

Ellucian's CRM Advise Optimization Services give you everything you need to make the most of CRM Advise. We'll partner with you to review your existing business processes, then we'll deliver:

- Recommendations on configuring and optimizing your CRM Advise system
- A focused training/re-training plan for your staff
- Individualized consulting based on your institution's needs

Key benefits

- **Unmatched expertise.** Experience matters. Our consultants understand higher education and the complex challenges of IT systems. We'll give you the best advice on how to maximize your solution and processes to achieve your institutional goals.
- **A plan for the future.** Our consultants work with other experts across Ellucian and have extensive knowledge of our product roadmaps. We'll help you take the long view with your solution and processes for long-term success.
- **Quick return on investment.** Your experienced consultant can help you achieve quick success on short-term CRM Advise projects with our established processes and deep implementation experience.
- **Custom scope.** With Optimization Services, you can define custom scopes to improve your processes and make the most of your investment.
- **Microsoft Dynamics certification.** Every Ellucian CRM Advise consultant is certified in Microsoft Dynamics CRM and can help train your staff in best practices for enhancing your CRM Advise experience using the Dynamics CRM platform.

Our approach

- **Conduct a functional system audit** that includes a high-level system review, gap analysis, and identification of opportunities for business process improvements.
- **Lead discovery and review of system features** to solidify requirements and guide best practices in the use of CRM Advise.
- **Develop a detailed, custom consulting plan** for streamlining business processes and maximizing your CRM Advise investment.
- **Introduce new features** in CRM Advise and identify use cases.
- **Help drive adoption** of CRM Advise within Student Services and across your institution.
- **Apply an iterative approach** to assessing your level of expertise in CRM Advise and developing repeatable processes for success.

Contact us at ellucian.com/solutions/deploy-sustain to learn more.