian Enterprise CRM Update

14 September 2015



1 CRM Overview

2 Recruiter

3 Pilot

4 Advancement Evolution

5 Summary and Questions

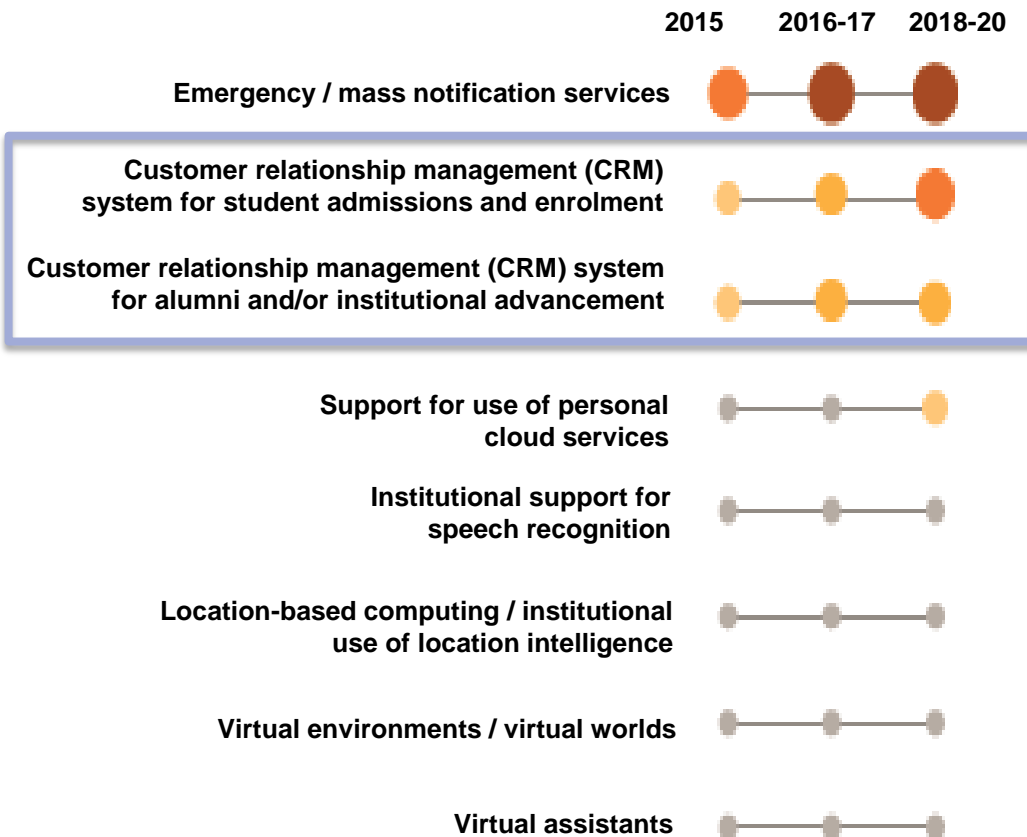
Ellucian Enterprise CRM

A stylized, low-poly illustration of a city skyline in shades of purple and blue. It features various buildings, including a prominent clock tower on the left, a domed classical building in the center, and a modern skyscraper on the right. There are also trees and clouds scattered throughout the scene.

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- ✓ **Limited** understanding of full relationship with the student
- ✓ **Hard** to engage in a conversation that is relevant
- ✓ **Unable** to make connections across departments / silos
- ✓ **Difficult** to get timely access to data for engagement
- ✓ **Inefficient** workflows and processes

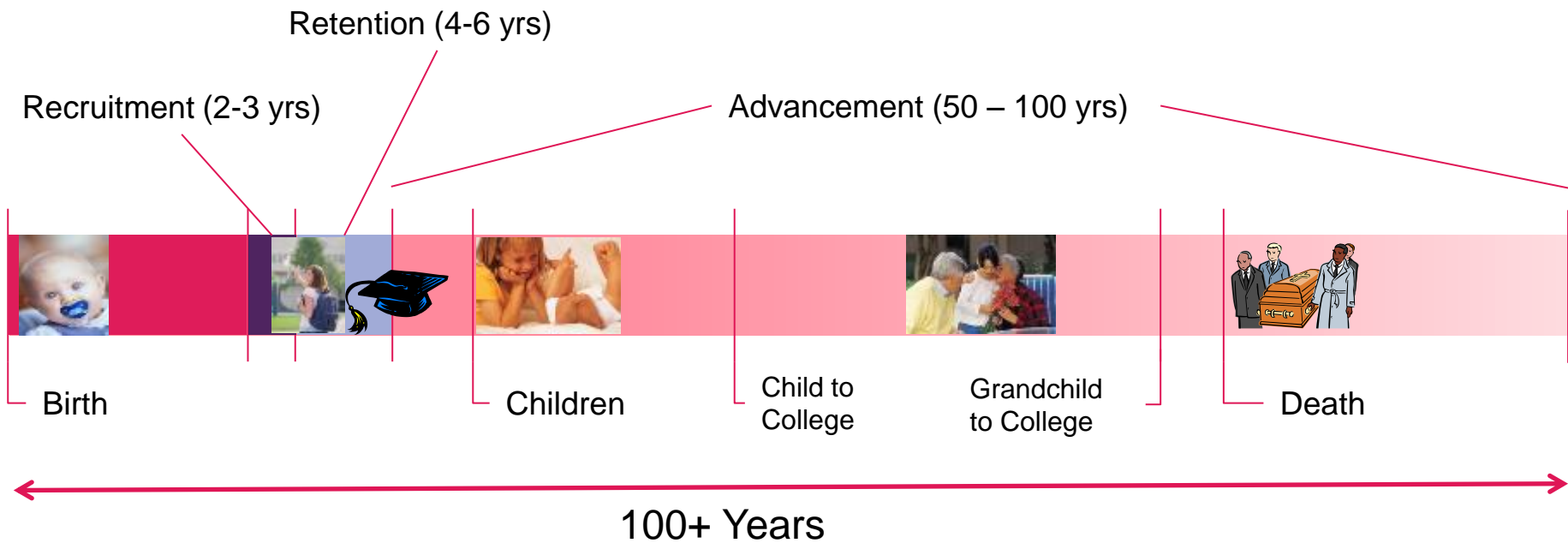
Top 10 Most Strategic Technologies for Higher Education



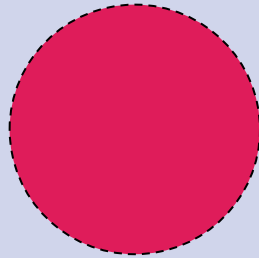
By 2018-2020, 40-80% of institutions will have adopted a CRM

