

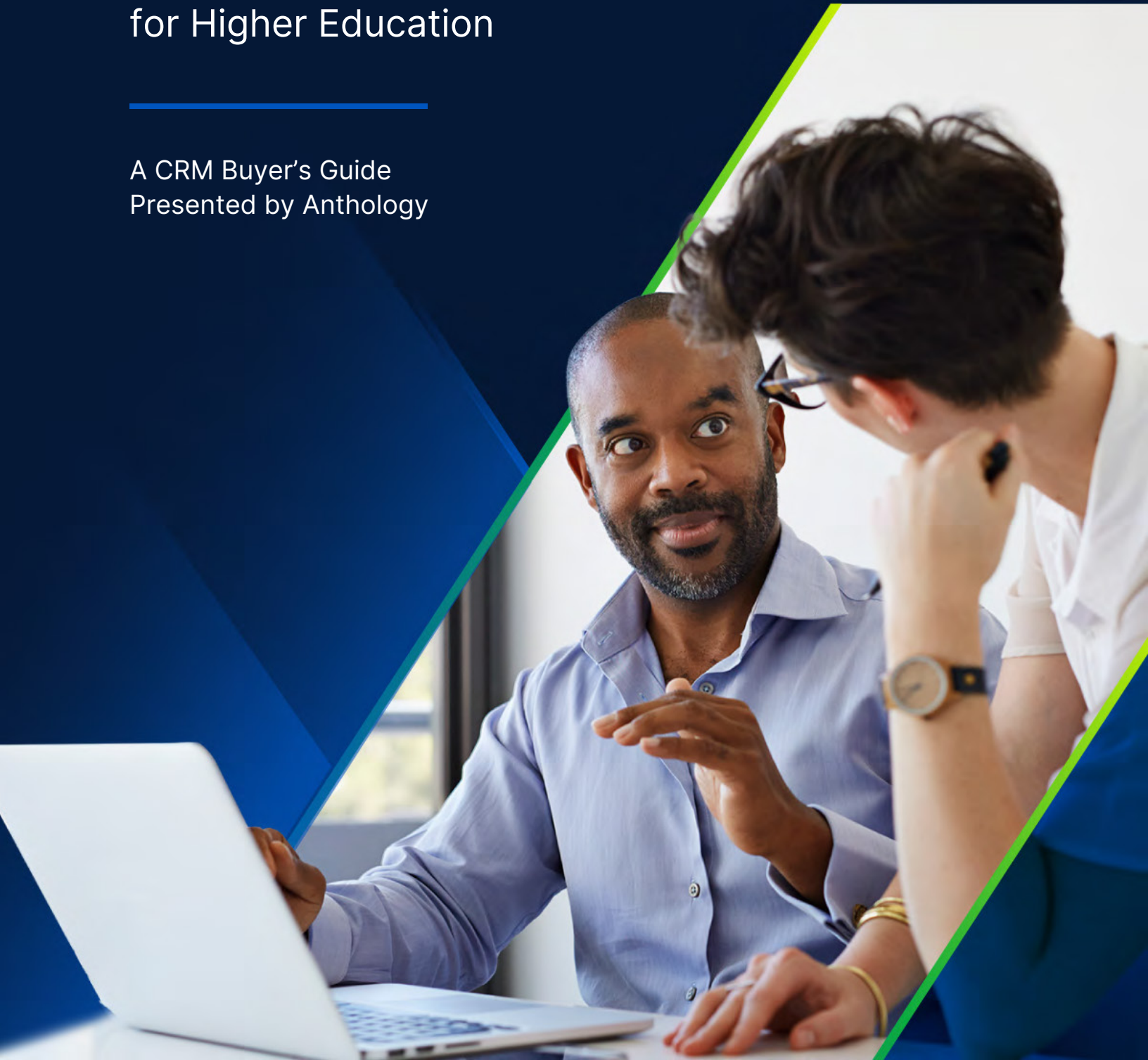
Future-Proofing Student Engagement:

Reach 
by Anthology

 **TD SYNEX**
Public Sector

Choosing the Right CRM for Higher Education

A CRM Buyer's Guide
Presented by Anthology



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The background is a solid blue color. It features several thin, light blue lines that intersect to form a large, abstract geometric shape, possibly a stylized 'A' or a series of overlapping triangles, in the upper half of the image. The text is centered in the lower half of the image.

