

OCTANE

VOL. 5, ISSUE 3, 2021

ACTIONABLE INSIGHT
REMARKABLE TOPICS

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INSIDE

The Art of the Relationship:
Painting a Canvas of Advice,
Help, and Friendship as an
Admission Counselor

Spreading Opportunity,
Eliminating Obstacles –
The PJ Way

Bringing Student
Search in House 2.0

LETTER FROM OUR

Vice President for Enrollment Systems



At enrollmentFUEL, we believe you always have to seek new information because fresh thinking FUELS new ideas.



enrollmentFUEL would like to extend our gratitude to Capital University in Bexley, Ohio, for allowing this photo to be featured on the cover of our magazine.

Octane the Magazine: A publication of enrollmentFUEL

A collection of innovative thoughts from a team of people bonded to clients in a way to prevent the knocking that comes with the "one size fits all" Student Search strategies. Adding Octane to your thinking fuels creativity and releases positive energy among enrollment professionals.

Dear Octane Booster,

Another cycle begins! This annual beginning is as an opportunity to use what I learned in the past year (both good and bad) to find ways to improve results. This issue of Octane offers a wide range of ways to improve outcomes in big and small ways, either by offering insight on overall strategy, or on how to level-up the daily tasks that must be completed to meet goals.

While the economy is in somewhat better shape than where we started in the previous cycle, many students and families face an uphill battle before fully recovering from the 2020 pandemic-induced downturn. If you are looking for ways to meet your recruiting goals (and also fulfill your institution's mission) please read, "Spreading Opportunity, Eliminating Obstacles –The PJ Way," by my friend and fellow financial aid geek, Keshia D. Woodous, MSHEA, FAAC. In the article, she talks about how *professional judgment* can help enrollment management professionals chart ways for students to afford college.

enrollmentFUEL founder, Mike Wesner, revisits bringing Student Search in-house, a topic he first wrote about in 2018 and is often discussed with enrollment leaders around the country. Jacquelyn D. Elliott "Jacqui", enrollmentFUEL's president, offers a plethora of practical tips for admission counselors on building relationships with recruits. Nick Balk, our Regional VP of University Partnerships, "investigates" Forensic Lead Generation™ and how it's best used to combat shrinking lead lists. And, we round out this issue with an article on email marketing, interviewing enrollment leaders at Tuskegee University, Hamilton College, and Dean College, with practical stories about what works now.

At enrollmentFUEL, we believe you always have to seek new information because fresh thinking FUELS new ideas. Everyone on the enrollmentFUEL team, including me, is always available to the Octane community to brainstorm, talk strategy, or share ideas. If we can help, please don't hesitate to reach out. We are at your service.

Partnering together!

Lisa Branson

Lisa Branson
Vice President for Enrollment Systems

P.S. Watch for new episodes of Enrollment Edge, enrollmentFUEL's podcast, now streaming on all your favorite podcast sites. Check it out!



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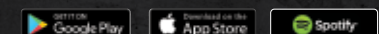
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THE ART OF THE RELATIONSHIP:

Painting a Canvas of Advice, Help, and Friendship as an Admission Counselor

By Jacquelyn D. Elliott, Ed.D.

Over the past three months, I have visited over 30 campuses. At almost every school, the concept of how we build relationships with students has emerged as a topic. Sometimes, it comes up because a school takes great pride in the way they approach the student and family to build the bond. In other conversations, it comes up because the leader is stumped about how to get counselors to focus more on *transformational* conversations instead of transactional conversations. In this article, I focus on some simple techniques to assist counselors in building a stronger and more meaningful relationship to close more sales and meet territory goals.

On What Should I Focus?

The challenge for an admission counselor is when you have many leads, how do you decide where to begin? The starting point is getting a list of 500-750 students representing *qualified* leads, far more manageable than 3000-7000 prospects. Enrollment leaders can accomplish this by using a call center to find the signals in the noise and identify those who are most interested. Once you have this “golden list,” the admission counselor’s job is to build relationships with the students and truly step into the role defined by the title, “counselor.”

In many ways, building a relationship with a student is like building any other friendship in your life. Don’t look at these as different; if you think of approaching these relationships the same way, you will be far more successful in your goal. Research on friendship¹ indicates there are essentially three primary functions of friendship: (1) provide material needs, (2) meet social and emotional needs, and (3) meet cognitive needs.

For admission counselors, this should come naturally and is an area where people who are drawn to a career in enrollment management excel. Admission counselors are already experts at being a friend in their personal life. By reframing cold calls to become friendly conversations where you help people collect information to take the next step, work becomes easier. Like much in life, it is the shift in perspective that turns high hurdles into barely noticeable bumps.

Let’s take a moment to examine the three areas above and provide some examples of the work to be done in each of these stages. To begin, the job as an admission counselor is to fulfill the **material needs** of your prospects. Material needs are comprised of two essential elements—help and support. For admission counselors, these are paramount to your success. Helping and supporting both come easily when you know the inner workings of the admission process and all things about your institution. You become the encyclopedia for your student. **And you provide information they cannot find easily on their own, so how do you do that?**

¹ Solano, C. H. (1986). People without friends: Loneliness and its alternatives. In V. J. Derlega & B. A. Winstead (Eds.) *Friendship and social interaction* (pp. 227-246). New York: Springer-Verlag.

TAKEAWAY TIP *One*

Identify information gaps. Figure out what is not on the website or in your print material, and present that information to your student. Both the website and collateral are intended to be sweeping overviews focused on getting a potential student *interested*. The admission counselor’s job is to provide information at a deeper level, with specifics that *sell* the student and parent on the value and benefits of your institution (major, athletic opportunity, internships, study abroad, etc.). Successful admission counselors recognize they must be teachers, and they don’t wait for every piece of information to be handed to them. They create simple charts, handouts, graphs, or images to share in Zoom, interviews, and conversations on their own. Admission counselors break down processes to make them accessible for students and parents to understand. Successful admission counselors know territory management is their responsibility, and they take the initiative to design materials (beyond what operations sends) that will help them recruit and close the sale.

To build a relationship, you must meet **social and emotional needs**. Guess what? We were all born to do this! As humans, we are naturally wired to be social and emotional creatures. Being yourself is all it takes because genuineness is what matters. Social and emotional needs come in the form of love and esteem. When many people read the word love, I am sure they think, “It’s not my job to love someone I don’t even know.” But, of course, it is. Remember, love comes in all shapes and sizes. The love I am talking about here is focused on Robert Sternberg’s third component of love: decision/commitment.² In this stage of relationship building, admission counselors develop feelings that lead them to “stick with their student” and move toward shared goals, together. Those shared goals will usually be comprised of (a) developing trust, (b) getting the student accepted and through the process of admission, and (c) obtaining a successful transition through orientation to matriculation. And, esteem (as described above) creates moments for affirmation and acceptance of your recruit.

² Sternberg, R.J. (1999). *Love is a story. A new theory of relationships*. New York: Oxford University Press.

TAKEAWAY TIP *Two*



People who believe they are liked *end up being liked* more by those in their circle of influence.³ Simply put, *believe* you will bond and be liked by your student recruits, and you will be. Another great tip centers on how teens view friendship so you can align to those needs. When teenagers were asked how they define friendship, the following were expressions that were most often given:

- Someone I can trust
- I can depend on
- We share things
- They accept me for who I am
- I enjoy talking to or spending time with
- I am close to them—"I feel like they have my back."⁴

Using this knowledge creates opportunities in communications for student recruits to trust admission counselors and depend on them. Use words of acceptance about who and where students are in their current life journey. Create enjoyable conversations (not filled with boring stats or information available on the website), so the student is eager to engage when your institution reaches out. And, most importantly, get to know the student by *asking questions*—this is the foundation for being genuine in all conversations and communications.

Lastly, as an admission counselor, you need to meet your student's **cognitive needs**, like curiosity and understanding. These include revealing shared experiences, activities, and a lively exchange of ideas and "did you know" moments. By assuming you are liked by the person you are with, being accepting, and showing genuine interest in students, you win naturally.

