



Scaling the Power of HBCU Connections: Advancing a CRM Network Solution

FOREWORD BY:

Dr. Quinton T. Ross., Jr.
President of Alabama State University

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About the Organizations



Founded in 2018 by Tony James, chairman of Jefferson River Capital, and Jim Runcie, CEO of Partnership for Education Advancement (Ed Advancement) and former COO of Federal Student Aid (FSA), Ed Advancement is a nonprofit that works collaboratively with HBCUs in support of their mission to advance socioeconomic mobility for their students. By providing highly individualized, sustainable solutions, Ed Advancement helps HBCUs serve their students and meet strategic enrollment, graduation and advancement goals.



For more than 20 years, Whiteboard Advisors has collaborated with the most transformative organizations, individuals and investors in education. Our diverse team of educators, wonks and storytellers brings in-depth understanding of policy, technology and practice to bear on cutting-edge research, powerful writing, and the design of communications and advocacy campaigns that challenge the status quo. Whether we're working with startups or the most established organizations in education, we're passionate about taking breakthrough ideas to scale.

About the Authors

ERICA PRICE BURNS

Erica Price Burns is a senior vice president at Whiteboard Advisors where she leads a team that advises Fortune 500 companies, foundations and investors working at the intersection of policy, practice and innovation. For more than a decade, Erica's research and writing on the connections between education, equity and economic mobility have been featured in CNBC, Wired, TechCrunch, Forbes and the Stanford Social Innovation Review, among others. Prior to joining Whiteboard Advisors, Erica worked for U.S. Senator and former Denver Public Schools Superintendent Michael Bennet and served in a variety of roles in Democratic politics and on Capitol Hill. Erica graduated magna cum laude from Washington University in St. Louis where she earned a degree in political science and economics.

TAYLOR HENRY

Taylor Henry is a director at Whiteboard Advisors where she focuses on higher education advocacy and state strategy. She joined Whiteboard from the Association of American Universities where she was a federal relations officer. There she led the association's advocacy for the National Endowment for the Humanities and overall budget and appropriations issues related to leading research universities, students and science agencies. Taylor holds a bachelor's degree in American government from the University of Virginia with a minor in leadership.

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As the 15th president of Alabama State University (ASU), a threetime graduate of ASU and a second-generation HBCU alumnus, I am committed to the vision and mission of my alma matter; but I also believe that leading an HBCU demands a passion and commitment to the broader mission of the 101 currently operating HBCUs.

HBCUs are a vital national asset; they are institutions of historic excellence with a significant strategic role in driving social mobility in our country. HBCUs enroll nearly 300,000 students, a majority of whom are from lower-income backgrounds (more than 70% of Alabama State students use a Pell Grant to fund their education) and are typically the first in their family with college experience. At times, the success of HBCUs as drivers of opportunity can be overshadowed by our campuses' significant resource constraints; however, in my view, it only makes the impact of HBCUs much more impressive. The average endowment per student at HBCUs is one-third the size of public non-HBCUs, and the disparity is even greater in contrast to private schools. Yet, the HBCU mobility rate — the percentage of students from low-income households who earn their way into a higher income — is 34.3%, compared with a national average of 15.8% and 7.4% among the “Ivy plus” colleges.

Even amid those resource challenges, HBCUs have stood out for their capability to foster connections and build communities in a way that fuels student persistence and graduation for the nation's most vulnerable populations. We have relied on our human capital to ensure students feel a sense of belonging on campus with multiple connection points with our faculty and staff. As we position our campus for a future where continuous innovation allows for flexibility and growth, Alabama State — like many HBCUs — is looking to strengthen its technical framework without sacrificing the human quality that has become a hallmark of our students' experiences.

When Ed Advancement offered Alabama State an opportunity to implement a new student life cycle customer relationship management system (CRM), it was about reimagining the student experience, increasing engagement and ensuring positive outcomes for our population of students. The CRM will become a community-scaling system by increasing interactions between faculty, staff and our students while also providing broad, cross-campus visibility of individual students' experiences.

Like serving on the White House HBCU Initiative or collaborating with leaders through my fraternity, participating in this project offers a tangible way for me to extend my leadership beyond my individual campus in support of advancing educational opportunities and social mobility broadly in our country. HBCUs are uniquely positioned to inform the solutions and strengthen the tools used in higher education to better serve the students who come to our institutions seeking opportunity and meaningful outcomes. I hope that Alabama State University's transparency about our implementation journey creates a network effect where other campus leaders leverage our experiences to refine their operations to provide improved services for their students. In this opportune time to advance the promise of higher education for all through HBCU-led design and discovery, we are proud to be change-makers.

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Executive Summary

One of the great conundrums of education in America is that many students who are qualified and eager to earn post-secondary degrees stop before they even begin. In fact, 40% of those who intend to go to college don't matriculate. Overwhelmingly, they are students of low and moderate income and students of color, and the higher education sector (broadly speaking) has done very little to reach them.

There are some exceptions among institutions, of course. Historically Black Colleges and Universities (HBCUs) serve a student population with [twice](#) as many students eligible for Pell Grants, and [50% more](#) first-generation students than non-HBCU institutions. And at a time when the value of higher education as an engine for economic mobility has been questioned, HBCUs are a bright spot, with graduates who are 51% more likely to move to a higher-income quintile than graduates of other institutions.

Research from McKinsey suggests that “higher enrollment and retention and graduation rates [at HBCUs] could translate into an increase in Black worker incomes of \$10 billion per year.” That’s \$10 billion that could support Black families and communities and foster the next generation of HBCU alumni.

With such a profound opportunity, if there are ways we can innovate or learn from other sectors to help more students find their way to HBCUs, apply, persist and graduate, we should find ways to do so.

What can we learn from the marketing strategies of companies, who have adopted new tools to improve revenue? Could the same techniques be used to help solve the summer melt challenge and help more students meet their academic aspirations?

The customer relationship management platform (CRM) is omnipresent in other sectors — over [90%](#) of companies with more than 10 employees use one. Yet today, fewer [than half](#) of all colleges and universities use a CRM.

The \$50 [billion](#) CRM market is built on a relatively straightforward premise: That by knowing more about what your customers want and need and sending them the most relevant information and offers (often in an automated, high-frequency approach called a drip

campaign), companies in sectors from retail to hospitals to telecom can cultivate new customers, encourage more or bigger purchases, and improve their bottom line. It's a clear example of how small changes can drive big impact.

Through the Historically Black Colleges and Universities Digital Transformation (HBCU Dx) initiative, the Partnership for Ed Advancement is enabling colleges to use the same technology that reminds individuals when they've left items in a online shopping cart or that it's time for an eye exam or haircut to help students complete applications, navigate financial aid or sign up for housing. CRMs can automate time-consuming practices (freeing up staff time for higher-value, student-facing work), connect otherwise siloed data sources, and provide admissions and student support professionals with the data they need to provide outstanding support to students.

In partnership with Slate, a CRM from Technolutions, HBCU Dx provides partner institutions with a nearly plug-and-play technology solution that enables HBCUs to unlock a highly customizable and powerful CRM without taking on the resource-intensive build needed to set up the CRM. It's the difference between sewing a stuffed animal from scratch and making one at Build-A-Bear, representing a significant leap in feasibility and accessibility for institutions.

Over the last two years, HBCU Dx has supported development of two core instances of Slate – Core One and Core Two – each offered to a set of HBCU partners.

Core One provides a pre-built core, developed by a consultant in partnership with each organization, and supports data integration. The consultant refined the core for each institution and supported data integration.

While many aspects were successful, the initial Core One launch also provided useful lessons for HBCU Dx. Core Two offers a more robust core (developed by the Ed Advancement team) and a community implementation model (with institutions learning from one another as they implemented). While Core One offers a CRM for admissions only, Core Two provides access to modules for admissions, student success and advancement.

Core Two, in particular, holds promise as a scalable solution to support admissions (beginning from the very top of the prospecting funnel and extending beyond admissions to prevent summer melt) as well as student success and advancement. The community model of implementation builds expertise and confidence within institutional staff, and the ability to push new reports, templates or other resources out to institutions enables Ed Advancement to scale its ongoing support.

Continuing this work within each partner institution – and catalyzing additional HBCUs to adopt the solution – requires an understanding of both the process and the likely outcomes.

Quantifying the total financial impact of a CRM – the time saved from no longer manually entering data or downloading data from one database to upload somewhere else; the ability to reach students with personalized messages that were previously impossible to do at scale; and the improvement to business processes unlocked through access to data on the yield from various admissions events or trips – is complicated. But studies of other CRMs suggest they can provide \$2.5 million in total cost savings over time and [195% return on investment \(ROI\)](#) over three years. They also can increase student enrollment – one [study](#) from a different CRM provider found a 10% increase in new student enrollment after CRM implementation.



Introduction

Historically Black Colleges and Universities (HBCUs) are experiencing something of a renaissance as many Black students seek to reconnect with the sense of history and accomplishment associated with the storied institutions, particularly in light of heightened racial division that has plagued the U.S. over the past two years. Even as overall college enrollment has fallen since 2020, many HBCUs are [attracting](#) record high application numbers.

As institutions that serve as the pride of their communities, HBCUs have done in spite of decades of underinvestment by state legislatures responsible for ensuring equal access to higher education for all students. A recent report from the [Hunt Institute](#) estimated a total of \$12.8 billion in missing appropriations to HBCUs across 16 states, dating back over the last 23 years.

In just a few generations, the decision to attend an HBCU has gone from being a foregone conclusion as the only option for Black scholars to a sought after experience, steeped in history; rich in community; and, for some, a matter of family legacy. One HBCU alum shared with [The New York Times](#) that when it came to college, his father told him, “Son, you may go wherever you like, but I’ll be sending the check to Morehouse.”

Founded on the ideal of getting as many students as possible *in*, not keeping as many as possible *out*, HBCUs have served as a path to elevate students from all backgrounds — those whose families built the Black upper class, those who come from under-resourced backgrounds or who are the first in their family to attend college, and everyone in between. Regardless of a student’s starting point, HBCUs pride themselves on providing the level of support and nurturing needed to help students understand all that is possible for them after graduation.

For HBCUs, or many other institutions serving a high percentage of first-generation students, recruitment is more than just a business imperative (although enrollment is key to an institution’s vitality): It’s a social mission. For these institutions, the application process is rooted in being inclusive, not selective; supporting students and families with proactive communication; offering easy-to-understand and use tools; and creating as seamless an experience as possible.