Why the CRM is
central to your
institution's future



Higher education is undergoing a period of immense change. Student demographics and lifestyles are shifting, enrollment is declining in many markets, and the economy remains unpredictable. Meanwhile, the budgets and resources institutions have available to address these challenges are also in flux. As we look to the future, one thing is clear: the rate of change isn't going to slow down. Institutions need to invest today to prepare for upcoming changes or risk falling behind.

At Anthology, we believe that a purpose-built constituent relationship management (CRM) solution is an important investment for leaders who are looking to future-proof their institution. As the learning experience becomes increasingly digitized, so too will the relationships between students and their school, and only a high-quality CRM can ensure a productive relationship that is beneficial for all parties. The popularity of online and hybrid courses will only continue to grow, as students look to balance their studies with work and other commitments, which—if not managed correctly—comes with the risk that their engagement with their courses will diminish, and that they won't know where to turn when they face difficulties. Digitized, full-lifecycle student support is essential in this changing landscape.

Beyond the benefits for learners, an enterprise-level CRM also provides efficiency for institutions. This software can help consolidate communications plans, simplify internal processes, increase collaboration between departments, and provide a comprehensive

view of data to inform strategy. With enrollment rates declining, all of these functionalities become crucial to effectively engaging prospects and protecting institutional revenue. The inclusion of AI technologies is already providing efficiencies in these areas and has significant potential to expand its impact in the years to come.

Finally, there remains a distinction in higher education between learning and administrative technologies. At Anthology, we believe it's time to move beyond this. All technology on your campus is ultimately learning technology, and institutions should aim to develop a streamlined tech stack that works towards a single goal: advancing student outcomes. The CRM is crucial in this ambition and facilitates a smooth transfer of insight between the classroom and administrative functions that can underpin a genuinely student-centric approach.

This concise guide outlines the themes, trends, and functionality that you need to consider in your CRM today in order to thrive in the future. We start by looking at how higher education is different from other sectors—and why that requires a CRM designed specifically for use in education—before doing a deep dive into emerging trends that will impact this area in the coming years. You'll receive valuable insights and tips to help you evaluate the CRM market and find the right software for your institution.

What makes
higher education
unique?

1

Education isn't a commodity

Students take so much more from their time at your institution than just the title and certificate they receive upon completion.

In addition to what's learned in the classroom, a university promotes personal development, expanded social networks, extra-curricular activities and much more, which combine to make higher education a chapter in the student's life, not just a product that they purchase.

You should think of the CRM in this light. It isn't a tool simply to get students through the door; rather, it is a repository of all their experiences and interactions that should offer insight on how to support their success. You'll want to work with a partner that understands the realities of life on campus and has a proven history of success at institutions like yours.

RFP Considerations



Does the vendor truly understand higher education?



Can the CRM integrate with learning technology in a meaningful way?



A student is more than a customer

Recent years have seen many advocate for higher education to conceptualize a student as a customer.

This is a valuable framing, in that it encourages institutions to embrace best practices of digitized customer service from other sectors, but there's also a tremendous amount that it leaves out.

Choosing a higher education institution isn't just another purchase decision. It's an investment from the learner in their own future, and a multi-year undertaking from the institution to support their development. You should prioritize CRM providers who can help you truly understand your students and keep them engaged through the learner journey to show the value of their investment.

RFP Considerations



Does the CRM support the full learner lifecycle?



Does it have functionality tailored to student behaviors at key junctures in their education journey?

Resource and budget shortages

Many institutions saw significant cuts in resources during the COVID-19 pandemic, which have yet to be replaced.

While higher education is far from the only sector that has had it tough in recent years, it appears to be finding it more difficult than other areas to recruit and maintain top talent. A [2022 study by The Chronicle of Higher Education and Huron](#) revealed that 84% of institutional leaders have found hiring more difficult in the last year, and the number of open roles is growing as a consequence.

The result is increased work and stress for your staff and challenges in replacing expertise when good people choose to leave. Your CRM should help to ease, not exacerbate, these problems. Look for solutions that are simple for varied stakeholders to adopt, and assess the human capital required to support the software prior to choosing your preferred partner. Data is a crucial consideration here: the successful solution should not only collect data, but also present it to users in an easily actionable format.

RFP Considerations



Does the CRM require a large team for implementation and support?



Is it complex, with ongoing training requirements?



Does it require a lot of customization and technical know-how? If so, does your team have this?

4

Institutions are multi-faceted

Another defining characteristic of higher education institutions is that they often have a large number of departments.

