ACTIONABLE INSIGHT
REMARKABLE TOPICS
Brought to you by enrollmentFUEL
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INSIDE

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Letter from the President

Octane celebrates collaboration, not competition.

Dear Octane Booster:

Here we are—another travel season has wrapped up and a new year is starting—all after a well-needed (and deserved) holiday break. During this time, we come to work rejuvenated and prepared for reading applications, financial aid packaging, and lots of student engagement. The rhythm of our work provides us all with guideposts and markers of completion.

As we move into this new—yet familiar time, I hope you find the articles in this edition of *Octane* to be valuable and insightful. As I have shared many times, one aspect we love about our work at FUEL is creating this vibrant community of practice. *Octane* celebrates collaboration, not competition. One of Mike's favorite quotes is "a rising tide lifts all boats," and I couldn't agree more with that mentality.

In this edition of *Octane*, you will find information on how to navigate and communicate effectively with trustees, thoughts on strategic territory management, actionable ideas and insight based on real-world enrollment frustrations, and the benefits of building relationships with independent counselors.

Last, but not least, I tackle *A Countdown to May—Tips, Tricks and Calls to Action*. This article provides timely reminders, new tips, and a few crazy out-of-the-box ideas. It's time to FUEL for the home stretch to success; so, let's get going!

Yours in collaboration,

Jacquelyn D. Elliott, Ed.D.
President

enrollmentFUEL would like to extend our gratitude to Belhaven University 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" search strategies. Adding *Octane* to your thinking fuels creativity and releases positive energy among enrollment professionals.

inside OCTANE

Our Annual Holiday Giving Campaign Shines Brightly

To see the wide variety of participants' locations, check out the map at: PayForward.enrollmentFUEL.com

We are happy to report great participation in enrollmentFUEL's annual "Pay It Forward" holiday giving campaign. Members of the FUEL team selected five charities. This year's charities were:

- Feeding America
- Habitat for Humanity
- Heifer International
- Polaris Project
- USO

When a participant clicked on a given charity, they donated \$19 to that charity, and then, hung a light on the giving tree reflecting their location and choice of charity.

We are pleased to announce that enrollmentFUEL distributed a total of **\$21,648** in charitable giving this year.

Thanks to all who participated and helped make FUEL's annual giving campaign shine brightly in 2018!

A Countdown to May—

Tips, Tricks and Calls to Action

By Jacquelyn D. Elliott, Ed.D.

The countdown to May is a ritualistic cycle we experience every year. It's like our enrollment version of *Groundhog Day*, but without "I Got You Babe" playing over and over. The truth is, we don't know "who we got"—yet. But, we have five short months to figure it out.

The FUEL team has worked with many schools. One thing I see over and over again are counselors who struggle to meet goals because of lack of clarity, a fear of closing the sale, or simply no tenacity. In the end, it comes down to grit, clarity, and process. So, what can you do to meet your goal, inspire your team, and help them be successful in all that you are asking of them? In the month-by-month breakdown that follows, I offer some suggestions and reminders about best practice and a few hair-brained ideas that have worked well for me in the past.

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January

Every January, when my team and I returned from the holiday break, we came together in the first week to reorganize, discuss our goals and brainstorm how we would meet them. This built on the meeting we held in July. Having the staff articulate their goals one more time in front of each other, along with the steps they planned to take to get there, really helps to cement things.

January is the time to run weekly reports showing every student by counselor area and tracking their progress. When was the last phone call? The last email or text? Has the student been accepted, packaged, deposited, housed or registered? By scanning one report, I see a snapshot showing the progress of each student, and can compare results from all areas. The staff gets the same report, so they can see how they stack up against each other. I often find counselors think they did great by completing 18 calls in a night… until they realize everyone else averaged 26.

January is also the time the financial aid staff refreshes the admission team on the packaging and award letters. From the time the ISIR hits the aid office, the staff has 48 hours to package and get the award out the door. Admission counselors call each awarded student to review the package and ensure the student and their family understands each aid element on the letter, including what is "free" money and what is not. (Tip: Auto-program calls about financial aid in your CRM, so they appear in the admission counselor's call queue five days after the Financial Aid office logs the date that the letter was mailed.) Counselors are trained to use this call to help close the sale by asking for the deposit. At the end of each call, the counselor ranks the likelihood of getting a deposit. That report was used each week in the staff meeting to help prioritize what we expected, and when. It also let us know if we were on pace to reach our goal both at the counselor level, and as an office.

