



Educational & Institutional Cooperative Services, Inc.

greymatter Retain

Keep Students Engaged, On Track, and Moving Toward Graduation

greymatter CRM

Recruit | Admit | **Retain** | Promote

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WHY GREYMATTER RETAIN?

greymatter supports the full student lifecycle through four integrated lifecycle areas: Recruit, Admit, Retain, and Promote. Institutions can deploy any lifecycle area individually or combine them for a fully connected experience.

Retain focuses on student persistence and success—empowering advisors, counselors, and student services teams to engage proactively, resolve challenges early, and guide students from enrollment through graduation. Whether used as part of the complete platform or as a standalone solution, Retain turns reactive support into strategic, data-informed engagement that measurably improves retention outcomes.

Unlike point solutions that only flag risk after problems arise, Retain combines predictive analytics, case management, degree planning, and self-service tools in one unified platform. This holistic approach reduces silos, improves collaboration, and gives institutions real-time insights into student progress, so they can act before issues impact persistence or completion.

Unlocking Student Success Through Five Core Capabilities

Retain delivers measurable impact through a focused set of capabilities designed to help institutions support every student, at every stage. Together, these capabilities enable staff to anticipate needs, personalize engagement, and create a seamless experience that drives retention and graduation rates higher.

PROACTIVE STUDENT ENGAGEMENT & EARLY ALERTS

Help advisors intervene before challenges escalate. Retain's predictive analytics and engagement scoring identify students most likely to need support, so staff can focus resources where they'll have the greatest effect.

Key Capabilities

- **Dynamic Student Profiles:** View academics, engagement, and milestones in one place.
- **Risk & Engagement Scoring:** Identify students at risk of attrition before they disengage.
- **Automated & Manual Alerts:** Flag academic, attendance, and behavioral concerns in real time.
- **Success Plans & To-Dos:** Create actionable steps and track completion.
- **Behavior Tracking:** Log incidents and monitor resolutions securely.

Business Impact

- **Boost Retention:** Intervene earlier and keep more students enrolled term over term.
- **Improve Efficiency:** Help advisors spend less time searching for risk indicators and more time supporting students.
- **Deliver Equitable Support:** Ensure no student is overlooked, even in large caseloads.

COORDINATED CASE MANAGEMENT & HOLISTIC ADVISING

Eliminate silos and deliver coordinated support. Retain provides a centralized hub where advisors, counselors, and support staff can collaborate seamlessly to resolve cases quickly and comprehensively.

Key Capabilities

- **Comprehensive Case Records:** Capture every touchpoint with secure, permission-based notes.
- **Cross-Department Collaboration:** Coordinate interventions across advising, counseling, and support teams.
- **Student Self-Service Case View:** Allow students to see their assigned advisors and case progress.
- **Integrated Communication:** Notify students with email, SMS, and portal updates.

Business Impact

- **Faster Case Resolution:** Reduce time from issue identification to resolution.
- **Greater Student Satisfaction:** Give students visibility into their support network and case progress.
- **Institutional Insight:** Track caseload trends to inform resource planning.

SEAMLESS SELF-SERVICE APPOINTMENTS & QUEUE MANAGEMENT

Empower students to get the help they need—without the frustration of long waits or complex scheduling processes.

Key Capabilities

- **Real-Time Appointment Booking:** Directly integrated with Microsoft Outlook for instant confirmation.
- **Virtual Queue Management:** Students can join queues remotely and receive live wait-time updates.
- **Equitable Service Delivery:** Balance workloads and minimize wait times for both in-person and virtual visits.

Business Impact

- **Higher Utilization of Services:** Make it easy for students to access advising and support.
- **Reduced Administrative Burden:** Free staff from manual scheduling and triage.
- **Improved Student Experience:** Reduce wait times and no-show rates.

PERSONALIZED DEGREE & CAREER PLANNING

Motivate students to persist by giving them a clear, interactive view of their academic path and career opportunities.

Key Capabilities

- **Interactive Degree Audit:** Real-time visualization of completed, in-progress, and remaining requirements.
- **What-If Analysis:** Model impacts of major changes or course substitutions.
- **Pathway Creation:** Build guided academic plans that encourage timely graduation.
- **Drag-and-Drop Plan Builder:** Create or modify degree plans collaboratively with dynamic validation.

Business Impact

- **Higher Completion Rates:** Help students stay on track to graduate on time.
- **Reduced Major-Switch Delays:** Let students see the impact of program changes before making them.
- **Increased Advising Impact:** Advisors can focus sessions on planning and mentorship rather than administrative tasks.

STREAMLINED CURRICULUM & ATTENDANCE MANAGEMENT

Keep students engaged at the course level and intervene early when attendance becomes a risk factor.

Key Capabilities

- **Course & Program Management:** Maintain up-to-date catalogs, schedules, and prerequisite rules.
- **Attendance Tracking:** Faculty portals and apps make recording attendance simple and connected to alerts.