TAKEAWAY TIP *Three*



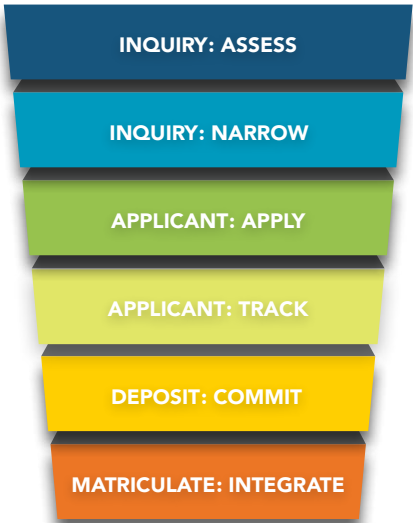
Fear of missing out (FOMO) is a real and natural driver that makes others want to talk to you. By approaching each communication with some helpful fact or fun update, students perceive they are "in the special circle" of knowledge. This helps motivate potential recruits to take your calls and respond to emails and texts. Creative in-the-know messaging helps students realize that you (the admission counselor) are **their connection** to navigating the college selection process with ease. Think about creating a series of life tips to help students transition from high school to college. Examples could be how to manage a move, dealing

with homesickness, ways to manage finances, or even brochures from your local tourist office highlighting things your student can do outside of the campus experience. Think like a friend. Mail personalized cards, stress relievers around exam time, or even fun and simple things like gamebooks or adult coloring books. You can get all of these from the local dollar store and make a real difference in the type of relationship you build with your students.

Remember, building relationships with recruits is like building any other friendship in life. Focus on these three areas (1) provide material needs, (2) meet social and emotional needs, and (3) meet cognitive needs to move the needle and meet territory goals.

Communicating at the Various Stages of the Funnel

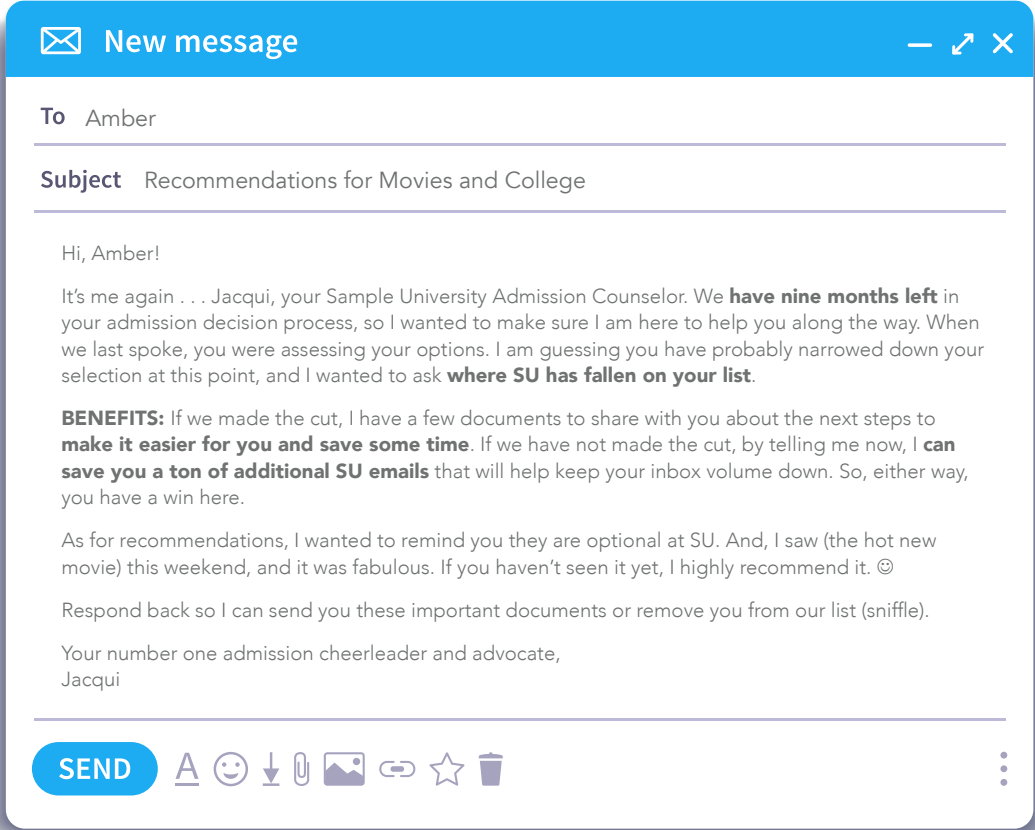
The great news is we have now identified how to start building meaningful relationships with students. While you are always working on strengthening these relationships, the types of interactions you have as a student progresses through the various stages of the funnel will, indeed, look and sound different. Remember, your student is going through a *buying* process while you are going through the process of *selling*. If you are not aligned during this journey, your communication will be off, leading to unopened emails and letters and unanswered calls and texts. Let's pause here to think about the funnel stages and identify what the student is thinking at each stage. Of course, as the counselor, you become involved after the student has raised his or her hand, indicating interest. These are essentially the stages⁵ the student will go through:



Clearly, at each stage, the student needs different things. To provide this, you must identify where recruits are in the process. What is the simplest way to collect this information? In one word: ask! Each time you engage with the student,

ask where they are now and their needs. Remember that one of the critical aspects of building trust is having the student know they can depend on you to "have their back." This is where the rubber meets the road.

For example, let's say you are getting ready to email a student at the top of the funnel in the inquiry stage (they have not applied). Wording for an email could go something like this:



As you can see from the sample email, I did a few important things. I asked where Amber was in the process. I provided benefits for answering my question either way to elicit a response, and I shared something personal—a shared experience we can talk about if she continues with Sample University, planting a seed for our following conversation.

The vital action for the admission counselor is recognizing where the student is in the funnel and then building communications accordingly. Don't ask applicants simple things about their interests. For example, you should never ask an applicant about his or her major (you know what that is from the application). If the student is undecided, I usually say something like this: "Amber, as a still-deciding major, I am here to help you narrow down your interests. If you would like to take an assessment that highlights your

skills and strengths in academic areas, I would be happy to arrange that for you with our Career Placement Office. You might find that helps you narrow down where you have both skill and *passion*. Remember, as your counselor, I am here and dedicated to *you and your success*. I encourage you to take advantage of this offer—it's free and can help provide insight you may not get from other schools—and it can help you for years to come, even in your profession. This is a tool that keeps on giving."

In closing, the admission funnel is segmented for a reason. It helps admission counselors manage territories in a structured way with specific communications to assist the student through the process. **The funnel IS THE PROCESS.** Success comes by letting students know what they can expect at each stage.

³ Strack, F. & Forster, J. (2009). *Social cognition: The basis of human interaction*. New York: Psychology Press.
⁴ Fehr, B. (1996). *Friendship processes*. Thousand Oaks, CA: Sage Publications.

⁵ Elliott, J.D. (2021). "The Evolution of Communication Flows: A 360° Journey." *Octane* 5(2). pp. 2-5.

Techniques

As we wrap up, I want to share some techniques I have used during my 30+ year career. For the sake of space and time, I am only sharing six of the 25 (contact me at jacqui.elliott@enrollmentfuel.com for the complete list if you are interested). When I work with admission counselors (and some of you reading this may be the very folks who have heard me say this), the position “admission counselor” is a 30/70 job at small private colleges. What do I mean by this? I mean that about 30% of your job will focus on admission work, and about 70% will focus on counseling. So, if we know that you will spend an inordinate amount of time in the counseling realm of your job, why not look to the field of counseling for tips and techniques? These six techniques come from the field, and I have found them particularly helpful over the years when building relationships with students.

#1 SPHERES OF INFLUENCE

This assessment technique gets you talking with students about who in their life is impacting and influencing them. Some spheres of influence to consider are: themselves, immediate family, friends, girlfriend or boyfriend, extended family (grandparents), job (boss) or school (teacher or counselor), community (urban/rural), culture (first gen, student of color) or religion (church leader, etc.). This technique helps the counselor know who else you need to address or talk about in conversations with students. If you know, for example, that the boyfriend is important, ensure you mention the boyfriend in follow-up calls. “You mentioned last time we talked that your boyfriend was nervous about you going to a different school than him during college. How is that going? Have you two continued to talk about that since we last spoke?”

#2 STUDENT EXPECTATIONS

When you begin to build a relationship with applicants, they should voice their opinions about your school and their beliefs about the remaining process. If they don’t volunteer this information, ask. In the beginning, they should be able to communicate their expectations for education at your institution, permitting you to guide and direct in response.

#3 FOCUSING

This technique demonstrates you understand what your student is experiencing and helping them realize you connect with them on a particular point. Focusing helps determine what the student needs to obtain next in the process toward matriculation. Identify key adjectives linked with feelings in this stage, defining the student’s state of mind. Share what you hear. “I hear you are frustrated by...I sense you are not sure about where to go from here...I understand you want to attend, but the finances seem to be a barrier. Is this an accurate assessment on my part?”

#4 IMMEDIACY

This technique features you speaking openly about something occurring in the present moment. It helps the student learn from their real-life experiences and apply what they learn now in the future. You could say, “Wow—congratulations on doing so well on your math test. That tells me that you are positioned to do well here in your core classes at Sample University. It’s exciting to think of you progressing to your second semester without the stress some students experience. I’m so happy for you.”

