

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)

izquotes.com



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

Personnel changes

Athletic rosters

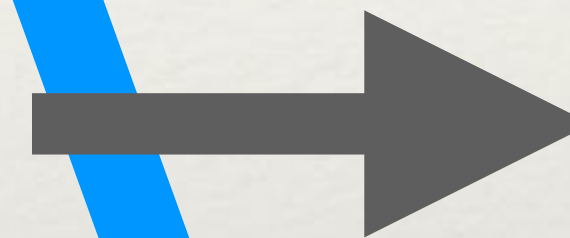
“The wave”

Available aid

Campus news

A global pandemic?

The Enrollment Funnel is a Myth!



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**



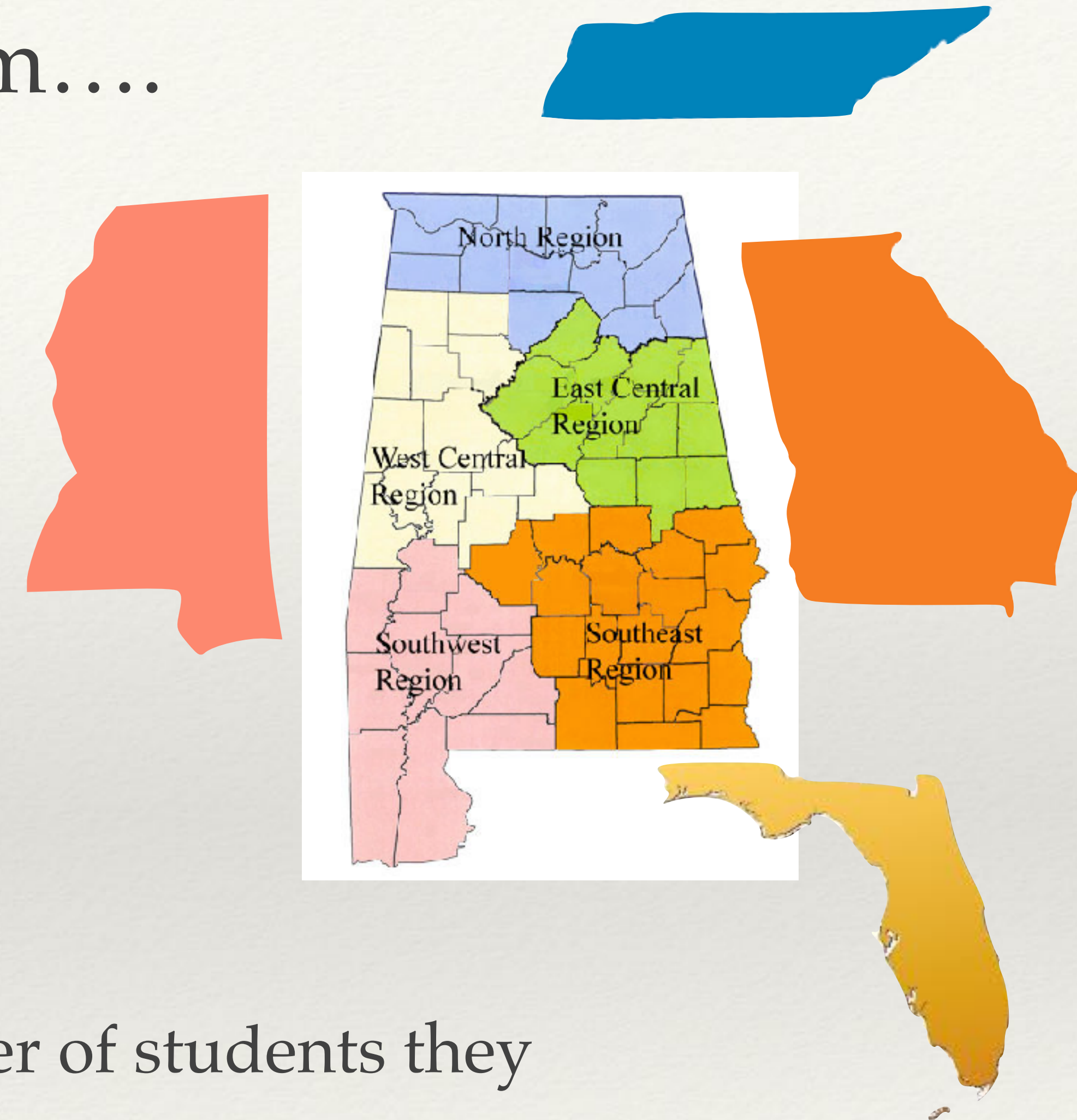
Adopt a territory management paradigm....

