



Educational & Institutional Cooperative Services, Inc.

greymatter Student Lifecycle CRM

Engage, Support, and Grow Your Students

Full Lifecycle Overview

Recruit | Admit | Retain | Promote

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GREYMATTER CRM OVERVIEW

greymatter is a unified, student-centered solution purpose-built for higher education. It helps institutions break down silos by bringing all engagement, interactions, and data into one place, solving the common challenge of fragmented student information across multiple systems and departments.

With a complete, real-time view of every student and alumnus, greymatter gives faculty, staff, and administrators the insights they need to support students effectively at every stage of their journey.

greymatter delivers tangible business value by enabling institutions to:

- 1. Engage Effectively:** Deliver timely, personalized communication to prospects, applicants, students, and alumni through the right channels at the right time.
- 2. Gain Insight:** Understand trends in recruitment, admissions, retention, and alumni engagement, allowing staff to make informed decisions and anticipate challenges.
- 3. Take Action:** Turn insights into results by prioritizing high-value prospects, identifying students who need support, optimizing outreach, and allocating resources efficiently.

Whether used as a complete suite or through individual lifecycle areas, greymatter empowers institutions to strengthen relationships, improve operational efficiency, and achieve measurable outcomes across recruitment, admissions, student success, and alumni engagement.

WHY GREYMATTER?

Not all higher education CRMs are created equal. Unlike one-size-fits-all systems, greymatter empowers staff to make smarter decisions, act faster, and engage students more effectively—driving measurable outcomes at every stage of the student journey.

With greymatter, institutions benefit from:

- **Seamless Student Lifecycle:** A complete, unified platform—no more fractured data or disconnected processes.
- **Actionable Insights:** Real-time analytics and reporting help teams prioritize high-impact activities and make data-driven decisions.
- **Personalized Engagement:** Tools to deliver meaningful, timely communication that keeps students and alumni connected and supported.

Below is an overview of the key product differentiators that set greymatter apart and help institutions achieve real results.

Purpose-Built for Higher Education

greymatter is designed specifically for colleges and universities, not adapted from generic commercial systems. Its language, workflows, and tools are tailored to the realities of higher education, supporting the full student journey from prospect to alumnus.

Complete Lifecycle Management in One Platform

With four purpose-driven lifecycle areas—Recruit, Admit, Retain, and Promote—greymatter gives institutions a seamless, unified approach to managing the student lifecycle. Departments can work collaboratively, reduce duplication, and maintain continuity across recruitment, admissions, student success, and alumni engagement.

Recruitment Efficiency and Smart Engagement

The Recruit lifecycle area helps institutions attract and engage prospects more effectively. Teams can prioritize high-interest leads, manage territories and events, coordinate outreach, and ensure every prospect receives timely, relevant communication.

Streamlined Admissions and Application Management

The Admit lifecycle area simplifies the application process for both students and staff. Automated workflows guide applicants, track required materials, and support decision-making milestones, reducing administrative workload while enhancing the applicant experience.

Proactive Student Success and Retention

The Retain lifecycle area empowers institutions to identify students who may need support and intervene early. Tools for academic progress tracking, advising, and case management help improve retention and promote student success, ensuring no student falls through the cracks.

Career and Alumni Engagement for Lifelong Value

The Promote lifecycle area helps institutions extend support beyond graduation by managing career services, employer relationships, continuing education, and alumni engagement. With tools for targeted communication and event management, Promote strengthens lifelong connections and drives meaningful outcomes for both alumni and the institution.

Personalized, Omnichannel Communication

greymatter enables institutions to reach prospects, students, and alumni through the right channels at the right time using automated, behavior-driven campaigns.

Actionable Insights Across the Lifecycle

greymatter equips staff with real-time insights and scoring tools to drive better outcomes:

- **Lead and Engagement Prioritization:** Identify the most promising prospects and optimize recruitment and admissions efforts.
- **Early Alerts and Intervention:** Flag at-risk students early and take proactive steps to support their success.
- **Lifecycle-Wide KPI Tracking:** Dashboards provide visibility into conversion rates, application progress, student engagement, academic performance, and alumni activity.