#5 SELF-ACTUALIZATION QUESTIONS

The technique of asking self-actualization questions helps students see themselves differently or from a different perspective. The matriculation question could be something along the lines of: “When you enroll at Sample University, what will change in your life for the better?” Or, the life goals question could be: “What would your world look like if you graduated from Sample University? Describe your first year after college to me.” Or, “How would being a college graduate change things in your life?”

#6 STRUCTURING

When a student becomes an applicant, discuss the process and protocols for each stage of the funnel and the requirements of each. If you don’t explain your school’s processes and expectations, how will your recruit know? I often use a diagram of the admission funnel and have them draw it with me and make notes during a phone call. If on Zoom, I share my screen and walk through it visually. This technique will help your students understand the requirements and limit frustration. To provide excellent customer service, you must ensure students know the institution’s rules, so recruits are not blindsided later or feel rules are being used against them.



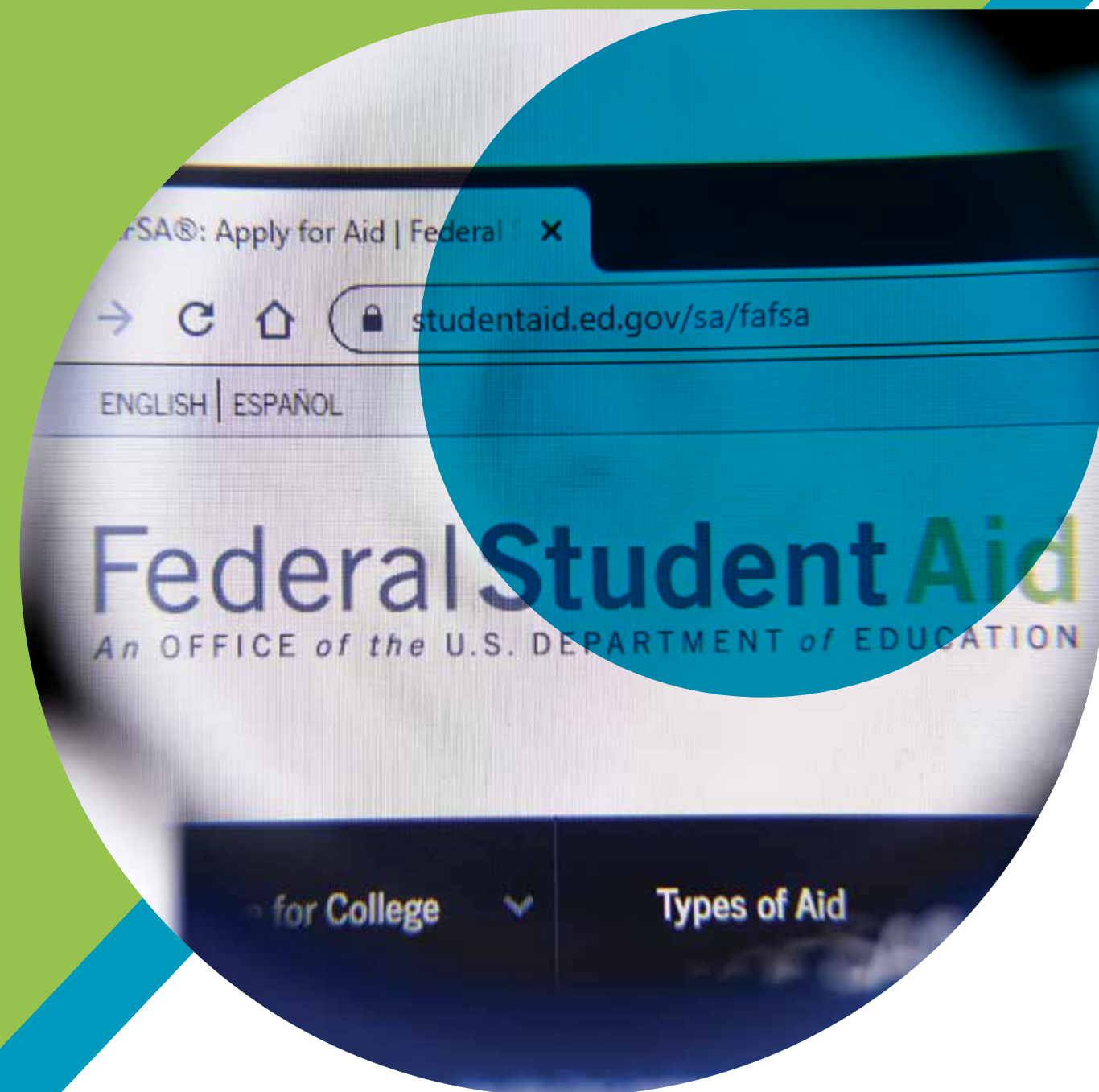
A necessary first step for the development of a relationship is that paths must cross. To turn a casual interaction into something more profound, you must be intentional, a skilled communicator, responsive, and not shy. The six techniques I shared give admission counselors a leg up for relationship-building.

In conclusion, building relationships, although a natural part of the human experience, is also an art. To paint your autographed canvas, you must focus on the three aspects of building a friendship: providing material needs, meeting social and emotional needs, and meeting cognitive needs. Recognize there is a need to communicate differently at each stage of the funnel and apply counseling techniques that have long been tested and used in the field of psychology. By applying these concepts, you are sure to craft a masterpiece that can meet and exceed territory goals.

Dr. Jacquelyn D. Elliott is President of enrollmentFUEL. Over the years, she has developed strategies and trained and led teams at multiple campuses to record enrollments. She is passionate about professional development and recently worked with her team to introduce “The Admission Counselor’s Guide to Achieving Recruiting Goals,” part of enrollmentFUEL’s REV training program. Contact Jacqui at jacqui.elliott@enrollmentfuel.com.



Spreading Opportunity, Eliminating Obstacles – The **PJ** Way



By Keshia D. Woodous, MSHEA, FAAC

October 1 of each year marks the beginning of a new financial aid cycle. The Free Application for Federal Student Aid (FAFSA) opens for students who plan to attend a college or university in the future academic year.

While there will always be issues with government forms, many students and families who filled out the FAFSA in preparation for the 2021-2022 school year confronted an unexpected barrier. The FAFSA required them to use 2019 tax returns—the year preceding the economic upheavals resulting from COVID-19.

A report by The Brookings Institute¹, studying the effects of COVID-19 on the U.S. economy, reported the following facts:

- During 2020, small business revenue dropped by 20%
- Layoffs and shutdowns drove declines in total hours worked
- Low-income families with children were most likely to experience an income shock

Multiple sources corroborate the magnitude of the impact. In April 2020, The Bureau of Labor and Statistics indicated the unemployment rate increased from 10.3% to 14.7%—the highest rate since 1948 when the Bureau first started collecting data.² By July 2020, CNN reported that more than

50% of all U.S. adults lived in households that lost income during the pandemic.³

In the 2020-2021 cycle, high school seniors from affected households struggled with more than the stress of changing learning models. Many who planned to attend college made it to graduation only to face new worries about how they would pay for college classes.

While the economy is improving, many students still face challenges. Funding has always been a potential barrier to students from low-income homes, but COVID-19 also erected barriers for those in higher income brackets. In cases where students face funding challenges, schools have (through the Department of Education) a Federal Student Aid sanctioned solution known as "Professional Judgment." More commonly called PJ in the industry.

³ Retrieved from: <https://www.cnn.com/2020/07/30/politics/lost-income-jobs-covid-congress/index.html>

¹ Retrieved from: https://www.brookings.edu/wp-content/uploads/2020/09/FutureShutdowns_Facts_LO_Final.pdf

² Retrieved from: https://www.bls.gov/opub/ted/2020/unemployment-rate-rises-to-record-high-14-point-7-percent-in-april-2020.htm?view_full

COMMON ACRONYMS

ED	Department of Education
EFC	Effective Family Contribution
FSA	Federal Student Aid
PJ	Professional Judgment



WHAT IS PROFESSIONAL JUDGMENT?

The FSA is a division of the U.S. Department of Education. It defines PJ as “the discretion granted to financial aid administrators by law to override dependency status and/or make adjustments to need analysis, including data elements used to calculate the EFC and costs with the cost of attendance components.”⁴ After making qualified adjustments, a student can become eligible for additional federal and/or state aid programs potentially reducing the need for supplemental tuition discounting.

