THE
ENROLLMENT
GROWTH PLAYBOOK
THE ENROLLMENT GROWTH PLAYBOOK
2nd Edition: Bigger, Better, and Growier

How to Launch, Market, & Grow Successful Online & On-Campus Programs

Helix Education
To those who believe deeply in the power of higher education, all while tenaciously pushing for its betterment.
The first edition of the Enrollment Growth Playbook was released in December 2016, and we couldn’t have imagined a better reception from the higher education community. We heard from college presidents, provosts, VPs, marketers, administrators, and faculty from all over the country who immediately began elevated discussions with their teams about adult enrollment growth strategies—using our playbook as their roadmap.

As we continue to have conversations with our partners and industry analysts, we’ve been encouraged to publish our viewpoints on additional aspects of the student lifecycle, which we’re now happy to share. In this new, expanded version of the Enrollment Growth Playbook, you’ll find brand new content that will help you better understand:

• When “high demand” programs can actually set you up for failure
• When you should give up your marketing dollars in exchange for a corporate partnership focus
• Why people trust people more than your brand’s content, and how to take advantage of this through influencer marketing
• The two very different audiences your SEO strategies need to serve
• The incredible return on giving away information through content marketing
• Why speed-to-start is your most critical enrollment lever
• What “student-first” enrollment operations should really look like
• The personalized power of stage- and obstacle-based communications
• Why you should lose half your admission requirements
• How to speed up document processing and save your enrollment funnel
• How to make returning to college less scary for your adult students
• The enrollment and political advantages to a fixed-start model
• How enrollment growth technology can truly personalize your entire student lifecycle
• And much, much more!
Helix Education's Enrollment Growth Playbook represents NEXT-GENERATION THINKING about how universities and colleges should execute their enterprise-level goals, growth, marketing, enrollment, retention, and data intelligence.

– Eric Stoller
INSIDE HIGHER ED

I’ve found Helix’s Enrollment Growth Playbook to be such a useful resource in helping me ORGANIZE AND PLAN MY ENROLLMENT MARKETING and student lifecycle strategy. Institutions looking to grow their enrollments will find a wealth of valuable worksheets, tips, and guiding principles applicable to online, undergraduate, graduate, or professional education.

– Lesley Nichols
EXECUTIVE DIRECTOR OF PROFESSIONAL STUDIES
AT EMERSON COLLEGE
Helix’s Enrollment Growth Playbook is a MUST-READ for anyone interested in the latest strategies and techniques for recruiting and retaining students in today’s digital, multichannel marketing environment.

– Mark Greenfield
DIGITAL STRATEGIST
AT UNIVERSITY OF BUFFALO

I highly recommend Helix’s Enrollment Growth Playbook—it’s a quick read and a POWERHOUSE OF KNOWLEDGE for admissions directors, marketing directors, academic advisors, and those responsible for attracting and retaining students.

– Donna Talarico
FORMER DIRECTOR OF INTEGRATED COMMUNICATIONS
AT ELIZABETHTOWN COLLEGE
Helix’s Enrollment Growth Playbook outlines such awesome actionable insights that can help any institution make significant strides to increase their enrollment—a MUST-HAVE for everyone in the enrollment management field in higher education.

– Rachel Reuben
FORMER VP OF COMMUNICATIONS
AT COLGATE UNIVERSITY

Whether you are a newbie to the enrollment management field, or a seasoned professional, YOU WILL BENEFIT FROM THE STRUCTURED AND INFORMATIVE APPROACH Helix Education has created in their Enrollment Growth Playbook.

– Jennielle Strother
CHIEF ENROLLMENT OFFICER AT
AT CONCORDIA UNIVERSITY TEXAS
Six years ago, I interviewed for the Marketing and Communications Director position at the University of Wisconsin-Waukesha. As part of the interview, I was required to give a presentation outlining a strategy to recruit and enroll more adult students. **IF I WOULD HAVE HAD HELIX EDUCATION'S ENROLLMENT GROWTH PLAYBOOK** back then, I’m pretty sure I would have been offered the job on the spot.

– **Dr. Liz Gross**  
**HIGHER ED EXPERTS**
CONTENTS

1. Define Your Goals ........................................... 1
2. Determine Growth Opportunities .......................... 5
3. Design Your Marketing Strategy ............................ 17
4. Enhance Your Enrollment Operations .................... 43
5. Solidify Your Retention Approach ........................ 61
6. Leverage Technology & Data Intelligence ............... 69
7. Choose a Partner ............................................. 73
8. About Helix Education ........................................ 77
There’s no doubt that institutions looking to grow in today’s hyper-competitive higher education market face significant challenges. “Post-traditional” learners have taken their place as the new traditional students, bringing to the classroom a very different set of needs. Technology is changing at breakneck speed. College retention rates are hovering near 60% per the National Center for Education Statistics.¹ In an environment marked by these modern-day challenges, many institutions are searching for solutions to stay both relevant and competitive.
But too often, institutions attempt to overcome these barriers by jumping straight to tactics—all before setting strategic goals.

“We need a new brand.”
“We need a new program.”
“We need a new website.”

But what you really need is more students.

And before you start implementing solutions, you need to determine what enrollment growth success looks like across your entire institution. Is it 8% year-over-year growth? A 25% increase in active students? An adjustment in your student mix? Patchwork, tactical goals alone simply won’t get the job done. You must set your sights on making improvements that affect the institution as a whole. Only once you commit to high-impact, enterprise-level goals—and achieve institutional buy-in on them—can you start on the path to achieving them; a path that guides the way to a strategic, integrated, and data-driven enrollment growth plan that advances your institution to success.

**Adopt an enterprise approach**

Often, institutions looking to solve an enrollment growth challenge will throw their support behind one or two high-growth programs instead of taking an enterprise-wide approach.
But when you’re really looking to move the needle for your institution, the math simply doesn’t favor this piecemeal approach.

**GROWTH TIP:** An MBA or RN-BSN program that boasts 25% growth may sound like a huge victory on paper. But even if these two programs make up 10% of your institution’s total enrollment, this growth only ends up being a 2.5% total increase to your institution. Whereas, an enterprise approach that can provide a 15% increase in new starts across your entire program portfolio offers an enrollment growth solution that is much more strategic.

From determining growth opportunities to designing your marketing strategy, enhancing enrollment operations, solidifying your retention approach, and leveraging technology and data intelligence—the Enrollment Growth Playbook is your step-by-step guide to helping your institution craft an enterprise roadmap to success.
Once you’ve developed your strategic growth goals, the challenge to achieving them comes in deciding where to start first. That’s because the roadmap to growth is ripe with variability, and the route from goal to success can come in a number of different forms. But when you’re looking to build the most effective strategy for enrollment growth, first you need to build a solid understanding of where you’re starting from today.
Identify what makes you special

While you may have internal hypotheses about how you perform in comparison to other institutions and why, you will gain a much more comprehensive understanding of your market by conducting an in-depth investigation of your competition. By conducting a formal competitive analysis, you’ll gain a deep understanding of what your competitors offer, how they speak to prospective students, and what ultimately differentiates your institution from theirs.

To conduct a competitive analysis, investigate the following questions:

- Who, exactly, are my competitors?
- Which programs do they offer?
- What is the cost of their tuition?
- What percentage of their students graduate?
- How do they articulate their brand?

There are a number of ways you can uncover this information about your competitors. Perhaps the best resource to start with is the Integrated Postsecondary Education Data System (IPEDS), a collection of survey data gathered on an annual basis by the U.S. Department of Education’s National Center for Education Statistics. This is a great, free resource for information regarding finances, enrollments, program completions, graduation rates, and more, for
all postsecondary institutions that participate in federal student financial aid programs. Historically, IPEDS has focused only on the first-time, full-time student, absent of part-time and online enrollments. However, recent changes in the data elements for reporting provide greater insight to the post-traditional learner.