But these institutions face a challenge in finding tools that are purpose built for their needs and students. For example, many tools for recruitment and enrollment were created assuming a single admissions cycle for first-year students (prevalent among flagship state and elite, predominantly white institutions), with one timeline for all matriculating student records to flow into the student information system. That approach makes the tools a poor fit for institutions, like those with rolling admissions, that need more flexibility in how records shift from being a prospect to being a student. And the considerations that exist within admissions continue into other areas, from student success to alumni support.

To support HBCUs' transformational impact, Ed Advancement engaged in an HBCU-centered assessment and design process to identify high-leverage places where technical support and platforms can drive value for HBCUs. That work quickly homed in on CRM tools as a resource that holds promise for unlocking student insights, providing more personalized interactions with students on their journey to matriculation, and identifying what's working and what institutions can improve across the student life cycle.

Through the course of developing and implementing the CRM with a dozen HBCUs, two models of implementation emerged, described below as Core One and Core Two. To determine the value that each implementation brought to each institution, identify areas of strength and opportunities for improvement, and recommend a scenario for scaling this work by accelerating implementation, Ed Advancement engaged Whiteboard Advisors. The evaluation included interviews with multiple individuals at six institutions involved with the CRM implementation project as well as interviews with Ed Advancement staff involved in creating and refining the project.



HBCUs: Opening Doors to Opportunity

HBCUs have a rich history and tradition of creating pathways to economic mobility for their students. In 1977, HBCUs conferred over one-third ([35%](#)) of the approximately [58,600](#) bachelor's degrees that Black students earned. Today, more than 100 public and private HBCUs together enroll only 1% of all postsecondary students but confer about 13% of the 197,000 bachelor's degrees that Black students earn, demonstrating the outsized impacts of HBCUs on cultivating Black talent.

But it doesn't stop with graduation. A [McKinsey](#) analysis found that HBCUs are uniquely powerful engines of economic mobility: Their graduates are 51% more likely to move up to a higher-income quintile than graduates of other institutions. That economic mobility is particularly notable given that HBCU students are more likely to come from under-resourced backgrounds. About 70% of students enrolled at HBCUs qualify for Pell Grants, [compared](#) to 32% of students at non-HBCUs. And over half of HBCU students are first generation.

Economic quintiles are [notoriously "sticky"](#) at the highest and lowest levels – social structures and entrenched barriers mean those born into the top and bottom are statistically more likely to end up there as adults. But even operating within unjust systems, HBCUs have [higher graduation rates](#) than comparable institutions. HBCUs enroll 10% of Black college students but [represent](#) 20% of Black graduates. They also drive greater economic mobility, [particularly for Black students from low-income backgrounds](#). HBCU attendance is [even correlated](#) with a 35% lower risk of individuals developing metabolic illnesses like stroke or type 2 diabetes.

HBCUs outperform their non-HBCU counterparts despite a lack of sufficient public investment. The 18 public land grant HBCUs were underfunded by a total of nearly [\\$13 billion](#) (in inflation-adjusted terms) over the past three decades. In 2020, the North Carolina legislature appropriated twice as much per student at North Carolina State University (\$16,400) as it did at North Carolina Agricultural and Technical State University (\$8,200).

That underinvestment seems particularly short-sighted given the value HBCUs drive for both their students and society. Estimates from McKinsey suggest "higher enrollment and retention and graduation rates [at HBCUs] could translate into an increase in Black worker incomes of \$10 billion per year."



The CRM Imperative

Reminders that an individual left items in their online shopping cart. Discounts offered on product or service for a person's birthday. Emails pitching a new service for a business, targeted based on something a person posted on LinkedIn. CRMs drive all of those communications.

The \$50 [billion](#) CRM market is built on a relatively straightforward premise: That by knowing more about what customers want and need and sending them the most relevant information and offers (often in an automated, high-frequency approach called a drip campaign), companies in sectors from retail to hospitals to telecom can cultivate new customers, encourage more or bigger purchases, and improve their bottom line. It's a clear example of how small changes can drive big impact.

Just as CRMs can help draw customers in and smooth their experience in other sectors, CRMs in education can help institutions improve communication at the top of their prospect funnel, encourage students who abandon an application to complete it ("You've left something in your cart!"), and create personal connections (like birthday messages) that may make admitted students more likely to enroll. They can even add confetti to acceptance letters to help a student celebrate the moment.

CRMs help colleges and universities manage relationships with all their key constituents — prospects, students, alumni, faculty and staff. The platform creates a profile of each constituent, tracks interactions with them and connects the data into a unified view of their journey to date. Those data and insights are accessible in a centralized database by a range of campus units that use them to support and enhance student outcomes. CRMs can improve a range of functions and outcomes, including:

- Improved proactive communication — create personalized drip campaigns reminding students to apply or reminding them of application needs and deadlines; offer higher-touch, proactive outreach to families who may be navigating the college-going process for the first time; raise the immediate fall enrollment rate for [high school graduates from the current 43%](#).
- Boost enrollment — leverage the unified record of contact information, attributes and touchpoints with each prospect to provide a more personalized admission experience. Enroll more of the up to [40% of college-interested students](#) who don't matriculate.

- Drive retention – help student services track and proactively identify students who need outreach and support to retain the [25% of first-time students](#) who currently do not persist from their first to second years.
- Enhance alumni relations – provide advancement with a single record of alumni profiles, contacts and donations to manage engagement and giving initiatives to increase alumni engagement and giving.

Although the benefits of a CRM in higher education seem evident, utilization is far from universal. One higher ed industry [report](#) suggests 41% of higher ed institutions use a CRM system. Compare that to other sectors, where CRM usage is estimated at [91%](#) for companies of over 10 people. The relatively low adoption rate speaks to both a need for greater awareness of CRM's benefits as well as the complexity and cost involved in CRM implementation.

Institutions face myriad hurdles in procuring and implementing a CRM: They must choose a system that meets their needs from among an array of options; they need to ensure that it integrates with their existing software systems; they must have the technical and functional personnel trained to set up and operate the system; and they need to train the campus unit personnel on using the CRM effectively.



Market Failure and the Role of Philanthropy

Technology companies in nearly every sector want to create one product and deploy it without modifications in as many places as possible. Customization is time-consuming and makes providing support or updates more challenging. As a result, tech companies try to avoid it, sometimes using high fees for customization as a disincentive. That means tech companies don't develop products with institutions' unique needs in mind – and in many cases, modifying existing platforms requires either significant internal development resources or significant financial resources. As one institution noted in an interview, “with [the current CRM], we can't customize at all. [Company] frowns on customization because they can't repair if things go wrong. That's the biggest thing – from a bird's eye view, you can't customize.”

But doing the hard work of tailoring a technology solution for a unique context is the only way that a solution will be effective. A CRM for an amusement park will come with different templates and drip campaigns than a CRM for a hospital. Even within education, a CRM built for wealthy, highly selective institutions may not come with the templates and outreach campaigns that would be useful for open-access institutions, institutions with rolling admissions or institutions with large numbers of transfer and re-enrolling students.

The unspoken assumption seems to be that what is good enough for Harvard University or Yale University should be good enough for other institutions, which fails to recognize how other institutions' needs differ from those of the Ivy League. And well-intended edtech companies that want to create a solution tailored for HBCUs, mission-oriented Minority Serving Institutions (MSIs) or even community colleges often face challenges in raising investment capital to scale, with many investors skeptical about both the size of the market for these solutions and institutional ability to pay.

Not only are the products not designed to serve all institutions, the marketing approach isn't either – smaller or less-resourced institutions rarely get invited to fancy prospect dinners, which means institutions that would benefit from a range of services may not even know about them.

Philanthropy has a role to play to support areas where the market fails. Without incentives for building and marketing a purpose-built, low-cost, financially sustainable tool, a mission-driven or philanthropically funded tool may be the only way for many institutions to access technology that will improve both their student outcomes and business processes. Technology alone cannot effect positive change. Partnerships with philanthropy can give HBCUs and other MSIs the gift of time and resources to accelerate their use of technology for social good and share their best collective processes with the larger higher education community.



The Digital Transformation Initiative

Given the immense value of HBCUs – and the potential they hold to do even more, with the right resources – the Partnership for Education Advancement began exploring ways to support HBCUs to advance their goals in authentic and scalable ways.

Driven by a discovery process that engaged HBCU leaders from public and private HBCUs with diverse campus profiles and technology ecosystems, Ed Advancement engaged in end-to-end assessments of HBCU processes to identify areas for innovation.

During the discovery process, HBCUs reported a substantial technical gap in executing recruitment and admission processes. Through its functional assessment of institutional practices, Ed Advancement found that “operating with an inadequate Customer Relationship Management (CRM), or no CRM at all, placed schools at a strategic disadvantage for achieving enrollment goals.”

To support institutions with a CRM, the Ed Advancement team engaged in a market exploration to identify a platform that could meet the institutions’ objectives for a shared network student life cycle CRM: a tool that had robust functionality for not just enrollment but also student success and advancement and that provided opportunities to deploy work created for one institution across an entire cohort of institutions (making the solution more efficient and scalable).

That research surfaced Slate, a CRM from Technolutions, as the best tool to accomplish institutions’ goals, and Ed Advancement chose it as the platform to underpin a new initiative called HBCU Digital Transformation (HBCU Dx). In addition to offering a highly customizable platform, the Technolutions team offered something perhaps more valuable: the willingness to create a new model for supporting institutions, with a core built once (by a non-Technolutions partner) and then replicated across multiple campuses through the institutions’ own Slate instance. That model represents a new approach for tech companies, creating an innovative way to connect public, private and philanthropic sectors – and one that holds promise for use in other parts of edtech to support HBCUs, MSIs, community colleges and more.

The Ed Advancement team built HBCU Dx to allow for constant iteration and improvement. While it began with one model, as it identified opportunities to improve, it made the decision to launch a second implementation approach (see graphic on page 23: Lessons from Core One).

Although the exact model of HBCU Dx shifted over the course of the work, core components (technology platform, a developed core and implementation support) existed across both implementation models.

Software: Platform + Middleware

- Slate by Technolutions is a CRM to support three institutional priorities: admissions and enrollment management, student success, and alumni/advancement. Slate helps institutions unlock the insights within their own data, breaking down data silos and connecting previously separated departments. Data on campus tours, email outreach and application status (among many others), which may have existed in three different systems before Slate – to the extent they were being captured and used at all – can be connected through the CRM to provide a more holistic picture of an individual as they apply, enroll and engage post-graduation.
- The platform itself is highly customizable – so much so, in fact, that customization is both a pro and con. It can become anything an institution needs (pro) but comes out of the box as a blank slate; building the forms, templates, applications and other resources needed requires significant staff bandwidth and expertise that can be a barrier to implementation (con). Ed Advancement aimed to overcome that barrier to implementation by building out a core instance that each institution could then replicate and personalize, saving HBCUs significant time.
 - > The difference is similar to making a stuffed animal by going to Build-A-Bear (just add stuffing and personal touches) vs. being given all the raw materials but no pattern for sewing a bear. One of those two requires a substantially different timeline and set of skills than the other.
- As part of HBCU Dx, Ed Advancement provides startup funding to cover Slate for two years for participating institutions.
- Ed Advancement supported data integration for all participating institutions; for some, that meant supporting an in-house integration. Those institutions developed their own code and scripts, in partnership with Ed Advancement, to connect Slate and their student information system. For other institutions, Ed Advancement provided a middleware solution to help with data integration across campus systems. Both of those options allow the Slate CRM to “talk” back and forth with an institution’s student information system.