Examples for which this type of adjustment would apply:

- Loss of income
- Unusual family medical or dental expenses, not covered by insurance
- Tuition expenses, either elementary or secondary, for the student’s siblings—or their dependents in the case of adult learners
- Extraordinary dependent care expenses
- Divorce of a dependent student’s parent, or a divorce affecting an independent student
- Death of a dependent student’s parent or an independent student’s spouse

Other situations may qualify for PJ as well. However, there are rules for its use, and special conditions must be in place that differentiates an individual student from a class of students. **First, PJ is subjective in nature;** no two circumstances are exactly alike. Because of

this, administrators must keep an open mind to remain equitable in decision-making. While situations may be similar, each case must be evaluated individually. Second, **each school must make its own judgment**, and one school’s judgment is not transferrable as a leading example to another school. Third, **decisions must be made on a case-by-case basis**. Administrators cannot create groups of students and make adjustments using broad-brush decisions.

Finally, **each case must be fully documented**. I cannot emphasize this enough. DOCUMENT, DOCUMENT, DOCUMENT! Decisions should be documented (as required) to leave no doubt—not even a shadow—about how the administrator reached a conclusion.

REVIEW YOUR POLICY EARLY IN THE CYCLE

ED requires schools to have written policies and procedures that address PJ. These policies should be easily accessible by staff and included in the consumer information and policy sections on your website. Though we are all hopeful that no new upheavals will be felt in this year’s cycle, many students still are coping with the fallout. The judicial use of PJ paves a path to helping these students get the financial assistance they need to achieve their higher education goals.

When constructing policy, allow room for flexibility. Being too restrictive can box you into a corner when making decisions. For instance, if your policy states you will only consider PJs that involve income loss—but not an increase in medical expenses—or if you state only certain types of documentation is acceptable, you potentially add an undue burden on the student, thus defeating the purpose of the PJ.

State and institutional aid is designed to vary depending on domain and policy decisions at the school level. Generally, schools should create an institutional request form for students with space for a narrative version of the particular circumstances. Other forms addressing specific circumstances (a divorce, a parent’s unusual loss of income, unexpected medical bills not covered by insurance) could also provide examples of acceptable documentation, such as:

- Signed statements
- Letters from knowledgeable third parties
- Tax returns
- Receipts for payments or canceled checks
- Court documents, such as a divorce decree
- Notice of unemployment benefits
- Letter from former employer

While it is essential to review your policies to ensure you comply with all laws, it is just as important to ensure your PJ policy is aligned with your institution’s mission, vision, and values.

WHILE THE NEED IS HIGH, AWARENESS IS LOW

Many students are not aware that PJ is an option. Since the pandemic, ED has made efforts to let students know aid administrators can assist them. If families have experienced a significant change in financial circumstances, there is information on the FSA website (studentaid.gov) recommending students and parents contact their respective schools because they may be eligible for financial aid adjustments.

Furthermore, the Higher Education Emergency Relief Fund (HEERF) III requires schools to use funds received to advise students about their PJ options. ED does not dictate how much of the funds to use. However, a general poster, flyer, or social media post alone is not acceptable. Schools are required to send one-to-one notifications. Examples include, but are not limited to, an email, text message, or a mailing sent to each student.

Financial aid counselors are usually considered the parent and student’s first line of contact on financial questions.

Leveraging PJ to assist students can be the difference between a student attending and not attending your institution. It’s a win for the student and a win for you.

While this is accurate, admissions counselors can also serve as a resource to inform students of their options.

Historically, if a school had too many PJ cases, it could be flagged and trigger an audit. ED expects that schools will have an influx of these appeals and made provisions to address the issue. The government has also allocated special funding to help schools get the word out to affected students.

Students faced many challenges and stressors in 2020 and 2021. Many of those students may feel they need to delay college because of their families’ financial stress. A significant percentage could make this decision without knowing there are assistance options available.

Higher education benefits individuals and society. It creates opportunities for both employees and employers. When a change in circumstances unravels a student’s college plans, schools have the chance to come to the rescue.

Leveraging PJ to assist students can be the difference between a student attending and not attending your institution. It’s a win for the student and a win for you.

Keshia D. Woodous, MSHEA, FAAC is Assistant Director of Client Services in the Financial Aid Office at Norfolk State University, Norfolk, Virginia. She is an expert in financial aid, customer service, student recruiting, and admissions. She has an MS focused in Higher Education/Higher Education Administration from Southern New Hampshire University. Contact Keshia at kdwoodous@nsu.edu.

The FSA is a division of the U.S. Department of Education. It defines PJ as “the discretion granted to financial aid administrators by law to override dependency status and/or make adjustments to need analysis, including data elements used to calculate the EFC and costs with the cost of attendance components.”

⁴ Retrieved from: https://www.sasfaa.org/resources/Pictures/Conference2017/Presentations/Professional%20Judgment_Preconference%20%20SASFAA_Handout_013117_mj.pdf

BRINGING STUDENT SEARCH IN HOUSE

By Mike Wesner, M.Ed.

2.0

In 2018, I wrote, “Bringing Student Search In-House” for the fourth issue of *Octane*. This topic was prompted by many discussions I was having with Chief Enrollment leaders wrestling with the ineffective quagmire that many large-box-styled, traditional marketing solutions had created. These antiquated techniques were leftover from an earlier time when volume, a funnel, and gravity worked as a scientific law for an effective marketing solution.

During the early days of our company, I visited many campuses and had several discussions on the feasibility of some schools bringing this service in-house. Looking back, several followed the guidelines arising from the discussions. If you are exploring this path, I want to encourage you because I love adventuresome spirits who want to find better ways to do things. Finding a better way is the same entrepreneurial spirit that prompted me to start enrollmentFUEL in 2014 and pioneer new strategies for recruiting.

In my current discussions with enrollment professionals, I encourage such spirited leaders to consider taking on this herculean task only after careful evaluation, which could be compared to developing and creating your own business plan. It’s not always for the timid, but some elements of it can be done effectively on your campus (depending on the asset/resource hand you’ve been dealt). As I use the analogy of this being similar to opening a small business, it’s imperative that the same planning and care be taken. Make sure to exhaust all consideration avenues, ensuring the necessary due diligence.

Like all big-change initiatives undertaken in higher education, when you look at bringing Student Search in-house, you find “off-the-charts” successes and “where-to-go-now?” fails. Successful case studies often come from schools that created a hybrid model by using external partners to close expertise gaps. At FUEL, we experience this firsthand when we manage digital campaigns alongside campaigns run by internal teams with foundational communications capabilities.

In recent years, I have seen more institutions considering whether now is the time to bring Student Search operations in-house. For some leaders, it is an issue of maintaining oversight and the belief they would be more successful by exercising internal control over the process. In today’s landscape, control is often dictated by what a CRM can do.

The other primary reason I think in-house Student Search is more heavily considered these days is the volatility of the changing world around us. By operating Search internally, there is temporary energy for those who prefer to do things their way. I often refer to this as America’s *rugged*



<https://youtu.be/pF-k64PX LDA>



Watch the video for more thoughts from Mike Wesner on bringing Student Search in-house.

individualism. (I have to footnote my eighth-grade history teacher for that lesson about the will of the early pioneers of our country. Thanks, Mrs. Woodley.)

When looking at external forces, let’s start with examining one within the higher education community. In 2019, NACAC voted to change its *Code of Ethics and Professional Practices*. enrollmentFUEL Vice President, Jay Fedge, predicted these changes would lead to an environment of “embattled melt” because the revisions allowed institutions to poach other colleges’ already committed students.¹ This has happened, though the effect has varied by institution.

After the rules revision, the pandemic hit, resulting in massive upheavals for institutions, students, and families. Change accelerated in multiple areas. Suddenly, fewer students were taking tests, and more schools decided the time was right to adopt a test-optional admission model. It was a lot to cope with, and most of it was outside our control. And that led some of the leaders I talked with to take a hard look at bringing Student Search in-house when they wanted a sense of greater control.

To achieve success, I recommend leaders consider five questions:

1. Do you have the right platform and tools?
2. Are you equipped with the right “people talent”?
3. Are you evaluating the hidden costs?
4. Do you have all the partners you need?
5. Do you have a backup plan?

As you envision the future of your enrollment shop, here are some “2.0” aspects you will also want to consider.

1. People

Some schools have the luxury of having a rockstar on their team. In 2018, I was introduced to a rising superstar named Nathan Baker, doing incredible things with marketing automation at a small private college in Indiana. Eventually, his skills attracted the attention of a nationally known CRM company, and they recruited him.

People like Nathan who understand marketing automation are rare. When you have one on your team, pay them well, and let them build because they are a key stakeholder in what you're doing.

2. Find a Teaching Organization

At enrollmentFUEL, we love helping you figure these things out. We are rooting for you, and we'd love to play a role in your success—even if it's just helping you get started. When I first wrote about bringing Student Search in-house, I quoted Jason Black, the Assistant Vice President for Enrollment Management and Dean of Admission at Samford University in Birmingham, Alabama. He is a long-time partner who I worked with in a previous role, which inspired the creation of enrollmentFUEL. Jason has successfully brought Student Search in-house. While making the transition, he used enrollmentFUEL and other outside partners to fill gaps and train his team.