Source: Grajek, Susan. *Educause ECAR. Higher Education's Top 10 Strategic Technologies for 2015.*

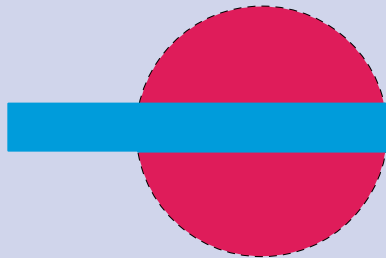
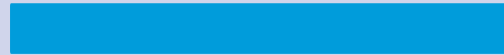
Higher Education Relationships Are Life Long



**Institution's
Needs**



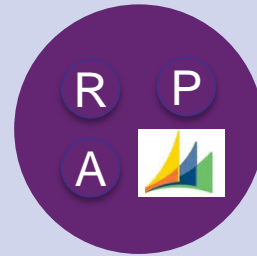
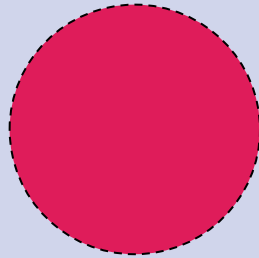
General CRM
Tech Platform



Institution Must Make
Large Investments in
Building and Maintaining a
Custom Solution

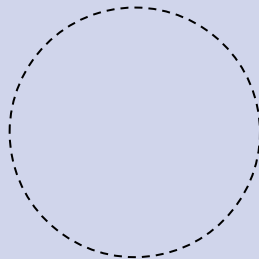


Institution's Needs



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- Microsoft Dynamics CRM Platform
- Ellucian Enterprise CRM Platform
- Recruiter
- Pilot
- Advancement Evolution



Small amount of tailoring
and configuration to meet
institution-specific needs



ELLUCIAN ENTERPRISE CRM

Recruiter

Student Success

Advancement

Ellucian CRM Platform

Enterprise class and
higher education
specific

Unparalleled
integration and
interoperability

Extensive technology
supports speed to value
and minimizes costs

Flexible
deployment
options

XE



↑
APIs | Web Services
↓



ERP

HR | Finance | Student | Financial Aid

Banner

Colleague

PowerCampus

Significant IP Specific for Higher Education

260

**Custom
Entities**

240

Plug-ins

110

**Processes/
Workflows**

100

Reports





Microsoft
Dynamics® CRM

Ellucian Awarded 2015 President's Club



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Recruiter



Pilot



Advancement Evolution

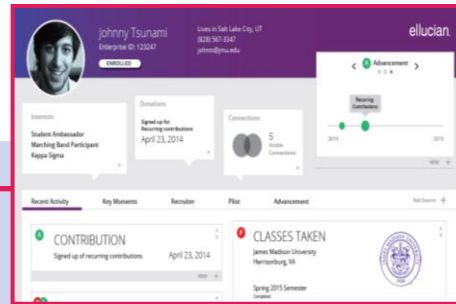


Ellucian Enterprise CRM

Ellucian Integration Hub



Next Step: Unified, 360 Degree View



Recruiter

Pilot

Advancement
Evolution



Ellucian Enterprise CRM

Ellucian Integration Hub



Unified, Integrated, Extensible Higher Education CRM

- ✓ World Class CRM Platform
- ✓ Ellucian Enterprise CRM Built Specifically for Higher Education
- ✓ Full Featured Higher Ed Applications (Recruiter, Pilot, Advance)
- ✓ Integration Hub with Higher Ed Data Model
- ✓ Extensible
- ✓ Unified 360 Degree View
- ✓ In the Cloud



- ✓ Faster time to value
- ✓ Lower total cost of ownership



Ellucian Recruiter

A stylized, low-poly illustration of a city skyline in shades of purple and blue. It features various buildings, including a prominent clock tower on the left, a classical building with a dome and columns in the center, and a modern skyscraper on the right. There are also trees and clouds scattered throughout the scene.

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- ✓ **Difficult** to identify, attract, and enroll best fit students
- ✓ **Inability** to execute on high-touch, personal experience prospects expect
- ✓ **Lack of visibility** into funnel status and campaign effectiveness
- ✓ **Difficult** to predict enrollment and ensure goals are met



**PERSONALIZE
COMMUNICATIONS**



**FOCUS ON
APPLICANTS, NOT
PAPERWORK**



**INTEGRATE
TEAMS**



MAXIMIZE RESULTS

- ✓ **Doubled** the prospect pool
- ✓ **Increased** applicants by **20%**
- ✓ **Increased** application completion rate by **80%**
- ✓ **Increased** yield by **10%** or more
- ✓ **Increased** enrollment by **15%**
- ✓ **Reduced** staff data entry for student application by **60%**
- ✓ **Reduced** time from application to enroll by **50%** or more



We were actually 12% over our enrollment goal. We attribute that success strictly to Recruiter.



We achieved a 34% cost reduction in our student search costs. Instead of paying outside vendors, we can much more easily manage our own communications to prospective students



Before, thousands of applications had to be manually entered. Now, 90 percent of our applications are received online and flow directly into Ellucian Recruiter.



We are able to substantially increase the volume and quality of communications. We've gone from having five touch points with a prospect to 15 or 20, without adding staff.

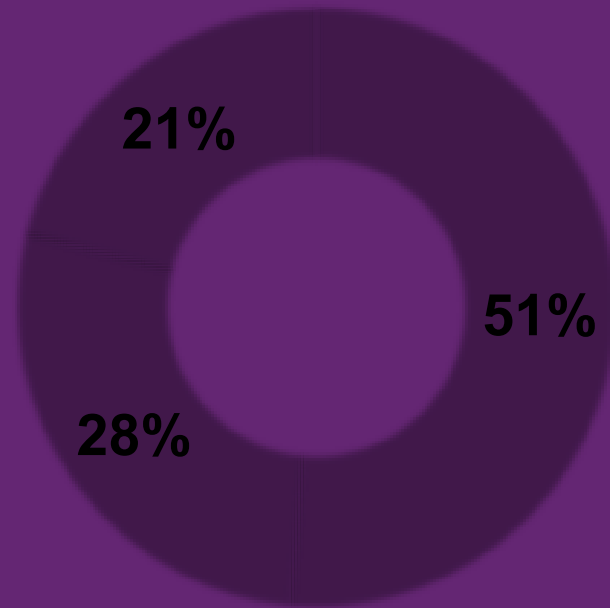


We saw a 16% increase in campus visits and a 29% increase in participation at a major scholarship event.