Implementation Support

- In addition to building the core, the Ed Advancement team provided training and implementation support. That included training on the Slate tool, relationship building within multiple levels at each institution to understand the HBCU’s goals and help remove blockers to success, and ongoing implementation support.
- The grant also included external support in the form of a third-party consultant to help build and refine each institution’s Slate instance (in the initial model) or a community implementation model that included shared training and a community of practice for important insights and recommendations (in the second model).
- Some initial institutions also had access to staffing grants to support a Slate captain, the individual who would oversee the Slate implementation.

Additional Support

The Ed Advancement team provided a range of additional supports in addition to those above; in the initial model (Core One), that included staffing grants for a Slate captain. In the second implementation model (Core Two), it included ongoing development support for new Slate resources (reports, forms, etc.) that could be shared across all of the Core Two implementations.

Although Slate provides a powerful platform to start with, by building the two core instances, Ed Advancement removed a significant barrier to using the product. Institutions interviewed as part of this evaluation all understood the potential power of unlocking their student data, but they needed a partner like Ed Advancement to help make that a reality. Starting with a core that could be copied into individual institutional versions of Slate (also called their Slate instance) catalyzed the tool's adoption.

Over time, adoption and use of Slate should save time and money by improving processes that were, in many cases, still paper based; create a better student experience by offering nudges that are personalized to where each student is in the funnel (from just showing interest to applying to being admitted); and importantly, improve communication with families, students and alumni.

Core One and Core Two

	Core One	Core Two
Admissions	●	●
Student Success	○	●
Advancement	○	●
Middleware	◐	●
Implementation Consultant	●	○
Ed Advancement Implementation Support	●	●
Community of Practice	◐	●
Staffing Grants	◐	○

This is a gift we are blessed to have ... it was the direction we already wanted to go.

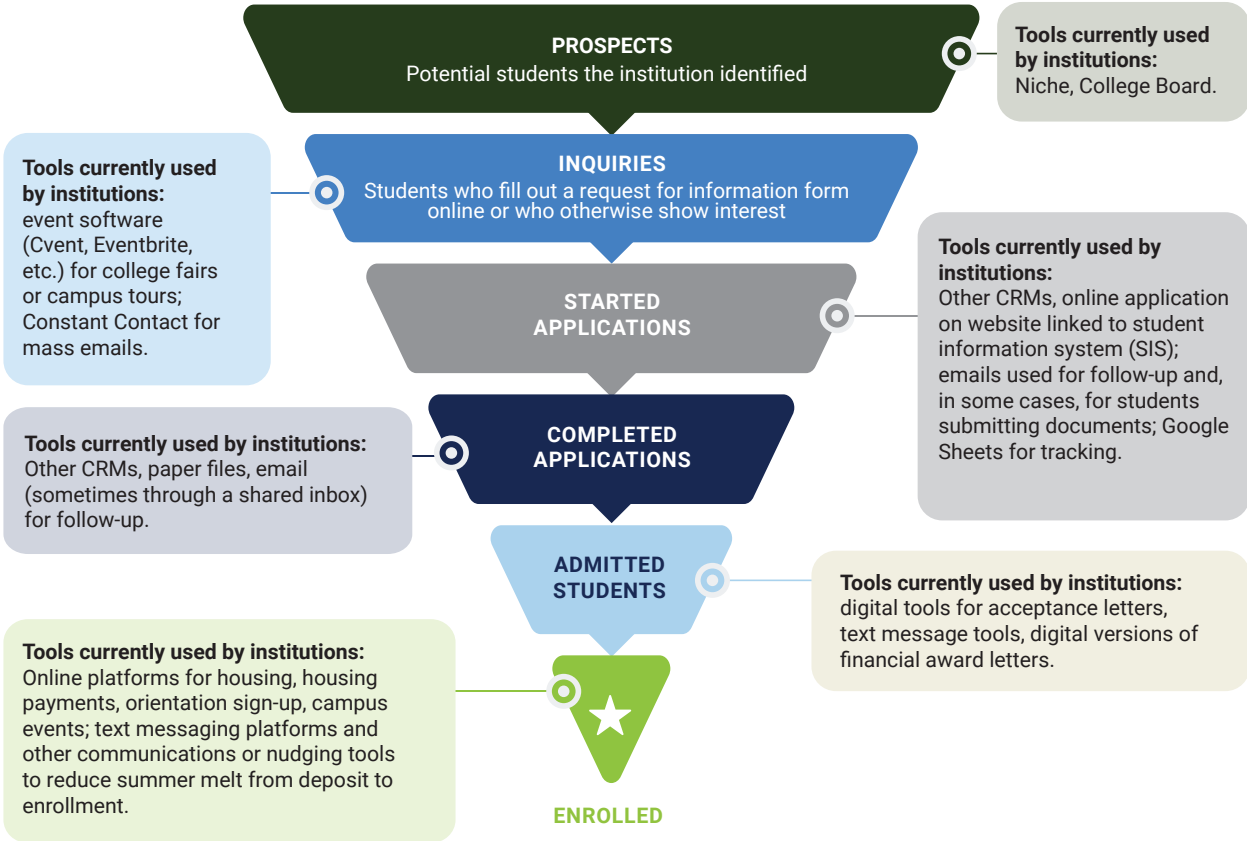


Core One: Approach & Lessons

Six institutions – Alabama State University, Benedict College, Hampton University, Norfolk State University, Shaw University and South Carolina State University – participated in the initial implementation model as Core One schools.

Core One focused on recruitment and admissions only (not student success or advancement), but the term “only” belies the complexity of the task and the range of needs, processes, systems and players.

The Enrollment Funnel



Core One Components: Technology

Core One is the pre-built instance of Slate for recruitment and admissions that can be ported into each institution's own version of Slate and modified from there.

Because Slate comes out of the box ready for customization — as a blank slate — the objective of Core One was to shorten the time to implementation (and therefore the time to value). The model helps institutions start on third base and gives them resources to help them reach home. Ed Advancement hired a third-party contractor to support development of Core One and to work with each institution to set up their own instance.

The Slate CRM represented a significant change in the application process for many of the Core One institutions: Some relied on paper applications, while others had digital applications with varying levels of connection to other admissions tools. In some cases, institutions accepted applications through the Common App but didn't have a way to import the student information automatically, so the admissions teams had to manually re-enter data from the Common App into their system.

“Before, we had to type everything in by hand; [there was] a lot of manual processing that the data processing team had to do. That was a big chunk of their day. Now they can focus on recruiting or answering phone calls.”

One institution interviewed for this analysis identified nine different tools, platforms or resources it used during the admissions and acceptance process; of those, about half would be integrated into Slate, creating a unified record instead of siloed data for each student and removing the need for time-consuming manual downloads and imports. Other tools would be eliminated given the capabilities within Slate (e.g., moving away from other solution providers for large blast emails or text messages).

In the Core One implementation model, each HBCU was responsible for testing, overseeing the final rollout and connecting Slate to its SIS, with support from both an implementation partner and Ed Advancement. As part of the grant application process to be part of Core One, institutions also indicated technical readiness for implementing bidirectional data integration between Slate and their SIS (and they received technical support); while that capability may have existed within the institutions, accessing the resources for in-house data integration proved challenging, and four of the six Core One institutions eventually relied on a middleware solution to connect their CRM and SIS.

Core One also included shells of many tools — for example, a template email with the school logo but without any content. That represented an improvement from previously available tools (institutions interviewed as part of this report noted being unable to send branded emails — or in some cases could not send emails formatted in html — or with photos or attachments). However, the original core stopped short of populating these items with draft email copy or marketing copy; as a result, these templates were not truly turnkey.

Core One Components: Human Capital and Change Management

Implementing a CRM at any institution is an example of where misaligned incentives and indirect value have the potential to collide and create a perfect storm of gridlock. Institutions adopting a CRM are often sold on the vision of supporting students and the functional staff that use the platform, giving the admissions office an easy way to see what components of an application a student is missing and reach out to that student with a personalized note, for example. But a critical (though relatively small) piece of implementation – supporting data integration – falls on the IT team, who may see this as all work and no reward. One of the institutions interviewed noted that its IT team had previously faced a challenging implementation with another CRM, making staff hesitant to engage in such a process again. While the IT work is a relatively small part of the overall implementation workload, delays in that work can hold up other implementation progress.

In reality, the CRM platform should, over time, reduce some of the IT workload, both by decreasing the overall number of platforms that are being used (and that may need technical support) and by offering a tool that allows functional users to do things that previously flowed to the IT department. As one institution shared during an interview, “Before [Slate], if a change needed to be made to the application, we had to go through IT, do a ticket ... now we can do it ourselves.”

But those positive returns on the IT department’s time investment are longer term and are not guaranteed. Potentially as a result, institutions involved in Core One expressed frustration at making this implementation a priority within the IT department.

To build internal momentum for the CRM project, Ed Advancement staff provided on-the-ground support, meeting with institutional leaders to understand their goals for the implementation and remove as many barriers as possible. In some cases, that led to powerful champions at the highest levels of the institution who were able to keep momentum for the implementation across multiple departments. In other cases, the Ed Advancement team had tough conversations with institutional stakeholders to help keep the implementation moving or to get it back on track.

Institutional Stakeholders and Participants



Functional

Individuals within an institution working on recruitment or admissions,

from the top of funnel to orientation, including not only those working in the admissions office as readers, recruiters, etc., but also individuals with responsibilities for housing, orientation, campus tours and more



Technical

IT staff or other technical leads responsible for maintenance

and updates to campus tech systems as well as integration across systems



Leadership

University presidents, cabinet-level staff, vice presidents of enrollment

To create an internal expert and champion for the implementation, Core One's implementation approach included a Slate captain. Two of the initial core institutions were offered staffing grants to fund those roles; one of the Slate captains was hired through a staffing grant, only to leave the institution three months later.