If you're wrestling with a situation where different parts of your institution have pursued their own technology requirements and you now need to consolidate, rest assured that you certainly aren't alone.

This has a bearing on your search for a new CRM. You'll need to understand the requirements of your respective departments to find a solution for each, and—as touched on in the point above—you'll want to prioritize solutions that can easily be scaled and adopted by users from different parts of the institution.

A helpful framing here is to think of strategic versus tactical decisions. Your CRM needs to remove data siloes to enable genuine strategic action at an institutional level. However, it should also allow departments the autonomy to execute tactical initiatives to meet their objectives.

RFP Considerations



Are you currently balancing multiple CRMs?



Which departments do you wish to align with a centralized CRM?



Do you have all the correct stakeholders involved in the review process?



Emerging trends to consider when choosing a CRM

Institutions streamline and simplify their tech ecosystem

To date, much of digital transformation on campus has involved finding software to replace formerly manual processes. The result is that many institutions now have an unmanageable suite of platforms and poor connectivity between them, as well as high costs to run and resource so many different systems.

“We continue to think about how to simplify systems and processes,” explained Sarah Visser, executive vice president for strategy and student experience at Calvin University, as quoted in [EDUCAUSE](#). “So instead of having 128 different applications, we’re trying to move toward a system-wide enterprise approach.”

The CRM can play a key role in helping institutions to simplify their technology. Firstly, many institutions currently use multiple CRMs for different tasks—for example, they have one system for admissions and another for student retention throughout their degree. A true enterprise-level CRM should be able to meet all the needs of your different departments and stakeholders.

Secondly, the CRM should integrate seamlessly with other key software and thus contribute to your broader simplification tech strategy. Institutions should prioritize considering how easily each CRM option connects existing tech infrastructure as part of the review process.

- **#2: Administrative Simplification** is issue #2 in the [2025 EDUCAUSE Top 10](#).
- **\$120,000:** Microsoft Dynamics 365 has been shown to drive savings of up to \$120,000 annually by retiring legacy systems.¹

RFP Considerations



Does the CRM integrate with other major campus technologies?



Is it backed by an established tech provider that users have a strong familiarity with?

Did you know?

Anthology® Reach is a tailored higher education CRM built on **Microsoft Dynamics 365**. This makes it easy to assimilate with your broader tech stack and familiar to users to promote rapid adoption.



¹ [Forrester](#). *The Total Economic Impact™ of Microsoft Dynamics 365 Customer Insights*. Commissioned by Microsoft. Page 6.

Data unlocks opportunities to improve student outcomes

As an extension to the previous trend, a streamlined tech stack comes with the potential for amalgamated data. Institutions should look for CRM alternatives that can break down data siloes on campus, ingest data from varied sources, and make it accessible to staff when it matters.

Crucial to this is the integration between learning data and student support. Through deep integration with the learning management system (LMS), the CRM can provide advisors with a detailed view of student progress, allowing them to intervene where appropriate. Conversely, insights on engagement from a CRM may also be helpful for teaching and learning professionals.

However, there is more to a student than just their academic output, and your CRM should leverage other data sources as well. Integration with your student information system (SIS), for example, can provide valuable insights into a learner's accounts and financial aid status, while you may also look to capture engagement with extra-curricular activities to build out a holistic profile of each student.

- **#1: The Data Empowered Institution** is issue **#1 in the 2025 EDUCAUSE Top 10**.
- **80%** of higher education institutions believe integrated data is essential, yet only **20%** have achieved such integration.²

RFP Considerations



Can the CRM integrate with multiple data sources?



Are insights easily accessible for users in a way that improves student support?



Is a deep integration with your LMS possible?

Did you know?

Anthology Reach connects seamlessly with both the Anthology® Blackboard LMS and Anthology® Engage, providing a holistic view of all student interactions on campus, spanning both curricular and non-curricular activities.



² **Tyton Partners.** 2023 *Time for Class: Bridging Student and Faculty Perspectives on Digital Learning*

Student demographics continue to diversify

Recent years have seen fundamental changes in the nature of the student body. While much attention has been paid to the decline in overall learner numbers—as well as the anticipated “enrollment cliff” due to the dropping birthrate in Western markets—there have also been significant shifts in the demographics that are signing up for higher education.