February

By February, we were promoting our spring open house coming up in March. This final open house is a great way to seal the deal and ramp up on-site deposits. We saved the best for last, ensuring the open house would be a fresh experience for attendees and did not mimic the fall open house. Nothing could be worse than to have a family attend this final open house when they are deciding, and their big day turns out to be a stale repeat of what they experienced last fall. That is a surefire way to inspire them *not to deposit*. Think boldly about this day and craft interaction that leads to deposits.

February is also the major application push to complete files. It doesn't matter how many applications you are ahead if they can't deposit. They have to be accepted to do that. The best indicator of success for reaching your goal is the number of applications **completed**. Set an internal goal for the counselors about how many applications should be completed (accepted/rejected/wait-listed) by the end of the month. Each week, run each counselor's percentage, and send it to them on Friday afternoon. If they are behind, schedule follow-up meetings to help them get back on track. Sometimes, just talking it out and setting expectations helps get the needed traction. Leaving struggling counselors alone during this critical time doesn't set you up to meet the goal. Directors need to direct here—delegation won't cut it.

Every week at the February staff meeting, I asked the counselors to share what they were doing to get the files complete. One outcome from this meeting was a plan to create a transcript release signature directly on the application for both the student and the parent. We also created a separate form that we could email to the parent to obtain the necessary signatures for the high schools (we collect the parent's email address on the application). The scanned form can be emailed to a high school guidance office, so that the admission counselors can get missing transcripts. Calling a guidance office directly without a consent to release is a waste of valuable time and energy. Get creative about how to solve the problem.

March

In March, the team held yield events in major areas where we had a healthy number of applications. These events allowed us to take the show on the road, so the family didn't have to travel to us. Events varied from year-to-year. At some of them, the president attended, at others it was the provost. Current students also attended, and the event was held in a neutral place with a private room to break bread and enjoy each other's company. Make the presentation light and fun—maybe by incorporating a game to highlight the content. There is nothing worse than asking potential students to sit through another boring PowerPoint presentation. Of course, depositing at the event is your call to action to students and parents.

Okay, now for the first out-the-box idea. One of the best changes I ever made at any institution where I worked was having advance registration days. Trust me when I say that online registration for freshmen is not helping us with retention. Advance registration days start in March, followed by events in mid-June, mid-July, and early August for deposited students. These days are scheduled, so families come and complete all the administrative functions required to enroll. Once the family has checked all the boxes and jumped through all the hoops, they tend to be locked-in and show up for move-in day. It dramatically reduces summer melt. By doing all the legwork up-front, it protects move-in day as a time to be *celebratory*, because all the transactional stuff is out of the way. Registration days should be FLAWLESS, with no lines and no waiting. The student meets with an advisor, gets their courses, finalizes any financial aid questions, pays the bill (or makes arrangements), gets their student ID, receives all their technology passwords, and sees their room. To make the day special, we gave away amazing prizes that mattered to students (one semester of free books, a flat-screen TV, an Xbox, a micro-fridge, etc.). We had a live band playing in the quad during a picnic-style lunch. There are many ways to ensure your day is fabulous. Think Disney!

The last tip I want to share in March is about meeting with your team. March is the mid-way point between January and May. In January, I met with the team to re-

articulate the plan to meet the goal. In March, I meet individually with the counselors, who came prepared with data to answer the following questions:

1. **How many more applications are you expecting in your territory?**
2. **How many of your unresolved applicants do you think you will get accepted?**
3. **Of your accepted applicants, who have not yet deposited, how many:**
   - **Will deposit for sure?**
   - **Say they will deposit but have an issue?**
   - **Are still deciding?**
   - **Are not likely at all?**
4. **What barriers are you experiencing that are hindering you from closing the sale or finalizing getting application files completed?**

Once I have this information, I help the counselor focus their energy and create a final plan of action up to May, with incremental goals along the way. The best way to eat the elephant is one bite at a time.

