



Student Lifecycle CRM

Focused Giving, Guided by Intelligence

Designed to help Advancement and Development teams deepen relationships, focus effort where it matters most, and accelerate philanthropic impact.





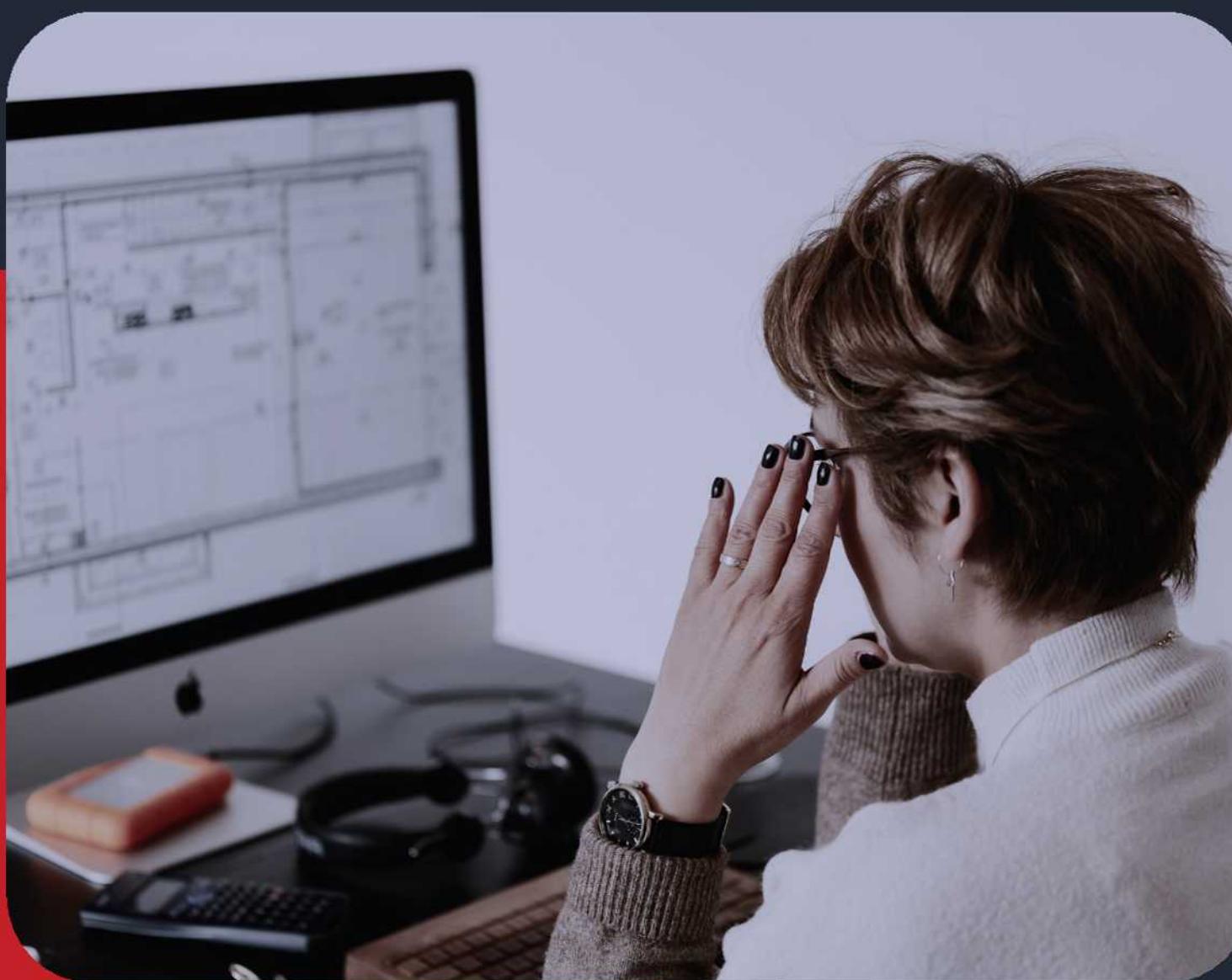
Why Advancement Needs a New Approach

Advancement has never been more complex—or more critical. Institutions face increased competition for donor attention, rising expectations for personalized engagement, and growing pressure to demonstrate measurable impact.

Yet many Advancement teams remain constrained by systems that are reactive by design. Traditional CRMs capture transactions and interactions, but rely on fundraisers to interpret data, prioritize effort, and decide what to do next. greymatter Advance changes that.

greymatter Advance brings prescriptive guidance, lifecycle modeling, and higher-education-specific intelligence directly into Advancement workflows—helping teams focus effort, deepen relationships, and act with greater confidence.

By combining advanced guidance with deep domain expertise in higher education advancement, institutions gain a solution that not only manages relationships—but actively guides them.