There should be no question about territories.

Work out issues like:

- 'Borderline' schools
- Athletes
- Transfers
- Affinity groups

Each counselor should be crystal clear on they 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

Original source

Secondary sources

Sport 1, 2, etc....

Recruiter info

Maintain consistency!

Funnel stage dates

Academic major

Geographic info

School

Church

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?

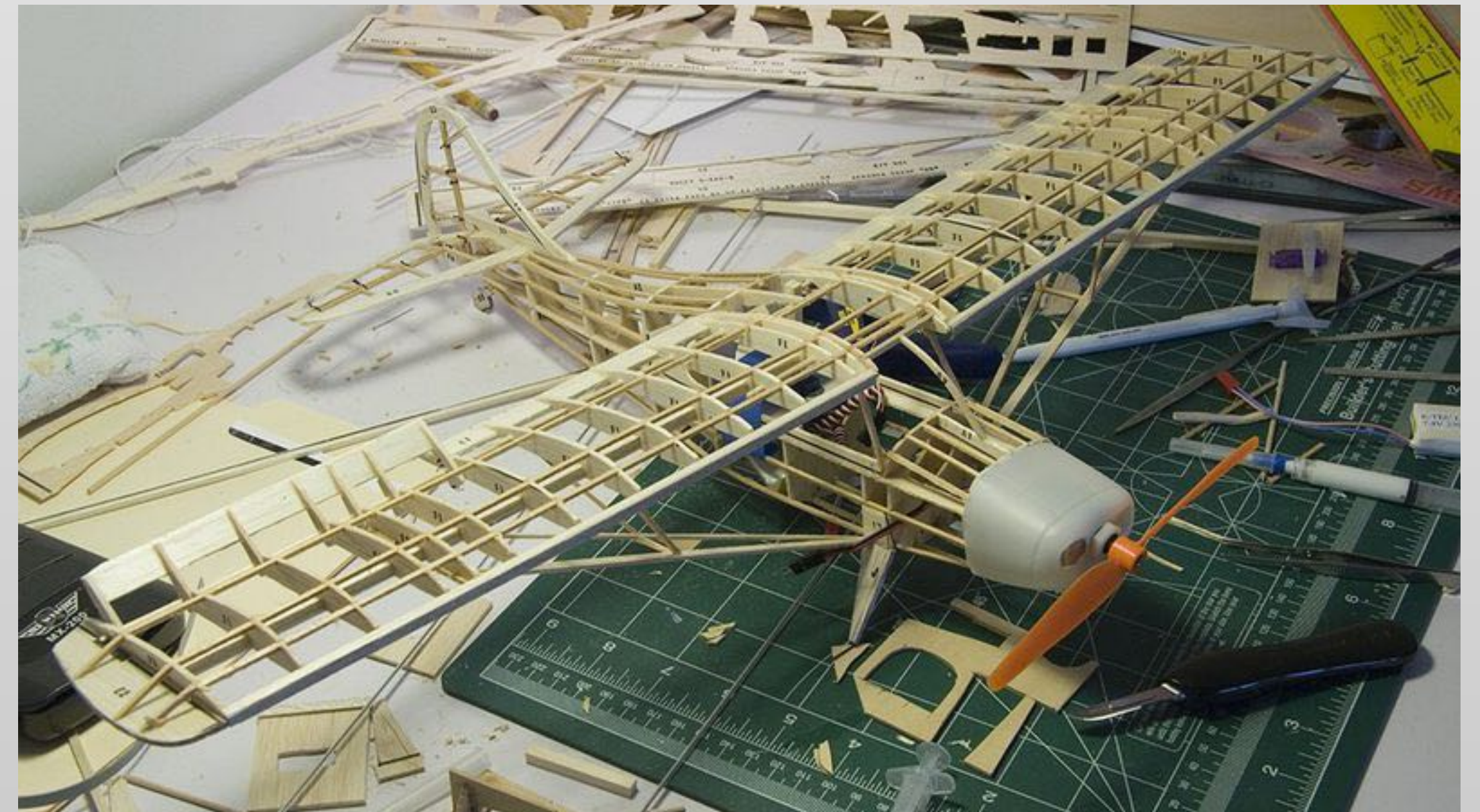
Do you have the personnel in place?

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....