Core One: Intended Outcomes

Interviewed institutions expressed similar goals for their CRM implementation: improved communication (both with students and families), a better student journey to enroll and more efficient processes (both within admissions and across departments).

- **Communication:** Many interviewed institutions cited improved communication as the biggest positive change coming from the CRM implementation. Every interviewed institution put communication at or near the top when asked what parts of the CRM would be most valuable to their institution.

"... HBCUs work with a lot of first-generation families and [first-generation] students definitely don't always have a lot of support. And that support is not because [parents] don't want to support them, but they just don't know the questions to ask. So being able to present them [with] information that will help guide their student, I'm very excited about."

- **Student journey:** HBCUs in Core One ranged from using paper-based applications to having a CRM already, but regardless of where they started, each saw room for improvement with Slate. One institution that already had a CRM noted that Slate's ability to allow students to upload documents from a mobile phone was functionality missing in their current CRM. The same institution called out Slate's ability to allow admissions officers to "impersonate" a student within the platform (allowing the admissions staff to see exactly what the student is seeing and guide them through the process) as a significant improvement over their existing CRM.

"The manual process [led to] poor customer service ... tour, application, admissions office was nonresponsive—they were trying to make sure everything was set up, but the criticism on campus made them feel ineffective even though they were working nonstop."

- **Process improvement:** Both within the admission department and across other departments, Slate allows data to be collected and used in ways that create new efficiencies. Previously, pulling reports was complex (or impossible) and was handled by internal specialists. Because Slate is relatively user friendly, the CRM enables more opportunities for many more people to access and use real-time data than ever before.

"If the math department wants to know how many students have applied as of now, we want to send something to them. That's a quick report that we can just simply run now ... Now, a couple clicks and something that may have taken an hour and a half or two hours can be done in five minutes."

Core One: Lessons

Lesson 1: The Downside of Too Much Support

Interviewed Core One institutions expressed satisfaction with the consultant teams contracted to support the work. Interviews indicate that the consultants were highly responsive while engaged on the project. However, one lesson from Core One is that they may have been too responsive, building capabilities and making modifications that met client expectations but had two unintended consequences: First, making each instance more personalized to the institution limited Ed Advancement's ability to push out new resources to all institutions because of minor differences in how fields populate (e.g., whether they offer the same prompts for answer options; whether they have the same application structure). Second, because they had a consultant to rely on, institutions did not need to spend as much time building (and learning) within Slate. That time savings, originally seen by Ed Advancement as a benefit of the implementation approach, turned out to be a weakness. Even with nearly 10 hours of training, the absence of more time learning by doing meant that many institutions did not have the internal knowledge necessary for Slate implementation at the end of the consulting term.

Lesson 2: The Last Mile Challenge

The Core One model of "starting on third" assumed that the (approximately) final 20% of the build, which included things like writing email copy, would be best left to institutions, enabling institutional messaging or other differentiators to shine. Unfortunately, those final steps proved to be a barrier for institutions in using the full CRM capabilities.

A similar lesson emerged with the data transfer to and from the SIS. Although both Ed Advancement and the institutions initially agreed that the institutions would take on this responsibility, data integration became a sticking point in moving implementations through, and the Ed Advancement team pivoted mid-implementation to a middleware provider to support this recurrent issue.

Lesson 3: The Limits of Staffing Grants

Despite funding available for supporting a new staff member to serve as Slate captain, institutions struggled to either hire or keep staff in that role. Interviewed institutions expressed frustration with the pool of applicants to be a Slate captain and the lack of applicants with Slate experience. That likely reflects both the high demand for individuals with Slate experience and the broader labor market pressures in the wake of the "Great Reshuffle."

Lesson 4: Plug and Play Still Takes Time

Digital transformation is more than taking paper and analog processes and making them digital. It requires shifts to people, processes and technologies, which have a downstream impact on [workforce needs, culture](#) and more. Interviewed institutions noted that the investment in time to rethink processes is both incredibly important and a significant additional responsibility. While a few institutions hired new staff to specifically support this work, many more individuals were working on the implementation on top of their other day-to-day responsibilities.

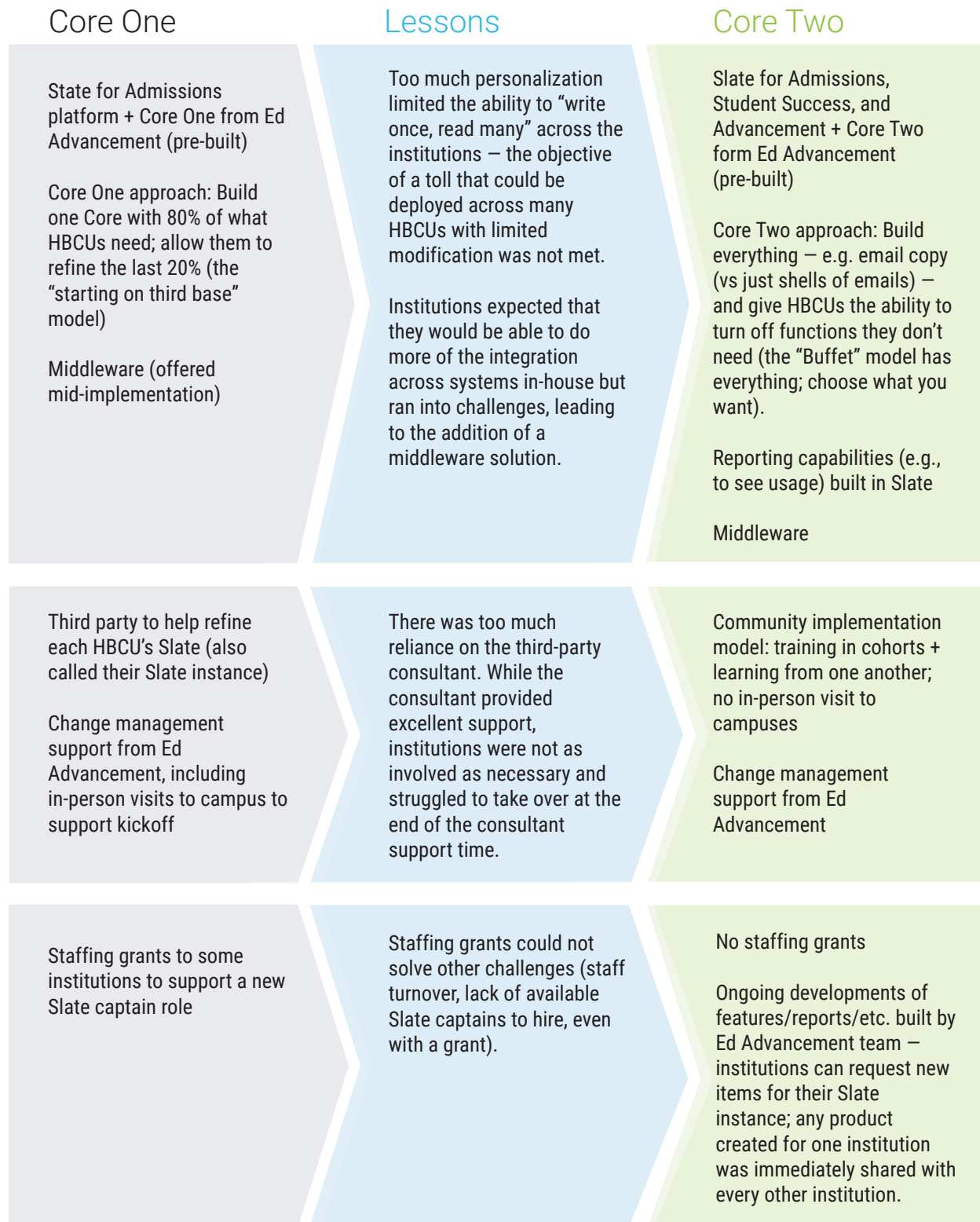
“One of the main conversations I’ve had with some of the other schools ... is [reimagining] processes. What is going to ... make it a better process for your students and families? But also, what is going to make the work that you do in your office easier and more efficient for your staff? Because there’s so many things that can be done with this tool that you can reimagine how you do your internal processes.”



Core One: Determinants of Success

- **Leadership from the top:** Particularly due to the multidepartment engagement of the implementation, perhaps the biggest determinant of a successful and quick implementation is vocal support from an institution’s leadership. Institutions with strong buy-in from their presidents were able to move most quickly. While other criteria were initially used to determine readiness, presidential ownership rose to the top as most meaningful.
- **Team approach:** In addition to leadership, both the functional and IT teams need to be at the table from the beginning. The team approach can also extend across campuses. Interviewed institutions noted that they received valuable feedback from other institutions that had implemented Slate. In particular, one institution noted that being connected with a peer institution that used the same SIS provided support for some of the more challenging aspects of mapping and connecting the two platforms.
- **Slate consensus:** Each interviewed Core One entity had already chosen Slate on its own at some point – either earlier in the process after learning what CRMs could help with (Alabama State) or through staff who had used it at other institutions and were pushing for adoption. That meant that there was clear agreement on both what each was trying to achieve and the tools it wanted to use to meet those objectives. Implementations still faced challenges, but those challenges often stemmed from the relative priority of the work across departments; individuals did not question the value of the work or the chosen tools.
- **Vital external support:** Each institution articulated different times or ways where Ed Advancement support proved integral for implementation success, from being a carrot (or a stick) to get the implementation unstuck and incentivize action to providing extra hands and knowledge to support the actual implementation process.

Learning From Core One





Core Two: Approach & Lessons

Core Two grew organically out of Core One’s work. Four institutions (Claflin University, Florida A&M University, Texas Southern University and Tuskegee University) received a Slate instance with Core Two loaded into it as well as support to implement the tool. While the implementation objectives in Core Two were largely consistent with Core One (e.g., improving communication with students), the approach differed in both technology and human capital.

Core Two Components: Technology

The biggest shift from Core One to Core Two was the core itself. Core Two is more robust in three ways: First, it includes three modules, covering admissions, student success and advancement (fundraising) instead of just admissions. Second, while it still allows for customization, it comes preloaded with more content for sample drip campaigns, reminder emails and more. All told, Core Two includes about three times as many pre-built forms, fields, prompts, campaigns, queries and reports as Core One does, representing thousands of additional components that make Slate more powerful and easier to use. This includes a 4,000% increase in queries and a 500% increase in reader workflows. And third, because the Ed Advancement team built it (with fewer structural changes within each institution’s instance than Core One), new reports and resources Ed Advancement built can flow seamlessly into each university’s instance.