Another useful resource to help you really understand who your competitors are is the National Student Clearinghouse. Through its data service, institutions can better understand where prospective or attrited students may enroll when they leave yours. Nothing indicates a competitive set more strongly than exploring student enrollment behavior.

After investigating the strengths and weaknesses of your competitors, you are ready to apply your knowledge to answering perhaps the most important question of the process: Why should students choose us? Then, the second-most important question becomes: Do students care about what makes us different?

Once you know what truly differentiates your institution from your competitors, you can incorporate your distinctive features into your branding and messaging moving forward.

**GROWTH TIP:** Your “competitors” are institutions you actively lose students to who had you in their consideration set. Some institutions think too aspirationally when putting together their competitive set and then position themselves against the wrong institutions.
Utilize IPEDS data to discover your true competitors, then conduct a competitive analysis.

<table>
<thead>
<tr>
<th>Your institution</th>
<th>Competitor 1</th>
<th>Competitor 2</th>
<th>Competitor 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flagship programs</td>
<td>Flagship programs</td>
<td>Flagship programs</td>
<td>Flagship programs</td>
</tr>
<tr>
<td>Tuition cost</td>
<td>Tuition cost</td>
<td>Tuition cost</td>
<td>Tuition cost</td>
</tr>
<tr>
<td>Graduation rate</td>
<td>Graduation rate</td>
<td>Graduation rate</td>
<td>Graduation rate</td>
</tr>
<tr>
<td>Primary brand message</td>
<td>Primary brand message</td>
<td>Primary brand message</td>
<td>Primary brand message</td>
</tr>
</tbody>
</table>
Offer programs students want

When institutions look to implement a new program, they often first look at employer data in their market area. While job outlook is an important aspect of program research, this data point only speaks to the projected future demand from employers for “theoretical” graduates; it does not assess whether there are prospective students in the market today who are actually interested in the program in the first place. Therefore, before you look to the job outlook for the field, first consider market demand.

**GROWTH TIP:** Employer demand for graduates ≠ program demand from students.

So how do you determine market demand for new potential programs?

To know what programs your prospects want, first look to what they’re searching for online. Through tools like Google Trends and Google AdWords: Keyword Planner, you can research keywords and broader keyword categories related to the programs you’re thinking of offering. You can also view historical trends and future forecasts for how a group of terms have done/might do.
Search for answers to the following questions:

- How much traffic has that category of program search terms seen?
- How much traffic has that category of program search terms seen specifically in your region?
- How competitive is the paid search market for these terms?
- How are these search terms trending?

Doing your due diligence to understand demand potential allows you to determine whether a new program has an uphill demand and/or competition battle, or if you may have struck a hidden and golden opportunity. Once you have a solid idea of how the program may perform in the market, you can more confidently start planning curriculum, assessing resources, and seeking necessary approvals.

**GROWTH TIP:** Consider spinning new concentrations out of existing programs in order to take advantage of new market opportunities while minimizing your course development, new faculty requirements, and accreditation approval process. While it might be difficult to roll out a full Master of Cyber Security program, adding a new Cyber Security concentration to an existing MBA program might be an easier and more viable option.
**WORKSHEET:**
**NEW PROGRAM SEARCH DEMAND**

Determine market demand and competition for new potential programs by utilizing *Google Adwords: Keyword Planner*.

<table>
<thead>
<tr>
<th>Search term</th>
<th>Average monthly searches</th>
<th>Competition (low/medium/high)</th>
<th>Suggested paid search bid</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
When “high demand” programs can actually set you up for failure

Conversations around the new program planning table often hinge around the word “demand.” Employer demand usually gets first mention, and hopefully student demand is a primary factor as well. Yet instead of plugging an institution into the heartbeat of its local economy, sometimes “high-demand” programs actually set the institution up for failure.

Consider a program in data analytics, which has been gaining interest from both employers and prospective students alike. To answer this demand, many colleges have begun pooling resources and forming teams to incorporate data analytics programs into their institutional offerings. Yet the development and maintenance of a data analytics degree program can often provide more logistical challenges than it’s worth, for two main reasons: difficulty in meeting faculty requirements and an ill-prepared student body.

Faculty positions can be expensive to fill. Frankly, faculty salaries in subjects like data analytics tend to be quite high because you’re often recruiting them away from successful research or for-profit positions. If a professor in a data analytics program is required to make more than some C-level executives at the institution, the
situation becomes untenable from both a logistical and political standpoint.

**Many students are underprepared for these programs.** Preparation for some degrees, particularly those in the STEM fields, really starts in grade school—long before these programs have been marked with the “high demand” signifier. While larger R1 institutions may have an adequate pool of prepared students to draw from when filling such programs, smaller private institutions will often either have trouble filling these programs or have trouble graduating students from them.

New-program planning absolutely can and should be weighted toward the realities of both market and student demand. But when trying to operate within the business confines of today’s higher ed market, institutions have a missional and operational obligation to acknowledge the logistical realities for any new program, then search out resourceful solutions.

**Expand to viable geographies**

Depending on your brand, academic reputation, and unique nature of each program, your online offerings could place you on the national map. But just because you offer your programs online doesn’t necessarily mean students from across the nation
Determine Growth Opportunities

will start feverishly enrolling. Not only will you be stepping onto a court with the biggest brands in higher education, but national marketing efforts are also notably more costly compared to local marketing efforts. The fact of the matter is that, for most institutions, online education is most successful when considered as an alternative modality for local students familiar with an institution’s brand, rather than a path to the national market. To build a truly data-driven plan for regional market expansion, build demographic and psychographic information into a geographic Market Potential Map for your institution.

**Demographics** – To identify new potential students, look first to the demographic data on your current and past student body. Data points related to age, race, income, and place of residence may hold key insights into which geographic areas may appeal to similar prospects. Post-traditional learners are particularly inclined toward online offerings, so finding areas that both fit the demographic profile for the post-traditional learner and don’t currently have a saturated market for your programs can unveil future opportunities. Demographic information for potential new markets can be easily obtained through the U.S. Census Bureau.

**Psychographics** – In addition to demographic information, psychographic information is key to
identifying potential new markets. Data points related to lifestyle, interests, and preference all make up a psychographic profile, and this information becomes poignant if your institution and programs fill a particular psychographic niche. Perhaps you offer a faith-based approach to learning. Perhaps your campus location and programs offer a wilderness/environmental point of view.

Incorporating psychographic research into your market research will help you appeal to students who are in the market for what you’re offering. Psychographic information can be obtained through primary research (surveys that target the potential new market or your current students) or various market research reports like Mintel Academic and Passport.

By combining demographic and psychographic research with competitive analysis for a particular market area, you can effectively and strategically identify opportunities for expansion.

**GROWTH TIP:** Just because your program is offered online doesn’t necessarily mean you can promote it in other states. Since each state’s higher education authority sets the rules on this, joining the State Authorization Reciprocity Agreement (SARA) becomes a valuable step in moving toward interstate programmatic offerings.
Once you’ve done the research and know that you’re launching the exact programs your market wants, there’s nothing secret about the formula to an effective higher ed marketing strategy.

You simply have to deliver the right message. To the right student. On the right channel. At the right time. For the right price.
Yet how do you make these determinations? How do you find your “right-fit” students? How do you reach them at precisely the right time? How do you know what the right price is?