TRANSYLVANIA UNIVERSITY
FOUNDED 1780

340 Recruiter Clients



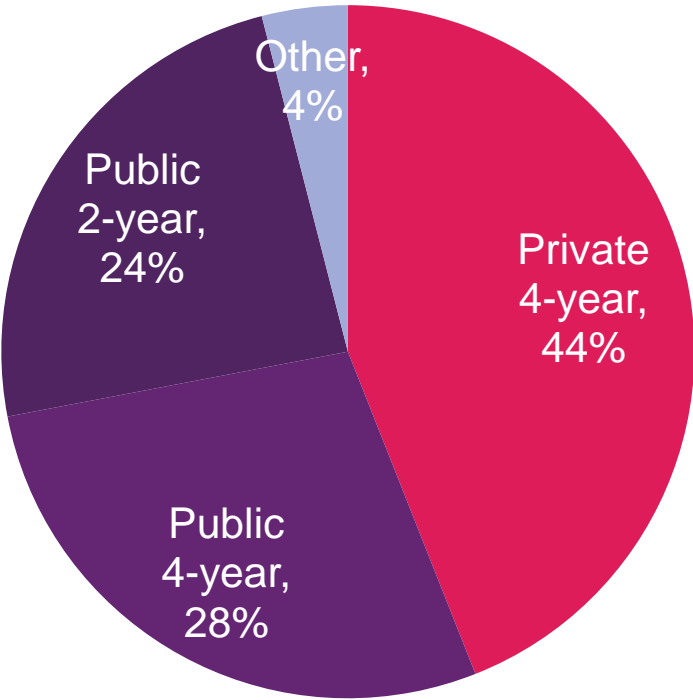
4 Year Private

4 year Public

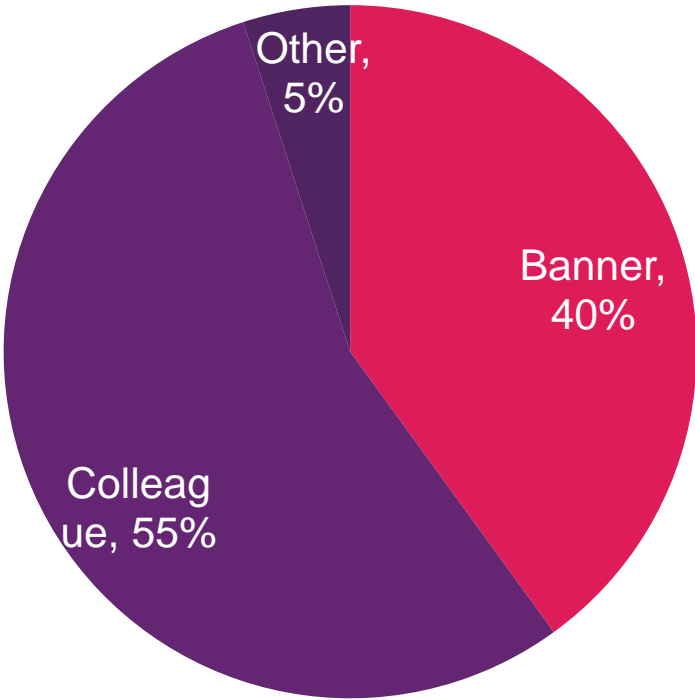
CC Public (2yr)

Recruiter Community Continues to Grow!

Institution Type



Student Information System



341 Clients (data as of June 2015)
Very active eCommunity

Regresa a Ellucian.com

Salir | Mi Cuenta | Solicitud en línea | Eventos

Recruiter En Español

Item	Description	Submission Status	Attachment
Acta de nacimiento*	Official transcript from High School		<input data-bbox="1619 639 1773 668" type="button" value="Browse..."/>
Resultados de Examen*	Official results of SAT/ACT tests		
Certificado Bachillerato*			
Certificado Secundaria*			
Fotografía*	Foto no mayor a 100 x 80		

Certificación y Firma

Please affirm the following before you submit your application.

Entiendo que: *

- Todos los documentos requeridos y entregados para completar el proceso de admisión pasan a ser propiedad de la Universidad Ellucian desde el momento de su entrega.
- No suministrar la información requerida en esta solicitud incluyendo la que refiere haber estado matriculado en otras instituciones educativas o proveer información falsa me hará inelegible para la admisión en Universidad Ellucian.
- Si una vez admitido en la Universidad Ellucian se descubre que no suministré información requerida, incluyendo a la que se refiere haber estado matriculado en otras instituciones educativas o proveer información falsa podría ser expulsado de la universidad.
- La distribución o reproducción no autorizada por cualquier medio material protegido por las leyes de reglamentación de derecho de autor (Copyright) puede conllevar a la imposición de sanciones civiles y criminales.

CERTIFICO que toda la información y documentación suministrada para completar el proceso de admisión es correcta y autorizo a la Universidad Ellucian a verificar información.

☒ Yes ☐ No

- 1. College Board Student Search Service**
- 2. Common Application Prospect Import**
- 3. Common Application Import**
- 4. NRCCUA TIP & Smart Approach Import**
- 5. ACT Test Score Import**
- 6. SAT Test Score Import**
- 7. Miscellaneous high priority CRs**

A Simple Upgrade to 3.8

- **You must be on Recruiter 3.7.1 to upgrade to Recruiter 3.8**
- **The only required upgrade component is the Recruiter CRM Server solution.**
- **Ellucian will perform the upgrade for hosted clients.**

ERP	Component	Supported
All	Payment Gateway (optional component)	On Premise: 1.3 or higher SaaS clients: Payment Gateway 1.4
Colleague	Colleague updates	- SU012823-4.1.0 - DMI update in support for Recruiter 3.6 and higher (same as 3.7.1, no new release expected) - SU63015.19-1805 Colleague update in support of Recruiter 3.6 and higher (same as 3.7.1)
Colleague	Colleague Web API	IN014283*9 Colleague Web API 1.7 and higher, including IN014283 Colleague Web API 1.8 IN015384*3 (requires SU015086-485*4 and SU014798-1805*36) Colleague Web API 1.8.1 IN015384*3 (requires SU015086-485*4 and SU014798-1805*36) Colleague Web API 1.8.1 (3.7.1 supported 1.5.1, 1.6.1 and 1.7)
Banner	Banner Recruiter Integration Manager	2.0.0.2 or 2.0.0.3 or higher (3.7.1 supported 2.0.0.2 and 2.0.0.3)
Banner	Student	8.6.1.1 or higher (3.7.1 supported 8.6.1.1 and 8.7. The SAT changes are in 8.8.2)
Banner	Banner Event Publisher	1.2.1 or higher (3.7.1 supported 1.2.1 and 1.2.3)
Banner	Financial Aid (optional component)	8.18.3 or higher
Banner	Banner Document Management (optional component)	8.4 or 8.5 with Web Access .NET 6.5 SP2 (3.7.1 supported 8.4 and 8.5)
PowerCampus	PowerCampus	8.6.0 or higher



