



BEYOND ACADEMICS PROPOSAL:

Assessment Recommendation For CSN's Greymatter Initiative

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Version 1.0
August 22, 2025

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Greymatter Assessment & Roadmap

Introduction

Over the past three years, CSN, Synoptek, and Frequency Foundry have struggled—unsuccessfully—to make **Greymatter** a fully operational Student CRM platform. As a result, Greymatter has become an unloved solution that **puts institutional outcomes at risk**.

Staff report significant technical issues with the product, including **data loss and workflow gaps** that prevent students and staff from receiving critical notifications and information the system “believes” it has sent. Poor data structures have allowed over **370,000 duplicate records**, while limited search capabilities and missing automation features slow down service resolution.

While it performs basic ticketing and support operations, faculty and staff consistently report that it is not intuitive—particularly for non-technical

users. The interface and workflows are clunky, with **unclear pathways for resolving issues** or escalating requests.

Greymatter’s vendor, the Canadian company Frequency Foundry, has **little to no higher education experience** in the U.S. and **no experience implementing a full CRM solution** in a large, complex college like CSN—either in the U.S. or Canada.

In addition to poor usability and outcomes, Greymatter suffers from a **lack of clear product ownership**. There is **no visible roadmap or improvement cycle for the tool**, and many of its **advanced capabilities**—such as workflow automation and AI-driven routing—**remain dormant**. Beyond strongly recommends that CSN not continue to invest in this platform.

The business leaders at CSN also appear fully aligned in their desire to retire this system. We would recommend transitioning away from Greymatter as

quickly as possible, while ensuring there is no interruption to critical functions currently running on it.

Time is of the essence. The first step in this transition is to create a roadmap and detailed project plan to guide CSN in replacing Greymatter with minimal disruption to users.

With our understanding of the dependency several functional departments have for this CRM, we also believe **Beyond is best positioned to quickly develop an effective roadmap and guide CSN through a successful transition**—rather than bringing in a 3rd party who will need time to onboard and ramp up to execution speed.

Scope of Work

Beyond proposes an engagement of no more than 4 weeks to create a roadmap and detailed project plan for rapidly moving off of Greymatter with a minimal amount of disruption to the users.

The Deliverable will include:

- A ROM estimate of the financial investment needed. We would start with a baseline of the amount of financial investment CSN had budgeted to fix the Greymatter implementation, and estimate how much more or less investment would be needed.
- A ROM estimate of the human resources needed. The estimate would be built on the assumption that Synoptek would execute the technical work, under the guidance of Beyond—acting as the vendor manager and PMO.
- Plan for which Greymatter functionality should be:

- Moved back to legacy solutions (e.g., Veterans Affairs)
- Supported by a new solution (along with its adoption roadmap)
- Customized into ServiceNow—already in use at CSN
- Replaced with AI / AI Agents (along with the build roadmap)

- A high-level project plan to move from Greymatter into a new solution set. This plan will be modified for details/dates/timelines once the implementation work is awarded, and a start date is set.
- A proposed Greymatter project governance framework.

Activities We Will Engage In

- Review information gathered regarding Greymatter during Beyond's CSN IT Assessment.
- Hold 1 ThinkSpace with Greymatter End-user to ensure all required functionality (current and wishlist) is documented.
- Hold working sessions with key CSN business owners to confirm strategic CSN business and system requirements.
- Review solutions ("legacy vendors") that CSN had previously used to support functionality that had worked reasonably well, and could be redeployed (e.g., the solutions supporting CSN's Veterans department).
- Contact the legacy vendors to understand the timeline and cost to bring their solutions back online at CSN.
- Assess current technology like ServiceNow already in the CSN tech stack for its capabilities to support the functionality of Greymatter.

- Work with Beyond's AI developer team to identify places where automation and AI Agents can be leveraged to deliver the best possible outcomes.
- Review status reports, Issue Logs, and any previous project plans related to Greymatter.
- Coordinate with Synoptek to identify resource needs/costs to assist in the work.
- Prepare an integrated project plan, budget, and overall roadmap narrative for CSN's leadership to review and approve.

Immediately following approval of the plan, Beyond would propose moving into a 4-8 month implementation phase for the replacement of Greymatter.

Timeline

Depending on the availability of CSN resources, Beyond proposes an engagement of no more than four weeks, with the understanding that CSN will review the plan and authorize work to start as soon as possible. It is our intent to have key departments operating on the new platform(s) within 6 months or less.

Investment

Beyond proposes to complete this roadmap and high-level project plan for the firm fixed fee of \$7,500. Payment is due 30 days from invoice date. Any travel by Beyond resources to CSN for this initiative will be approved by CSN prior to booking and will be invoiced at cost. We anticipate one (1) such in-person trip lasting no more than 2 business days.

Summary

Failure to act expeditiously risks continued productivity losses, user frustration, and missed opportunities to improve customer relationships. To move rapidly off of Greymatter, the funds budgeted to fix that platform could be applied toward returning the institution to a healthy operating environment.

We feel it is important to have a working "product" ready in time for the Greymatter contract ending. The Beyond team is committed to finding ways to make that a reality – but every day counts at this point. If we delay in moving into this replacement process, CSN could be forced to re-commit to an underperforming platform or face a rushed, costly replacement. This engagement ensures leadership will have the insights, cost estimates, and plan needed for a confident, strategic CRM decision.