Why Traditional Advancement CRMs Aren't Enough

Most traditional Advancement systems were designed to record relationships—not to actively guide them. They excel at capturing transactions and interactions, but stop short of helping teams decide what to do next.

As a result, they answer retrospective questions such as:

- What happened?
- How much was given?
- Who attended?

Today's Advancement leaders need answers to a different set of questions—questions that drive focus and action:

- Who should we engage right now?
- Where should major gift officers focus this quarter?
- Which alumni are most likely to deepen engagement next?
- What action is most likely to increase giving momentum?

greymatter Advance is designed to answer these questions—directly and prescriptively.

The greymatter Advance Foundation

greymatter Advance is purpose-built for higher education Advancement and Development teams and is natively built on Microsoft Dynamics 365 Fundraising and Engagement—providing a secure, scalable, enterprise-grade foundation.

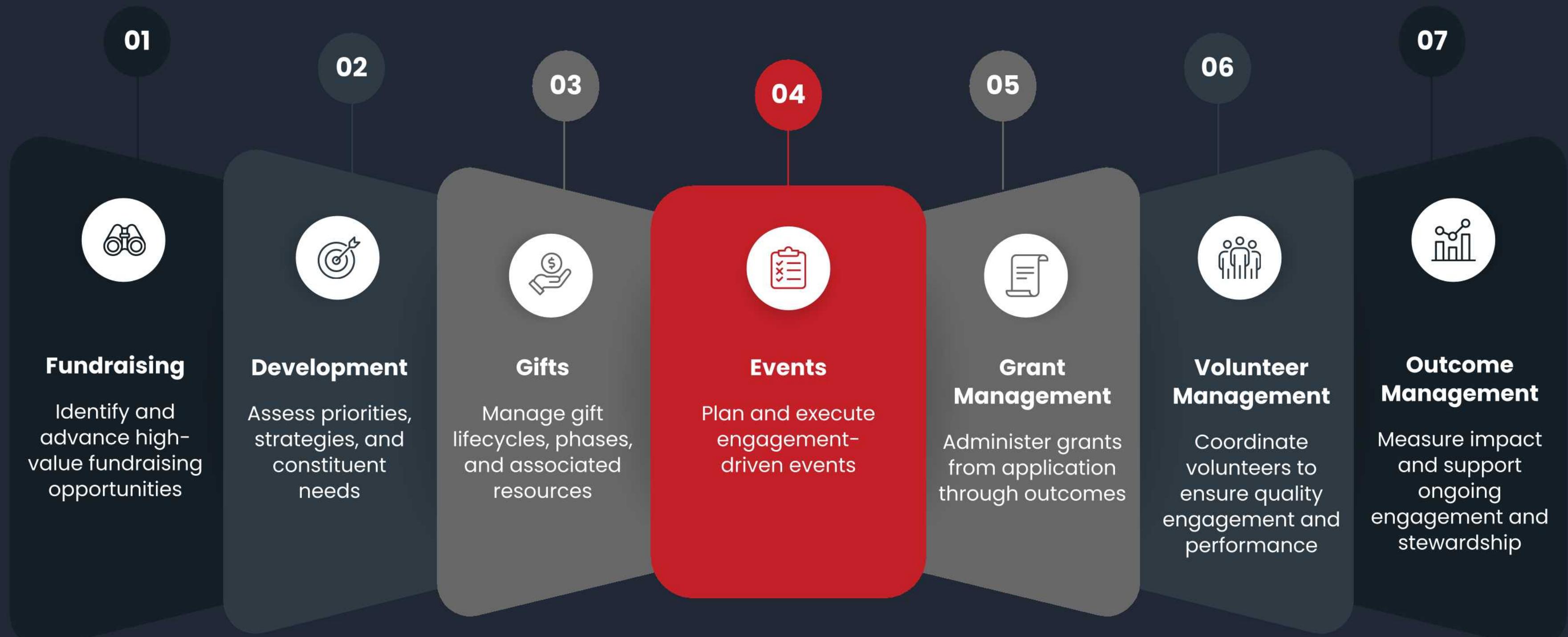
This foundation delivers the core capabilities required to manage Advancement operations at scale, while ensuring reliability, performance, and compliance across the institution.

- **Constituent & Donor Management**
- **Opportunity, Pledge & Gift Management**
- **Payment Processing & Receipting**
- **Event & Volunteer Management**
- **Grant & Outcomes Management**



Advancement

Lifecycle Coverage



A single operational foundation supporting every stage of **Advancement work**.

Core Value Pillars

➤ Unified Relationship Intelligence

greymatter Advance unifies data across the Advancement ecosystem into a single, trusted source of truth. By maintaining a continuously updated 360° constituent view with consistent data definitions, teams reduce silos, reconciliation effort, and uncertainty—creating a stronger foundation for every relationship decision.