Refugio Martinez

Dominic Soriano



Elma Cantu Aldrete

Todd Golden

Dinah Kinard

Angela Svoboda

Estefanita Valdez

- **Import format update release scheduled for next Fall**
- **Support for 3.x extends into 2017**
- **Contact your Customer Success Manager with questions**

Product	Projected Release Date	Actual Release Date	End of Programming Support	End of Full Tech Support	End of Limited Tech Support
Recruiter 3.5.1	3/7/2014	3/7/2014	6/30/2015	9/30/2015	12/31/2015
Recruiter 3.7.1	3/13/2015	3/13/2015	6/30/2016	9/30/2016	12/31/2016
Recruiter 3.8	8/12/2015		2/28/2017	5/30/2017	8/31/2017
Recruiter 3.9	8/10/2016		8/31/2017	11/30/2017	12/31/2017

For newly implementing Recruiter clients

- Streamlined user experience
- Faster data entry
- More data at your fingertips
- Universal search
- Simplified contact management
- Improved funnel management
- Enhanced mobile access
- Consolidated online help



**Recruiter 4.0 General
Availability Sept 30**

For existing Recruiter clients who need to upgrade

Data migration tools to move from CRM 2011 to CRM 2015

Scanner to assess your specific “customizations” / configurations and guide you for how

Significant streamlining of forms/views/processes can occur and reduction in your client-specific configurations based on beta client feedback



**Recruiter 4.x General
Availability TBA Sept 30**

10. A simplified, more personalized experience
9. Faster to get data in
8. More of the information you need at your fingertips
7. Easier to find what you need fast
6. Help is more helpful
5. Easier to track prospective students throughout the recruiting & admission process
4. Mobile friendly experience for staff and students
3. Modern user interface backed by research
2. Embedded best practices
1. Powered by your input

- **Review Recruiter 4.0 recordings and documents available now via eCommunities:**

- • **Recruiter 4.0 Pre-Release Overview document**
- • **Recruiter 4.0 Scanner Tool Webinar**
- • **Recruiter Readiness Plan and Q:A**

- **Additionally, stay tuned on eCommunities for release information on the following:**

- • **Recruiter 4.0 Scanner Tool software**
- • **Recruiter 4.0 ODSL courses**
- **Additional webinars**

Information presented here is subject to change at any time at the sole discretion of Ellucian and should not be relied upon in making any purchase decision

*** Dependencies are not yet confirmed and as a result, release timing is uncertain**

3-5 Beta clients

Will work with beta clients to complete the upgrade and data migration

Will make upgrade path generally available once several beta clients have validated the upgrade process and are live in production

Thank you to our incredible team of development partners

30 institutions regularly engaging since January

American University	MSU Denver	University of South Alabama
California Lutheran University	Mount Vernon Nazarene University	University of the Sciences
College of Southern Maryland	Niagara University	University of Toledo
Escuela Bancaria y Comercial	Northwestern Michigan College	University of Washington - Seattle
East Carolina University	Ocean County College	University of Washington - Bothell
Grandview University	Olivet Nazarene University	University of Washington - Tacoma
Illinois Institute of Technology	Pacific University	University of West Alabama
Kansas City Kansas Community College	Purchase College, SUNY	University of West Georgia
Kean University	Regis University	University of Wisconsin Eau Claire
Lafayette College	Saint Ambrose University	University of Wisconsin River Falls
Loras College	Sam Houston State University	Wheaton College
Loyola Marymount University	Susquehanna University	William Jewell College
Marywood University	Texas State University	Wilson College
	Thomas Edison State College	Winthrop University
	Transylvania University	

- **Direct integration between Recruiter & BDM**
 - View BDM documents in Recruiter *even if prospect or application has not been sent to Banner*
- **Create new prospects in Recruiter based on BDM document receipt**
- **Connect BDM documents to Recruiter applications**
 - View BDM documents as part of Recruiter application review
 - Update Supplemental Item status in Recruiter based on BDM document receipt
- **Address client feedback (Change Requests)**
- **Improve documentation**

- **Paper letters are the primary method to send decisions to prospective students**
- **Push admission decisions online to the WFE**
- **Batch Decision Updates**
 - Update group of prospective students admission decision based on selection criteria
- **Dashboard/Reporting**
 - What letters are waiting to go out on daily basis?
 - How many accepts, declines, etc.
- **Improve decision data on application**
 - Add decision date to prospect's application
 - Associate decision reason with a prospects application record from pre-populated list of reasons
- **Auditing and Data Tracking**

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Banner Analytics: Recruiting and Admissions Performance (RAP)

Performance Applications

Recruiting & Admissions
Performance

Student Retention
Performance

Advancement
Performance

Ellucian
Perform

Analytic Databases

Banner Enterprise Data Warehouse

Banner Operational Data Store

Ellucian
Recruiter



Banner
ERP



Financial Aid



Student



Registrar



Admissions



Enrolment
Management

Degree
Works



RAP Brings Data Together from both Banner and Recruiter

Banner Only	Banner-Recruiter Merge	Recruiter Only
Banner Attribute	Academic Study (Curriculum)	Recruiter Assigned
Banner Admission Cohorts	Person, Demographic	Recruiter Sources
Latest Banner Application Decision	Post-Secondary	Recruiting Teams
Financial Aid	Secondary School	Territory Goals
Applicant attributes not available in Recruiter	Preferred Address	Initial, Current Funnel Status
	Applications	Funnel Status entry/exit dates
	Test Scores	Desirability and Probability
	Interest	

Ellucian Pilot

A stylized, flat-design illustration of a city skyline in shades of purple and blue. The skyline includes various buildings, a prominent clock tower on the left, a domed classical building in the center, and a modern skyscraper on the right. There are also stylized trees and clouds scattered throughout the scene.

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Some Interesting Statistics

Challenges in 4-Year Institutions

- Only 39% of first-time, degree-seeking students actually achieve their goal of earning a Bachelors degree within 4 years
- 59% complete Bachelors degree within 6 years

Larger Challenges in 2-Year Institutions

- Only 26.5% of first-time students completed degrees or certificates from their starting institution within 6 years
- State and federal funding increasingly tied to performance
- 4-Year and 2-Year graduation rates have remained flat over the last 30 years

Macro-Economic Factors

- Student who graduate with a 2-Year or 4-Year degree can expect to earn up to 70% more than those with just a high school diploma
- US Economic Recovery depends in large part on how well we succeed at delivering education and retraining
- Building human capital to drive innovation is critical to sustaining the US's global standing

Sources: *National Center for Education Statistics, National Student Clearinghouse, Bureau of Labor Statistics*

What Progress has been Achieved So Far

Organizational Responses

- 60% of 2-year and 70% of 4-year institutions have identified an individual responsible for coordinating retention strategies.