All data indicates this trend is likely to continue in the years to come. In the United States, for example, it is forecast that the number of **Hispanic students expected to graduate high school will increase by 16% by 2041**, whereas all other major racial cohorts are expecting to see declines—shifting the demographic composition of prospective college students. Across the pond in the United Kingdom, institutions have seen applications from the EU **decline by 51% since 2010**, in stark contrast with those from outside of Europe, which have more than doubled in the corresponding period. Markets like Australia and Canada are also seeing declines in domestic demand and assessing the right policy approach to welcome more international

students while maintaining an equitable system. While this addresses the variable of ethnicity, there is also growing diversity in terms of students’ cultures, languages, beliefs, interests, and much more.

This comes with fundamental considerations for a CRM. You’ll need a system that can easily apply unique communication strategies to different cohorts. Further, you’ll need to support varied learning paths to ensure retention, not just have a strategy to recruit new students.

- **+16%:** Anticipated growth in Hispanic students in the US by 2041.³
- **+104%:** Growth in applications to British institutions from nations outside the UK and Europe since 2010.⁴

RFP Considerations



Can the CRM support complex communication paths and strategies without being overly complex for staff?



Does it extend robust data and analytics for engagement for different demographics, allowing gaps in service and support to be identified?



Is the CRM designed to support learners through the full lifecycle?

Did you know?

Anthology Reach leverages Microsoft Copilot’s “Journey Builder” to deliver AI-powered, multi-channel outreach, optimized to the individual student’s communication preferences.



³ Inside Higher Ed. *A Long Way Down the Demographic Cliff*.

⁴ House of Commons Library

AI Enhances—not replaces —human expertise

Much of the current conversation around AI in education relates to efficiency. AI technologies have already shown great potential to speed up administrative tasks across different parts of the institution, and this will expand to additional areas over the coming years. Understandably, this has led to fear in some parts that AI will replace staff on campus.

At Anthology, we don't see it this way. Quite the opposite, in fact—we see AI as a huge opportunity to elevate the work of your team. In the case of your CRM, it can help to automate time-consuming tasks in the process of building communications with students, allowing your staff more time to analyze data and work through the most effective strategy for the institution.

There are also significant ethical considerations for institutions as the use of AI grows within higher education. Nowhere is this more important than in the management of your CRM, a system that holds a lot of data and directly impacts the student journey. You should seek vendors who not only have a plan to include AI in their technologies but also a clear view of what responsible AI use means in this sector.

- **65%** of higher education administration staff feel enthusiastic about the use of **AI in admissions and recruitment**. There is also positive sentiment for **student support services** and **data, reporting, and analytics**.⁵

RFP Considerations



Does the vendor have AI innovation included in their solution and future roadmap?



Do they have a proven history of implementing AI in their solutions?



Have they addressed the ethical considerations for AI? What safeguards are in place for your institution?

Did you know?

- As part of our comprehensive partnership with Microsoft, Anthology Reach incorporates Copilot at no additional cost to save time on administrative tasks. This allows your team to invest their time and energy in helping students succeed.
- Anthology's [Trustworthy AI Approach](#), aligned with Microsoft's long-standing commitment to [responsible AI](#), details our direction with artificial intelligence and has already inspired several market-leading innovations—such as the AI Design Assistant in the Blackboard LMS, which 96% of instructors report saves them time with course and assessment creation.

⁵ Anthology. *AI Usage in Higher Education Administration: Where Do We Need It?*

The culture of lifelong learning continues to grow: For students *and* institutions

Recent years have seen more students embrace the concept of lifelong learning. With the skills that employers seek regularly changing in line with shifts in the economy, there is a growing awareness among learners that education is now an ongoing endeavor, involving the accrual of skills over time and less delineation between study and the workforce. This trend appears set to continue.

This, in turn, has big implications for institutions. As the traditional enrollment stream of high school graduates continues to wane, growth will become contingent on attracting learners at different points throughout their careers. This may include adopting different learning modalities (such as short courses and micro-credentials) and adjusting the academic calendar to match. You'll need a CRM that can respond to these changes and deliver targeted communications and support. Again, having a robust, 360-degree view of data is essential to successfully segment and engage relevant cohorts.

Fundraising is another crucial revenue stream that needs to be supported in this changing landscape. This places further emphasis on having a CRM that genuinely supports the full lifecycle, allowing you to convert successful students into engaged alumni.