When asked for his thoughts on the topic after experiencing years of success, Jason Black said, "I would repeat what I said then. If you are considering bringing Student Search inside, plan carefully. Then, plan some more. The planning must be extensive because you don't know everything it will take to be successful. The unknowns may not be known early enough to fix, and you'll need to be prepared with a good backup plan and partner." Jason went on to share that you must look for a teaching organization when choosing a Student Search partner. "I've worked with Mike twice now because companies he has led were willing to share knowledge."

When a peer at another institution told Jason they were considering moving Student Search in-house, he shared his experiences and recommended finding a teaching organization. Having been through the process himself, he felt it took about three years to transition fully. Having the right outside partners to support the internal team learn helped position Samford University for long-term internal success.

3. Email Marketing: Understanding the Complexities

Let me say one important thing here. **Email is neither free nor easy.** There are algorithms, honey pots, spam traps, and reputation issues to be navigated. Enrollment leaders who are not aware of pitfalls (like how artificial intelligence robots are tracking and scoring the numbers of unopened emails sent from an institutional domain) that can cause a school's reputation score to tank. When this happens, it requires time, expertise, and resources to fix, which can be costly. When I

wrote my first article on bringing Student Search in-house, enrollmentFUEL didn't worry about these issues. Today, it is a different story, and we have a dedicated team that uses technology to monitor, evaluate, and pinpoint potential problems. And, trust me, this is labor-intensive. We often hear "lack of time" is the number one pitfall, so keep this in mind.

Digital Expertise: A Must-Have Skill

One way enrollmentFUEL achieves good open rates for campaigns is by running digital ads in advance of emails. Using this pre-marketing (or priming) technique as part of a Student Search campaign introduces your brand to the audience before the campaign, making it more likely to be recognized (and thus having people engage). When an email arrives, recruits recognize the logo and are more likely to open your email, helping you keep your reputation scores healthy.

Other digital marketing factors also affect Student Search. Examples include Gen Z preferring video over other social channels, the elimination of third-party cookies, the rise of influencer marketing, the power of Connected TV and streaming radio, and the effect of Apple's new privacy policies.

In the Pew Research Center's study, "Social Media Usage in 2021," they reported that 84% of adults 18 to 29 are using some form of social media.²

Among users,
Pew Research
reported:³

95% used YouTube
70% used Facebook
71% used Instagram
65% used Snapchat
48% used TikTok
42% used Twitter
32% used Pinterest
30% used LinkedIn

The audience you want to reach is spending a lot of time online. When you bring Student Search in-house, managing digital tactics can challenge the VP because digital marketing evolves quickly, requiring expert resources to keep up and do it well.

This is especially true if you are considering influencer marketing. Gen Z is suspicious of marketing in general and has a keen eye to detect what is not authentic. Partnering

with micro-influencers is a way of building new connections. It's effective, but there is a lot to manage, such as finding them, contracting with them, and staying out of trouble with the laws governing these types of communications.

Though using influencers in higher education is still in the early stages, we have embraced it at enrollmentFUEL. Tori Canonge, enrollmentFUEL's Director of Influencer and Social Strategies, is developing a REV training course on the topic for schools that want to handle it internally.

4. Data Work

Data fuels the system. If you take on top-of-funnel Student Search activities formerly outsourced to partners, you need to think through your data plan. Otherwise, bogus and out-of-date data clogs the system and disguises insight.

When starting enrollmentFUEL, I did not plan on the hours and expertise required to clean and maintain data. My mistake was thinking it was a low-level task that would be easy to manage. But we quickly found out how many hours of human resources it consumed and realized we needed to automate at multiple levels. Achieving up-to-date, usable data meant enrollmentFUEL had to invest many dollars in additional programming resources and tools.

Final Thoughts

If you are thinking about bringing Student Search in-house, I'd recommend you sit down and start by analyzing what you do best. Identify gaps and decide what you should outsource. As you think about what you need, look for a partner who is willing to share their knowledge. Be bold and have a teachable spirit. You can get where you want to go, but sometimes the journey will be smoother with a partner who can help you over the rough spots in the road.

1. Retrieved from: <https://resources.enrollmentfuel.com/blog/nacacs-change-in-spgp-ethics-standards>
2. Retrieved from: <https://www.pewresearch.org/internet/2021/04/07/social-media-use-in-2021/>
3. Ibid

Mike Wesner is the principal, founder, and Chief Imagination Officer at enrollmentFUEL. He welcomes conversations on this topic, and he is currently planning fall trips to campuses wanting to explore this topic further. Reach out to Mike for a conversation about helping your leadership evaluate the feasibility of bringing Student Search in-house or deciding on what parts of this solution you should outsource. Reach Mike at mike.wesner@enrollmentfuel.com.

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@ EMAIL MARKETING

CURRENT & NEXT THOUGHTS

FROM ENROLLMENT LEADERS

By Linda Bishop, MBA

Ray Tomilson was a computer programmer with a master's degree in engineering from MIT. He worked for Bolt, Beranek and Newman (now BBN Technologies). As a side project, he implemented the first email program on the ARPANET system, the precursor to our modern Internet fifty years ago, in 1971. Tomilson used the "@" sign to separate user names, a convention that stuck and is still used.¹

Tomilson's feat would revolutionize communication, but decades passed before email became the number one channel for higher education communications. Past research shows the contrast between email's early days and now. In 1995, the Pew Research Center published "Americans Going Online... Explosive Growth, Uncertain Destinations," detailing email and Internet usage. At that time, they reported **the average email user sent three emails a day and received five.**²

1995 also marked the year that Constant Contact opened its doors. Their goal was to provide an affordable technology platform that simplified email marketing by allowing non-programmers to create impressive emails with pictures and links. The introduction of this platform, and others like it, changed the game for higher education, giving enrollment management leaders an efficient way to send branded emails to suspects and inquiries, and communicate with applicants and deposits.

In 2020, during the pandemic, email marketing and open rates surged. Better yet, for educational institutions, click-through rates—one of the primary behavioral indicators of interest—experienced a massive 70% increase in 2020, according to research conducted by the email provider, EMMA.³

¹ Retrieved from: https://en.wikipedia.org/wiki/Ray_Tomlinson

² Retrieved from: <https://www.pewresearch.org/politics/1995/10/16/americans-going-online-explosive-growth-uncertain-destinations/>

³ Retrieved from: https://engage.sailthru.com/rs/500-BIA-880/images/2020_EM_uni-benchmarks-guide.pdf?mkt_tok=NTAwLUJJQ504ODAAAF-NT2KVEZmSISA-fJ8pcSYtojSgzzWz55AGy4xau_fd674Z7XrUilV3Q8geM6gqsWyyX5smgkhQn_kV3Osl6qEs8IMSp05haSCwYSTpsppLPG0

Building on The Foundation of Brand Strength

What do esteemed educator Booker T. Washington, famous scientist George Washington Carver, and a group of legendary World War II pilots have in common? They all are linked in the minds and hearts of potential students with the well-known and well-respected Tuskegee University.

Joseph Montgomery is the Vice President for Enrollment Management and Student Success. During his career, he has served in multiple admission-based leadership roles at public and private institutions, as well as the Director of Higher Education Services at the College Board. He joined Tuskegee University, located in Tuskegee, Alabama, in December 2019, just a few months before COVID-19 was declared a worldwide pandemic.

When asked about Tuskegee's email marketing, Mr. Montgomery said Tuskegee typically sees open and click-through rates substantially higher than many other institutions. "Some of that can be attributed to our national name recognition because we have a place in the world's history books," he said. "We build on that, leveraging brand recognition to support our email marketing with digital advertising, social media and influencer campaigns, connected TV advertising, and direct mail. This integrated, multi-channel approach allows us to meet students and parents where they are."

Students at Tuskegee are strongly focused on career preparation, and that is reflected in the institution's email marketing. "In our comprehensive email campaigns, we talk about Tuskegee's outcomes while pushing students through the process of successfully enrolling," Mr. Montgomery said. He also referenced another benefit of email marketing—data collection. "Emails give us the ability to disseminate messages quickly, and email data files tell us a story about the kind of things that are top-of-mind for prospective students."

At Tuskegee, the "story" is told through actions. For example, a prospective student opens emails. One day, they decide to click on a financial aid link. This "plot twist" could prompt a personalized email from their admission counselor offering to answer financial aid questions.