**Craft the right message**

To get prospective students to understand your value, your message must clearly convey why you’re special. Much of the messaging within higher ed has a tendency to be generic, selling the benefits of “college” instead of YOUR college. Think about it: If you took your competitors’ messaging and put your logo on it, would anyone even notice the difference? Your messaging should take a position and either say something your competitors aren’t saying or—at a minimum—say it in a different way. So how do you go about crafting your message? First you must understand what’s already being said, then you must appeal to both the emotionality and the logic of your audience.

**Brand & whitespace analysis** – To know what you need to say, you must first identify the messaging whitespace. What are your competitors communicating? What messaging gaps exist in your market? And what’s uniquely great about your institution that you can not only speak to, but also own in the minds of your marketplace? Once you know the available opportunities, this brand and

“100% ONLINE
JUST LIKE EVERYONE ELSE

18 Design Your Marketing Strategy
whitespace analysis will help you determine messaging that effectively stands out from the crowd.

**Message to capture both the elephant & the rider’s attention** – To capture your audience’s attention and posit your message to be absorbed, you must appeal to both their emotionality and their logic. The metaphor of “The Elephant and the Rider” was coined by social psychologist Jonathan Haidt to help explain human behavior and decision making based on our two brain systems—the automatic/instinctual mind (symbolized by the elephant) and the conscious/rational mind (symbolized by the rider).\(^2\) In a media-saturated world, we must first attract the elephant’s attention, and then quickly work to persuade the rider to action. This one-two neuroscience punch needs to be the backbone strategy behind all of your enrollment communications:

1. **Attract the elephant**: Design compelling creative that both demands attention and provides emotional appeal. Our first competition is noise.

2. **Persuade the rider**: Develop unique brand messaging that mobilizes the thinking brain to both justify the immediate reaction of the elephant and build a logical case for pursuing a degree at your institution.
One university, one voice

Marketing more programs to more students has forced some institutions into a house of brands, rather than a branded house. And in a highly competitive marketplace, institutions that message in silos set themselves up for failure. To solve for this increasingly complicated business situation—one marked by slowing enrollments and increasing competition in the higher ed space—institutions are once again turning to branding.

Branding is a mobilizing buzzword in higher education, and the notable surge in branding efforts is particularly palpable of late. According to a 2015 survey of higher ed marketers produced by mStoner, 73% of senior marketing leaders have conducted a brand strategy project at their institutions in the past five years. Of those marketers, 42% reported increased competition as a key motivating factor, and 38% referenced enrollment growth as the primary driver. Obviously, the changes in competition and demographics are particularly acute for colleges and universities; institutions are looking to stand out and get ahead in this increasingly complex market. However, by turning to branding to solve an enrollment problem, institutions are ignoring many of the core issues standing in the way of enrollment growth. They’re simply spending a lot of time, effort, and resources on beautiful branding that doesn’t work.
The key is establishing “one voice” that aligns programs, schools, and departments through an integrated marketing plan that marries brand and direct marketing—creating relevancy and action among all of an institution’s audiences.

**Design differently**

We are now fully immersed in an attention economy; to survive in a marketplace where attention is currency, messages simply HAVE to draw attention. Unfortunately, recent research about human behavior has revealed that the amount of time you have to actually capture someone’s attention is extremely narrow—only about 200 milliseconds or so. So how on earth can you cut through the noise and draw attention in such a short amount of time? Step out of your comfort zone with visually arresting design.

As author Robert Cialdini argued extensively in his book *Pre-Suasion: A Revolutionary Way to Influence and Persuade*, the messages that we present first have a dramatic impact on the influence of the messages that follow, in two notable ways. The first job of those opening messages is to simply initiate the communication flow, and the second job is to remove barriers to receptivity. While the notion that messages must garner attention is largely intuitive to many, the attention-grabbing aspect of design is often underweighted in terms of importance. As Cialdini points out, there is a “human tendency to assign
undue levels of importance to an idea as soon as one’s attention is turned to it.” Therefore, the simple act of catching attention not only initiates the conversation, it exponentially increases the chances that your message will be metabolized and accepted.

These first messages often take the form of design in marketing messages, and designs must, first and foremost, stand out. It is often the case that the imagery used by most higher ed institutions is interchangeable. One university’s ad for its online MBA program could easily belong to the university across town, and vice versa. What ends up happening in these higher ed ads is that they sell the experience itself—an MBA or online education—rather than portraying the unique experience of the individual institution. By playing it safe, you simply sell the industry, not your institution. And more importantly, you’re highly unlikely to initiate the interaction at all.

Logistically speaking, as institutions develop campaigns, most of the work is reviewed by multiple people, multiple times. In the time it takes to move a campaign from concept to market there are multiple iterations, revisions, feedback loops, etc. And when we review creative at such a granular level, we often lose sight of the fact that most people will only see the design a few times, with only one chance at a first impression. Yet we make tradeoffs, debating nuances that only our own community will catch rather than prioritizing the power of first impressions. So as we review creative, we have to champion that first touch, defend the rights
of the busy consumer, and ensure our work is bold enough to break through.

Optimize for total numbers or total information?

The more fields you have on your inquiry form, the more you can know about your students, and the more personalized your communications to them can be. But for forms that feature more than four required fields, the data show that each additional field requirement decreases the prospective student’s likelihood of completing the form by about 20%.

So would you rather have scant information on 100% of your inquiries, or 60% the number of inquiries but with expanded data profiles from which to engage and nurture? Honestly, it depends on the methodologies of both your enrollment coaches and your post-inquiry marketing plans. You have to test and decide for yourself.

Target right-fit students

As author Derek Thompson noted in his book *Hit Makers: The Science of Popularity in an Age of Distraction*, “If content is king, distribution is the kingdom.” This statement is the finger pointing to the truth of the matter: *If your audience never sees your message, you’ve little to no chance of persuading them.*
With 85% of students now being classified as “post-traditional,” and with more colleges and universities moving away from the traditional student as their sole priority target, institutions are realizing that finding post-traditional prospective students isn’t so simple. You can’t just buy ACT and SAT names to find them. You can’t just go to high school college fairs to find them. And yet, a spray-and-pray approach to targeting is incredibly cost-prohibitive.

So, how do you find students searching for the programs and experience you offer? By showing up where they’re looking. By building out integrated, comprehensive media campaigns that efficiently utilize your most effective media channels. By building out search campaigns across all the major search engines that target the precise keywords your prospective students are searching for. By tapping into your local community with solid influencer outreach strategies. And by optimizing your website’s program pages for specific keywords to bolster SEO traffic.

Choose the right channels

According to a 2016 research study published by Helix Education and UPCEA, 68% of higher ed marketers don’t know their estimated overall conversion rate from inquiry to enrollment. A key step in obtaining this information is first identifying which media channels are the most effective for YOUR institution.
The path to a perfect media mix is nuanced and ever-evolving, and the evaluation of each channel should be viewed in its relation to the whole pie.

**Traditional media** – Many institutions are moving away from traditional media and toward digital channels for the data transparency and opportunity for attribution they often provide. But your traditional media attribution doesn’t have to be “soft.” We constantly test different allocation breakdowns for our clients, and often we see that the inclusion of traditional media provides high return-on-investment (ROI) because of its reach and multiplicative influence on other channels. If you judge traditional media only on its direct attribution success, it may very well not be worth it. But if you’re able to successfully track how it influences your other channels, its ROI contribution may be hard to ignore.