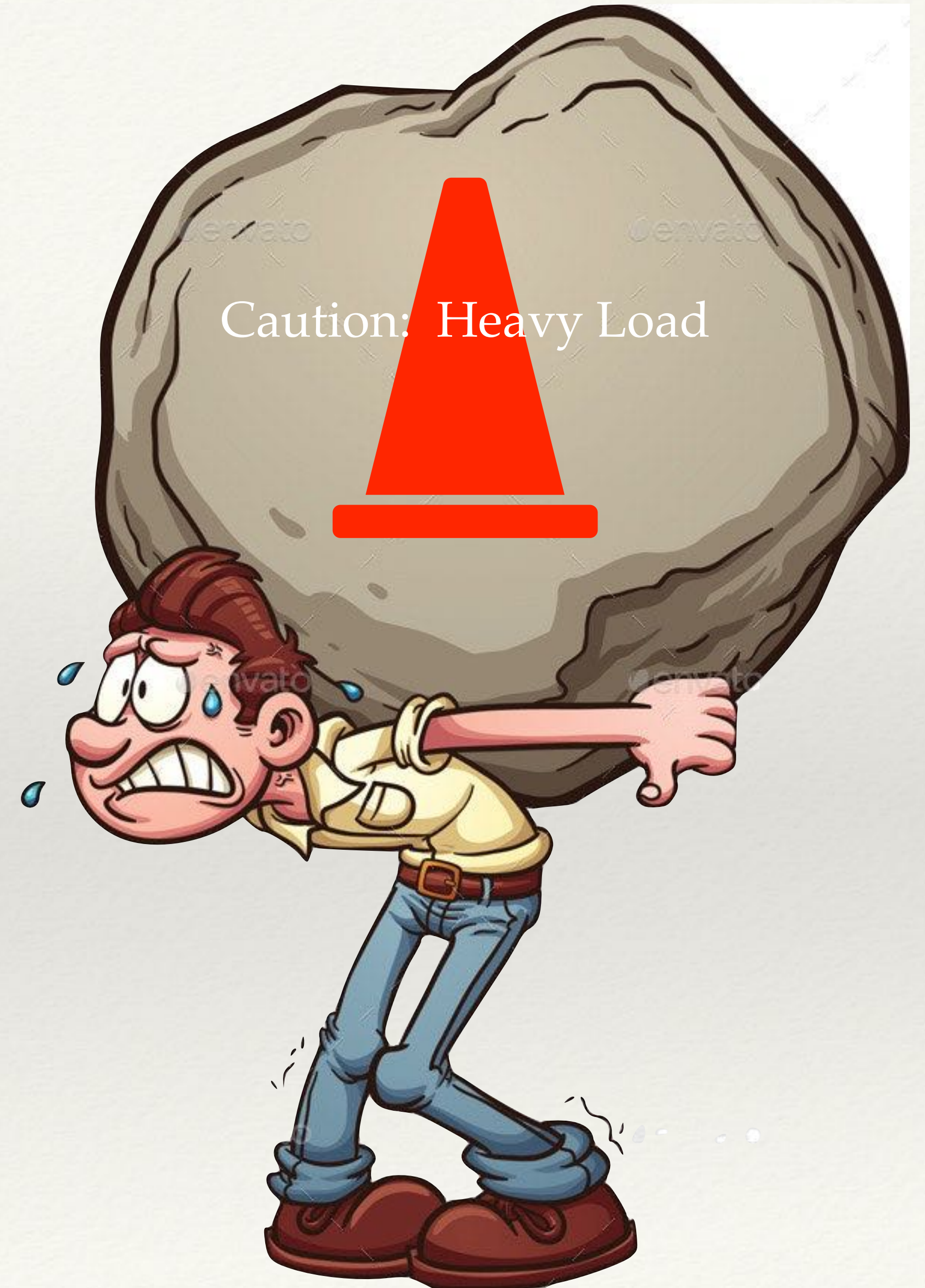
Let's get started.....