- According to the **World Economic Forum: The Future of Jobs Report 2025**:
 - **39%** of current core skills held by workers globally are expected to no longer be core skills by 2030.
 - Skills forecast to grow over the next half decade include **AI and big data, networks and cybersecurity, technological literacy, and creative thinking.**

RFP Considerations



Can the CRM support alumni engagement through events, giving campaigns, and communication channels?



Can it facilitate hybrid engagement, supporting learners through varied study and career paths?

Did you know?

Not only does Anthology Reach support the full lifecycle, it uses a modular approach that can meet your specific needs and evolve as your institution grows. You can start with admissions and add alumni components when the time is right, or vice versa.



Discover Anthology Reach:
Empower the full student
and constituent lifecycle
with an AI-powered CRM

Comprehensive capabilities across every stage

Enhance student enrollment, foster deeper engagement, and accelerate institutional growth by leveraging AI-driven insights and data-informed strategies. Anthology Reach delivers measurable success throughout the entire student and constituent journey—from marketing and communications, admissions management, retention management, and alumni and advancement efforts.



Marketing and communications

- Two-way SMS communications
- Email marketing
- Customer journeys
- Engagement analytics
- Personalized multimedia content
- Omnichannel communications
- Events and travel management



Admissions management

- Prospect lifecycle management
- Prospect scoring
- Applications management
- Prospect lifecycle management
- Appointment/trip management
- Territory assignment
- Nearby contacts
- Test score management
- SMS messaging framework
- Address type ahead
- Doc management integration
- Document generation/templates



Retention management

- Success networks
- Success plans/to do
- Campus surveys
- Ad hoc surveys
- Private notes
- Positive acknowledgements
- Student groups
- Staff and external calendar check
- Google calendar integration
- Blackboard LMS insights
- Student engagement score



Alumni and advancement

- Alumni and constituent management
- Constituent relationship management
- Prospect identification
- Giving and fundraising
- Giving societies
- Donations/gift records
- Fund and campaign management
- Advancement analytics

Built on the powerful Microsoft platform for seamless integration and performance