➤ Prescriptive, Not Just Predictive

greymatter Advance embeds prescriptive intelligence directly into Advancement workflows, moving analytics from passive insight to active guidance. Priorities and next-best actions are surfaced automatically based on engagement and giving signals, enabling action without added complexity.

➤ Focus Where It Matters Most

greymatter Advance keeps teams focused on the relationships and actions that drive the greatest impact. By continuously surfacing high-value opportunities, at-risk relationships, and moments for deeper engagement, teams can shift from reactive outreach to intentional relationship building.

➤ Built The Way Your Teams Work

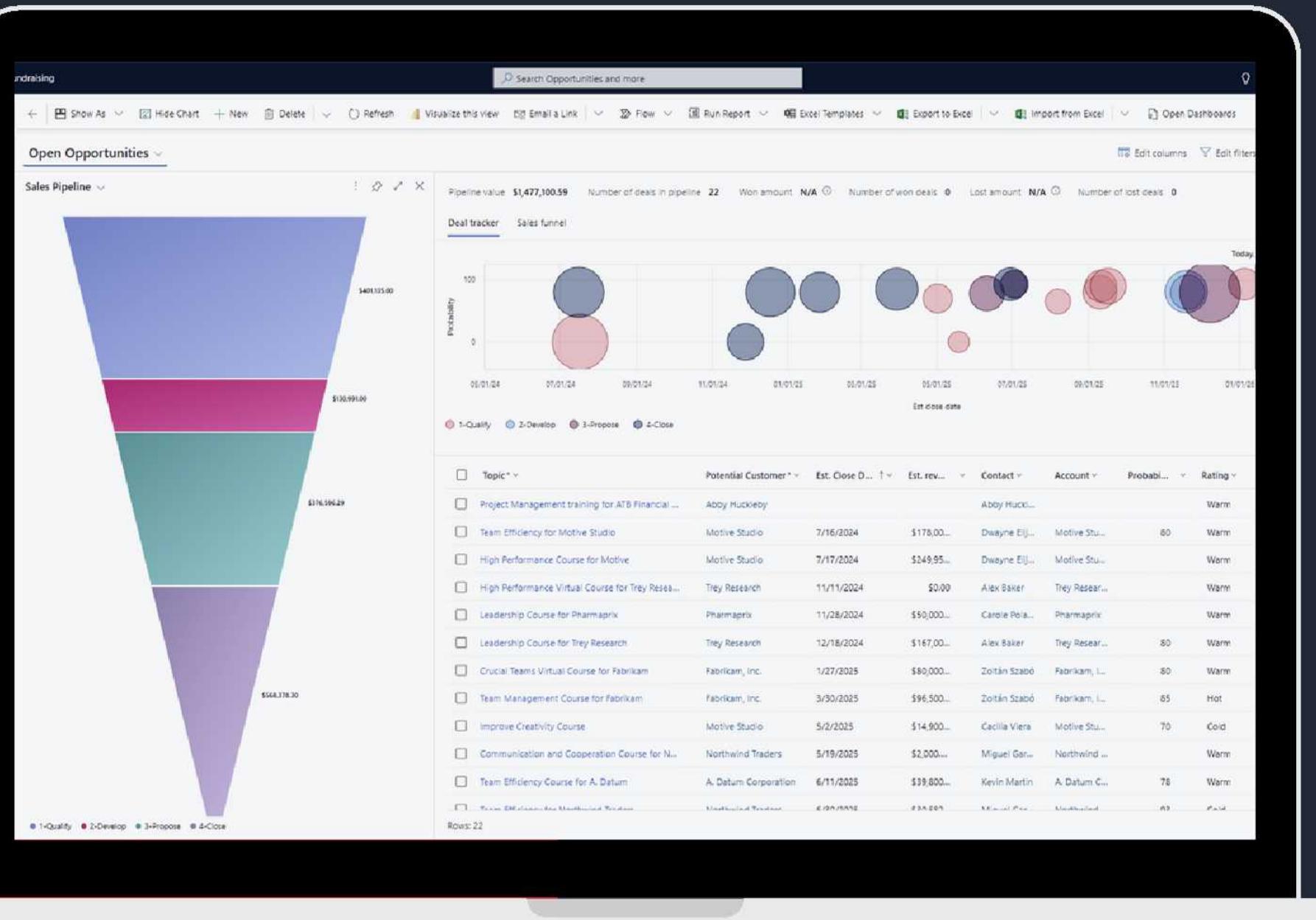
greymatter Advance is purpose-built for higher education Advancement teams and adapts to how institutions operate and evolve. Flexible models, low-configuration overhead, and support for changing campaigns and priorities ensure the platform remains a durable foundation over time.

Integration Capabilities

greymatter Advance is designed to integrate seamlessly with core systems such as ERPs and payment processors, extending and connecting the broader technology ecosystem.

Samples of Supported Systems

- Ellucian Banner
- PeopleSoft
- Touchnet
- Moneris





Get in Touch
for a Free Demo



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