Acquire 3-5 years of enrollment data

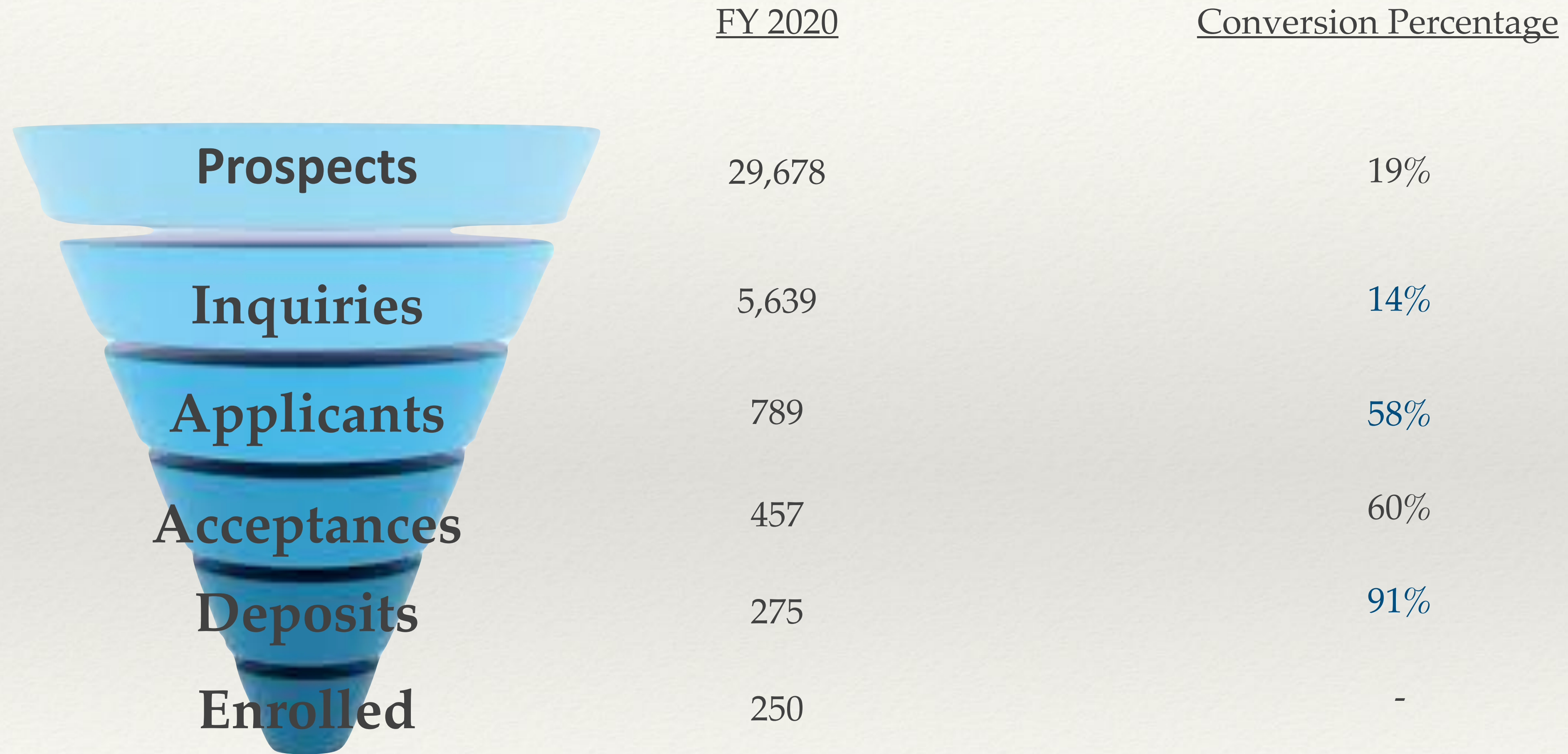
Realize that there have been many changes lately