**Paid search** – Utilizing paid search is one of the best and most scalable ways to make sure you show up when prospective students search for programs and institutions like yours. After all, students who are actively shopping and considering their options are more often than not the most valuable. If you can catch them in the act of exploration, you’re far more likely to ensure that they consider you.
But which key phrases should you bid for? Which are relevant to your programs and institution? Which offer the most search traffic? Which offer the lowest cost-per-click? Which provide inquiries that convert the best? Your bid strategy needs to incorporate all these factors, and your bid strategy needs to change constantly to optimize your return.

Because keyword phrases like “online MBA” are extraordinarily popular to higher ed marketers, ranking high for them is incredibly expensive. In this case, your conversion rate from the search term must be high enough to justify the premium cost-per-click. But you can also play the “long-tail” keyword game, and bid on less popular and longer key phrases (e.g., “online mba data analytics”) that are still hyper-relevant to your program. And remember to always test and track not only your cost-per-inquiry but also your conversion rates as well, to make sure your paid search strategies are paying off.

**GROWTH TIP:** Are you paying the same for keywords on Thursday a.m. as Saturday p.m.? Unless you have a fully-staffed 24/7 call center, the inquiries you get on Thursday morning are likely worth WAY more to you. Are you tracking this?
**Affiliate marketing** – Affiliate partners are search sites and organizations that find students looking for specific programs and institutions and are willing to sell you that inquiry information. Often, these inquiries aren’t cold names. Depending on the partner, these students have noted specific interest in either your institution or the programs you offer. Many institutions are averse to the idea of purchasing inquiries from other vendors but, as with any other channel, you must let the data decide.

These affiliate sites often get their student inquiries from their SEO prowess—they often achieve high organic search rankings for specific program key phrases. You can attempt to play the long SEO game to catch up or play an expensive paid search game to try to outrank them. A third option, however, is to see these affiliate partners as potential allies worth testing to see how their inquiries compare to your other channels and channel combinations. While these inquiries convert at a lower rate than channels such as paid search, they also cost significantly less. Additionally, affiliate is the easiest channel to scale from a volume perspective, which is an important factor to consider if you’re trying to ensure you have enough consistent inquiries for your enrollment team to work.
Social media marketing – The savviest institutions are putting more and more marketing dollars into social media each year. Not because they’re looking to increase the chances of their game-changing meme finally “going viral,” but rather because of the advanced audience-targeting capabilities many social networks provide. You can target your advertisements to appear to prospective students based on their education level, interests, location, and any other data point they list in their social profile. This hyper-targeting capability is helping many institutions achieve impressive cost-per-inquiry and cost-per-start metrics. It can be difficult to maintain this performance if you’re looking to capture significant volume, but if you’re willing to be patient, it’s a strong potential player in your media mix.

GROWTH TIP: Another great benefit of social media is its ability to tap into networks. Alumni and current student referrals are often a highly effective form of advertising, so find ways to incentivize students to refer your institution.

Re-engagement marketing – If you have a limited budget, this is a great place to start; regardless of budget, it’s a place you need to be. The term “re-engagement marketing” speaks to the re-engagement
with past inquiries that never made it through your enrollment funnel. These inquiries may have gone cold for a number of reasons—life got in the way, the prospects were confronted by some challenge they couldn’t overcome, or the timing just wasn’t quite right. Yet simply because these past inquiries never converted to an enrollment doesn’t mean the prospect's original goal to earn a degree vanished.

By targeting these past contacts with targeted and personalized messaging, your institution can simultaneously regenerate their interest and express your institution’s interest in helping them earn their degree. Reach out and see if you can help them finish what they started. Your ROI on recruiting this once-interested audience is almost sure to beat your return on any other channel.

**Influencer marketing** – People are more likely to trust other people than your brand’s content. So how can you partner with people who already have large platforms and a creative megaphone? Influencer marketing focuses on identifying and financially partnering with leaders within, and related to, your community to help expand both your reach and your credibility.
Alumni – This is probably the easiest and best place to start when expanding your influencer reach. Alumni boast a number of favorable attributes when it comes to influence: They have a personal connection to your institution, they often have expanded networks in your local community, and they are often eager for ways to give back to your institution that move beyond financial contributions.

Program-specific influencers – Is your institution particularly strong in a certain program or academic focus? If so, utilize that brand overlap with influencers within those particular fields. Are you a leader in medical science? Appeal to influencers within that field. Do you have a nationally ranked writing program? Partner with recognizable writers in your area.

Niche-specific influencers – Some institutions boast a certain affiliation with niche groups. Faith-based institutions and those with a noted military connection are two examples that appeal to a certain niche. If your institution fits this description, reach out to local influencers within this niche to expand your reach.

Employer partnerships – Partnership with local corporations can be a great way to establish an evergreen pipeline of potential students. A properly formed relationship based on mutual benefit and reciprocity does wonders for both businesses and institutions.
Establish a tuition discount for organizations who send a certain number of students through your programs, and they’ll likely reward you with cohort after cohort of high-performing and motivated students.

**GROWTH TIP:** If you only have $75k to spend on marketing your programs, don’t. Hire someone dedicated to building corporate partnerships instead.

**Search engine optimization (SEO)** – There are two audiences to keep in mind when pursuing search engine optimization strategies: your site visitors and the search engines from which they come.

By some estimates, the top listing in Google search results receives about 33% of all traffic, with the number two spot claiming 18%, and the rest declining from there. Unless you can first appease the needs of this digital behemoth, you’re unlikely to reach the eyes of your intended audience.

The Venn diagram of SEO blends three main components: technical SEO, content quality, and social referral indicators. But if your website contains technical flaws that limit its ability to be crawled by search engines, anything else you do is worthless because you’re as good as invisible to your intended audience.
Thus, the first step in optimizing your SEO is to audit the technical structure of your site (e.g., title tags, keyword placements, sitemaps, data structure, etc.) to determine the quality of your links and the optimization of your technical structure. Once you have a solid idea of where your technical deficiencies lie, you can start prioritizing which problems you’ll move to solve.

**GROWTH TIP:** Most websites have many issues, but not all technical problems are created equal. Make sure you prioritize the high-value, low-effort fixes first.

Only once your technical structure is streamlined can you begin to focus on the content and social aspects of SEO. And this is where the long game starts. Once you’ve trimmed the fat on your website and let Google know that you’re a high-quality site now, you must continually prove your worth with high-quality content optimized for the key phrases that a) your prospective students are searching for and b) you can rank highly for.

**Content marketing** – Institutions possess enormous amounts of intellectual capital. Professional staff, faculty, and even all-star alumni have knowledge to share. Rather than wait until a student enrolls to begin to share that professional expertise and guidance, content marketing
provides immediate value to prospective students before and within the enrollment funnel—earning trust and bolstering your brand. Examples of content marketing may include a guide on how to navigate financial aid or a blog with tips on submitting an outstanding application.

Giving away some of what you know for free with content marketing allows you to take those promises you make in all of your promotional messaging (of responsiveness, expertise, and support) and create something tangible, valuable, modular, and portable.

**Utilize a “brand-direct” strategy**

Many institutions separate brand awareness and direct-response tactics by channel. And while certain channels are absolutely more effective at certain stages of the decision funnel, a “brand-direct” strategy means that every promotion you design is maximizing its potential—both elevating your brand and driving direct response.

So, once you find your highest-performing channels, can you just put your entire marketing budget there and call it a day? Unfortunately, no. The concept of diminishing returns means that your cost-per-start will curve at a certain point per channel. So, the secret is to develop an appropriate and acceptable cost-per-start channel mix, then continue to optimize as you go.
**WORKSHEET: MARKETING CHANNEL CONTRIBUTION**

Map out your current marketing channel contribution metrics to help determine your optimal marketing mix.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Inquiry volume (low/medium/high)</th>
<th>Cost-per-inquiry</th>
<th>Enroll rate</th>
<th>Cost-per-enroll</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Determine marketing budget and allocation

Is your current marketing budget enough to meet your enrollment growth goal? Do you need more? Could you reach your goal for even less if you optimized your channels and reallocated your spend? Or do you really just have no idea at all? The good news is you only have to know two numbers to know if your marketing budget is adequate:

- What’s your enrollment goal?
- What’s your current cost-per-start?