The shift from the “starting on third” approach (e.g., creating a branded but blank email template) to the “buffet” approach (e.g., offering everything and letting institutions choose what they want to use) in many ways reflects the way CRMs work in other sectors, with sample marketing campaigns or other outreach tailored to the needs of small businesses, ecommerce and many more. It lowers barriers to utilization by recognizing that it’s often easier to start with a sample rather than starting with a white piece of paper.

Despite the many differences, there were some similarities between the two implementations: Like Core One, Core Two institutions used a middleware solution for integration with their SIS. Additionally, in both cases, Ed Advancement staff worked hand in glove with institutional implementers to support with guidance, technical assistance and change management.

Core Two Components: Human Capital and Change Management

From a human capital perspective, the Core Two implementation used a community implementation model, with Ed Advancement staff working alongside institutional stakeholders to implement Slate. That “teach a person to fish” approach was a defining difference from Core One’s consultant-supported “give a person fish” approach. The community implementation model included weekly meetings, which Ed Advancement staff led, to walk through a particular element of either the Slate platform (e.g., how to build a request for information form) or of process (e.g., how to build out workflows for application reviews). A dedicated staff contact, additional office hours and Slack channels provided additional opportunities for HBCU staff to ask questions or get additional support.

The combination of multi-month weekly training, coupled with having some resources already available in the core, allowed those leading the implementation to learn by doing – and to gain confidence by initially making tweaks at the margins and eventually building their own forms or templates.

“So [Ed Advancement is] like, ‘Hey, we’ve got a template of an RFI (request for information) form ... take a look at this template and then just kind of tweak it to your institution.’ And that helps again with that learning curve. So, now I feel confident if I had to go and build an RFI form from scratch, I would know how to do that.”

Core Two institutions also benefit from additional reports or other resources the Ed Advancement team built. Because Core Two was built to be more consistent across instances, the Ed Advancement team can build new functionality in the primary core (e.g., reports, templates, forms) that can be pushed out to all of the Core Two institutions. That approach is more complicated with Core One because of the differences in how Core One instances were configured at each institution.

“It’s a long life cycle on admissions, and if anything happens outside the preferred method, we may not be able to circle back to the student and help the ones that fall between the cracks unless they raise their hands and say ‘hey, I need help.’”

Core Two: Intended Outcomes

Overall, institutions involved in the Core Two implementation wanted the same things out of Slate that their peers in Core One did: more personalized communication with prospects, applicants and accepted students; staff efficiencies due to a more integrated system; and the real-time data necessary to make data-driven decisions.

- **Communication remains key:** As with Core One institutions, those using the Core Two model in Slate expressed excitement about Slate’s capabilities to send targeted email campaigns. One institution explained that its counselors currently send individual emails to students one by one, so the CRM creates a significant opportunity for time savings. Additionally, institutions hope proactive outreach during the application process can help individuals who may be at risk of abandoning their application.
- **Support to go further:** Two interviewed Core Two institutions already had a CRM in place prior to joining the HBCU Dx initiative. For them, implementing Slate offered a way to take their efforts one step further. For example, being able to send drip campaigns based on where a student is in the enrollment funnel is a leap forward for institutions that did not have that functionality before. Previously, emails asked students to ignore irrelevant information (e.g., “If you’ve already submitted your deposit, please disregard”); now staff can structure campaigns so each student receives personally relevant information. Core Two institutions shared a desire to go further, reaching out to prospective students based on intended major, geography, interest in Greek life or hobbies and connecting them with alumni in their region with shared interests.
- **Monitoring business metrics:** In addition to the student-facing improvements that institutions seek as part of HBCU Dx, they are also keen to use data from the CRM for improving their own practices. That includes understanding whether students are opening emails and link click rates within emails and even tracking prospective student attendance at recruitment events and yield coming out of those events.

“[We could] track recruitment, productivity ... being able to see how many students [are we reaching], what the yield is looking like and how much we are spending on these recruitment trips. And should we be going to some of these locations? They had never tracked that before.”



Core Two: Lessons

Lesson 1: ROI Has Room to Grow

Although Core Two includes modules for student success and advancement, admissions staff thus far have driven Slate implementations for Core Two. The admissions departments expect significant value from HBCU Dx, but they also see the value that Slate could drive for other departments. Because those modules come at no additional cost, there is significant value to be unlocked.

Lesson 2: Planful Preparation for Ongoing Training

Because individuals responsible for Core Two implementation have invested so much time in the process, they may be more cognizant of the ongoing training needs as more members of the functional teams use Slate. That is a feature of the implementation strategy – individuals involved in the initial implementation will have a deep understanding of what the training process needs to entail and can make more informed decisions on the training that makes sense for their team as the circle of users grows.

"We haven't gotten to the point where we would need to train other staff members in the admissions office on how to utilize the tool. So, right now it's just admissions leadership who are on the calls ... but there will come a time where we're going to have to train the data processors. We're going to have to train the recruiters about the functionality of Slate and how they can use it."

Core Two: Determinants of Success

Core Two is still in relatively early innings, so identifying determinants of success may be premature. With that in mind, a few items did arise as particularly meaningful for success in Core Two.

- **Ultra-responsive community:** Individuals responsible for implementation at Core Two institutions valued the partnership of both Ed Advancement and the broader community. As one person noted, "I have multiple ways I can email them. We use our Slack community. We have a community portal that they have built for us, so I can go on there and just leave a message and they'll respond back, or they'll send me a video; they'll send me links ... it feels like it's almost 24-hour access. It almost feels like I'm the only one working with them."
- **Ed Advancement's secret sauce? Finding yes:** A relatively small but powerful factor in keeping implementations moving along seems to be the Ed Advancement support team's ability to problem-solve within the Slate platform and help institutions accomplish their goals. If Slate doesn't have the exact capability an institution is looking for, the team works to find a way to help it still achieve its goals within Slate.

*"In my experience working with our current CRM, I've been met with 'oh, we can't do this. Oh, we can't do that.' But since working with Slate, it's been 'we can do this.' I've never been met with the language of what [Slate] cannot do. It's been positive around what it *can* do."*



Recommendations for Continuing and Accelerating Impact

Assessing Core One vs. Core Two

Core One provided participating institutions with capabilities that largely did not exist in their prior tech stack. However, a desire to be responsive to HBCU needs and to make building and implementing Core One as simple as possible had the unintended consequence of creating some tools that institutions underutilized and that didn't allow for broad use of shared resources on an ongoing basis, because each instance of Slate was slightly different.

Core Two is still in relatively early stages but appears better positioned for adoption and utilization within each institution. The community model of implementation builds expertise and confidence within institutional staff, and the ability to push new reports, templates or other resources out to institutions allows Ed Advancement to scale its ongoing support.

Institutions in Core Two agreed that, while they're excited about the work thus far, there is also significant untapped potential within the additional modules of student success and advancement.

Setting Expectations for Timing – and Normalizing Pain Points

While several institutions interviewed said that one of the surprising parts of implementation was the long timeline or expressed a desire for the process to move faster, anecdotal data suggests that a one- to two-year time horizon is relatively common for a new CRM implementation. "Implementation timelines for users ranged from nearly 3 years (for widespread adoption across domestic, graduate, and international admissions), to a mere 6 months," according to [one survey](#) of Slate implementations. The same survey noted "if you're looking for a similarly speedy integration in 2021, proceed with caution." "Slate was much smaller at the time of our implementation 4 years ago and a lot more responsive than they are now," reported one user who has noticed a shift in Slate's ongoing technical support structure since it began using the platform at their large public research university. And implementation of just the advancement module of Slate can take [up to a year](#), even when an implementation consultant guides it.

As a result, setting expectations by supporting institutions with benchmarking data may both offer more transparency into the project's likely length as well as normalize the implementation challenges.

“The assistance with this implementation is so valuable. Previously [in another role/institution] we did all of this work ourselves. ... I don’t know that my colleagues will quite know how valuable this [implementation support] is, because they didn’t do it – they didn’t see it another way.”



Benchmarking Trends in CRM Adoption and Understanding Maturity Models

Similarly, sequencing adoption of the student success and advancement modules after adoption of the admission module for Slate (the approach of Core Two HBCU Dx institutions) reflects the broader trends in CRM adoption. According to an [Educause](#) quick poll, while 91% of institutions with a CRM are using it for admissions, only 64% are using the CRM to track or support academic progress, and only 39% use it to monitor efficiency of degree completion.

Slate also seems popular among first-time CRM users who may have a longer path to digital transformation. Among advancement offices using a CRM, Slate represents a small share (5%, based on [data](#) a faculty member at North Carolina State University gathered). Nearly 90% of the institutions that reported using Slate for advancement did not move from a different CRM compared to only 27% of institutions who used Salesforce.

Benchmarking the implementation approaches and timelines of institutions in the HBCU Dx initiative against a broader set of institutions suggests that both the crawl-walk-run approach of beginning with the admissions module and the timeline to implementation are both within norms for the higher ed sector broadly.



Cost & Value Analysis

Implementing a CRM can be a significant investment of both time and money. While the technology's fixed costs are relatively straightforward, the time investment both from the Ed Advancement team and the institutions is more difficult to quantify.

Even more difficult to quantify is the significant value from the implementation. On the admissions front, while Slate will likely create some cost savings as institutions can shed duplicative tools, the bigger impact will be in admissions offices automating manual processes (including data reentry or downloading from one source and uploading to another one) to free up staff time to support students in other ways and in adding new capabilities that extend well beyond what is feasible with their current tech stack.

To understand the market rate for platforms and services as well as HBCU Dx institutions' current spending on related products and services, Whiteboard Advisors used a proprietary database of public-sector purchases (including 100 million purchase orders). Because private university spending is not publicly available, those institutions were not included in this analysis.

Cost Analysis:

For the first two years of the implementation, HBCU Dx covers annual costs for Slate (between \$50,000 and \$125,000, depending on the number of applications received) as well as the annual cost for the Axiom middleware (\$12,000 annually). There is an additional cost for middleware implementation of between about \$7,000 and \$14,000, also currently funded through the HBCU Dx initiative. All in, each institution receives a total of between \$130,000 and \$288,000 in grant support to cover technology across two years.

In addition to the technology cost, Ed Advancement estimates its cost to implement Slate at about \$50,000. That is in line or lower than benchmarked costs for Slate implementations identified; fees for Slate consultants found through purchase orders range from about \$50,000 to over \$150,000. Wright State University, a public university near Dayton, Ohio (enrollment: about 7,500), paid \$84,600 to a consultant for "Slate Planning and Process Mapping"; Oakland University in Michigan (enrollment: 13,700) paid over \$150,000 for "consulting with the Slate Implementation." And based on publicly available purchase orders, Augusta University (enrollment: 9,200) spent more than a half million dollars (and more than two years) on consultants to support its Slate implementation.