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

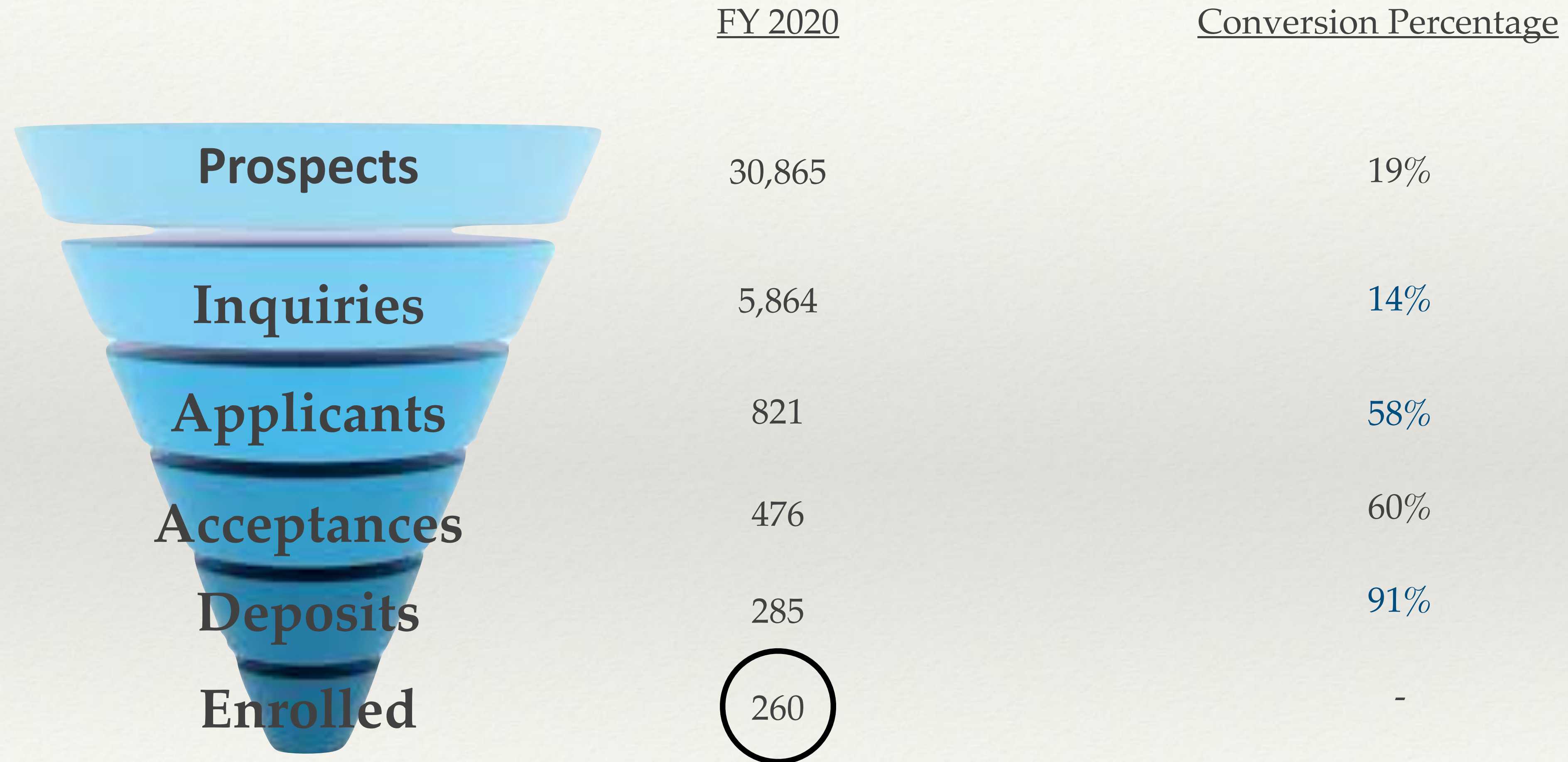
Use your judgement or national norms if needed



Use your historical data to calculate your overall conversions



Now, find a balance (be reasonable) and choose an overall goal





Before adopting the goal, count the cost....

Salaries

Print/electronic collateral

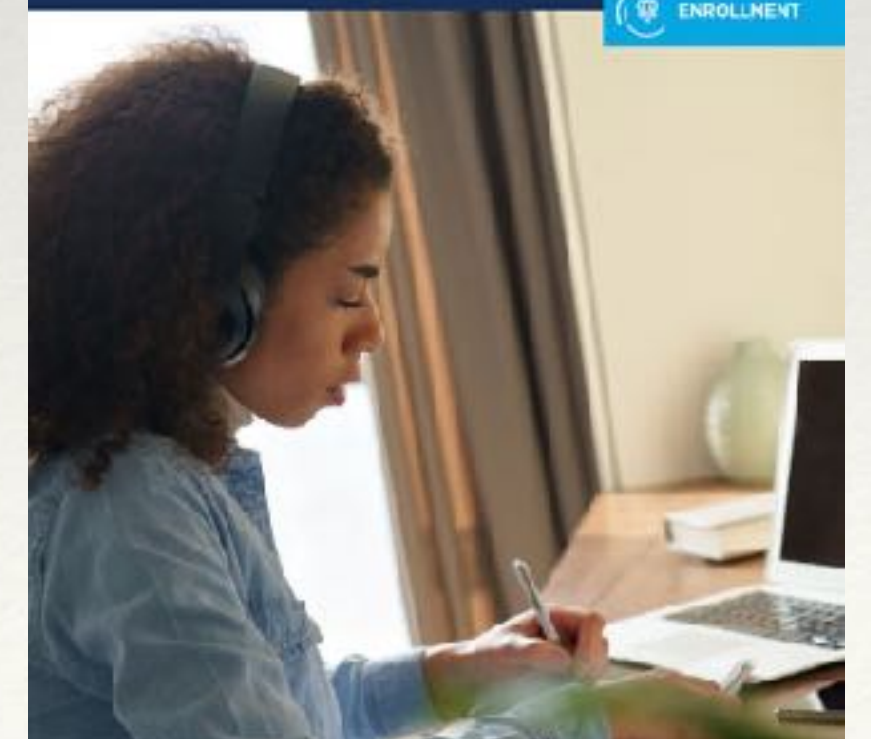
Postage

Operating

Portions of support office's time

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....