Microsoft
Teams



Outlook



Microsoft
365



Microsoft
Copilot



Dynamics 365



Power BI



Power
Automate



PowerApps



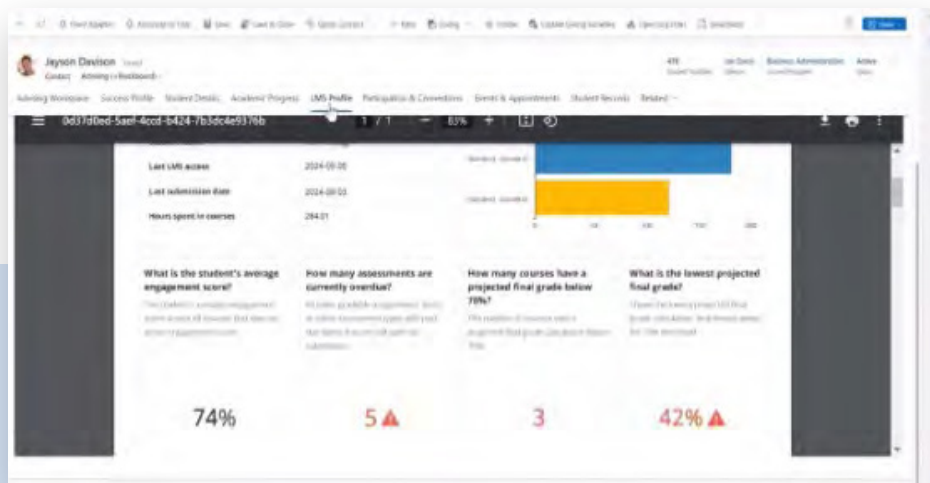
Azure

The only CRM with AI-powered academic engagement insights from Blackboard

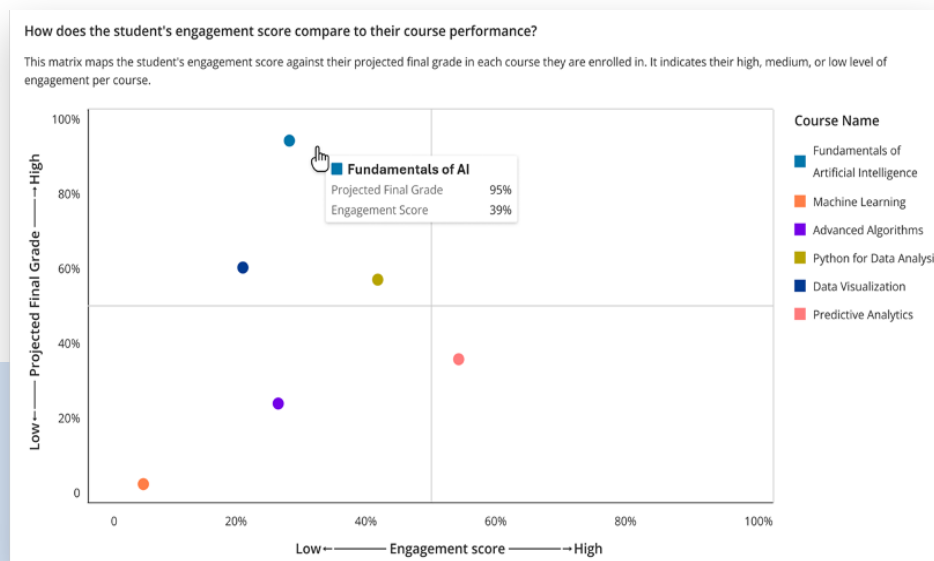
Elevate student support with academic engagement and performance insights

Identify students at academic risk earlier to prompt effective interventions

Boost student achievement proactively with leading indicators and predictive AI



LMS Trends Report Predictive Student Engagement Score

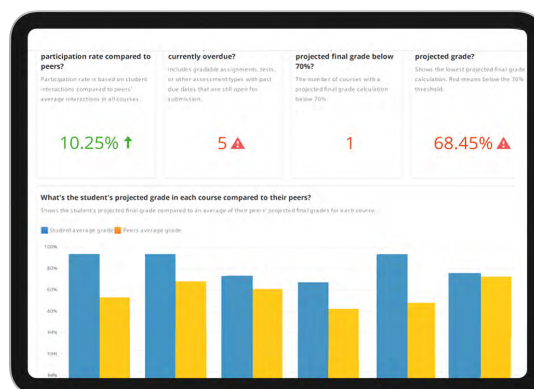


A holistic approach to advising and student success

Anthology Reach is the only CRM that integrates with Anthology Blackboard, Anthology® Student, and Anthology Engage to deliver actionable insights from academic engagement and performance, advising, and co-curricular involvement. What's more, it's natively integrated with these solutions at no additional cost.

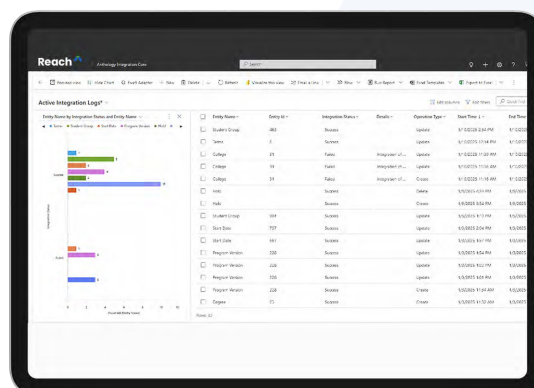
Blackboard | Reach

Industry-leading advising solution with real-time LMS data and predictive analytics



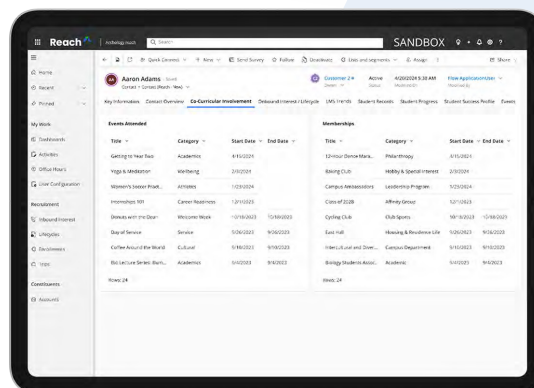
Student | Reach

A complete ERP + CRM solution designed for higher education and powered by Dynamics 365