Those consultants or implementation fees aren't unique to Slate. The same consulting firm had a \$470,000 contract with Wayne State University (near Detroit) in 2017 for a reimplementation of Banner (plus an additional \$68,000 in travel costs).

The cost savings beyond platforms currently only includes those likely to be cut as a result of the admissions module. Once institutions implement student success or advancement, additional immediate savings will likely occur. One interviewed institution spent \$145,000 on a student success platform from EAB in 2019.

Cost Savings:

Cost savings will be highly variable across institutions, because each institution comes to the HBCU Dx initiative with a different set of solutions. But cost savings generally come from three areas: ending use of duplicative tools; taking advantage of Core Two (rather than institutions building a core themselves); and time savings that result from more efficient practices.

- **Duplicative tools:** One institution in the initiative, based on publicly available procurement data, has spent \$25,000 annually on a text messaging tool and another \$70,000 on a recruitment and admissions CRM. A continued Slate contract could simply take the place of duplicative tools in that case. In other cases, tools institutions are replacing are lower cost (and often lower functionality) items and will not fully offset the cost of Slate and Axiom. Bulk emailing (about \$2,000 annually) and form builder tools (\$1,000-\$2,000) are two examples.

Examples of Institutional Efficiencies From CRM Implementation

Across implementations, the following changes are anticipated to save time (not all are relevant to every institution):

- Ending (or significantly decreasing) manual data entry.
- Ending (or significantly decreasing) time spent pulling data from one online platform to upload into a SIS, CRM or printing to a paper file.
- Less time answering emails about the status of an application or whether something was received (students can see themselves in the portal).
- Less time physically collating and sharing application files for readers and processors.
- Less time waiting for other departments (IT or Institutional Research) to make changes to an online form or application or pull a report (admissions staff will be able to do this themselves).
- Less time checking the status of a student across departments (e.g., whether they have put down a housing deposit, signed up for orientation, etc.).
- Faster, more accurate reporting.
- Less downtime for CRM maintenance (for those switching from a different CRM) and no need for quarterly data oversight during periods of updates.
- Efficiencies created by offering tailored applications for different types of students (e.g., not requiring proof of residency for students transferring from an in-state institution; not confusing first-year students by including questions meant for transfer students).

- **Saved cost of Core Two:** The Ed Advancement team estimates 500 hours invested in building Core Two. At an hourly rate of \$170 for consultants (benchmarked based on publicly available contract data for Slate consulting), each institution saves \$85,000 by using Core Two, rather than starting from scratch.
- **Efficiencies in processes:** Interviewed institutions were fairly consistent in their view that the CRM may not change their overall staff footprint but would change how staff spend their time, moving from data entry tasks to higher-value, student-facing tasks. One institution we spoke with noted that it has 14 open positions in the admissions department (not all of which are active or being filled). Many other institutions shared stories of lean staffing within their recruitment and admissions teams. As a result, efficiencies likely have a significant positive effect on the ability to deliver excellent service to students and to increase enrollments.

Those efficiencies, however, cover only improvements to current processes – they don’t take into consideration the human capital it would require to offer drip campaigns; monitor the yield of various recruitment events to measure ROI; or provide personalized, high-touch service to potential students and their families without having a CRM to enable each of those things.

It also doesn’t account for improvements in utilization of other tools. For example, an institution spending \$60,000 annually on a prospecting tool will get much greater value from that \$60,000 as a result of having a purpose-built CRM.

Quantifying all of those is an imperfect science, but a Forrester Total Impact Study of Salesforce’s CRM identified \$2.5 million in total cost savings over time and [195% ROI](#) over three years.

Increased Revenue:

HBCU Dx’s primary objective is to increase annual enrollment at partner schools through a combination of both admissions and retention. A [study](#) from a different CRM provider found a 10% increase in new student enrollment after CRM implementation.

But even if the change in enrollment was 5% instead of 10%, institutions would capture meaningful additional revenue. (This analysis uses in-state tuition as a proxy for the blended rate of tuition that results from higher tuition from out-of-state students and lower tuition due to institutional discounting).

Institution	Incoming Class	5% increase	In-State Tuition	Annual Incremental Revenue
Alabama State University	1,000	50	\$11,068	\$553,400
Florida A&M University	3,000	150	\$5,785	\$867,750
Norfolk State University	1,300	65	\$9,622	\$625,430
South Carolina State University	1,100	55	\$12,000	\$660,000



Future Implementation

Considerations for Future Implementations and Areas for Further Exploration

Embedding IT: Time to implementation ranged from five to 15 months. Institutions with longer implementations often also had some hurdles with other departments, either due to real or perceived obstacles. While strong presidential leadership is one way to shift IT priorities, another is to embed someone with IT skills within the admissions office to support the implementation. Connecting individuals with the functional knowledge (e.g., how processes need to run) and individuals with the technical knowledge to learn and implement the system could lead to significant time savings and, as a result, cost savings.

“There is a tech side but also a functional side. When you’re engaged with individuals that actually understand the enrollment funnel, it enhances the experience ... the tech people missed [adding] applications date and decisions date [on a report]; it’s easy to forget those on a report but not if you know admissions ... application status is hugely important for communications.”

Funding analysis: Across interviews, every institution either reported that it believes it will absolutely still be using Slate in three years or that it will be using Slate if the institution can afford it. Similar to the functional analysis that consultants did for institutions at the outset, philanthropic dollars could fund a few analyses at institutions to identify cost savings and increases in revenue that would offset the ongoing investment in Slate.

Amplifying success stories: As more implementations go live and as the first classes using Slate begin to matriculate, institutions sharing success stories with those earlier in the process (or those considering a CRM implementation) may help to either continue momentum or catalyze new interest.

Extending support: A few interviewed institutions suggested that additional training – and in particular, in-person training – would be useful for greater utilization and adoption across their institution.

Expanding the market: While Ed Advancement built the Core Two model for HBCUs, many other institutions would likely benefit from this tool. Philanthropic funds could expand the program’s reach to MSIs or other institutions working with priority populations.



Alabama State University: The Value of Leadership and Community

Top-Down Leadership and Bottom-Up Connections Support a Strong Implementation

Backdrop and Goals



Alabama State University (ASU) took part in the discovery phase with Ed Advancement, engaging in an end-to-end functional assessment of their systems and practices. This analysis surfaced a clear need: to support their almost 3,900 undergraduate students (and an annual freshman and transfer student class of over 1,047), Alabama State University needed a CRM.

The institution saw such promise in the concept of a CRM that they jumped into action, beginning a search for a tool that would meet their needs. After talking to other institutions, the Alabama State team decided on Slate – unaware that the Ed Advancement team was already working to deploy the Core One Slate instance as part of the HBCU Dx initiative.

The admissions process at Alabama State University prior to Slate was very manual: importing student data from the Common App or Black Common App required downloading the application, printing, and re-typing it. Without a CRM, students' supporting documents like transcripts and test scores often came in individually, and students and staff didn't have an easy method of tracking what had arrived, what emails had been opened, and which application pieces were missing.

Solution: Bought in, Brought in



According to Alabama State University staff members, when the university president, Dr. Quinton T. Ross, Jr., met with the Ed Advancement team to learn more about the Slate CRM work, he “bought in after the first conversations.” But not only did the president buy in, he also brought the rest of the university's relevant leadership into the discussions.

Before becoming President of Alabama State University, Dr. Ross spent 15 years in the Alabama State Senate, including a tenure as Senate Minority Leader. His time in politics may have guided his approach – creating a consensus and shared vision from the very beginning. “It wasn't a conversation with one or two people,” Dr. Freddie Williams, ASU's Assistant Vice President for Student Affairs/Enrollment Management/Admissions & Recruitment, recalled of the initial grant conversations. “Everyone came to listen to the pitch. Everyone was so excited about it – there wasn't a single person who wasn't in favor of it... VPs, assistant VPs, and directors were brought in right away [and] they knew it was important to Dr. Ross.”

By voicing his support clearly and bringing everyone to the table, Dr. Ross helped Alabama State University avoid some of the delays other institutions experienced. Everyone knew the Slate implementation was a priority to the President, and everyone understood the value and importance of keeping the implementation moving.

During implementation, informal connections with other institutions provided important insights. While the Core One implementation relied on consultants rather than the community implementation model, ASU staff found ways to create connections with other institutions. Because they had never used a CRM before, “we didn’t even know what to ask for or what we needed,” explained one staff member. “Having [people who had implemented before] with us in conversations gave us some ideas.”

Concerned about the cost of middleware, Alabama State University chose to do their own integration between Slate and their SIS (Peoplesoft). Just as the Admissions team found peer institutions to help guide them through the process, the Alabama State University IT team also found a resource in another institution – the University of Massachusetts. UMass, also a user of both Slate and Peoplesoft, was able to offer insights to help Alabama State through the integration. “They [are] a large school – their IT staff is over 120 people compared to our 15,” Sonya Satterfield of Alabama State shared. “It was very good to have a partner like UMass who had been on [Slate] for a few years, who could see everything – good, bad, ugly; it was a good pairing.”

Alabama State University began their work with Ed Advancement in mid-October 2021, and their leadership team plans to be fully up and running with Slate by the end of 2022.

Outcomes



Application (Self) Improvements: Prior to Slate, if the Admissions team wanted to make a change to the application, they had to go through the IT department. With Slate, the Admissions team can fully own the application. Slate allows for more intuitive applications – first-year students see the best application for them, while transfer students receive a version without the fields specific to first-year students. “Now the application is prettier, looks more appealing, and the student experience is more seamless,” said Dr. Freddie Williams. For events, the institution will now be able to use a QR code for students to reach the application easily on their phones, with a better mobile interface than the institution’s prior application tool.

The end of Manual Processes: Before implementing Slate, one person on staff downloaded applications from the application software and uploaded them into Peoplesoft. Another printed letters confirming applications had been received (these will become emails through Slate). “These roles will change because those functions won’t be needed,” Williams explained. “The labor-intensive things we did before will go away with Slate.”

Faster processing of applications: Prior to Slate, getting ACT and SAT scores for students to flow automatically into the school’s system for review presented an ongoing challenge. “We paid thousands of dollars to try to resolve the problem, and it never got resolved,” Williams noted. “With Slate, we’ve gotten that taken care of.” Now that the institution isn’t waiting on test scores, their application processing time will be even faster.

Improved intra-departmental communication: Part of an effective drip campaign to nudge students who have been accepted to attend Alabama State University requires understanding

where they are in the process. Because ASU's orientation and housing teams have operated on different systems, the Admissions Department has not readily had access to the information they need to provide customized communications reminding students to submit payments or to be conscious of impending deadlines. Through Slate, "we can design and send out what people actually need, rather than general emails that say 'If you've already done this, disregard,'" says Williams.