Creating Defined Retention Goals

- 32% of 2-year, 54% of 4-year Private, and 66% of 4-year Public Institutions have established clear improvement goals for student retention from the first to second year

Creating Defined Completion Goals

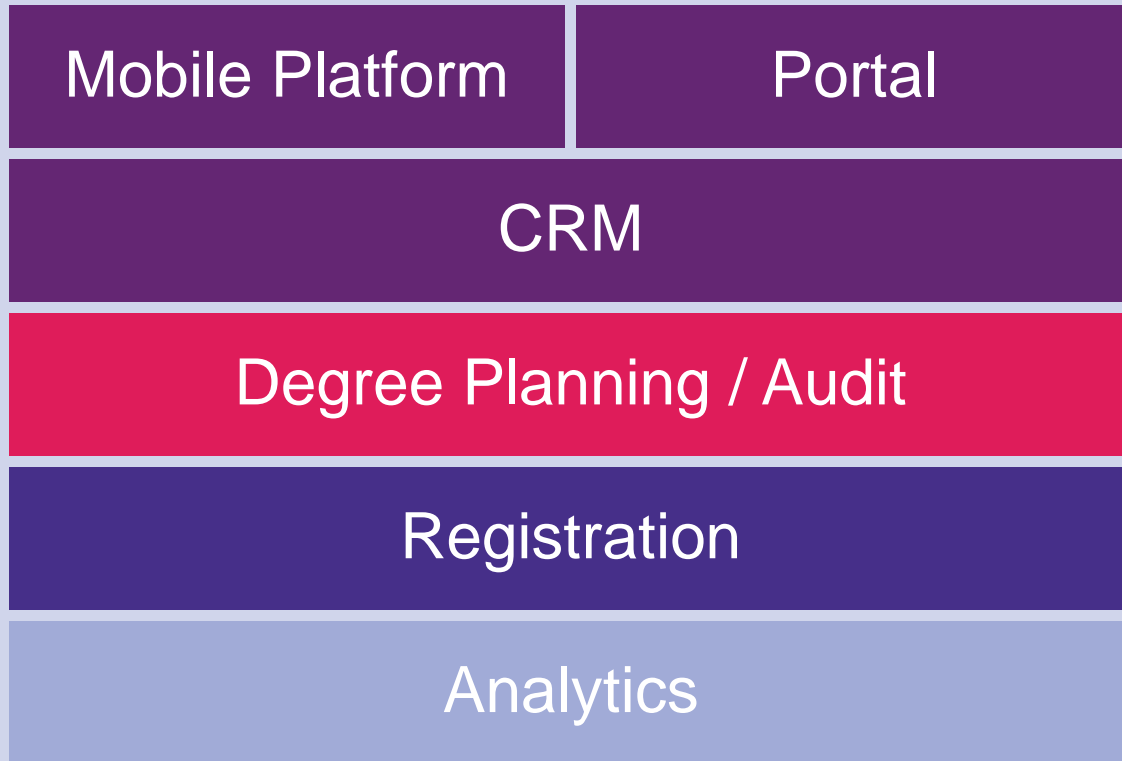
- 23% of 2-year, 36% of 4-year Private, and 53% of 4-year Public Institutions have established clear goals for degree completion

Despite the progress being made, moving the needle is still difficult

Source: *ACT National Student Clearinghouse*

Ellucian: Unified Technology Approach

An integrated offering for both students and staff



The Ellucian technology portfolio supporting guided pathways for student success





Identify



**Alert &
Engage**



**Involve &
Coordinate**



**Measure &
Inform**

Collaboration and visibility across the institution



- ✓ Enable everyone who supports Student Success efforts with a complete view of interactions and engagement
- ✓ Identify at-risk students and sources of risk early so you can intervene before it's too late
- ✓ Automate meaningful, personalized student engagement; facilitate consistent, timely communication
- ✓ Match students with the right student success staff and programs to best meet their needs



21 institutions have licensed Pilot so far

- ~50% Community Colleges
- ~50% Banner / ~50% Colleague

More than 50% of demos are now Recruiter plus Pilot together

- Validates the need for enterprise CRM solutions

RFP activity for Enterprise CRM Solutions is increasing significantly

Engage Students to Participate in
“High Impact Practices”

New Student Intervention Strategy

Automated outreach to students who have not participated in:

- Developmental courses
- Orientation
- College Success Seminar
- Academic planning

Adviser follows up with phone call

Returning Student Intervention Strategy

Automated outreach to students who have not reenrolled.

- 1) Email outreach
- 2) Alternative email outreach
- 3) Phone outreach

Results: 315 of 1,566 at risk returning students re-enrolled for Fall 2015
Significantly higher participation in High Impact Programs (20% to 50%)

Results Achieved With Pilot

High Impact Practices ▾

Student Success Course

Attended CSS-100
CSS-100 High Impact Practice



Orientation

Attended Orientation
Students who attended orientation



Developmental Courses

Students who tested into DEV ED and enrolled in 2 or more DEV ED courses
Students who tested into DEV ED



