Setting and Achieving the Right Enrollment Goals

Keith Mock, Ed.D
AVP, Enrollment Marketing Solutions
Liaison International
Private, Christian University in Montgomery, AL
Founded in 1942
About 3000 students overall - 1000 traditional

Headquartered in Boston, MA
Known for its CAS systems
EMP division in Poughkeepsie, NY
Campaign creation/deployment
True variable print
CRM
AI/ML Prescriptive Modeling
Using Data to Set Realistic Goals - No Wishful Thinking!

Your historical data are very good indicators and must be heavily considered!
How do you set your goals? Or who sets them for you?

Consider:

The involvement of others. Is this your goal, or a goal for the campus?

What percentage of your school’s budget is funded by tuition?
Consider:
Your budget vs. historical budget
Enrollment numbers from previous years (3-5)
- Prospects
- Inquiries
- Applicants (complete and not complete)
- Acceptances
- Deposited (registered)
- Enrolled

Your market share (and admission criteria)
Consider:

External pressures
Program (Majors) - anything new?
Athletics! (Mix and roster)
Retention
Your budget for comms and operations
Your staff
Housing availability
The campus environment
The Substantial Impact of Financial Aid and the Cost of Attendance

Consider:

Financial aid
Cost of attendance increase?
Average award per student
Average accepted award (and the gap)

You have:
1. Paid too much for many of your students
2. Let many students walk due to $1K-$3K
We all know that goals are important….

Fear of change
Fear of failure
Fear of winning
Stuck in a rut
People don’t know how to set goals
Organize for Success

1. Take a hard look at your personnel
2. Adopt a territory management paradigm
3. Ensure that you have well-defined enrollment stages
4. Evaluate your tracking system
5. Don’t overload counselors with ‘other duties’
6. Be clear with prospects in the hiring process
To build the right plan, begin with the end in mind ... 

- How many students do you want to enroll overall?
- How many students do you want from each territory?
- Are you being tasked to shape enrollment in any way?
- Have you considered all the variables?
- Is your goal appropriate? (Stretch vs. Budget)
Then work backward....

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<tr>
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Make sure your counselors accept (and then own) their goals

- Derive goals at the beginning of the year
- Let them agree on their overall number
- Show them history for the area
- Allow them to set monthly goals
Work out the goals for the individual recruiters

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These are different for each recruiter!
Then show them how to reach their goal....

This part is on you!

158 Applicants  68% Accepted  58% Deposited  91% Enrolled  50

Don’t forget about interviews and campus visits!!
Break down goals and keep them in front of the counselors

Monthly goals are already agreed upon...

Explain the weekly and daily tasks that will allow them to reach these goals

- Daily (meaningful!) contacts
- App pool maintenance

Have healthy and helpful meetings with counselors
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**Ashley’s 2020 Goal:**

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Establish a consistent weekly report

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<th>Same Week 2017</th>
<th>Same Week 2016</th>
<th>Final 2017</th>
<th>Projected 2018</th>
<th>Goal 2018</th>
<th>+/- Goal</th>
<th>+/- YOY</th>
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<td>Yield (Accept to Deposit)</td>
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<td>27.1%</td>
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*FR. projection with conservative yield*
Remember that **you** have an important role in keeping things moving.

Do you have executive support? Is this evident to your team?
Are your nurture campaigns running and effective?
Are you delivering warm leads?
Does your team have access to training and support?
How are you supporting your team?
Is your pricing and financial aid leveraging strategy on point?
Reaching Your Prospects

4 Keys to Success

- Immediate
- Relevant
- Automated
- Trackable
Stand out from the beginning!

…and all the way through!
First Impressions are Lasting…
Define the Reality for the Campus Community

History:

Your numbers and conversion rates
- Overall
- Groups
- Majors
- Sports

Outside colleagues:
- User groups
- Listserves
- Professional organizations
- Supportive personnel
- Ayo and Nadia

Industry Standards:
- Research from organizations like ABHE, NACCAP, RNL, Liaison, etc
- ACT/SAT Demographic data
- Check Inside Higher Ed and others
Get everyone on the team on the same page
Ensure buy-in for your enrollment plan!

- Board of Trustees
- President
- Cabinet Members
- Coaches (Roster size)
- Financial Aid (Process and service)
- Housing
- Bursar (Billing/deposit)
- Registrar/Advisors
- Your Admissions staff
Advocate for the resources that you need

Are you equipped for the cost for each lead, inquiry, app, and accepted student?

Do you have the appropriate staff to handle the volume?

How many students are assigned to each counselor?

Are institutional recruitment process set up (i.e. transfer students)

What is your plan to keep data organized and comms flowing (CRM)?
What is your mechanism for informing your leadership and colleagues about the status of the incoming class?

Constant communication is key!
Weekly and monthly reporting
Updates from the field - Get out there!
Market trends that make you pivot
Include academics and other recruiting agents
Always go into a meeting with some sort of data!
The way you arrive at and articulate your goals is very important!

- Public Goal
- Budget Goal
- Stretch (office) Goal
Grasping the Importance and Process of Data Informed Decision Making

“It would appear, Hopkins, that your gut feel was only indigestion”
USPS: “What Package?”

FedEx: “Your package is coming. You’ll get it when we get there.”

UPS: “Your package is in your city, on a truck driven by Mike. It will arrive at 6:27 pm today.

Amazon: We are already inside you residence. Check the bathroom.

Facebook: We know that you were thinking about getting a toaster exactly 17 seconds ago. Here are 20 different ads for toaster ovens.
Commercial Leaders:

Netflix
Amazon.com
Google
What resources are we using to plot our path?
Universities are failing to capture the value of their data, research finds. The lack of modernization in data processing also stemmed from outdated ways of thinking, respondents said.