That’s all you need to know to determine if your marketing budget will get you to where you need to go. But this simple formula isn’t static. Your cost-per-start is fluid. And to optimize that, you need to understand a few more numbers:

- What does it currently cost to have an interested prospective student inquire? Per channel?

- How many of those prospective students who inquire actually start? Can you determine that data by the source that generated the inquiry (paid search, organic search, affiliate, etc.)?

- Now, what is your cost-per-start per channel?
WORKSHEET:  
MARKETING BUDGET DETERMINATION

Determine your necessary marketing budget by simply multiplying your target enrollment by your average cost-per-start.

<table>
<thead>
<tr>
<th>Enrollment Goal</th>
<th>____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average cost-per-start</td>
<td>x $</td>
</tr>
<tr>
<td>Marketing budget necessary to beat goal</td>
<td>= $</td>
</tr>
</tbody>
</table>

Continuously optimize

There is no “set it and forget it” when it comes to enrollment growth. Everything is changing all the time. Your audience is changing. The return on your marketing channels is changing. Your enrollment team is changing. So, how do you effectively manage the constantly new?
Know your numbers

That’s the secret. Because you can’t optimize anything if you don’t know your baseline and your goals.

Reminder: Here are the numbers you should be embarrassed not to know, and should work hard to find:

- What’s your enrollment goal?
- What’s your current cost-per-start? What’s your cost-per-start goal?
- What’s the lifetime value of a student (per student type/program)?
- What’s your current cost-per-inquiry per channel?
- What’s your contact rate percentage for new inquiries, per channel?
- What’s your current inquiry-to-start conversion rate? Per channel?
- What are your funnel velocity numbers (inquiry-to-application, application-to-enroll, and enroll-to-start speed)?
- What’s your cost-per-start per channel?
Look for early performance indicators

While your cost-per-start is absolutely the most critical metric for optimizing your marketing allocation, this figure also takes a long time to generate. Many institutions see “bake times” for this number of several months to nearly a year before attributing new marketing campaigns with new starts. So what do you do when you can’t wait a year to see what’s working?

Look for early indicators to determine whether you need to course-correct or not, including:

- Have I been able to effectively contact inquiries acquired from this channel?
- Am I having successful interactions?
- Do I have engaged applicants?
- Do I have completed applications?
- Is there an increase in website referral traffic from this channel?
A/B test, then test again

To optimize your chances of getting the right messages to the right students at the right times, you must do more than plan: You need to test. Test and pick winning channel, message, and design combinations. Then, test again. The goal with A/B testing isn't to find “the” winning combination. It’s to find the leader, and then try to beat it.

There are a number of practical ways to incorporate testing into your marketing efforts. If you have Google Analytics running on your institution’s website, you can use Google Content Experiments to easily conduct A/B content testing. Using this tool, you can easily segment and track traffic visiting different content and design combinations, track conversions and behavior, and determine the winner.

Most marketing automation tools have the capability to build A/B tests directly into message dissemination as well. For example, email marketing campaigns launched with Marketo
can run a test for a percentage of the recipients, then deliver the winner to the remaining recipients. This functionality allows you to test subject lines, personalization, delivery times, and other aspects of your email message to optimize your communication effectiveness.

**Take a channel-neutral approach**

Many institutions have default channel-allocation strategies based on untested legacy marketing budgets. They've been putting certain percentages of their budget toward certain channels for so long, they only really test new channels and strategies with a small remainder of their total budget. But it’s important to constantly test every channel—even the proven ones. **Certain channels may deserve even more of your budget than you think.**

In a channel-neutral approach, the strategy is not to stick to some predetermined marketing mix and channel allocation but rather to continually reallocate your budget based on real-time results. If paid search is outperforming paid social, see if you can mobilize more funds here until reaching a point of diminishing returns.
GROWTH TIP: The ultimate goal is to optimize for cost-per-start, NOT cost-per-inquiry. Otherwise, you may end up maximizing your inquiries, but targeting less-serious students that have more difficulty converting. However, cost-per-inquiry can be a good place to start while you gather data toward the cost-per-start figure.

Insist on closing the gap on closed-loop attribution

Marketing optimization only works if you’re able to track your efforts and close the loop on what channels worked, what channels worked together, and what their exact output was. Whether you create a microsite, a custom URL, or a landing page for a particular campaign, you need to know how people made their way to you and what they did after they got there. If you can’t track it, you shouldn’t spend much on it. Through closed-loop attribution, you’ll be able to further optimize your marketing spend and ensure those dollars come back to you with the greatest possible return.
Many institutions tout their student-first mindset. Yet, unfortunately, the number of institutions truly operationalizing a high-value experience for ALL students from inquiry to graduation is far fewer. Understanding and considering the needs of every student and designing a proactive, persistent, and personalized approach to student recruitment takes true coordination and integration between a number of departments and processes.

“WELL DONE IS BETTER THAN WELL SAID”

— BENJAMIN FRANKLIN
For example:

- Enrollment departments should cater to all potential student groups—teams that do not staff in the evening hours do not operate with the adult student in mind.

- Student portals and online learning environments should be easy to navigate.

- Critical information about a student’s application status, financial aid status, academic standing, and other financial responsibilities should be easy to access and presented in a direct, clear, and digestible format.

- Processes should be in place to ensure smooth and intuitive hand-offs between key student-serving teams who engage with students on an ongoing basis.

Truly, a student-first mindset IS a customer-service mindset. Functionally, there are a number of ways institutions can tighten up their customer-service processes through the right communications, policies, and technology. Questions to ask yourself when evaluating your student-first operations include:

- Do we really understand who our students are and what they need? If not, how can we gain that understanding as soon as possible through our first-contact coaching scripts?
• Have we really thought about the students we’re trying to serve, and how do we adjust our operations to best align with the needs of these students?

• Are we providing our students with the best service we can to ensure they are successful and able to persist and graduate within the desired timeline?

• What do our students need, in addition to what we are providing, to stay engaged and successful with our institution?

Engage immediately

If you’re not calling your new inquiries within minutes of acquiring them, you’d better start. Because your competitors are—and the first institution to get the student on the phone has a huge advantage. Research shows that immediate contact with a prospective student is pivotal in helping them start their path toward enrolling and starting at your institution. Whichever institution speaks to a student first gets the first chance to build a relationship with that student. An institution's enrollment coaches can learn about a student's goals, ambitions, challenges, and life circumstances and begin to help the student envision themselves at the institution. So, that institution better be yours. Because if you’re reaching out after the prospect has already emotionally connected with someone else, it’s an uphill battle that becomes harder to win.
Not only do these initial points of contact help set a precedent of customer service and care in the minds of your potential students—they also arm you with a robust understanding of who the student is. This knowledge helps you to better provide personalized communications throughout the recruitment process, and it helps you retain them throughout their academic experience as well.

**Engage when/how convenient for students**

How and when a prospect or student is contacted is a pivotal consideration of a student-first institution. And in an age when myriad communication platforms are being used in real-time, at any given time, by any number of students, institutions should increase their ability and agility to move between platforms and time blocks with ease. So what’s the best way to ensure you’re reaching people when and how it’s convenient for them? Start by identifying how they first communicated with you. And just ask.

