



Holistic Advising Throughout the Student Journey

Longstanding customer Delta College evolved with CRM Advise for more comprehensive, personalized student support.

Technology can only help when everyone involved knows how to use it effectively. Delta College implemented CRM Advise in 2015, but it wasn't until 2018 that administrators and staff realized they could better support students throughout their educational journeys by changing their approach to advising technology. "We were utilizing about 10% of CRM Advise," says Dean of Student Success, Shelly Raube. "We didn't truly understand the scope of what it could do for the institution."

Delta was determined to make a change, but they couldn't do it alone. They brought on Rachel Merkle, a student success technologist dedicated to supporting CRM Advise. With the on-site Ellucian Managed Services team, they worked backwards to understand how their current technology roadmap fit into a larger understanding of community needs. "How will it help students? How will it help faculty or staff? If we can't answer those questions, we can't move forward," Raube explains. In this case, Delta had been leveraging CRM Advise for communications, but hadn't fully unlocked its potential as a retention driver.

By including all stakeholders, Delta is creating a comprehensive approach to student success. "We're bringing the students, faculty, and staff together and defining what we're calling the student journey," Merkle says. "Going from application to graduation and every piece in between."

Turning Advising Generalists into Specialists

Previously, Delta advisors weren't assigned to anyone, which means they had to be ready to help *everyone*. But when students walked through



Case Study

Main Challenge

A fully supported student journey required a new approach to advising

Solutions

CRM Advise
Ellucian Managed Services

Results

- Narrowed caseloads from approximately 500–600 students per advisor down to 250–350 students per advisor
- Nearly 2% increase in retention rate from fall 2021 to fall 2022
- 800% increase in student email volume in 2018

the door, they often needed specialized support that a generalist model struggled to quickly provide. As part of their transformation, Delta prepared to switch to a caseload model in which every advisor is assigned to a specific list of students and equipped with insights from CRM Advise to make sure they can meet each one's specific needs.

"We wanted to create a holistic view of the student in one location," Merkle says, describing how CRM Advise can aggregate information into configurable and convenient dashboards. "Advisors can get a good sense of the student who is walking into their next appointment just by looking at the student's account."

This has been instrumental in easing the transition for seasoned advisors who weren't used to doing caseload management. "For 15 years, [advising] had to be really transactional," Raube says. "Rachel [Merkle] has helped get an idea of what each advisor needs in their individual dashboard and how they can use it. We can then let the advisors use their skillsets to drive their own caseload within set expectations."

One major benefit of the caseload model is that advisors can now stay with students throughout their educational journey. "We're building that relationship between our students and advisors to help them right from registering for their first class all the way through graduation," Merkle says. "That person will be with that student and support them the entire time."

With a consistent, specialized advisor, students are better supported and prepared for life beyond completion. "Advisors can help students on a deeper level now," Merkle explains. "Not just in their classes but digging deeper into the career fields themselves."

Providing High-touch Student Support

Delta was already using CRM Advise for student communications, but now that they've unlocked their technology's full potential, their messages can make an impact at scale. Even when emails go out to larger groups of students, personalization tools ensure that each recipient is getting the timely information most relevant to them.

With CRM Advise, Delta could also uplevel their communications to students throughout the semester. Faculty are able to collaborate to create strategic, multi-channel outreach plans for individual students needs. A student may receive an email from their advisor one week, followed up by an automated text a week later, and then, if necessary, an email from a program coordinator. "That way, students are getting multiple communications from a more holistic view," Merkle explains. "It



shows that the whole college is supporting them instead of one voice.” CRM Advise has helped transform an existing early alert system. Like many institutions, Delta had tools to indicate when a student would benefit from extra support, but it was too easy to miss critical referral points happening in the classroom.

“By giving faculty access to CRM Advise, we’re increasing collaboration between faculty and staff on behalf of the students,” Raube says. In centralizing information in one system, Delta has created a central hub for all offices to work together and better meet student needs as they arise. “To have access to early intervention within one system and bring that all into one cohesive model—that’s been huge for faculty, staff, and students,” Merkle explains.

The students themselves can stay on top of their academic standing through Ellucian Experience. When certain criteria are met—such as a dip in GPA—students automatically receive intervention resources that they can sign up for directly through their dashboards. By bringing students into the process, Delta empowers them with agency over their own educational progress.

Looking Ahead

Through centralizing information and activating collaboration across offices, Delta College has established a holistic approach to advising that more effectively supports and retains their students. With improved, high-touch communication and intuitive dashboards, advisors are no longer generalists, but specialists, ready to provide deeper, more personalized guidance throughout the educational journey.

It takes everyone involved to transform the advising process, including Delta’s technology partners. “We couldn’t do this without our Ellucian team,” Raube says. “They provide us the in-house support we need.” And now that they’re using CRM Advise fully, the staff is energized to expand advising’s impact, with plans to utilize data for systemic early alerts.

“We’re having a lot of meetings around the campus that are bringing ideas to fruition,” Merkle says. “We have these conversations with Ellucian, and they help us make it happen. We are very grateful to the team for always helping us grow our people and our products.” Working together and empowered by their technology, Delta College can continue innovating while supporting their students every step of the way to graduation day.



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