Florida A&M University: Embracing Purpose-Built Technology and Partnership

Finding ways to hit the technology “easy button” to support institutional aspirations

Backdrop and Goals



Florida A&M University (FAMU) shifted from paper applications to an online application four to five years ago, but even with that initial digital adoption, recruitment and admissions practices were still human capital-intensive. “Because we’re still using the older systems, it’s a lengthy process,” said Ryan Preatto, FAMU enrollment specialist.

Despite managing 10,000 applications annually, the staff of 35 still often sent emails individually to applicants or relied on mail-merged bulk emails with no way of capturing or using data around which emails were opened or whether students clicked the included links in email. Systems were similarly segmented across campus. The campus tour office, for example, operated independently from the admissions office, leading to siloed information about prospective student interest.

Prior to implementing Slate, FAMU collected and processed admission applications in its student information system (SIS). While that represents a step toward digitization, the SIS is not built to serve the same purpose as a CRM: It does not capture the types of data that a CRM does or offer the ability to search and segment students to support tailored outreach. The admissions team, despite interest in taking a more data-driven approach to admissions, did not have a system that was sufficient to meet its needs.

Solution: Purpose Built By Partners



Like many of his peers in the HBCU Dx project, Hugh Durham, FAMU’s director of admissions, had experience implementing a CRM previously at another institution. The difference in Slate, as he explained, is that while it initially seems more complex and technical, it is actually much easier for staff to use without significant training. “It’s an easier product, as long as you have the correct automations, whereas with [the CRM used at a prior institution] you need individuals with a really strong command of how to build logic and workflows. Those nuances are easier in Slate,” said Durham. That makes it easier for functional users across the admissions department to use the data and insights – and turn those insights into actions that support prospective and current students.

The user-friendly nature stems from both the purpose-built nature of both Slate and the development of Ed Advancement’s Core Two. “You can tell Slate was built by higher ed professionals,” Durham said. Similarly, Ed Advancement’s work to provide a pre-built instance of Slate gave FAMU an important jump-start in implementation. “Instead of starting from scratch,

like a lot of schools have to do, we already had an instance built for us,” Durham explained. “If you have the shell and all you have to do is make some tweaks to build out certain things, to me, that’s half the battle they’ve been there with us every step of the way.”

With Ed Advancement as a partner and Core Two as a starting point, Durham says FAMU is on its way to unlocking functionality that will enable it to capture data and save time — giving its 35 staff members more time for proactive outreach.

The institution has taken a measured approach, turning on individual functions within Slate to take advantage of capabilities (for example, creating QR codes for prospective applicants to register for events) when needed, while not rushing the implementation for other components. “I feel good about it; the unique approach to implementation is different from anything I’ve ever done,” Durham shared.

The partnership from both Ed Advancement as well as the broader community of Slate users also provides a unique value to the process. According to Durham, “There’s always somebody that you can reach out to. That’s so important, and that’s what is different about this implementation versus my last implementation with [CRM used at a prior institution]. When we were done with our consulting hours with [the previous company], it was on us. If we had any problems, we had to reach out. If we couldn’t get it fixed through the help desk, we had to hire consultants to come back and help correct the problem. But with Slate, with Ed Advancement, if we do have challenges, they can help us.”

Outcomes



Improving recruitment communications: With Slate, the admissions office has started to build out an automated communications plan with increased personalization to remind applicants of missing documents and important deadlines. The office will also use drip campaigns and more targeted content to reach students who have expressed interest in the institution.

Supporting transfer students: Slate will help FAMU connect with all prospective students and better understand trends over time. That includes application and yield trends for transfer students. “We’re going to be able to communicate with [our IGNITE transfer students] more effectively, more efficiently. We’re going to be able to do a better job of tracking events throughout Florida. We bring our admissions team [to other campuses] and offer application help — being able to track who comes to the table and track them through the pipeline, through the evolution of ultimately becoming a student — those are things we’ve never been able to do before,” said Durham. This holds the potential to support one of FAMU’s institutional priorities. “[Transfer students are] our biggest area of opportunity. When it comes to transfer students, there is steep competition in our state because of the transfer pathway — as long as you have a 2.0, you could transfer to pretty much any of our state university system institutions. There’s more competition for those students. And other bigger [college] names can also give [students] a little bit more money.”

Producing more accurate data: Preatto sees plenty of potential for the additional data Slate will produce for FAMU’s admissions office: Where should FAMU focus its recruiting efforts? How many first-generation and under-resourced students have been admitted? Slate also should improve the university’s ability to monitor student success, such as ensuring that students are taking the correct courses and remain on track to graduate. “Student success,” Preatto said, “is going to be the most vital part of this effort.”



Norfolk State University: A Champion for a Right-Fit CRM

A Savvy Associate VP Swaps in Slate for Improved CRM Capabilities

Backdrop and Goals



Unlike several of the other Core One schools, Norfolk State University had a CRM in place prior to the Ed Advancement engagement. The CRM sat alongside a range of technology solutions: candidate text messaging, candidate search/recruitment, applications through the Common App and Black Common App, digital and video acceptance letters, virtual campus tours, and more.

The previous solution, however, didn't live up to expectations — or address the actual needs of the school. A limit on emails within the original CRM meant that Norfolk State used an email service to send mass emails, fragmenting the outreach data collection. And the text message solution didn't integrate with the CRM, requiring the admissions team to manage a separate database for text messaging and further fragmenting the view of what students were being reached, when, and how.

Having an existing CRM provided both a useful base of knowledge and practices for shifting to Slate. It also created some challenges. Staff, particularly outside of the admissions team, were reluctant to adopt a new solution — they'd taken on one CRM implementation (of a tool that Associate Vice Provost for Enrollment Management Dr. Juan Alexander said was “just not a good fit,”) and were not eager to do it again.

Solution: Overcoming Assumptions



The most exciting part of the project, according to Dr. Alexander was simply “finding a CRM that was a good fit,” which it turns out may have also been the easiest part of the implementation.

Norfolk State University was among the first institutions to kick off with Core One, launching in September 2021. Like other institutions, Norfolk State was considering a move to Slate prior to and independently of their work with Ed Advancement. Being included in Core One and gaining access to Slate was meaningful: as the NSU team put it, “this is a gift we are blessed to have; it was the direction we already wanted to go.”

Dr. Alexander, in particular, was a champion for Slate — a role that became more important as implementation extended for just over a year. Initial implementation steps went well, but implementation momentum flagged as other departments needed to be involved, and didn't have the same buy-in as the admissions team. A combination of initiative fatigue and

assumptions of how a Slate implementation would go (based on how their previous CRM worked) created hesitancy. By helping colleagues understand that concerns about system crashes, long waits for IT tickets, and who had access to IT tickets (common with the prior CRM) were largely moot with Slate, Dr. Alexander and his team worked to “retrain the brain to think ‘hey, this system doesn’t work this way.’”

Perhaps most notable, Slate makes small updates all the time in ways that don’t disrupt usage, instead of the quarterly update of NSU’s current CRM. “ [Quarterly updates have] been very cumbersome and very frustrating for some students because if they’re caught in that window of when we’re doing an update, they may lose some of their application – we may lose some of their data,” noted Holly Estrada, CRM Analyst at NSU. “You don’t want this to be a frustrating process. You don’t want to have to make a phone call, ‘hey, I’m so sorry, we lost X amount.’”

Outcomes



Mobile First: Compared to the institution’s prior solution, Slate is significantly more mobile-friendly, which Norfolk State believes will be an important advantage in reaching Gen Z students. Forms and portals in Slate are optimized for mobile; students can upload pdfs (of their transcripts, for example) directly from their phones (a feature not supported in the prior solution), and students can access their decision on their phone as well. Students also have a portal to track their status and check to ensure materials were received. “I think having the student portal within Slate helps the student a lot to be able to track things themselves,” Dr. Alexander shared, “They don’t have to do an outreach to the office every time they have a question about something being received.”

Streamlining Solutions: Slate will allow Norfolk State to shift away from some of their technology tools, and will enable easier, more efficient use of others. Some, like Common App, will integrate into the Slate platform. Others, like texting or email, will become redundant and can be eliminated. “Knowing the capacity of Slate, knowing the challenges we had as an office, knowing all the different products we were using– Slate can house a lot of those things and streamline [our technology].” said Dominique Harrison, Director of Undergraduate Recruitment.

Shared System, Shared Responsibility: The prior system and resulting practices left a small number of individuals in the admissions office responsible for many logistical and technical steps: if a staff member wanted something done, they would have to request that one of two people do it. With Slate, as Harrison noted, “if you can type things into a calendar, you can do an event. People are so used to all the extra steps of doing things that should be simple. As people begin using the [Slate] system, I think it will be a big “wow,” and then it will become second nature.”

Setting the Stage for Deeper Utilization: The admissions team at Norfolk State hopes the initial implementation of Slate for admissions sets the stage for more cross-campus collaboration – and adoption of more Slate modules (e.g. student success, advancement). “Those who have been involved now see how the work being done at the beginning impacts other areas,” says Dr. Alexander. “Our work on the enrollment management side in terms of admissions, the financial aid piece – they’ll impact retention and graduation.”



South Carolina State University: Maximizing Fresh Energy

A team with deep insights about CRMs (and Slate) gets the support it needs to do what it has always wanted to do.

Backdrop and Goals



South Carolina State University welcomed nearly 1,000 first-time freshmen in fall 2022 – a significant jump in class size for an institution that enrolls approximately 2,500 students overall. The freshman class, the largest since 2011, arrived after several years of declining enrollments. Dr. Alexander Conyers, recently inaugurated as the 13th president of SC State, gave credit for the enrollment increases to having “a first class team” as well as “setting a goal that we thought was attainable and then providing the resources to the enrollment management team.”

Dr. Manicia Finch, who took on the vice president of enrollment management role in January 2022, was part of that team. In partnership with SC State leadership, she launched new strategies to recruit students from neighboring states, widening the top of the recruitment funnel and making a CRM even more important for cultivating connections from recruitment through enrollment. Additionally, Dr. Finch wrote her master’s dissertation on CRMs, giving her a uniquely deep understanding of a CRM’s value – and the complexity of implementing one.

Solution: A Dream Come True



Buy-in for both a CRM conceptually and Slate in particular was already high at SC State when it began its work with Ed Advancement in March 2022. While the institution did not have an active CRM prior to the Ed Advancement project, SC State had previously chosen, but not yet implemented, Slate. But even identifying Slate as the best option on the market didn’t mean it was a viable solution for the institution without additional support. Out of the box, Slate isn’t a silver bullet, and implementation requires both political will across departments and a significant investment of time. As Dr. Finch noted, “We were interested in doing [Slate], we had sales pitching from Technolutions ... [but] it was only when we were invited to the Ed Advancement project and saw what Ed Advancement was doing in the CRM [that we moved forward.]”