As part of your preliminary conversations with each prospect, structure in questions and data fields relating to their preferred times and methods of communication. Once you have this information collected, you can segment students together based on these preferences. Place them on evening contact tracks, email nurturing tracks, texting alert tracks—the possibilities are endless. Be lean. Be smart. But figure out what makes the

Text Messages Have a 99% Open Rate
most sense in order to ensure your departments and processes can accommodate each group of students most effectively.

Get personal with your communication strategy

According to the Digital Marketing Association (DMA), message personalization is the “most important objective of a data-driven marketing strategy,” and higher education is no exception. Targeting and segmenting your audience is absolutely critical to help prospects see themselves at your institution. To help prospects build this vision, enrollment marketers can personalize messages to address the particular priorities of each individual. Message personalization provides an opportunity for institutions to connect with a prospect on a deeper level and help nurture an inquiry through the enrollment funnel.

This customization can take a number of forms, and marketing automation software is your best friend in getting these messages out. Through tools like Marketo, you can customize both the design and messaging of your communications to engage potential students with information most relevant to them. By identifying certain indicators such as employment status, family size, income, and program interests for each prospect, your marketing automation software can auto-populate the communications with information that addresses their personal realities.
Stage-based communications – Seeing as how potential students must move from an initial inquiry to an application, then advance to enrolling and ultimately showing up on the first day of class, the enrollment process is ripe with opportunities for a prospect to drop out. A fixed, calendar-based approach to enrollment outreach often misses the mark, leaving a prospect’s individual concerns unaddressed or under-addressed at pivotal points in their decision-making process.

Prospects don’t just need consistent messages, they need the right messages at the right times. The message that first gets their attention, the message that makes them first click, the message that makes them keep reading, the message that makes them first reach out, the message that makes them decide to apply, and the message that makes them show up on day one—they’re probably all different.

Stage-based nurturing campaigns that respond not to a fixed calendar but to a prospect’s enrollment status will help fortify an enrollment funnel and convert more prospects to students. Design stage-based communication sequences that make it as easy as possible for your students to keep moving through your funnel, with calls-to-action specific to the next step they need to take. If their next step is to inquire, apply, deposit, register, or send a missing document—that
should be the primary and singular call-to-action in your communication.

**Obstacle-based communications** – While many institutions have adapted their learning environments to accommodate the changing needs of today’s post-traditional students, the enrollment practices of these institutions often don’t reflect these same accommodations.

According to the 2011 report *Research on Adult Learners: Supporting the Needs of a Student Population that is No Longer Nontraditional*, published by the Association of American Colleges and Universities, among this group there is a “high likelihood that they are juggling other life roles while attending college, including those of worker, spouse or partner, parent, caregiver, and community member.”

With these mental barriers in play, the post-traditional student has an uphill battle when making the decision to return to and stay in college. Does the prospect have children? Perhaps he would be interested in learning of the on-site childcare center and online program offerings. Is the prospect financially independent? Inform her about the myriad options for financial aid and scholarships. Is this a prospect’s second attempt at higher
education? Introduce him to your success coaching program designed to help learners succeed through to graduation.

Make sure your enrollment coach captures these obstacles in their first contact conversation, and your entire team can utilize this data to personalize your communication strategy throughout the student’s journey.

Marketing automation tools such as Marketo make this kind of stage- and obstacle-based messaging not only easy, but also automated as students progress through your enrollment and retention funnels. And if you’re hesitant about these student-centric enrollment best practices coming across too “sales-y,” then don’t come across too sales-y. Just be helpful. But be helpful immediately after the student raises a hand. Imagine that you go to a store with questions, and no one comes over to help you because they’re nervous about coming across too “sales-y.” And so you’re just standing there. That is the real student experience at countless institutions today. But you won’t be able to get away with this level of non-customer service much longer. There are too many institutions doing things right these days—doing nothing is starting to look a whole lot worse by comparison.
Reduce unnecessary admissions barriers

Many institutions struggle to find the balance between academic selectivity and increased access. But if growth is truly a top priority, more open enrollment policies must be embraced. This is particularly true for colleges and universities that hope to take advantage of the growing numbers of adult students seeking online education.

Re-evaluating your admission requirements starts by asking good questions. Is the revenue gained from your current application fee worth the revenue you’re losing from turned-away applicants? Is your institution collecting résumés, but never even validating the work experience listed on them? Audit and question the value of your current admission criteria to determine if they are serving as roadblocks to your growth rather than intentional gatekeepers to ensure a quality program.

Streamline document management

Transcript collection can be a frustrating and time-consuming process for both the potential student who is enrolling with a higher education institution and the institution’s administrative staff. Countless (and unnecessary) hours are often spent downloading, printing, stuffing, mailing transcripts or request forms, signing consent forms, making payments, and updating
records. This process can take weeks before a student receives the transcripts necessary to complete the application or enrollment. Delaying that process only decreases the chances of that student ever starting with your institution. Electronic transcript exchange allows for institutions to reduce cost and operate more efficiently while simultaneously improving student services.

Now administrative staff and students can get faster transcript delivery, see automatic status updates, and receive real-time notifications. The process promotes a better student service experience while keeping all parties informed in a timely manner.

**Expedite financial aid processing**

There’s no doubt that finances play a large role in a student’s decision to enroll with a higher education institution, and the financial aspect goes far beyond the mere presence of financial aid options. The manner and expediency in which an institution handles the financial aid process can often persuade or dissuade a student from enrolling at that institution.

That’s why it’s essential to embrace a customer–service mindset throughout the application and packaging processes to ensure students have the financial information they need as soon as possible.
The 2017 Eduventures Prospective Student Survey, which obtained responses from over 60,000 prospective students across the country, echoes these sentiments. According to this survey:

- 61% of respondents reported that having more information regarding financial aid earlier gives a more complete idea of various options, and 38% were more likely to attend an institution that gives a fair offer early.⁹

- Yet, 55% of prospective students have little or no idea how much they’ll receive in grants and scholarships, which is pivotal information for their decision to enroll. Adversely, only 13% reported having a good idea of what to expect from financial aid.⁹

- Only 16% of prospects received financial aid offers at the same time as an offer of admission, while 68% received some or none at that point.⁹

- When asked whether an offer of financial aid was the deciding factor in their decision to attend a particular institution, 39% said yes.⁹

The numbers for the adult student population add greater urgency to the matter of financial aid. According to the report *Achieving Success for Nontraditional Students: Exploring the Changing Face of Today’s Student Population*, published by Barnes and Noble College,
non-traditional students reported finances as their top obstacle to enrolling with a higher education institution. And finances don’t just impact their decision to enroll—according to the same report, “financial issues are the number one reason non-traditional students gave for quitting a prior program.”

These findings show that an institution’s approach to financial aid processing, packaging, and messaging has major implications for the prospective student. Thus, in order to help grow enrollments to the best of your ability, approach the topic of financial aid in the spirit of customer service and expediency.

**Make returning to college less scary**

For most adults returning to post-secondary education, particularly those seeking undergraduate degree opportunities, the transition back to being a student can be a significant one. Many have not been particularly successful with the college experience to date, nor may they have had any experience with online learning and research technologies now available as part of the learning experience. A student’s successful integration into your institution can be facilitated through two very important mechanisms: a new student orientation (NSO) and/or a gateway course.
**New Student Orientation (NSO)** – A well-structured NSO experience has the opportunity to bring the right balance between the marketing and enrollment efforts and the future academic realities the student will experience once enrolled in your program. Depending on the timing of when the admitted student engages in the NSO activities, this can also be a way to mitigate melt between the admissions decision and the term start.