Intelligent Student Support with AI

ELSA, an AI-powered assistant, enhances engagement and reduces administrative workload. ELSA provides instant, context-aware responses to questions, escalates inquiries to staff when needed, and interacts with students, staff, and alumni across multiple channels.

Mobile-Ready and Always Accessible

Students, staff, and alumni can engage anytime, anywhere. Recruiters and advisors can manage tasks, track interactions, and respond quickly on the go.

Trusted Security and Compliance

greymatter ensures sensitive student and alumni data is protected at every touchpoint, helping institutions meet regulatory requirements and maintain stakeholder trust.

Flexible, Integrated Solution

greymatter works seamlessly with institutional systems to create a connected, efficient ecosystem that supports staff and enhances the student experience.

GREYMATTER LIFECYCLE AREAS: STREAMLINING THE STUDENT LIFECYCLE

greymatter supports the full student lifecycle through four seamlessly integrated lifecycle areas: Recruit, Admit, Retain, and Promote. Each area is designed to streamline processes, strengthen engagement, and deliver actionable insights—whether used individually or as part of the complete platform.

Every lifecycle area provides practical, outcome-focused tools that help teams efficiently manage recruitment, admissions, student success, and alumni engagement. This section highlights the core capabilities of each area, showing how greymatter helps institutions optimize workflows, improve communication, and drive measurable results.

1. **Recruit:** Engage, nurture, and convert prospects into applicants with intelligent, personalized outreach.
2. **Admit:** Simplify admissions with automated workflows, configurable processes, and streamlined evaluations.
3. **Retain:** Support student success with proactive interventions, case management, and engagement analytics.
4. **Promote:** Foster lifelong connections with alumni and learners through targeted engagement and career opportunities.

Thanks to greymatter's non-modular design, institutions can implement the tools they need now while maintaining the flexibility to expand over time. Each area integrates seamlessly to deliver a consistent user experience and a unified view of every student—from prospect to alumnus.

The following pages provide a high-level look at the key features and capabilities of each lifecycle area.

RECRUIT: ENGAGE AND CONVERT PROSPECTS

The Recruit lifecycle area helps institutions attract, engage, and convert prospective students efficiently. By combining personalized outreach, targeted campaigns, and proactive relationship management, Recruit ensures prospects move smoothly through the enrollment funnel while maximizing engagement and conversion.

Key Capabilities

- **Prospect and Lead Management:** Segment, track, and prioritize prospects to focus efforts on the most promising leads.
- **Multi-Channel Campaigns:** Deliver personalized communications via email, SMS, social media, and web to engage students where they are.
- **Event Management:** Plan and manage virtual or in-person events, including registration, attendance tracking, and follow-up, to strengthen connections with high-value prospects.
- **Agency and Territory Management:** Coordinate international recruitment agencies and assign territories to ensure coverage and accountability.
- **Self-Service Prospective Student Portal:** Provide a tailored online experience that guides prospects and showcases the institution's offerings.
- **Lead Scoring and Source Attribution:** Identify high-potential prospects and measure the effectiveness of recruitment channels and campaigns.

Business Impact

- Increased prospect engagement and conversion rates
- Improved ROI on recruitment channels and campaigns
- Reduced time to first interaction with prospective students
- Enhanced event attendance and follow-up effectiveness

Recruit equips institutions with the tools and insights needed to grow enrollment, strengthen relationships with prospects, and efficiently manage recruitment activities across multiple channels and partners.

ADMIT: SIMPLIFY AND ACCELERATE ADMISSIONS

The Admit lifecycle area streamlines the admissions process, helping institutions efficiently manage applications, evaluations, and decisions while enhancing the applicant experience. By automating workflows and providing real-time insights, Admit ensures every applicant receives timely, accurate, and personalized support.