Academic Planning / Goal Setting

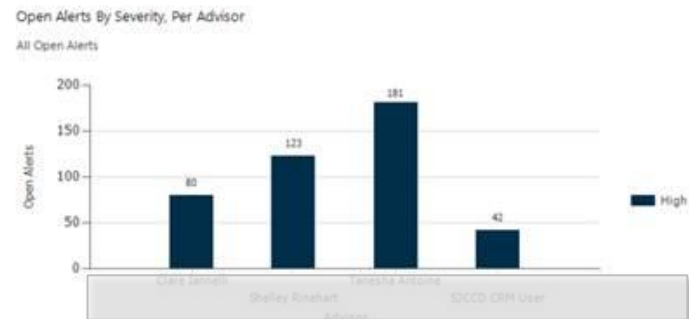
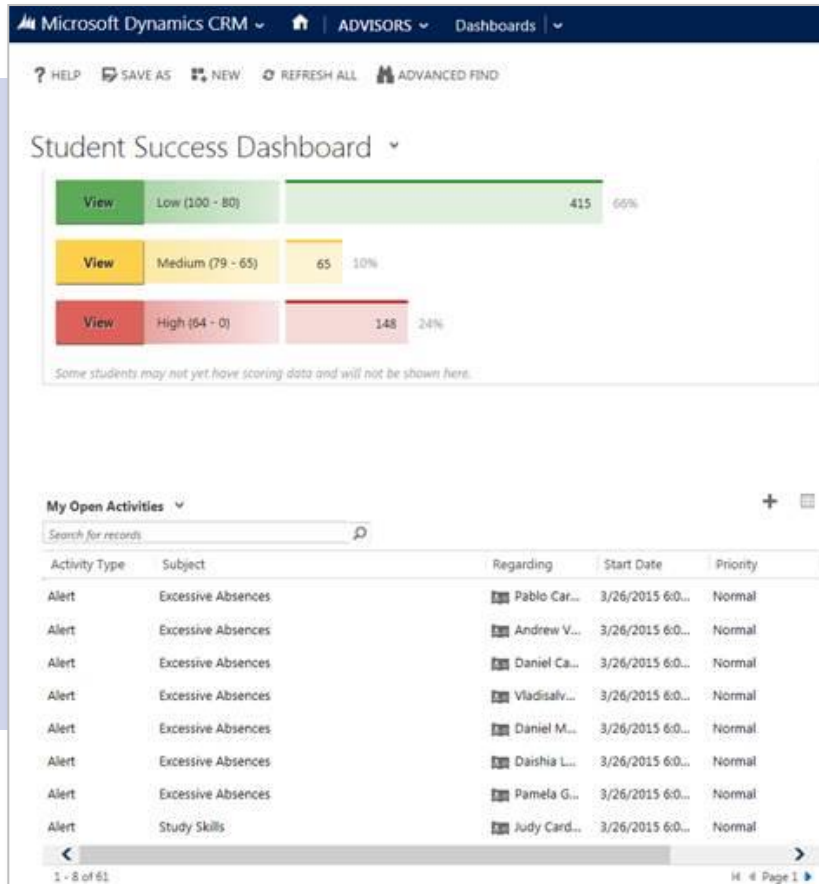
Academic Goal Setting and Planning - APPT within 12 months or have a MAP on record
Academic Goal Setting and Planning



Results Achieved With Pilot



Identified **148**
high risk students
and generated **61**
alerts **3** days after
going live.



Within the first 2 days, identified:

- **100+ first year, full-time students** who were deemed high risk based on a combination of criteria indicating preparation for college, demographics, student & academic performance.
- **~20 students** who were best suited to apply for a Fulbright scholarship

Now we are in the process of implementing **multi-step engagement plans that connect high risk students with timely & direct access to relevant campus resources** & staff.



A Pilot Alert or Engagement Plan Triggers a Communication

Microsoft Dynamics CRM

SUCCESS ENGINE

Mobile Notification ...

Mobile notification ...

CRM for Outlook

See how CRM for Outlook makes you even more productive.

Get CRM for Outlook

HELP

SAVE

SAVE & CLOSE

SAVE & NEW

DEACTIVATE

DELETE

ASSIGN

...

MOBILE NOTIFICATION TEMPLATE : INFORMATION

Mobile notification template of Fall registration

General

Name *

Mobile notification template of Fall registration

Mobile Headline *

Watch your email for your fall registration date!

Headline *

Fall registration dates will be published beginning March 23. Watch your email for your registration date! Fall web registration begins April 13!

Activity Code

--

Description *

Template to send mobile notification to students of the upcoming fall registration.

Destination Label

--

Destination URL

--

Push Notification

Yes

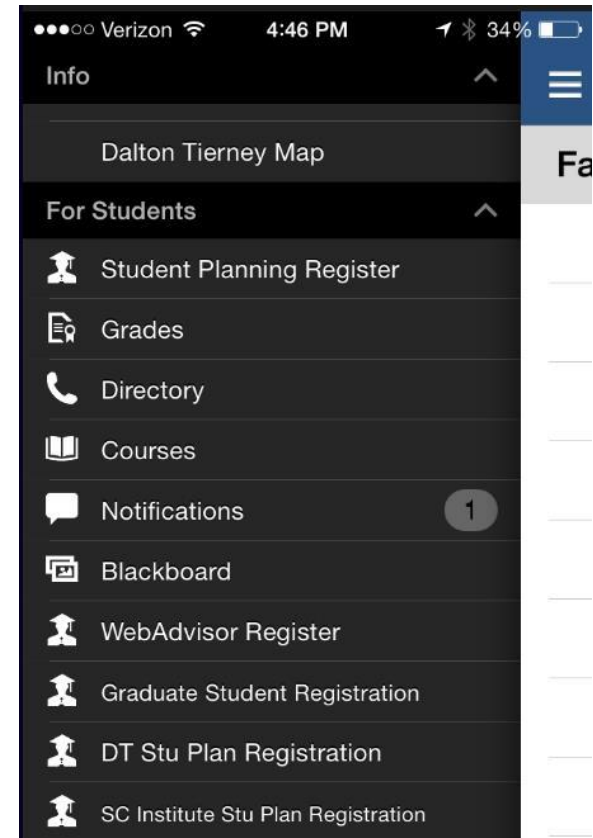
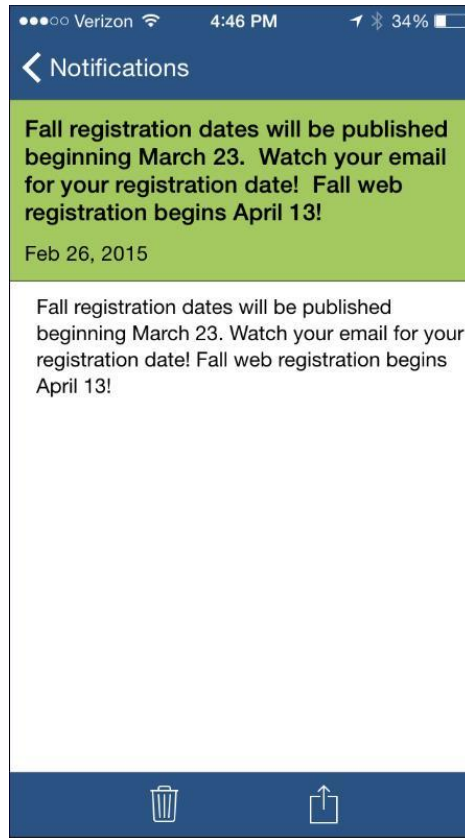
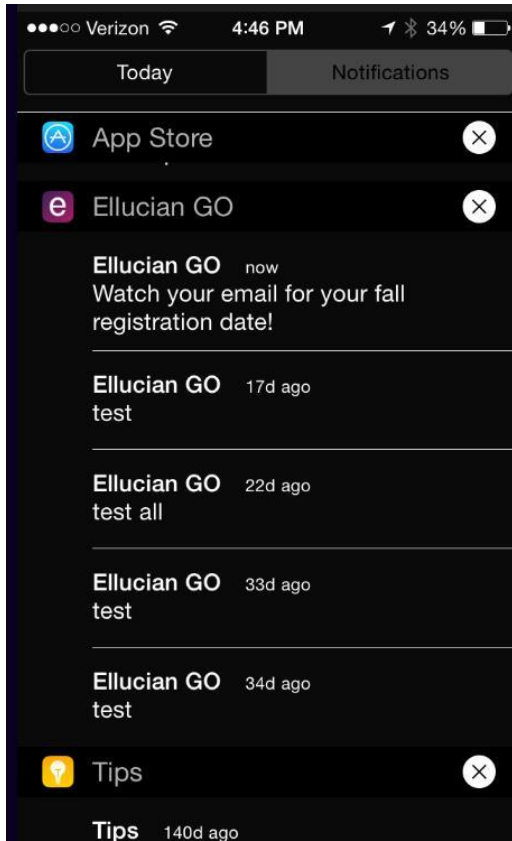
Expiration Offset