Business Impact

- **Improved Course Completion:** Catch attendance issues early and keep students engaged.
- **Better Data for Advisors:** Give advisors a clear picture of a student's academic participation.

OPTIONAL AI ADD-ONS FOR RETAIN

To take student retention and success to the next level, greymatter offers optional AI-powered add-ons that extend Retain's core capabilities with predictive analytics, personalized coaching, and career-aligned planning. These add-ons help advisors and support teams anticipate challenges, personalize interventions, and guide students toward graduation and career readiness.

FORESIGHT: PREDICT AND PREVENT STUDENT ATTRITION

The Foresight add-on leverages advanced AI and predictive modeling to identify students at risk of attrition, enabling institutions to deliver timely, tailored interventions.

Key Capabilities

- **Comprehensive Student Profiles:** Integrates academic, engagement, and persistence data for a holistic view of each student.
- **Personality Dimensionalization:** Assesses multiple traits to predict student success in programs and courses.
- **Risk Prediction & Targeted Interventions:** Flags potential academic or behavioral issues early and recommends personalized support strategies.
- **Resource Prioritization:** Focus staff efforts on students most likely to benefit, maximizing impact.

Business Impact

- **Reduced Attrition:** Predictive insights allow institutions to intervene early, keeping more students enrolled.
- **Data-Driven Interventions:** Advisors and staff can make informed, strategic decisions based on student risk and engagement data.
- **Optimized Resource Use:** Focus support where it will have the greatest impact, maximizing efficiency and effectiveness.

PORTRAIT: PERSONALIZED COACHING FOR SUCCESS

Portrait combines behavioral science and learning analytics to provide timely, personalized coaching and intervention strategies that increase engagement and academic achievement. Powered by WHALE (Warehouse of Holistic Academic and Learning Environments), Portrait delivers actionable nudges that keep students on track.

Key Capabilities

- **Personalized Learning Analytics:** Identify learning behaviors and recommend improvements for individual students.
- **Behavioral Nudges:** Encourage consistent 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 individual and group learning trends.

Business Impact

- **Higher Academic Performance:** Personalized nudges and learning insights help students succeed in courses.
- **Increased Engagement:** Targeted prompts encourage consistent participation and study habits.
- **Instructor Effectiveness:** Faculty receive actionable insights to guide teaching strategies and student support.

SKILLS PLANNER: ALIGN EDUCATION WITH CAREER GOALS

Skills Planner empowers students and advisors to connect academic planning with labor market demands, supporting undecided students, career changers, and lifelong learners.

Key Capabilities

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

Business Impact

- **Career-Ready Students:** Aligns education with labor market needs to prepare graduates for real-world success.
- **Improved Satisfaction:** Students gain confidence in their academic and career planning.
- **Enhanced Lifelong Learning:** Supports continuing education and skill development for evolving career goals.

GREYMATTER RETAIN LICENSING & DEPLOYMENT OPTIONS

The greymatter Retain license is built for teams driving student success, including Student Affairs, Advising, Counseling, and Retention staff. Whether deployed institution-wide or within a single department, Retain provides the tools and insights to deliver proactive, data-driven student support. Optional AI-powered add-ons further enhance predictive analytics, personalized coaching, and career alignment.

Who It's For

- Academic Advisors and Success Coaches
- Student Affairs and Retention Teams
- Counseling and Support Services
- Career Services and Workforce Development Staff

What It Includes

- **Engagement Tracking & Early Alerts:** Spot at-risk students early with risk scoring, behavioral triggers, and automated alerts.
- **Case Management & Advisor Notes:** Collaborate across departments, securely log advisor interactions, and track case resolution progress.
- **Success Plans & Interventions:** Build structured plans with milestones, to-dos, and interventions that keep students on track.
- **Self-Service Appointment Booking & Queue Management:** Streamline student access to services with online scheduling, real-time availability, and virtual queuing.
- **Degree Audit & Guided Pathways:** Help students visualize academic progress, explore “what-if” scenarios, and follow recommended pathways to graduation.
- **Curriculum & Attendance Management:** Maintain course catalogs, monitor attendance, and keep academic data aligned with student plans.

Optional AI Add-Ons (Annual Fee Licenses)

- **Foresight:** Advanced predictive modeling identifies at-risk students before issues arise and recommends targeted interventions.
- **Portrait:** Behavioral analytics and personalized coaching nudges drive engagement, persistence, and course completion.
- **Skills Planner:** Align academic and career pathways, highlight skill gaps, and support students in making informed career and education decisions.

Why It Matters

- **Drive Retention:** Enable earlier, targeted interventions that keep more students enrolled.
- **Scale Advising Impact:** Manage larger caseloads effectively without sacrificing personalization.
- **Maximize ROI:** Reduce stop-outs and time-to-degree, improving institutional performance metrics.
- **Future-Ready:** Flexible licensing scales with your needs and integrates seamlessly with SIS, LMS, and Microsoft Outlook for accurate, real-time data across systems.