Key Capabilities

- **Application and Document Management:** Simplify intake, review, and tracking of applications, transcripts, test scores, and other required documents.
- **Self-Service Applicant Portal:** Provide prospects with a personalized portal for application submission, document uploads, and status updates.
- **Automated Evaluation and Decision Workflows:** Standardize program- and persona-based evaluation criteria, manage reviewer assignments, and automate scoring and decision generation.
- **Financial Aid and Scholarships:** Manage awards, applications, and funding packages to support student affordability and enrollment goals.
- **Reference Management:** Facilitate referee submissions and track associations to ensure complete application reviews.
- **Configurable Dashboards and Analytics:** Monitor application progress, conversion rates, and decision timelines to guide data-driven admissions strategies.

Business Impact

- Higher application completion rates and reduced abandonment
- Faster, more consistent evaluation and decision-making
- Improved applicant experience through timely communication and transparency
- Increased offer acceptance and enrollment yield

Admit empowers institutions to simplify admissions, reduce administrative workload, and make informed decisions that improve outcomes for both applicants and the institution.

RETAIN: PROACTIVELY SUPPORT STUDENT SUCCESS

The Retain lifecycle area supports student success and persistence beyond enrollment. By equipping advisors and support staff with proactive tools for planning, monitoring, and engagement, Retain ensures students receive timely support to stay on track toward graduation.

Key Capabilities

- **Dynamic Student Profiles:** Track academic progress, engagement, and milestones to provide a holistic view of each student.
- **Early Alerts and Risk Identification:** Detect at-risk students through predictive analytics, engagement scoring, and automated flagging, enabling timely interventions.
- **Case Management and Academic Advising:** Coordinate support services, success plans, and personalized coaching to address student needs efficiently.
- **Degree and Career Planning:** Offer self-service tools for degree planning, “what-if” analyses, and integration with career services to guide students toward graduation and career readiness.
- **Appointment and Queue Management:** Streamline student interactions with advisors through self-service booking and virtual queue systems.
- **Attendance and Curriculum Management:** Monitor course schedules, attendance, and program requirements to support academic progress.

Business Impact

- Increased student retention and term-over-term persistence
- Faster resolution of academic and support cases
- Improved academic progress and completion rates
- Greater utilization of advising, support, and career services

Retain empowers institutions to proactively support students, drive academic success, and enhance overall retention outcomes, ensuring every student has the tools and guidance needed to thrive.

PROMOTE: BUILD LIFELONG ALUMNI AND CAREER CONNECTIONS

The Promote lifecycle area extends engagement beyond graduation, helping institutions foster lifelong relationships with alumni, learners, and industry partners. By supporting continuing education, workforce development, and alumni relations, Promote strengthens connections, drives engagement, and creates lasting value for both students and the institution.

Key Capabilities

- **Alumni and Donor Relationship Management:** Maintain ongoing communication, manage fundraising campaigns, and coordinate volunteer and engagement activities.
- **Continuing Education and Credential Tracking:** Support registration for credit and non-credit programs, track certifications, credentials, and continuing education units (CEUs).
- **Marketing and Campaign Automation:** Deliver targeted communications to alumni, learners, and partners to drive participation and engagement.
- **Events and Networking:** Plan and manage events, workshops, and volunteer opportunities to strengthen community and institutional relationships.
- **Employer and Industry Partnerships:** Track and manage relationships with employers, industry partners, and engagement opportunities to support workforce initiatives.

Business Impact

- Increased alumni engagement and giving rates
- Growth in continuing education and workforce program enrollment
- Higher participation in events and volunteer programs
- Strengthened employer and partner relationships, driving institutional impact

Promote empowers institutions to maintain meaningful connections, support lifelong learning, and expand engagement opportunities, creating value well beyond graduation.

OPTIONAL AI ADD-ONS: ADVANCED INSIGHTS AND PREDICTIVE SUPPORT

greymatter offers a suite of AI-powered add-ons that extend the platform's core capabilities with predictive analytics, behavioral insights, and personalized student support. Each add-on is designed to enhance decision-making, strengthen engagement, and drive measurable outcomes—whether applied individually or alongside the main lifecycle areas.