TUSKEGEE UNIVERSITY

Tuskegee, Alabama

Top 10 among the nation's HBCUs

Only HBCU to be designated a National Historic Site

As he looks forward to the future, Mr. Montgomery is speculating that changes are coming that will impact Tuskegee's marketing mix. He predicts that emails will continue to have their place in higher education marketing but expects challenges from other technologies. He said, "We will continue to toil and determine the correct marketing balance, thus ensuring we are visible in the spaces where students and parents want to find, experience, and are receptive to our messages."

Segmentation Strategies to Improve Outcomes

J.D. Ross is the Associate Dean of Admission and Director of Admission Communication at Hamilton College (named



HAMILTON COLLEGE

Clinton, New York

The third oldest college in New York, founded in 1793 as the Hamilton-Oneida Academy

Named after Alexander Hamilton, a member of the institution's original board

for another famous historical figure, Alexander Hamilton), located in Clinton, New York. He has over two decades of experience as a higher education communications professional. Like many schools, Hamilton College saw email open rates dip between 2018 and 2019, before returning to levels achieved in previous years.

He is looking for ways to maintain the gains. "We don't want to lose ground on this, so we have been studying the qualities of our high-performing messages to continue to keep open and click rates up," he said. "And, we have been experimenting with new audience segments and new senders to encourage prospective students to open these messages. A personal connection matters to students—especially after enduring a year-plus pandemic. When we can help make that connection via email by sending the email from an admission officer, or a student who interviewed them or conducted the campus tour, we have a much higher likelihood of the email being opened."

While Mr. Ross has extensive expertise in communications strategies and tactics, including web design, social media, and direct mail, he points out that email provides a significant benefit for enrollment professionals who need data to target resources. "Email communication provides an immediate and valuable feedback loop that is not easily achieved with other

forms of communication," he said. "We know, relatively soon after sending a message, how it is performing with our target audience and if they are taking action, like clicking a link or registering for an event. Through audience segmentation, we can drill down on behaviors within certain cohorts and quickly adjust our communication tactics if we aren't getting results."

Hubspot is one of the leaders in inbound marketing, and its solution is used by organizations of all types, including higher education. Their research has shown email segmentation strategies positively impact outcomes, with study participants reporting up to a 760% increase in revenues.⁴

If you are evaluating how you are currently segmenting email marketing lists, areas to consider include:

- Engagement metrics (online behavior, willingness to talk to an admission counselor, and participation in visits or events)
- Stated interests (degree, athletics, travel abroad, career support)
- Stage in the funnel
- Geodemographics to identify best-fit recruits

⁴ Retrieved from: <https://blog.hubspot.com/marketing/email-marketing-stats?toc-variant-b=>

- Other (urban versus rural, child of alumni versus first-generation student, student versus parent, etc.)

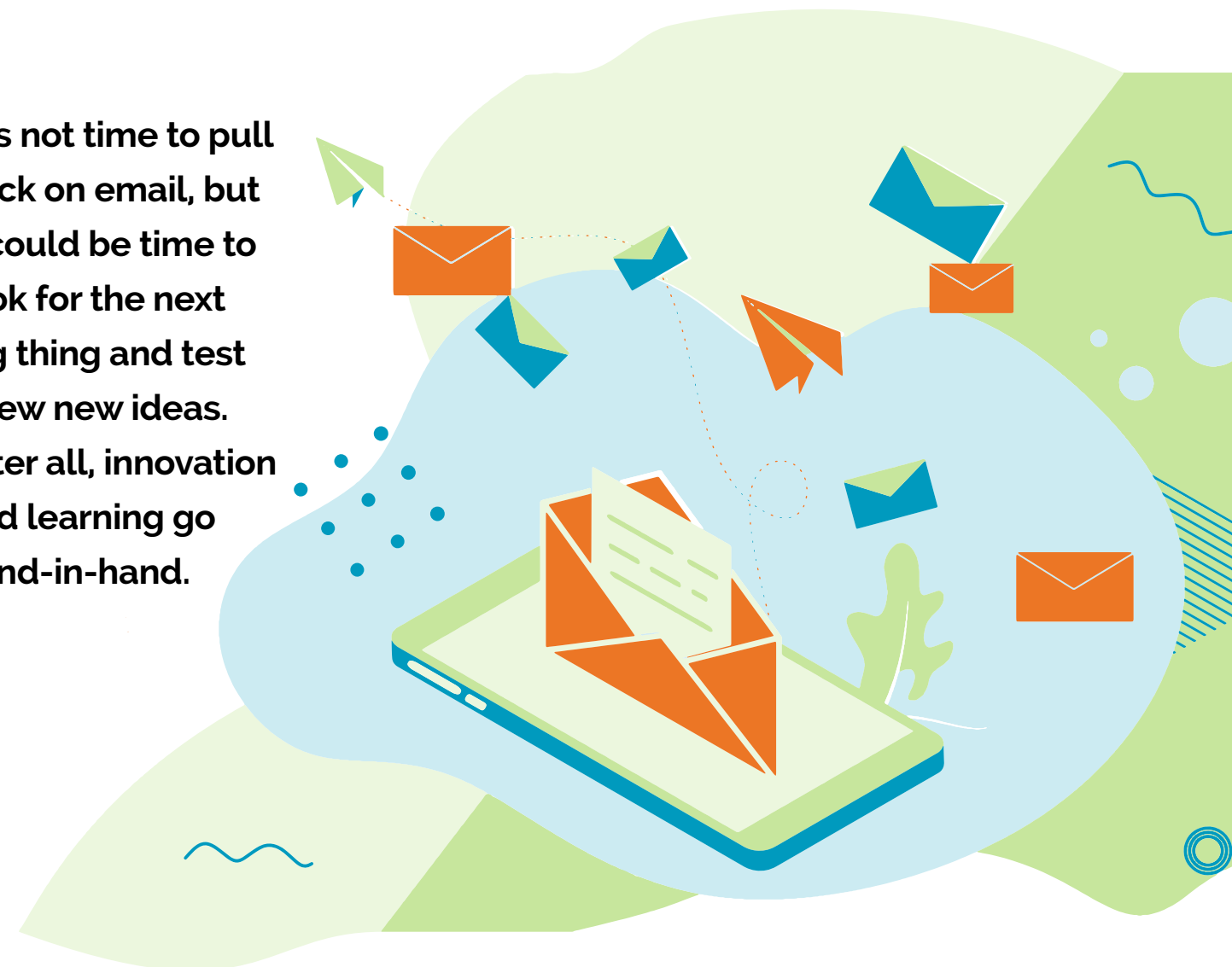
Mr. Ross continues to refine Hamilton College's email marketing strategy to increase relevancy. "I don't see email going anywhere anytime soon," he said. "We will experience ups and downs in attention spans as new social apps and other communication channels (TikTok is a good example) rise in popularity. But if you think back to the 2008-ish time when many predicted that Facebook and Twitter would kill email...well, that still hasn't happened! No matter what the channel, higher ed needs to become better at evaluating their data and using it to make actionable decisions. And in most cases, this needs to happen several times throughout the recruitment cycle, rather than waiting until the end to evaluate results."

Balancing the Mix

Iris P. Godes, Associate Vice President of Enrollment and Dean of Admissions at Dean College in Franklin, Massachusetts, also uses segmentation strategies and views emails as a valuable recruiting tool. During the pandemic, email allowed Dean College to deploy timely messages when situations were rapidly changing. She sees other positive benefits, including the cost of sending emails.

Ms. Godes said, "Email allows us to communicate with as many people as we would like without any budget concern. We can create a communications plan and set it up in our CRM (Slate). The technology runs on its own and is very efficient. We can also use it to provide personalized communications based on what we know, and tailor the email communication to the

It is not time to pull back on email, but it could be time to look for the next big thing and test a few new ideas. After all, innovation and learning go hand-in-hand.



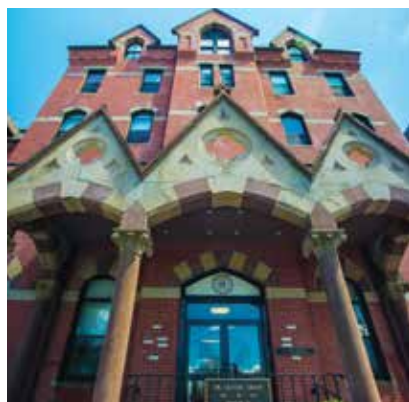


DEAN COLLEGE

Franklin, Massachusetts

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Building a transformative community since 1865



student's interests, stage in the enrollment process, etc."

Looking at Dean College's email marketing, Ms. Godes compared data from the recent cycle to what was happening five years earlier. She examined data in three categories: relational, transactional, and invitations to events. Currently, Dean College sends more emails during the recruiting cycle than in the 2015 to 2016 cycle.

