Weaving Together an Effective Enrollment Strategy with Successful Execution

Session 1:
Building a Sound Enrollment Strategy with Reachable Goals for Growth
• Private, Christian University in Montgomery, AL
• Founded in 1942
• About 3300 students overall - 1100 traditional

• Headquartered in Boston, MA
• Known for CAS systems
• EMP division in Poughkeepsie, NY
• Campaign creation/deployment
• CRM
Effective enrollment strategy - Basic but an absolute necessity
Think about just some of our challenges:

Increased attention to student recruitment and recruitment methodology by the big boys

Market concerns/doubts about ROI

Education’s poor image in the media

Declining number of students

Lower number of test takers

COVID anyone?

More Savvy buyers

However, the students still want the experience that we provide!
You've got to be very careful if you don't know where you are going, because you might not get there.

(Yogi Berra)
Setting goals is foundational!

This aspect of your operation must be on lockdown, automatic, no question

Start your building here.....
Many factors must be considered when setting goals

- Institutional priorities
- Existing personnel
- Strength of programs
- Athletic rosters
- Personnel changes
- "The wave"
- Available aid
- Campus news
- A global pandemic?
The Enrollment Funnel is a Myth!

Prospects
Inquiries
Applicants
Acceptances
Deposits
Enrolled

Prospects
Inquiries
Applicants
Acceptances
Deposits
Enrolled

Interviews
Campus visits
Organize for Success - your immediate team

Hire the right people - don’t settle

Ensure that your hires understand the structure

Be clear with prospects during the hiring process

Don’t overload counselors with ‘other duties’ ….no excuses for underperformance
Organize for Success - your support team

- Enlist the help of an IT professional or person with research aptitude
- Establish rules of engagement/priorities with marketing
- Identify key people in FA, Advising, Billing, and Advising - dotted line?
Organize for Success - your systems

- Adopt a territory management paradigm - aligned with available data variables
Adopt a territory management paradigm....

There should be no question about territories.

Work out issues like:

• ‘Borderline’ schools
• Athletes
• Transfers
• Affinity groups

Each counselor should be crystal clear on the number of students they are assigned to recruit.
Organize for Success - your systems

• Adopt a territory management paradigm - aligned with available data variables

• Ensure that you have well-defined and understood enrollment stages

• Assess scholarship/financial aid systems

• What about your comms flows?

• Evaluate your record keeping (CRM) and marketing systems
What resources do you have to track your progress?

Only do what you can measure

Only measure what you can track

Consider clerical personnel commitment

Invest where necessary
What are some of the important data points you will need?

- Conversion rates at all funnel points:
  - Prospect
  - Inquiry
  - Applicant
  - Accepted
  - Fin Aid applicant
  - Deposited
  - Interviewed
  - Campus Visit
  - Enrolled

- Sport 1, 2, etc....

- Recruiter info
- Maintain consistency!

- Academic major

- School

- Church

- Original source
- Secondary sources

- Funnel stage dates

- Geographic info
Setting accurate goals requires good data…

If you don’t have it, start now with benchmarking…
Building the Model

How many students do you want to enroll overall?
Each one costs money to recruit!

How many students do you want from each territory?
Do you have the personnel in place?

Goals for academic majors or athletes?
Do you have the faculty and the facilities?

On and Off campus goals?
What about housing?

Begin with the end in mind....
Let’s get started.....

Acquire 3-5 years of enrollment data

Realize that there have been many changes lately

Think in terms of getting all info on a single excel line

Use your judgement or national norms if needed
Use your historical data to calculate your overall conversions

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2020</th>
<th>Conversion Percentage</th>
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<td>29,678</td>
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<td>Inquiries</td>
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<tr>
<td>Applicants</td>
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<tr>
<td>Acceptances</td>
<td>457</td>
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Now, find a balance (be reasonable) and choose an overall goal

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Before adopting the goal, count the cost:

- Portions of support office’s time
- Postage
- Print/electronic collateral
- Salaries
- Operating
- Travel

Why would more students enroll if you aren’t doing anything new?
Articulating stretch and budget goals to the campus
Breaking the Numbers Down
Everyone has to take a slice of the pie!

In our example of a 260 office goal....
Everyone is different!!

Break out historical conversion rates at all funnel points for each recruiter

Consider territory nuances

Consider the ability and experience of the recruiters
Goals for individual recruiters

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<td>Acceptances</td>
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These are different for each recruiter!
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<th>Oct</th>
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</table>

Ashley's 2020 Goal: 100
How will I hit these numbers each month?
What about goals for underclassmen?

Think broadly - fill the pipeline

Aggressive drive to apply in spring/summer of junior year

Nurture beginning as early as possible
Communicating with Institutional Leadership
Defining reality can be difficult.
History:

Your numbers and conversion rates

Overall

Groups

Majors

Sports

Outside colleagues:

User groups

Listservs

Professional organizations

Supportive personnel

Industry Standards:

Research from organizations like ABHE, RNL, Liaison, etc

ACT/SAT Demographic data

Check Inside Higher Ed and others
As always, Know your audience!

President only?
Full cabinet?
Other internal stakeholder?
Board of Trustees?

What will you be reporting?

Think TDR, NTR, class characteristics, major, etc.

Whichever the case, balance your forecasts with history and cite it
Remember our office goal funnel?

<table>
<thead>
<tr>
<th>Stage</th>
<th>Goal</th>
<th>Conversion Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prospects</td>
<td>29,657</td>
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<td>Inquiries</td>
<td>5,635</td>
<td>14%</td>
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<tr>
<td>Applicants</td>
<td>789</td>
<td>58%</td>
</tr>
<tr>
<td>Acceptances</td>
<td>458</td>
<td>60%</td>
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<tr>
<td>Deposits</td>
<td>275</td>
<td>91%</td>
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<tr>
<td>Enrolled</td>
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Establish a consistent weekly report
## Applicants and conversion rates by month

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<thead>
<tr>
<th>Month</th>
<th>Total apps</th>
<th>Matriculants</th>
<th>Cancelled/rejects</th>
<th>% of mats</th>
<th>Conversion %</th>
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<td>Before Sept</td>
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<td>103</td>
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<td>1970</td>
<td>447</td>
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</table>
Notable data points to track throughout the year

Applicants and acceptances before September
Applicants and acceptances at Christmas
The first flight of financial aid awards
Scholarship Day
May 1
Deposits
Pre-registration
Use all dates to inform - watch outliers - don’t fool yourself
Thanks for coming!

Please clap and don’t ask hard questions

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