The program should be engaging, provide a more in-depth story about the institution and its mission/values, introduce the student to services available to support student success, and provide access to key institutional policies. There should be distinct considerations in how students who are primarily online versus those who will be in the on-ground or blended environments are addressed. And since today’s students are demanding more and more online offerings, developing and delivering outstanding online NSO experiences will be crucial to the success of these programs.

Components of a well-developed NSO program include:

- A presentation on the history, mission, and values of the institution, allowing the student to see him/herself within the community
• An introduction to the Learning Management System (LMS) and other frequently used technologies that a student will find in the classroom environment

• A review of available resources, their locations (and especially for online students, links to relevant resources on the website), and ways to engage with those services

• An overview of key institutional policies such as academic integrity, sexual misconduct, and the code of conduct (in the online environment an extension of conduct expectations regarding online behavior is also very helpful)

• Pedagogical strategies that encourage engagement with the content while providing assessment of student participation

The Gateway Course – Ideally, each program’s curricula will include a mandatory entry point in a gateway course that is worth academic credit to convey the course’s importance. When designing programs to scale, the gateway course is offered at every start point in the academic calendar and is shared across academic levels to create enrollment scale at those start points. The content should be appropriate to the academic level and can cover any of the following topics, among others:
• Professional development and career planning
• Time management
• LMS and other educational technology training
• Research strategies and resources
• Personal development through exploration of learning styles, personality preferences, and goal planning

The gateway course is also a great place to prepare a degree plan that allows the student to fully understand the transfer credit awarded upon admission, consider all of the life variables that will impact a path to enrollment, engage in setting his or her own goals for completion, and to identify an intended graduation date. In this exercise, the student can be introduced to the academic advisor to begin the long-term relationship that will facilitate student success and graduation.

**Fix your starts to suit your students**

In the earliest days of adult-focused education, the rolling start model offered some major business advantages. The idea is simple—you acquire a ton of inquiries, and as soon as those inquiries convert to reach
a certain number of applicants, you enroll those students right away. This model definitely lessens the lag time between the decision to enroll and starting classes, and institutions were quick to adopt it in the name of growing enrollments.

Yet without a marketing budget comparable to those for-profit institutions that dominated the adult space for decades, many institutions today simply can’t afford to generate the demand necessary to convert inquiries into enrolled students at this scale and speed.

Whereas a fixed-start model, with starts that are consistent and well-planned such as one every 8 weeks within the larger semester calendar, can provide a better experience for both students and your institution alike. Students are better able to time their educational experience. Institutional planning is improved as this model makes scheduling faculty to develop and teach courses a more reliable process. And the administrative realities of packaging financial aid and enrolling students on term-based start dates becomes much easier.

No model is ever perfect. But if you’re looking to figure out the best solution to grow enrollments and provide a great student experience, you’re likely better off falling into the rhythm of a fixed-start format than dancing to the tune of a rolling-start model.
Secret shop your enrollment team

You might have some hunches about where your enrollment funnel is strong and where it could use some help, but the only way to determine the strength of your funnel is to stress test it. Secret shop your institution. Submit test inquiries, and evaluate the communications (or lack thereof) you receive. It may be painful. But it’s absolutely necessary to find any and all problem points within your enrollment funnel.

When you secret shop your institution, keep track of the following:

- Speed-to-inquiry (time from when you inquire to when you’re first contacted)
- Response method (phone/email/text)
- Knowledge of enrollment coach
- Next steps provided
- Follow-up persistence
- Quality of communications (level of personalization and timeliness)

By making a proactive effort to determine the strengths and weaknesses of your enrollment funnel, you increase your ability to make data-driven decisions throughout the enrollment process.
WORKSHEET:
SECRET SHOPPER DIAGNOSTIC

Submit inquiry forms at your institution to secret shop your own enrollment team and determine potential pain points.

- Speed-to-inquiry __________
  (time from inquiry to first contact)

- Response method __________
  (phone/email/text)

- Quality of communication __________
  from enrollment coach

- Next steps given __________
  (yes/no)

- Follow-up time after initial conversation __________
Now your marketing operations are optimized. Your enrollment operations are running like clockwork. And more and more right-fit students are barreling through your doors, excited to start at your institution. Enrollment challenge solved? Well, not if half of those students you worked so hard to enroll don’t persist, retain, and graduate. And according to the National Center for Education Statistics, that’s the devastating reality the average institution can expect.
This is a missional failure. And despite this failure resulting in so much revenue walking right back out the door, institutions still mobilize far too few resources to solve this crisis. And the considerable student load of most institutional support staff often renders proactive outreach impossible. With limited resources, how do you scale retention support to make a critical difference?

**GROWTH TIP:** If you’re waiting for midterm data to come back to realize your students are struggling, you’re often way too late to make a difference. Focus first on the very first assignment of their very first class.

**Coach the whole student**

One common misunderstanding is that students drop out because the academic load is too difficult. But much more often, it’s because “life” is too difficult. A student’s personal issues and financial struggles become too much to handle when they’re also pursuing their education, and their education all too often gets the short straw. That’s why it’s so important for your support staff to think holistically about student success—to dig deep and uncover the real issues that may stand in the student’s way of completing their goal.
Success coaching incorporates a three-pillar approach to student success: academic, life, and career. The diversity of the college student experience remains an amalgam of distinctive personal, academic, and professional challenges, which is why it is so important to think holistically about student success. The coaching approach is driven by questions—questions that get at the heart of the barriers students face in their classes, their lives, and their careers. By focusing on the whole student, institutions can help students proactively navigate their paths to graduation.

Leverage enrollment data

Your enrollment coaches have gained so much knowledge about your students during the enrollment process—specifically potential risks and red flags. Is this information being effectively leveraged by your success coaches to keep students on track throughout their academic careers?

Quantitative data (highest level of education completed, employment status, years since last enrolled, etc.) and qualitative data (goals, motivations, obstacles) can begin to paint a preliminary picture (or predictive model) of the student’s initial chances of success. This data can allow you to have a cohesive and proactive retention strategy that will give you more and better data over time.
Before an institution can build out a data strategy, however, they must ensure their data collection and analytic components are in place. Capturing data using something like spreadsheets or Google docs—while certainly possible—might not be the most efficient way to share information about individual students with multiple departments over time. What we’ve seen our partners do with much success is leverage institutional tech capabilities—usually the CRM—to capture data, then integrate this data with information from an LMS or SIS. Once this data is consolidated, you’ll be able to get a good idea of the various demographics and behaviors that correlate with the retention of a student. By consolidating those data points into one central location that supports multiple institutional constituents, you can impart a proactive and cohesive student strategy that combines coaching—which we often refer to as success coaching—and various communications throughout the student lifecycle.

If you do not currently have the technological capabilities to aggregate your data in a way that is meaningful, it might be time to look at implementing technology that you don’t currently have.

**Build predictive risk models**

In the era of big data, the fact is that there are often quantifiable indicators that can predict when a person may or may not struggle to persist through to graduation. The old model of
Waiting for a student to raise his or her hand and ask for help is as ineffective as it is antiquated.

Early academic and behavioral indicators, as well as data surrounding a student’s life circumstances (gathered throughout the enrollment process), can often provide a silent call for help well before the student can verbalize that call. Luckily, most of those indicators are already present within your data and can be leveraged to build predictive risk models and help you mobilize resources toward those students who might need a little extra attention.

To build the predictive risk models, you must do three things: collect the data you need, integrate that data in a centralized data system, and then mine that data for trends. The more data you have, the more you might start to see correlations between the data points that speak to student success or struggle. And it’s not enough to simply analyze the data. You must then use your insights to inform personalized student action plans.