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

Everyone is different!!

Consider territory nuances

Consider the ability and experience of the recruiters

Goals for individual recruiters



FY 2020

Conversion Percentage



8,903

1,691

237

137

82

75

19%

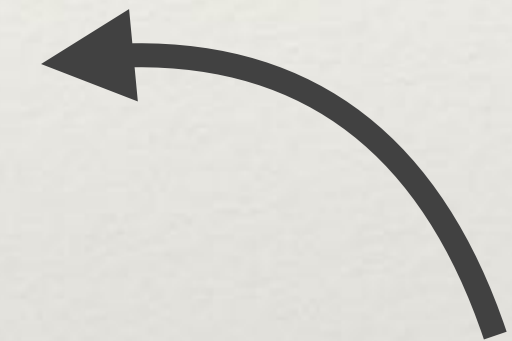
14%

58%

60%

91%

-



These are different for each recruiter!

How will I hit
these numbers
each month?



Lead book system

Applicant log

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 difficult

History

Industry standards

Outside colleagues



History:

Your numbers and conversion rates

Overall

Groups

Majors

Sports



Outside colleagues:

User groups

Listserve

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?

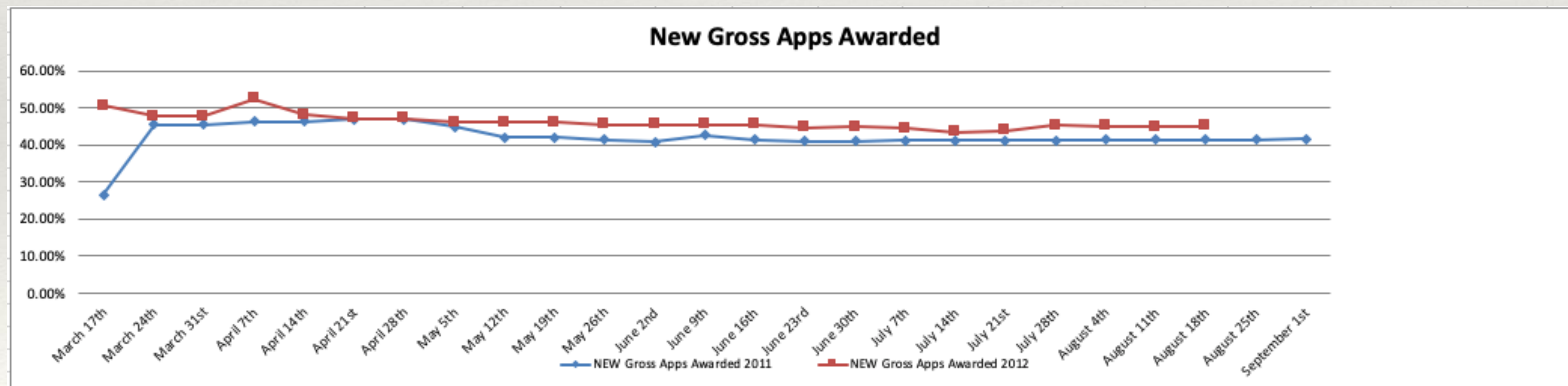


	<u>Goal</u>	<u>Conversion Percentage</u>
Prospects	29,657	19%
Inquiries	5,635	14%
Applicants	789	58%
Acceptances	458	60%
Deposits	275	91%
Enrolled	250	-

Projections for 2018 Fall Freshmen										
2/17/18										
FRESHMEN	Current 2018	Last Week 2018	Same Week 2017	Same Week 2016	Final 2017	Projected 2018	Goal 2018	+/- Goal	+/- YOY	
Inquiries	9412	9370	7700	7620	10104	11816	12000	-2%	18.2%	
<i>Conv. Rt. to Applicants</i>	14.6%	13.8%	14.7%	14.4%	17.6%	17.5%	15.8%	1.7%	-0.1%	
Applicants	1372	1292	1132	1098	1782	2069	1900	8%	17.5%	
<i>Conv. Rt. to Accepts</i>	62.7%	63.6%	70.2%	66.5%	69.8%	62.3%	61.7%	0.6%	-7.5%	
Accepts	860	822	795	730	1244	1288	1172	9%	7.6%	
<i>Conv. Rt. to Deposits</i>	30.2%	30.0%	25.8%	26.4%	31.5%	36.0%	43.5%	-7.6%	4.4%	
Deposits	260	247	205	193	392	463	510	-10%	21.2%	
<i>Conv. Rt. To Enrolled</i>	99.2%	99.2%	97.6%	96.9%	86.0%	87.6%	86.7%	1.0%	1.7%	
<i>Yield (Accept to Deposit)</i>	30.0%	29.8%	25.2%	25.6%	27.1%	31.9%	38%			
Active Deposits	258	245	200	187	337	406	442	-9%	22.5%	
TOTAL REGISTERED (FR)	0	0	0	0	362	-				
	FR. projection with conservative yield						398		-2%	