Compared to outcomes five years ago, she observed the following:

- For prospecting emails, open rates are down for relational and transactional emails, but invitation open rates are slightly ahead. Click-through rates are reasonably even between past and present.
- Open rates for relational, transactional, and invitation emails sent to admitted students have also declined, but the click-through rate for invitations is up.
- Open rates for relational emails sent to deposited students are above 50%, which is down from five years ago, while open rates for transactional emails remain steady.

Dean College is working through how to use the data to adapt. Ms. Godes said, "Over the years, every institution has

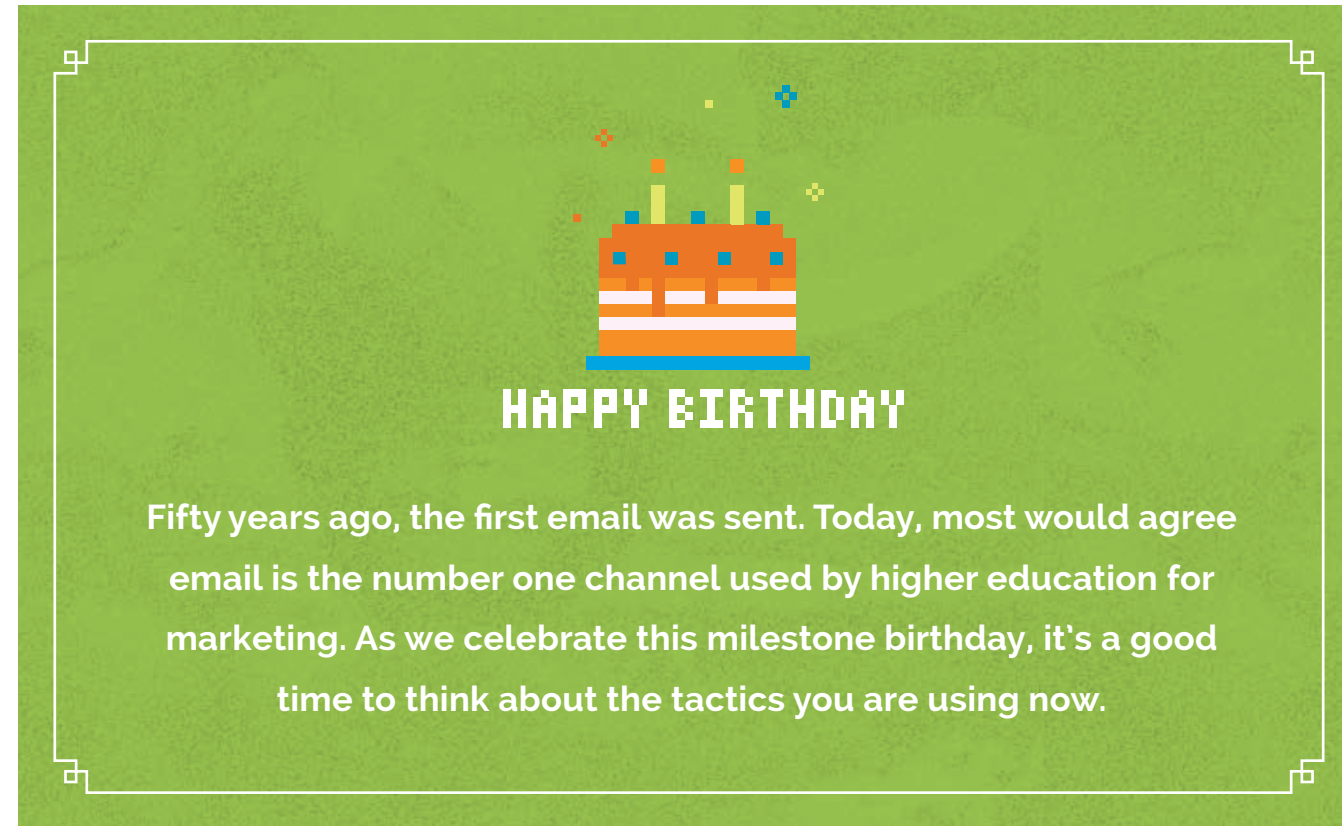
increased their number of emails. More 'noise' makes it harder to stand out, and many students feel overwhelmed by the volume. We are analyzing the number of emails sent and if we need to pull back in some areas."

Like Tuskegee University and Hamilton College, Ms. Godes is looking at other forms of communication. "You have to find the right balance and budget," she said. "One area where we are increasing focus is digital advertising and social media posts, to reach students online where they spend most of their time. We are holding onto print and are considering adding a few well-timed pieces throughout the funnel."

While Ms. Godes expects email to continue as the dominant communication channel at Dean College, she said, "With technology evolving quickly, you never know. Perhaps the 'next big thing' is just a few years away."

Evolution and Innovation

Joseph Montgomery recognizes Tuskegee University's brand strength brings benefits to email campaigns, but he does not rely on past accolades to support current recruiting efforts.



Instead, he innovates, both with email marketing and by testing new channels, to meet students and parents where they are today.

J.D. Ross uses segmentation to improve email marketing at Hamilton College. His communication expertise tells him email is not a "set-it and forget-it" tactic. At multiple times during the cycle, he assesses outcomes and makes adjustments as needed to ensure his institution reaches its goal.

At Dean College, Iris Godes works to improve email marketing at two levels. She analyzes outcomes from relational and transactional emails and event invitations. And, she takes a holistic approach, seeing to balance tactics within her budget to achieve objectives and maximize outcomes.

In 1989, an article was published by the Association of Computing Machinery (ACM). It predicted faxing would triumph as a communication solution over email. To support their position, the authors relied on the fact that the phone system already existed and was ready to support "telefaxing," while very few people had Internet access.⁵

⁵ Retrieved from: <http://www-formal.stanford.edu/jmc/harmful.html>

We all know how that worked out.

Fifty years ago, the first email was sent. Today, most would agree email is the number one channel used by higher education for marketing. As we celebrate this milestone birthday, it's a good time to think about the tactics you are using now.

It is not time to pull back on email, but it could be time to look for the next big thing and test a few new ideas. After all, innovation and learning go hand-in-hand.

Linda Bishop is the editor of Octane and provides marketing support for the enrollmentFUEL team. She is a subject matter expert on content marketing, campaign strategies, and online and offline integrated tactics, including marketing automation. If you have an article idea for a future issue of Octane, please contact Linda at linda.bishop@enrollmentfuel.com.

THE ALL-IMPORTANT SEARCH FOR PROSPECTS:

Why Forensic Lead Generation™ Matters

By Nick Balk, M.S.



"You are out of business if you don't have a prospect!"

— ZIG ZIGLAR

"We are way down in inquiries, and I am not quite sure if there's a solution in sight,"

is a lament that I frequently hear in my conversations with enrollment leaders at all types of institutions. Partly because of the pandemic, and partly because Gen Z are savvy customers, collecting prospective students' names and email addresses is more difficult now than ever. Test-optional policies have already reduced the number of prospects colleges and universities can collect from the College Board, ACT, and the GRE test-taker lists. Many schools report that the recent inability to recruit in-person at high schools, community colleges, and college fairs has led to decreased inquiries. And last but certainly not least, with each year that passes, prospective students are more and more aware of common advertising tactics. They are increasingly cautious about volunteering their contact information to all but their favorite brands, and their purchasing behavior often occurs in the shadows.

Organic website visitors are strong prospects because this audience found *you on their own*. That implies they already like you, were referred to you, or are interested in learning more about you. If your website is compelling enough to turn initial interest into action, organic web visitors may fill out a form or use your chatbot to ask a question. But more often than not, they depart as silently as they came, without identifying themselves.

This behavior is not unique to education. In a study conducted by Episerver, a global e-commerce company, 92% of consumers visit a "brand's" website for reasons other than making a purchase.¹

Potential students are a unique class of consumers. They visit your website to see what you have to offer, compare you to other options, and read content to learn. Forensic Lead Generation™ maximizes the benefits of organic web traffic. It uses digital tracking tools to capture actionable leads and remarketing tactics to spur additional engagement. With your website as a focal point for lead generation, you no longer need to rely as heavily on list purchases.

¹ Retrieved from: <https://www.prnewswire.com/news-releases/study-92-percent-of-consumers-visiting-a-retailers-website-for-the-first-time-arent-there-to-buy-300390086.html>

Maximizing Organic Web Traffic

Much has been written about strategies and practices in past Octane magazines to increase traffic to your website. Search Engine Optimization (SEO) and Search Engine Marketing (SEM) are the two primary marketing tactics to achieve this (for more information on SEO, please refer to my article "Get Found: SEO Lessons from STEM University" in *Octane* Volume 5, Issue 1, 2021). Good SEO requires expertise and a lot of legwork because search engine algorithms evolve constantly. Good SEM is an investment, and it can be expensive, especially for highly competitive segments such as MBA degrees and community college student recruitment. Like SEO, SEM requires expertise to maximize the ROI of media spends, and often colleges and universities seek external partners to assist with these specialized functions. Whether execution depends on your internal team, or an external partner, SEO and SEM are crucial steps to take if you want your website to turn into a lead-generating machine.