**GROWTH TIP:** Many institutions already have built-in, simplistic models to predict students who may struggle—an ACT or SAT minimum for example. But is that really the most effective way to determine which students still struggle? Maybe it is, but chances are there are better indicators out there. Dive into your data and figure it out.
Create tiered and personalized action plans

In a tiered retention approach, students are placed into one of three tiers that indicate how much support the student will require to succeed. Then, the student’s personal information is utilized to customize their action plan. The tiers are represented as follows:

**Tier 1** – These students are characterized as highly motivated and persistent, with little need for institutional support. The indicators for this tier include high levels of engagement, participation, and academic performance. While you still provide support for this tier, a large amount of resources won’t be required to keep students in this category on track.

**Tier 2** – These students are those in need of the most support and make up the tier that you should emphasize in your outreach. The indicators for this tier include inconsistent participation and engagement—they might be participating in one class but at risk of failing in another. Their GPA may be above satisfactory, but they might have a track record of not always earning credits in the classes they take. This group is important to recognize and actively engage; get to know them and evaluate red flags and motivations to ensure they overcome their challenges and persist through to graduation.
**Tier 3** – This student group is most at-risk, and they might drop out no matter what level of support you provide. Indicators include failing several classes in a row, starting a term on probation, and having a history of unsuccessful attempts at a degree. This tier is where many institutions might direct most of their focus and resources, but that can be a large and costly investment with minimal return.
Many institutions and individuals involved in their enrollment management operations point to a lack of data access as an excuse for why they’re not operating more intentionally and effectively. But if that’s the data reality at your institution, it’s up to you to solve for it.

You can’t manage what you can’t measure. You can’t track what you can’t see. And your data isn’t powerful unless it’s all connected.
There are many different technological solutions and combinations that can help provide you with the data intelligence and insight you need:

- An inquiry management platform can help you optimize marketing spend and channel allocation.
- An enrollment CRM (customer relationship management tool) can help optimize inquiry communications and enrollment funnel conversion.
- A retention CRM can help automate retention interventions and optimize your persistence rates.

But the real power of data intelligence comes from the connectivity and integration between all of these systems.

Enrollment growth optimization works best when you holistically track your efforts throughout the entire student lifecycle. Your marketing team may be able to report cost-per-click and cost-per-inquiry metrics, your enrollment team might give you final enrollment numbers, and your graduation rate can often be easily obtained. But what is the relationship between these data points, and how do you know how students are finding, enrolling with, persisting at, and ultimately graduating from your institution?
Whatever your technology situation, ensure you can affirmatively answer the following questions:

- Can I easily access all marketing performance data (cost-per-inquiry and cost-per-start analytics per channel)?
- Can I easily see my funnel velocity numbers (inquiry-to-application, application-to-enroll, and enroll-to-start speed)?
- Does our student data effectively talk to and travel between our CRM, SIS, and LMS systems?
- Can I easily pull reports and glean understanding?
- Can I route new inquiries to best-fit enrollment coaches based on specific student data characteristics?
- Does our technology help pinpoint holes in our enrollment funnel (underperforming marketing channels, enrollment coaches, and engagement communications)?
- Can I easily A/B test messaging and creative across marketing channels and enrollment communications?
- Can I leverage each individual student’s enrollment, academic, and behavioral data to personalize enrollment and retention communications?
- Are our student retention interventions automatically triggered by academic and behavioral data?
The goal of all this data is not merely to have it. It’s to set up an infrastructure where you can act on it. It’s to utilize this gleaned intelligence to truly personalize your student lifecycle, at scale. A future where every student receives the right message, on the right channel, at the right time. A future where more and more of your student’s roadblocks to success are automated away. A future where more and more of your students make good on the dream they had when they first filled out that form on your website to learn more.

If you do not currently have the technological capabilities to glean intelligence and insights from your data in a meaningful way, it might be time to investigate new technological solutions or to work with a partner who can help.
Let’s be clear. You don’t absolutely need an enrollment growth partner (EGP). You can do all of this on your own. If you have the budget, the runway, and the buy-in to run with this in-house—with a proven team who has done this before for some of our industry’s bigger players. Indeed, it may make the most financial sense for you to do so.

But sometimes, there’s the right time for the right enrollment growth partner. When you’re looking to grow fast. When you
don’t yet have the right team in-house. When you don’t want to invest the millions of dollars and numerous years it will take to build highly competitive and efficient marketing, enrollment, and retention strategies. When you want to do it all yourself eventually, but just need a little help getting there.

That being said, not all enrollment growth partners are created equal. And there are some partnerships that might seem to make sense when you’re getting started— but soon you’re stuck in a bad contract with no way out for the next 10 years. Here are some considerations when evaluating potential partners:

**Programmatic vs. enterprise-level solutions** – Some partners have experience cherry-picking and growing a small handful of select programs. And they’re willing to help manage those programs for you, in exchange for a big revenue share. But if you’re looking for a more holistic enrollment growth solution to really move the needle across your entire institution, it’s important you pick a partner that specializes in enterprise-level solutions.

**Higher ed experience** – There are some amazing marketing agencies out there who understand best-practice digital strategies. But if they don’t know higher education inside and out, you’re going to be their learning curve. And that learning curve will be expensive. The higher ed world is a completely different game—
with unique audiences and unique politics. Don’t be someone’s learning curve. Go with a higher ed partner who has deep experience—specifically with the growing non-traditional audience.

In-house talent – Different enrollment growth partners have different strengths. Some come from the LMS side and say they can do everything else. Some come from the Academic Services side and say they can deliver everything you need. Some claim deep marketing strength but actually outsource their marketing operations to other agencies who have little to no higher ed experience. Every partner has its strengths. Make sure you’re partnering with one whose strengths complement your own.

Financial alignment & flexibility – Are the partner’s incentives aligned with yours? Do you win if they win? Or will you be stuck in a long term punitive contract no matter what? Don’t take a cash grab that may look good up front, but leaves you with limited back-end upside.

Cutting-edge technology – Does this partner have proprietary data, technology, and predictive models that can help optimize your marketing, enrollment, and retention efforts beyond anything you could do on your own? Will this technology pair well with your existing
in-house infrastructure? Often with the right partners, you’re obtaining more than mere knowledge advantages, but sizable technological advantages as well.

**Data transparency** – Some partners won’t show you what they’re doing on your behalf. Seriously, it’s in some of their contracts. That’s nonsense. That’s not partnership. It’s not trust. It’s more often than not coming from partners who would be embarrassed to show you what they’re doing, rather than nervous you’re going to “steal” all their secrets for yourself.

In an era of changing student demographics, increasingly sophisticated marketing/communication tactics, and breakneck technological advancement, more and more institutions are turning to proven enrollment growth partners to keep up and stay ahead. Ultimately, the contributions of your partner should work to complement your work, your mission, and your institution.
ABOUT HELIX EDUCATION

Helix Education provides colleges and universities a comprehensive suite of technology and services to power data-driven enrollment growth 8x faster than the industry average. The company’s three solutions—Outsourced Program Management, Enrollment Marketing, and Retention Services—have successfully helped institutions find, enroll, retain, teach, and graduate post-traditional learners for more than 30 years. Our enrollment growth solutions are powered by a proprietary technology ecosystem that aggregates data across the student
lifecycle to better understand an institution’s best-fit student’s journey, and implements actionable intelligence to improve outcomes for students and institutions alike.

Ready to grow?

CONTACT US

helixeducation.com
discovery@helixeducation.com
801.886.2002
REFERENCES