--

Owner *

CRM Admin

Native Mobile Push Notification



The Communication is Tracked on the Student's Record in Pilot

Mobile Notification: Watch your email for your fall registration date! - Microsoft Dynamics CRM - Windows Internet Explorer

SETTINGS Mobile Notifications Watch your email fo...

CRM Admin PilotDec2014

HELP SAVE MARK COMPLETE SAVE & CLOSE SAVE & NEW DELETE CLOSE MOBILE NOTIFICAT...

MOBILE NOTIFICATION : INFORMATION

Watch your email for your fall registration date!

Priority	Scheduled End	Activity Status*	Status Reason
Normal	--	Open	Open

General

Mobile Headline*	Watch your email for your fall registration date!
Headline*	Fall registration dates will be published beginning March 23. Watch your email for your registration date! Fall web registration begins April 13!
Description*	Fall registration dates will be published beginning March 23. Watch your email for your registration date! Fall web registration begins April 13!

Activity Code	--
Regarding	Alycia Aitken
Destination Label	--
Destination URL	--
Expiration	--
Scheduled Send On	--
Sent On	--
Push Notification	Yes
Owner*	CRM Admin

Powerful Web Services Integration Enables More Effective Interventions

Microsoft Dynamics CRM

ADVISORS

My Students

Alycia Aitken

Create

Enter Search Item

Brian Brian Morrow
Pilot11March

HELP

REFRESH DATA

ADD TO ENGAGEMENT LIST

EMAIL A LINK

SHARE

FOLLOW

RUN WORKFLOW

PERSON : STUDENT

Alycia Aitken

ERP ID
0001989

E-mail
alycia_aitken@

Phone
831-744-8908

Summary

Student Details

Current Academic Standing
Academic Level
Class Level
Overall GPA
Current Success Score
Current Success Score Record
Scoring Plan
Is Student Athlete
Pager

Probation
Undergraduate
First Year
3.00
56
KPC Success plan --- 8/10/2015
KPC Success plan
No
--

Success Score Performance

Retrieving student data...

Current and Future Enrolled Student Secti...

Term	Name	Section	Course Score	Course Score Reco..
No Student Section records found.				

Majors

Student	Major	Start Date	End Date	Department
Alycia Aitken	Classical Studies	4/1/2015		
Alycia Aitken	Grad Business Managem...	8/25/2009		Management

Active

Read only

Administrator Requests A Data Refresh

Microsoft Dynamics CRM | ADVISORS | My Students | Alycia Aitken

REFRESH DATA | ADD TO ENGAGEMENT LIST | EMAIL A LINK | SHARE | FOLLOW | RUN WORKFLOW

ERP ID: 0001989 | E-mail: alycia_aitken@ | Phone: 831-744-8908

Student Details

Current Academic Standing: Probation
Academic Level: Undergraduate
Class Level: First Year
Overall GPA: 3.00
Current Success Score: 56
Current Success Score Record: KPC Success plan --- 8/10/2015
Scoring Plan: KPC Success plan
Is Student Athlete: No
Pager: --

Current and Future Enrolled Student Section

No Student Section records found.

Majors

Student	Major	Start Date	End Date	Department
Alycia Aitken	Classical Studies	4/1/2015		
Alycia Aitken	Grad Business Managem...	8/25/2009		Management

Success Score Performance

Last updated 8/12/2015 2:26 PM

Score: Success | Term: 2015 Second Summer Term

Web Services Update Data From Banner On Demand

General Student SGASTDN 8.5.8 (NAT1)

ID: 0001989 Aitken, Alycia Student Summary Term: 201510 View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

Curriculum Field of Study

Curriculum Record 1 of 1

Current: ☒ Replace: Update: Duplicate: Roll Learner: ☒ Yes ☐ No ☐ Default Roll to Outcome:

Activity: ACTIVE Apply to Graduate: Graduation Sequence: Rolled to Outcome: ☐

Study Path: 99 User ID: TBROBYN

Term: 200607 Session 2006-07 Activity Date: 04-DEC-2006

End Term: Start Date: 01-APR-2015

Catalog Term: 200607 Session 2006-07 End Date: 12-AUG-2015

Priority: 1

Program: BA BA Classical Studies

Level: UG Undergraduate

Campus: M Main

College: FA Faculty of Arts

Degree: BA Bachelor of Arts

Student Type: Site: Rate: Leave of Absence: Leave From Date: Leave To Date: Expected Graduation Date: Graduation Term: Graduation Year:

Admission Type: UA UG Admissions Office

Admission Term: 200607 Session 2006-07

Application: 1

Matriculated Term:

Latest Information Becomes Immediately Visible in Pilot

Microsoft Dynamics CRM | ADVISORS | My Students | Alycia Aitken | Create | Enter Search Item | Brian Brian Morrow Pilot11March

? HELP | REFRESH DATA | ADD TO ENGAGEMENT LIST | EMAIL A LINK | SHARE | FOLLOW | RUN WORKFLOW

PERSON : STUDENT
Alycia Aitken

ERP ID: 0001989 | E-mail: alycia_aitken@ | Phone: 831-744-8908

Summary

Student Details

Current Academic Standing: Probation
Academic Level: Undergraduate
Class Level: First Year
Overall GPA: 3.00
Current Success Score: 56
Current Success Score Record: KPC Success plan --- 8/10/2015
Scoring Plan: KPC Success plan
Is Student Athlete: No
Pager: --

Current and Future Enrolled Student Section

Term	Name	Section	Course Score	Course Score Reco..
No Student Section records found.				

Majors

Student	Major	Start Date	End Date	Department
Alycia Aitken	Classical Studies	4/1/2015	8/12/2015	
Alycia Aitken	Grad Business Management...	8/25/2009		Management

Active | Read only

Success Score Performance

Last updated 8/12/2015 3:04 PM

Score: Success | Term: 2015 Second Summer Term

0 22 Medium 63 100

Score: Success | Term: 2015 Second Summer Term

100 95 90 85 80 75 70 65 60 55 50 45 40 35 30 25 20

6/26 6/26 6/26 6/26 6/27 6/27 6/27 6/27 6/28 6/28 6/29 8/10

Advancement Evolution

A stylized, flat-design illustration of a city skyline in shades of purple. It features various buildings, including a clock tower, a domed classical building, and modern skyscrapers, interspersed with trees and clouds.