“I don’t think we made very good use of our data, in part because the people we had in our office were not used to using data to make decisions,” one senior leader told researchers.

2023 Applicant Waterfall

[Waterfall chart showing changes in various factors such as Applicant Historical, Max Test Score Type, Usual Hours/Week Worked, High School Class Size, etc.]

Increase | Decrease | Total
--- | --- | ---
562 | 9 | 489
8 | 5 | 12
2 | 2 | 0
-16 | -16 | 0
-21 | 8 | 5
-35 | -3 | 0
-12 | 0 | 0

[Legend for Increase, Decrease, and Total]
THERE IS WORK TO BE DONE, BUT 2023 ENROLLMENT IS ON PACE TO EXCEED ENROLLMENT FROM 2022.

ENROLLMENT OVERVIEW

The current predicted enrollment for 2023 is 482, which is a difference of -19 from the actual total of 501 in 2022. Fortunately, the total predicted enrollment after forecasting to account for future applicants, funnel conversions, and other actions is 527, which is above the total enrollment from 2022. Continuing remaining efforts similarly in 2023 to efforts in 2022, especially when combined with additional proactive and reactive interventions identified below, is expected to lead to positive enrollment growth.

TOP IMPACTS

The variable that currently has the most significant negative impact on your predicted enrollment is Distance. In comparison to your historical enrollment funnel, the data values for Distance from the Admit phase are predicted to result in a decrease in enrollment by 34 students.

If you want to identify which students are negatively impacted by Distance who you may want to proactively assist, follow these steps:

1. Navigate to the Analyze page.
2. Add the column for Distance to the Grid if it is not already present.
3. Click the Filter icon on the Distance column header, then select By Impact.
4. Set the Filter to show students where the impact is Less Than 0%.

The variable that currently has the most significant positive impact on your predicted enrollment is Distance. In comparison to your historical enrollment funnel, the data values for Distance from the Inquiry phase are predicted to result in an increase in enrollment by 5 students.

View the Waterfall visualization on the Analyze page for more impacts.

TOP RECOMMENDATION

There are currently 1498 students in the Inquiry phase who have a Recommendation for Campus Visit and would be positively impacted if addressed. Of these 1498 students, 19 are currently predicted to enroll, while up to an additional 189 could be expected to enroll if the Recommendation is optimally addressed.

If you would like to simulate ways to assist students who would be impacted by addressing Campus Visit or other Recommendations, follow these steps:

1. View the Recommendations list below for the top opportunities.
2. Navigate to the Analyze page.
3. Filter the Recommendation and Recommendation Value columns to only show students with the suggested opportunities.
4. Run a What-If Analysis using the Recommendation Value to see which students will benefit the most.
5. Alternatively, you may try simulating other decisions with a What-If, Sensitivity, or Matrix.
<table>
<thead>
<tr>
<th>Recommendation Variable, Value, and Phase</th>
<th>Count of Students with this Recommendation</th>
<th>Current Prediction Before What-If</th>
<th>Enrollment Increase After What-If</th>
</tr>
</thead>
<tbody>
<tr>
<td>% COA Met by Institutional Aid: 95% - 100% in Admit phase</td>
<td>10</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>App Visit Postcard: NO in Applicant phase</td>
<td>18</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Campus Visit: YES in Admit phase</td>
<td>169</td>
<td>57</td>
<td>54</td>
</tr>
<tr>
<td>Campus Visit: YES in Applicant phase</td>
<td>339</td>
<td>21</td>
<td>91</td>
</tr>
<tr>
<td>Campus Visit: YES in Inquiry phase</td>
<td>1,498</td>
<td>19</td>
<td>189</td>
</tr>
<tr>
<td>High School Visit: YES in Admit phase</td>
<td>141</td>
<td>31</td>
<td>60</td>
</tr>
<tr>
<td>High School Visit: YES in Applicant phase</td>
<td>160</td>
<td>6</td>
<td>45</td>
</tr>
<tr>
<td>High School Visit: YES in Inquiry phase</td>
<td>4</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
FUNNEL OVERVIEW

INQUIRY PHASE
There have been 3632 students who entered the Inquiry phase so far, which is a difference of 92 from the 3540 total students in 2022. Students currently in the Inquiry phase account for 21 out of the 482 predicted enrollment.

APPLICANT PHASE
There have been 2109 students who entered the Applicant phase so far, which is a difference of -197 from 2306 total students in 2022. There are 2109 students with a value before today’s date for Application Date, which is a difference of -197 from the 2306 to date in 2022. Students currently in the Applicant phase account for 33 out of the 482 predicted enrollment.

ADMIT PHASE
There have been 1173 students who entered the Admit phase so far, which is a difference of -160 from the 1333 total students in 2022. There are 1251 students with a value before today’s date for Admissions Decision Date, which is a difference of -82 from 1333 to date in 2022. Students currently in the Admit phase account for 141 out of the 482 predicted enrollment.

DEPOSIT PHASE
There have been 435 students who entered the Deposit phase so far, which is a difference of -76 from the 511 total students in 2022. There are 436 students with a value before today’s date for Deposit Date, which is a difference of -75 from 511 to date in 2022. Students currently in the Deposit phase account for 287 out of the 482 predicted enrollment.
If You Aren’t In A Position Right Now To Go All In....

- At least begin to benchmark now - Track all you can.
- Consider a CRM.
- Identify resources that can be used for this effort.
- Remember that yield starts at the top and is predicated on value-centric comms.
Thanks for coming!

Please clap and don’t ask hard questions

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