Establish a consistent weekly report

Category	March 17th	March 24th	March 31st	April 7th	April 14th	April 21st	April 28th	May 5th	May 12th	May 19th	May 26th	June 2nd	June 9th	June 16th	June 23rd
Freshmen Gross Apps Awarded 2011	27.21%	45.92%	47.70%	47.04%	47.04%	47.74%	47.61%	45.40%	42.45%	42.28%	41.64%	41.17%	42.65%	41.26%	40.94%
Freshmen Gross Apps Awarded 2012	55.96%	47.32%	47.60%	46.65%	43.30%	47.18%	47.18%	46.36%	46.37%	46.28%	45.73%	45.73%	45.73%	45.73%	44.78%
Transfer Gross Apps Awarded 2011	17.01%	38.14%	22.90%	38.37%	38.37%	38.66%	38.89%	39.01%	39.39%	40.67%	41.02%	39.68%	44.23%	44.32%	43.12%
Transfer Gross Apps Awarded 2012	8.70%	64.25%	62.40%	58.62%	51.90%	51.51%	51.51%	46.11%	45.67%	43.44%	42.23%	42.01%	42.01%	42.01%	42.41%
NEW Gross Apps Awarded 2011	26.56%	45.53%	45.58%	46.35%	46.35%	47.00%	46.83%	44.82%	42.01%	41.96%	41.38%	40.83%	42.59%	41.36%	40.97%
NEW Gross Apps Awarded 2012	50.62%	47.71%	47.71%	52.43%	48.07%	47.21%	47.21%	46.15%	46.14%	46.06%	45.45%	45.44%	45.44%	45.44%	44.60%
Freshmen Net Deposit Award Ltr Recd 2011	0.00%	39.36%	53.33%	49.68%	49.68%	50.41%	51.88%	53.42%	51.99%	51.21%	50.54%	52.78%	50.74%	49.51%	48.70%
Freshmen Net Deposit Award Ltr Recd 2012	0.00%	51.49%	39.10%	58.10%	57.54%	56.43%	49.93%	49.71%	49.71%	50.07%	49.57%	48.97%	48.97%	48.97%	47.37%
Transfer Net Deposit Award Ltr Recd 2011	0.00%	0.00%	0.00%	36.79%	36.79%	36.79%	36.79%	36.39%	37.07%	39.84%	39.84%	40.90%	42.04%	41.24%	43.15%
Transfer Net Deposit Award Ltr Recd 2012	0.00%	0.00%	62.20%	86.00%	86.00%	95.21%	67.03%	67.03%	64.51%	66.74%	64.51%	59.74%	59.74%	59.74%	50.51%
NEW Net Deposit Award Ltr Recd 2011	0.00%	39.36%	53.33%	48.04%	48.04%	49.00%	50.58%	52.14%	50.66%	49.91%	49.42%	51.50%	49.76%	48.54%	47.89%
NEW Net Deposit Award Ltr Recd 2012	0.00%	51.49%	51.49%	52.41%	51.72%	51.64%	51.69%	51.25%	51.22%	51.46%	50.49%	49.68%	49.68%	49.68%	47.51%
RETURNERS Awarded 2011	0.00%	0.00%	0.00%	45.26%	45.26%	28.07%	40.35%	37.53%	37.59%	42.30%	44.26%	37.59%	52.71%	53.93%	51.75%
RETURNERS Awarded 2012	0.00%	39.79%	39.79%	44.45%	38.92%	46.52%	38.50%	38.00%	38.10%	37.94%	38.91%	40.02%	40.02%	40.02%	39.60%
RETURNERS Award Ltr Recd 2011	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
RETURNERS Award Ltr Recd 2012	0.00%	65.66%	65.66%	35.28%	42.11%	42.11%	41.30%	41.36%	40.39%	40.86%	40.95%	40.13%	40.13%	40.13%	42.05%