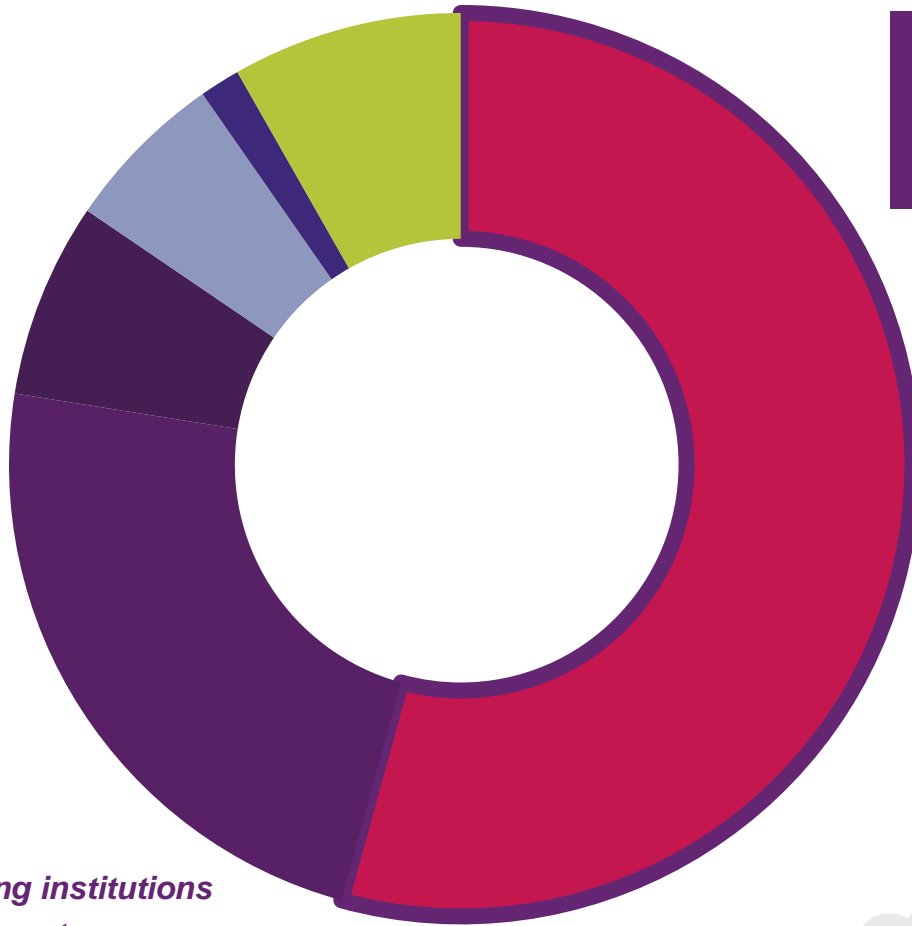
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Advancement Evolution Addresses Challenges

- ✓ Provide a **unified view of constituent interaction** to better understand the relationship
- ✓ Help staff focus on priorities by **eliminating inefficient processes**
- ✓ **Engage with constituency** more deeply at any point in the relationship
- ✓ Support **faster and better decisions** about strategies and tactics with integrated and consistent data
- ✓ Identify goals and **measure progress** towards them

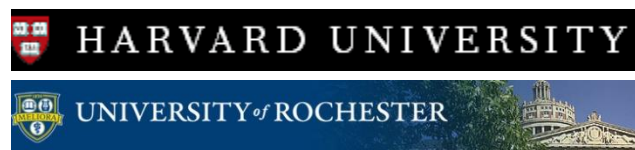
57


**Ellucian: \$15.9B
Raised**



*1060 reporting institutions
VSE 2013 Report*







**MODERNIZED
CONFIGURED
INTEGRATED
MIGRATION READY**

60

----- Jan 2015 ----- Oct 2015 ----- Mid 2016 ----->

Alpha

- Cloud; shared sandbox
- Seeded data - no migrations
- Exploring, providing feedback, planning

Beta

- Formal program
- On-premises and hosted/cloud options
- Feature, migration, & integration testing
- Production ready planning

Pre-GA Availability

- Comprehensive/full feature advancement solution
- Migration solutions for Ellucian advancement solutions
- APIs for ecosystem integration

General Availability determined by **client success** during Pre-GA Availability

61

Advancement: Alpha Institutions

Advance

- Arizona State University Foundation
- Carleton College
- Carnegie Mellon University
- Case Western Reserve University
- Emory University
- Franklin & Marshall College
- Massachusetts Institute of Technology
- New York University
- Oregon State University Foundation
- Princeton University
- Rutgers University Foundation
- Tufts University
- University of California Berkeley
- University of Massachusetts System
- University of Missouri System
- University of Rochester
- University of Vermont
- University of Washington

Banner Advancement

- Southern Alberta Institute of Technology Canada
- Temple University
- Tyler Junior College
- University of Alabama Birmingham
- University of Denver
- Western Washington University
- Xavier University

Colleague Advancement

- American University
- Mount Holyoke College
- St Ambrose University
- University of Tulsa
- Washington & Jefferson College
- Westminster College

**We will continue to support
our current advancement solutions
while you prepare
to adopt the next-generation**

Upgrade Program
for Advance, Banner Advancement,
and Colleague Advancement Clients!

Summary

A stylized, monochromatic purple illustration of a city skyline. It features various building shapes, including a prominent clock tower on the left, a classical building with a dome and columns in the center, and a modern skyscraper on the right. There are also stylized trees and clouds scattered throughout the scene.

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Unified, Integrated, Extensible Higher Education CRM

- ✓ Ellucian CRM Platform Built Specifically for Higher Education
- ✓ Full Featured Higher Ed Applications (Recruiter, Pilot, Advance)
- ✓ Integration Hub with Higher Ed Data Model
- ✓ Extensible
- ✓ Unified 360 Degree View
- ✓ In the Cloud



- ✓ Faster time to value
- ✓ Lower total cost of ownership



Thank you!

Dana Hamerschlag

Vice President, Product Management

Dana.hamerschlag@ellucian.com

A stylized, monochromatic illustration of a city skyline in shades of purple. It features various building silhouettes, including a prominent clock tower on the left, a domed classical building in the center, and a modern skyscraper on the right. There are also stylized trees and clouds scattered throughout the scene.

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