These optional add-ons provide advanced tools that help institutions identify high-potential students, anticipate challenges, and deliver tailored interventions across recruitment, admissions, retention, and career/alumni engagement. This section highlights each add-on and its unique value:

- 1. Admissions Optimizer (Recruit & Admit):** Identify high-potential leads and optimize recruitment and admissions strategies with data-driven predictive scoring and insights.
- 2. Foresight (Retain):** Proactively flag students at risk and prioritize interventions to improve retention and persistence.
- 3. Portrait (Retain):** Deliver personalized coaching and behavioral nudges to support student success and academic achievement.
- 4. Skills Planner (Retain & Promote):** Align education with career pathways, guide skill development, and support lifelong learning and continuing education.

The following pages provide a high-level look at the key features and business impact of each AI add-on.

ADMISSIONS OPTIMIZER: TARGET HIGH-POTENTIAL PROSPECTS

The Admissions Optimizer add-on leverages advanced machine learning to improve recruitment effectiveness and admissions planning. By analyzing historical and real-time data, it helps institutions identify high-potential prospects and focus efforts where they will have the greatest impact.

Key Capabilities

- **Enrollment Likelihood Scoring:** Forecast each prospect's likelihood to enroll, updating at key funnel stages to guide prioritization and resource allocation.
- **Customizable Predictive Models:** Tailor model inputs—such as GPA, geography, or program interest—to align with unique recruitment goals.
- **Demographic Snapshots:** Visual summaries of key prospect attributes support segmentation and targeted outreach.
- **Strategic and Operational Dashboards:** Role-based insights into pipeline health, campaign performance, and lead quality for executives and day-to-day users.

Business Impact

- More efficient targeting of high-value prospects
- Improved recruitment ROI and funnel conversion
- Smarter allocation of admissions resources

FORESIGHT: PREDICT AND PREVENT STUDENT ATTRITION

The Foresight add-on enhances retention tools with advanced predictive modeling. It enables institutions to proactively identify students at risk of attrition and deliver timely, personalized interventions.

Key Capabilities

- **Comprehensive Profiles:** Combines academic, engagement, and persistence data to generate a Commitment Index measuring motivation and intervention receptivity.
- **Personality Dimensionalization:** Assesses over 50 traits to predict student success in specific programs or environments.
- **Risk Prediction & Intervention Planning:** Flags potential academic or behavioral issues before they arise and recommends targeted support strategies.
- **Resource Prioritization:** Focus staff resources on students most likely to benefit, maximizing impact.

Business Impact

- Reduced attrition and improved retention rates
- More effective, data-driven interventions
- Optimized use of advising and support resources

PORTRAIT: PERSONALIZED COACHING FOR SUCCESS

The Portrait add-on applies behavioral science and learning analytics to support student success through personalized coaching and intervention strategies. Powered by WHALE (Warehouse of Holistic Academic and Learning Environments), Portrait delivers timely, effective, and tailored nudges to drive student engagement and course completion.

Key Capabilities

- **Personalized Learning Analytics:** Identify individual learning behaviors and recommend improvements.
- **Behavioral Nudges:** Deliver targeted prompts to encourage study habits, participation, and follow-through.
- **Adaptive Virtual Assistant (EMILIA):** Engage students with context-aware messaging based on LMS activity and behavioral indicators.
- **Instructor Insights:** Provide faculty with actionable teaching suggestions tailored to student and group learning trends.

Business Impact

- Higher academic performance and course completion
- Increased student engagement and persistence
- Data-driven support for both students and instructors

SKILLS PLANNER: ALIGN EDUCATION WITH CAREER GOALS

The Skills Planner add-on is an AI-powered career and academic planning tool that helps students align their education with labor market demands. It supports undecided students, career changers, and lifelong learners exploring continuing education.

Key Capabilities

- **Personalized Skill Development:** Map current competencies against job market requirements and recommend relevant courses or experiences.
- **Career & Academic Pathway Alignment:** Suggest academic pathways based on interests, skill gaps, and labor market demand.
- **Transfer Planning:** Identify credit transfer opportunities and institutions aligned with students' career goals.
- **Advisor Integration:** Enable collaborative planning with advisors for personalized support.

Business Impact

- Improved career readiness and student satisfaction
- Better alignment of academic programs with labor market needs
- Enhanced engagement for continuing education and lifelong learning