The Ed Advancement team quickly identified areas of opportunity in admissions that aligned with SC State goals and strategy – and specifically communications with students. “Ed Advancement identified that we had limited push campaigns and marketing materials.” Dr. Finch offered. “What Ed Advancement offered was a dream come true – these were all things that aligned with my strategy.”

In addition to supporting recruitment through ongoing communication as the university widens the funnel for applicants, SC State is also using Slate to improve its events and campus tours. Shifting tour requests and scheduling from an Outlook email inbox (with limited users) over to Slate provides more connectivity and flexibility. “If someone’s sick or out [of office], we can pick up where they left off,” Slate Captain Tammy Clubbs explained.

A consulting team, which Ed Advancement brought in, worked hand-in-hand with the SC State team on implementation. And while the team reported being very impressed with the level of support it received, it also felt that additional implementation support would be beneficial beyond the Ed Advancement project’s two-year lifespan.

On the technical side, connecting Slate with Ellucian proved to be a sticking point for implementation. SC State staff noted that a database administrator or someone with SQL knowledge would be a useful resource. In the current implementation model, the admissions team had to rely on the institutional research department for support with integration with its student information system (Banner by Ellucian).

Outcomes



Supporting enrollment growth: Slate will bolster existing initiatives at SC State (e.g., efforts to expand its student enrollment from neighboring states) by enabling ongoing outreach to both prospective students and their parents. “We’re growing enrollment – we had an increase this year, but I’m hoping that next year we’ll have an even bigger increase, and I’ll be able to tell you that Slate has been a part of that,” noted Dr. Finch.

Decreasing administrative burden; increasing student responsiveness: By integrating with other solutions like the Common App, Slate significantly decreases time spent downloading and reentering student information. “We have incorporated Common App with Slate to pull in each day,” Slate captain Tammy Clubbs noted. “Before, with some third-party application sources we had to type in everything by hand – a lot of manual processing that the data team had to do. That was a big chunk of their day. Now they can focus on recruiting, answering phone calls, etc.” Working with Ed Advancement, SC State has also integrated CampusESP to market to parents of students and ZeeMee to allow students in the enrollment funnel to connect with one another and create friendships before even getting to campus.

Becoming more data-driven: The SC State team plans to use data and insights from Slate to continually refine its processes. For example, as the university begins more proactively communicating with parents and families, it hopes to aggregate parent communications to understand trends and make changes to communications in response to what it hears from the community. Through Slate, SC State will be able to use best practices in enrollment management, connecting measurable communications to each student – an improvement over the previously used bulk email system. “We’re getting to where I want to be with data-driven enrollment,” said Dr. Finch.

Overall, despite a few hiccups in implementation, the SC State team reported an eagerness for full adoption of Slate. As Dr. Finch put it, “You better believe if they let me sit in this seat for a couple of years, we’re going to be using Slate to its fullest capacity.”



Texas Southern University: Saving Time Takes Time

CRMs provide time savings – but they also take time to implement.

Backdrop and Goals



Texas Southern University's (TSU) primary objectives for implementing Slate are to streamline its previously decentralized systems and processes and create more efficient processes that expedite time to decision release and support a better student experience.

Dr. Ceshia Love, executive director of admissions at TSU, previously led a CRM implementation for her department at her prior institution while leading the enrollment management team. By exploring peer institution CRMs and reviewing demos for three to four companies, she was convinced that Slate was the best choice.

In addition to recognizing Slate's value and the importance of CRMs in general, Dr. Love also came into the implementation with a clear view of the investment of time necessary for any CRM implementation.

Budget cuts and vacant positions significantly reduced the size of the TSU admissions office, and making the new CRM functional requires admissions staff members to shift time from day-to-day responsibilities to partner on the CRM implementation to ensure the new technology accounts for the full scope of the enrollment funnel.

Time has become the Catch-22 of the implementation process: Dr. Love and her team understand that once the CRM is up and running, it will save significant time compared to their previous systems and processes, but without having yet realized those time savings, finding time to dedicate to implementing the CRM is a challenge.

Solution: Taking It Slowly, Relying on Partners



Although they have outside support, employees of the stretched-thin admissions team have needed to devote time to supporting the implementation of the CRM even as their time is already devoted to the critical work of recruiting students and reviewing more than 10,000 applications.

To support her team members involved in implementation, Dr. Love carefully balances collaboration, accountability, dialogue and patience. She checks in regularly with colleagues in admissions and other divisions to confirm their work on key tasks and to support balancing time between their regular duties and implementation tasks. "Taking care of the employees and

making sure they feel supported is so very important in the success of this implementation,” Dr. Love said. Additionally, the TSU team strategically planned timelines of key components of the implementation. They set staggered interim deadlines (weekly and/or monthly) to keep up the momentum throughout the implementation process.

The partnership with Ed Advancement also has helped lighten the load for TSU staff. Dr. Love noted that, “The assistance with this implementation is so valuable. In my previous role, we did all this work ourselves ... the third party involvement has been truly beneficial.” The TSU team is confident in Slate as a solution but needs the additional support from the Ed Advancement team for timely implementation. Even starting with a pre-built instance as part of Core Two, the admissions staff noted challenges in finding the time for implementation on top of its day-to-day responsibilities; those time challenges would have been even more acute if the institution needed to start a Slate implementation without the Core Two jump-start.

TSU also benefited from engaged and supportive senior leadership at the institution, creating clarity on the expectations for cross-campus involvement. TSU leadership recognized the value in keeping senior leaders informed throughout the implementation so that if challenges arise that require leadership intervention. Keeping senior leaders informed throughout the implementation ensures that if challenges arise that require intervention, leaders are already at the table to support.

TSU is excited about using Slate across the student life cycle, from the top of the admissions funnel through alumni engagement and advancement. Getting there, however, will be a purposeful and incremental process. In fall 2022, the university performed its first data migration to the new Slate CRM. Rather than include all of the applicant data, Dr. Love and her team prioritized the components necessary to launch its communications plan and begin reaching out to applicants who are applying for fall 2023 admission. Next, they will integrate data for current students.

Outcomes



Expanding possibilities: So far, the value of Slate as a tool to streamline processes has surpassed the university’s expectations. For instance, TSU plans to use the geofencing feature, which allows students to automatically check in to events based on their location. As a result, students won’t need to stand in lines to check in for on-campus recruitment events.

Building relationships: Reviewing an admissions application and offering a decision is only one small component of a process that relies on an ongoing relationship between the student and university. Slate empowers the TSU team to proactively reach out to prospective enrollees throughout their matriculation journey rather than having a reactionary communication approach in which students’ outreach and queries drive engagement.

Centralizing data: Ultimately, TSU plans to use the student data collected during the admissions process and funnel it through to support their success on campus and also establish the relationship for advancement and alumni relations. The information establishes the foundation for providing tailored communications with graduates long after they’ve left campus. Centralizing information storage and data sharing will also enable TSU to better understand current and prospective students’ needs and continuously improve students’ campus journey.



Tuskegee University: Embracing “And More”

Replacing a legacy system to improve functionality – and more.

Backdrop and Goals



Tuskegee University began its digital transformation well before joining the HBCU Dx initiative. Much of the hard work to change processes and create new, digitally based workflows rather than paper-based ones happened as the university adopted its current CRM. In addition to applications, Tuskegee now tracks campus visits, open houses and event registrations.

Tuskegee University originally shifted to a CRM to replace a largely paper-based application process. The first CRM provided an online portal for students to upload documents, representing an important improvement in process as well as serving as a single repository for registrations for campus visits or open houses. Its first CRM also supported improved communication to students, based on their status (e.g., unfinished application, submitted application, admitted student, etc.)

But while the initial CRM implementation enabled Tuskegee to move away from manual data entry to a more efficient process, Tuskegee leadership realized it had an opportunity to take the next leap in the digital transformation process after understanding the Slate CRM’s capabilities. In partnership with the Ed Advancement team and using Core Two in Slate, the university hopes to reach a new level of personalization and cross-campus collaboration.

Solution: Big Aspirations, Small Bites



The shift to Slate is enabling Tuskegee to reimagine its admissions process and collect information on the front end that will help it make more data-informed decisions. The new CRM collects and reports on more data points – including analytics that show how many students open admissions office emails and the percentage of those who click on the links inside each email. As a result, it offers more insights and functionality than Tuskegee’s previous CRM.

Slate’s technology also will support targeted student recruitment for Tuskegee. For instance, for a prospective student from California who wants to study chemical engineering and play a varsity sport, Tuskegee can send the student information tailored to those characteristics. And with the increased data available through Slate, Tuskegee can also improve the application process and the overall experience with the admissions office by sequencing or organizing messages based on the student’s response (or lack thereof).

Tuskegee plans to pilot a new application in fall 2023. The university will initially use the application for students pursuing its fully online degree offerings, which are smaller and attract fewer applicants than the traditional on-campus program, before launching it more widely. “The vision is, let’s start small and let’s figure out the many things that Slate can do right now with a smaller group of students,” said Jeffrey Pierce II, CRM systems manager. From there, the plan is to launch more widely.

Outcomes



A vision for campus data sharing: Admissions is only the starting point. Tuskegee University leaders envision using Slate to work with many other campus divisions, including housing, financial aid, student advising, the business office and advancement. Each of those divisions contribute to a student’s time on campus, and shared data is the foundation of a streamlined experience. If an applicant indicates that they’re the child of a Tuskegee grad, admissions can share that information with university fundraisers and potentially create a new prospect for the alumni office.

More personalized: Collecting better and more information about prospective students in a user-friendly, cross-campus platform supports Tuskegee’s aspirations to create connections across the broader Tuskegee community as well as a streamlined admissions process. The admissions team at Tuskegee University hopes to eventually be able to connect prospective students not only with alumni in their area but alumni in their area with shared interests. “If a student is on our website, they fill out a request for information form, and they say they’re interested in sports, and they’re from the state of Georgia. How do we build a communication plan that speaks to that?” Pierce shared. “Can we say, ‘Oh, we have an alum in Georgia who studied the same major you chose. Or, not only do we have an alum in Georgia, but here’s an alum in Georgia who played sports while they were at Tuskegee.’”

More fun: Communicating with prospective students is all in the details. With Slate, when a student opens their acceptance letter, confetti falls on the screen. Getting into college is an exciting moment for students and their families, and a little technology can help make the good news even more exciting.