IP Validation and Reverse Append Tactics

Did you know that it is possible to correlate the IP addresses of your website visitors to physical home addresses? This information is invaluable because you can send direct mail and digital advertising into the home when you have a physical address. You also can correlate household addresses of website visitors with home addresses in your CRM lists to qualify existing suspects.

We recommend tracking students who visit your website after receiving email communications from your institution as inquiries. At enrollmentFUEL, we identify these leads using our proprietary matchBACK technology. We also use inquiryDETECTOR, which is another solution for identifying new leads who found your school through a web search. Both solutions provide valuable intelligence to help recruiters focus on top leads and new prospects.

Remarketing to Generate Repeat Engagement

One visit to your website indicates interest, but it takes multiple marketing touches to move leads from interest to engagement. Digital retargeting ads and direct mail are two effective ways to communicate with website visitors, motivating them to take the next step and fill out an online form.

Research on retargeting ads has shown the tactic increases engagement. In a 2017 study, Sahni, Narayanan, and Kalyanam found that retargeting advertising “causes 14.6% more users to return to the advertiser’s website in four weeks.”²

In their book, *Visible Learning and the Science of How We Learn*, authors Hattie and Yates explore principles and strategies of learning, and it offers insight for enrollment professionals.

Creating engagement starts with brand recognition. Hattie and Yates would place visual cues like logos and school colors in the category of “sensory recognition.”³ Logos and color palettes often serve as the starting point for a “string” of information, with thoughts, associations, and memories linked together in a prospect’s mind. Repeated exposure to information helps to ensure a string forms.

Retargeting ads use repetition. By exposing a website visitor to your logo and a short benefit-driven message, you build brand recognition. As information is added to the string, prospects shift from simple associations (I heard of this school.) to more complex linkages (This school has the degree I am interested in and is well-known for its programs.). The more a lead thinks about your benefits, the more likely they are to take another step.

When using a remarketing strategy, there is a benefit to pushing repeat visitors to a specific landing page where your embedded lead capture form is placed in a prominent location. Keep the look and feel of remarketing collateral consistent with the look and feel of the landing page to make a solid cognitive connection. Effective landing pages are built around the framework of a persuasion architecture, presenting information that is benefits-focused, convincing, and easy to understand. When motivated leads take action, visual continuity between the form and subsequent communications link new information with existing strings.

Remarketing to past website visitors helps with brand recall and increases mindshare among existing leads. More importantly, they give you another way to generate

² Retrieved from: https://sics.haas.berkeley.edu/pdf_2017/paper_snk.pdf.
³ John Hattie and Gregory Yates, *Visible Learning and the Science of How We Learn* (New York: Routledge, 2014) 126 - 129.



new inquiries by turning a stealth visitor into a hand-raiser who fills out a form.

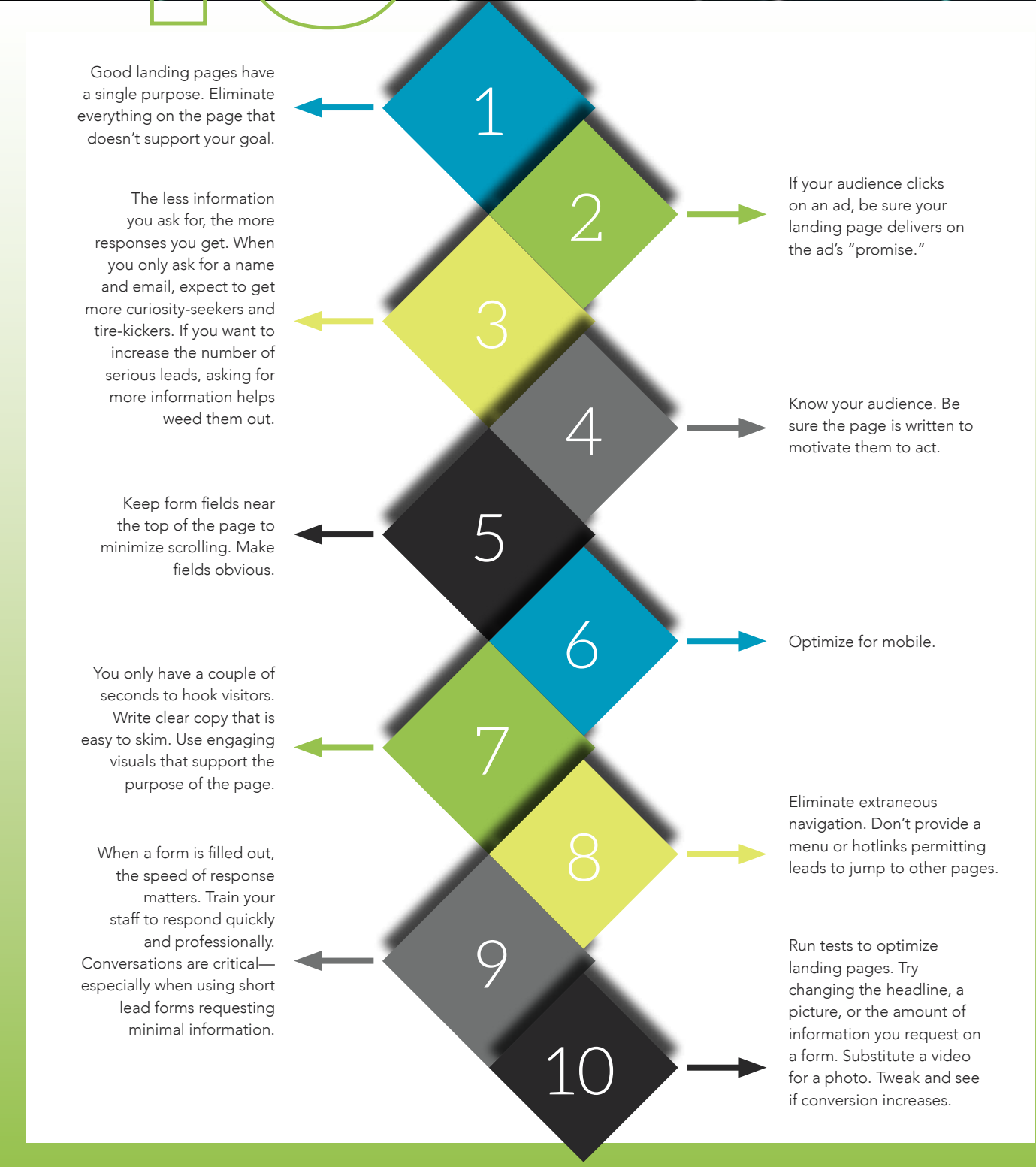
Forensic Lead Generation ensures you leave no rock unturned in your lead generation strategy. It helps you uncover leads at all entry points, including transfer students, graduate students, and adult learners, who are not commonly found on purchased lists—but who could be checking out your website even as you read this.

There is another benefit. At enrollmentFUEL, we believe “people recruit people.” Forensic Lead Generation helps you identify who came to your website and what pages they viewed. It allows you to pinpoint which leads on a purchased list took independent action to visit your website to see what your institution had to offer. This information arms your recruiters with actionable intelligence based on behavioral clues.

If you look ahead and see a day when fewer names will be available for purchase on lists, now is the time to investigate options. As the old saying goes, “The best way to get something done is to begin.”

Nicholas Balk, M.S., is the Regional Vice President of University Partnerships at enrollmentFUEL. Serving as the Director of Admissions at Albany College of Pharmacy and Health Sciences gave Nick insight on current recruiting challenges and how innovative digital strategies and tactics lead to success. For information about how institutions use Forensic Lead Generation™ to reach their goals, please contact Nick at nick.balk@enrollmentfuel.com.

10 Tips to Optimize Landing Page Design





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Forensic Lead Generation[™]

Spot digital fingerprints, uncover clues to identify stealth inquiries, and uncover new leads. If you are looking for innovative ways to reach your recruiting goals, talk to the forward thinkers at FUEL about this technology-based solution.



Expand Your Lead Pool with Look-Alike Modeling

How do you find leads when fewer students take tests? Look-alike modeling is a solution to consider. Talk to the FUEL Student Search experts about how you can use this tactic to find new leads.

GIVE ENROLLMENT PLANS A **BOOST** WITH **FRESH THINKING** FROM FUEL

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