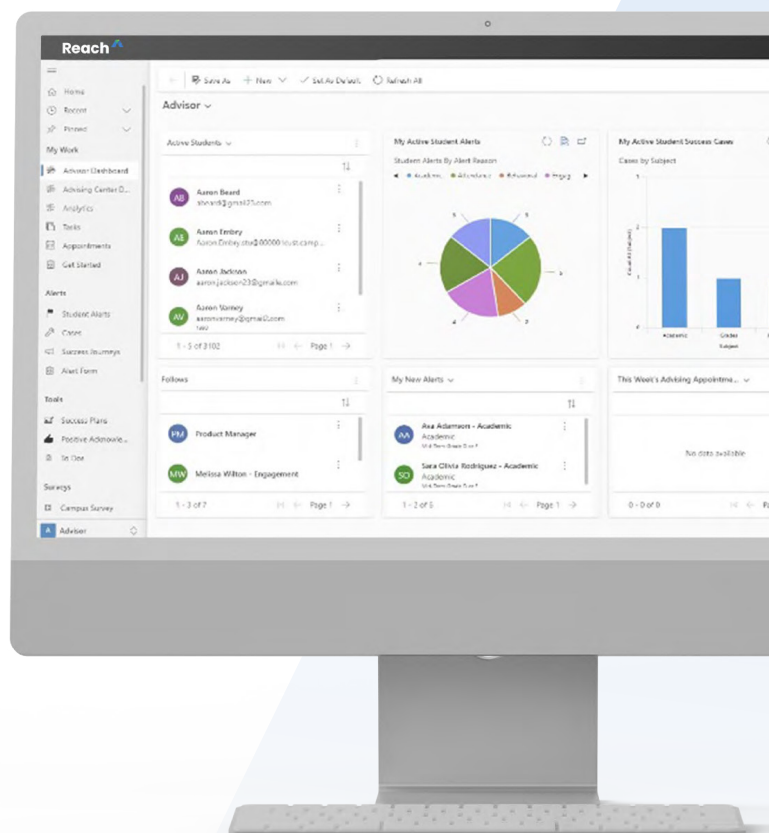
Anthology Engage | Reach

A more holistic student picture, including co-curricular engagements



Built-in lifecycle engagement analytics

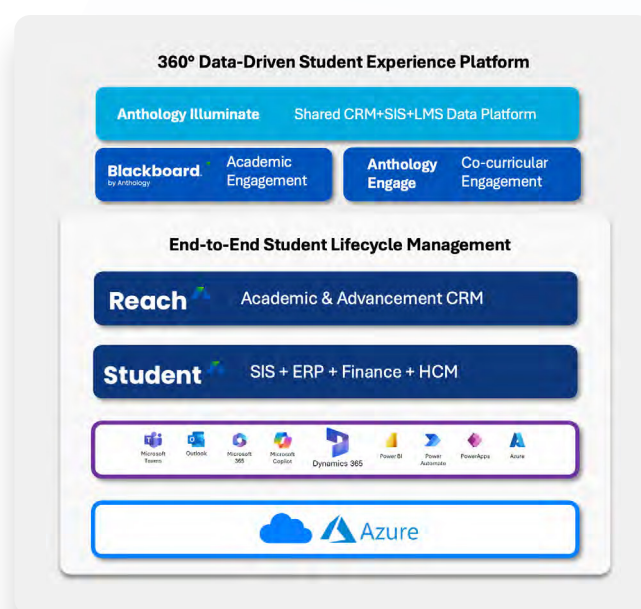
Build a stronger enrollment, retention, and advancement strategy with **centralized information and actionable insights leveraging** data visualization and analytics in Power BI.



Empowering the full student journey with an integrated, insight-driven ecosystem

Student success ecosystem

- ✓ In-workflow AI academic insights for advising
- ✓ Shared data, APIs, interoperability
- ✓ 3P integrations
- ✓ File upload, transcripts, templates
- ✓ Professional Services





Reach by Anthology:
**Microsoft Business
Applications 2024/2025
Inner Circle Award winner**



We're excited about our collaboration with Anthology to power new AI solutions for education with a shared commitment to responsible use. Anthology is a proven partner that has consistently demonstrated innovation and is aligned to our mission of empowering education through technology.

—Serena Sacks-Mandel

Global Chief Technology Officer
for Microsoft Education



Explore everything Anthology Reach has to offer at anthology.com/reach

About Anthology

Anthology delivers education and technology solutions so that students can reach their full potential and learning institutions thrive. Millions of students around the world are supported throughout their education journey via Anthology's ecosystem of flagship SaaS solutions and supporting services, including the award-winning Blackboard® (LMS), Anthology® Student (SIS/ERP), and Anthology® Reach (CRM). Through the Power of Together™, we are uniquely inspiring educators and institutions with innovation that is meaningful, simple, and intelligent to help customers redefine what's possible and create life-changing opportunities for people everywhere. anthology.com