Applicants and conversion rates by month

Month	Total apps	Matriculants	Cancelled/rejects	% of mats	Conversion %
Before Sept	203	46	157	10%	23%
September '13	133	30	103	7%	23%
October '13	307	44	263	10%	14%
November '13	261	33	228	7%	13%
December '13	204	27	177	6%	13%
January '14	253	58	195	13%	23%
February '14	120	34	86	8%	28%
March '14	130	31	99	7%	24%
April '14	182	60	122	13%	33%
May '14	59	24	35	5%	41%
June '14	45	21	24	5%	47%
July '14	54	29	25	6%	54%
August '14	19	10	9	2%	53%
Totals	1970	447	1523	100%	

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

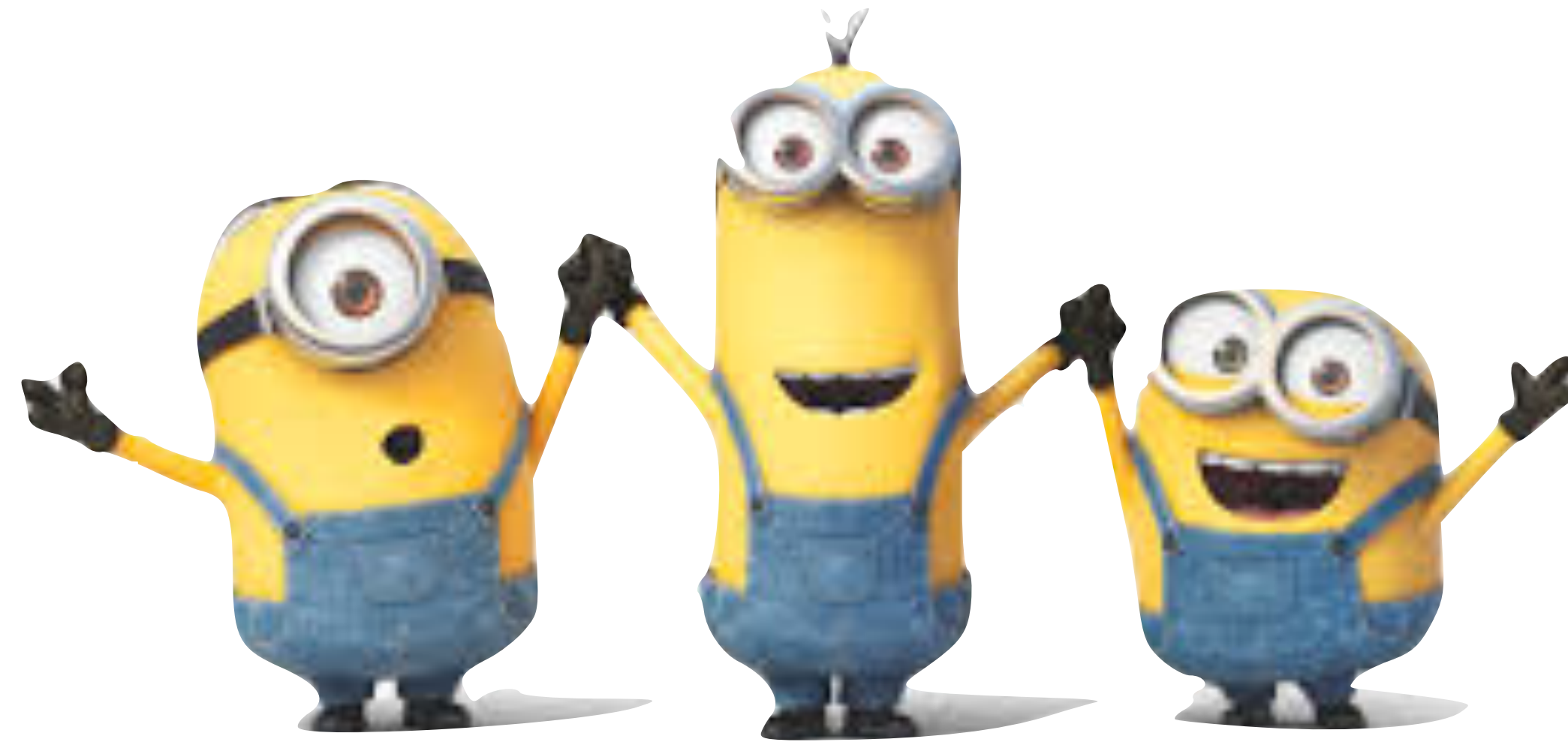
Deposits

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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