April

April is an odd month in all this. The planning is pretty much done, and now, we are executing—and watching with baited breath. Visit days and yield events are over. This is the PUSH month. Almost always, every counselor works two late nights a week, on a 1:00 PM to 9:00 PM schedule, phoning students and parents. I hear people say all the time that calling is a waste of time, but in my experience, calling pays off. It is one of the last opportunities to make a personal pitch to sell your school. When your team is trained to close the sale, it is an effective use of time. When you can take credit cards, you make it easy to finalize the transaction. Your business office can help you set up that functionality if you don't already have the means to do it. Don't take no for an answer, because it contributes to success. Internal barriers to getting deposits must be overcome.

In April, the execution month, you finalize financial aid files and calls, and ask for the deposit. That's the most critical thing. Ask for the deposit. Training is the key to success. At many schools, the deposit is credited against tuition. Use that to your advantage, and say, *"The next step to finalize everything, so we can get your classes and housing assignment, is to get your deposit. Remember, this isn't additional money; it is an advance deposit on your tuition and credited against your tuition bill. I can take a credit card over the phone, and we are set up to do that securely for you. What credit card would be best?"*

While some people say to me, "Jacqui, that is too sales-like, and you sound like an online order club," I answer, "It works!" At the end of the day, we have to do our job, which is to get deposits. We, therefore, need to reframe our thought process. For many families, the call about the deposit makes the whole process easy for *them*. They don't have to do the heavy lifting of logging in online, filling out the form, etc. To me, this is just *excellent* customer service. It's all about the lens.

May

The all-stressful National May 1 deadline hits, and you take toll of the numbers. For many private colleges, the work isn't done, and recruitment continues well into August to finalize your class. Remember that I said there were some out-of-the-box ideas? Here is the last one. What I have found to be the most helpful change in the work I have done is to create a freshman services position, responsible for all deposited students and the re-recruitment of freshmen.

This position does many things. First, as soon as the student deposits, they are handed off to start building a relationship with the freshman services guru. Let's call him Brandon—because he deserves to be called out by name. Brandon calls the students right after they deposit and introduces himself. He tells them that he will be working with the family, until the beginning of sophomore year. Because Brandon is working with these students, he frees up the counselors to stay *focused* on the rest of the funnel and convert acceptances into deposits. It works. Counselors are not trying to continue to engage the deposited student to avoid summer melt, thus, distracting them from getting more *new* deposits. By dividing the work, you help ensure both positions are successful.

How often have you heard students say their counselor just "disappeared" after the deposit? Because Brandon is focused on this *singular* task of working with deposited students, they don't fall between the cracks while the counselor moves on to get the next deposit. This system works and positively impacts overall retention in the freshman year. If we are serious about relational recruiting, then we must take steps to preserve the relationship. Brandon is on campus and not traveling when the student is a freshman. He continues to use the same methods we used to recruit the student throughout their freshman year. He has his direct mail cycle and calling cycle, etc. Students still get birthday cards and a ton of individual attention.

Many of you may now be asking how that handoff works. Does the student feel their counselor has "abandoned" them? In my experience, no. The relationship is simply transferred. The transactional work between the student and Brandon leads to the transformational, and Brandon is trusted by the student and family. At this point, it's the person who has the information, is available to provide the service the student and family expects, who reigns supreme in the entering student household—Brandon is a savior.

I hope this countdown to May, with all the twists and turns, got you thinking about tried and true best practices, perhaps provided some new ideas, and most importantly, inspired you to exceed your enrollment goal and be the hero of the day. I'm off to sing "I Got You Babe"—it's stuck in my head now- and maybe watch *Groundhog Day*, too!

Dr. Jacquelyn D. Elliott is President of enrollmentFUEL. Her admissions, retention, and financial aid strategies have led multiple institutions to reach record enrollments. She can be reached at jacqui.elliott@enrollmentfuel.com.

STRATEGIES

Components of Territory Management

By Alicia Kornowa and Christopher W. Tremblay, Ed.D.

Territory management is an approach that is used in college admission offices throughout the United States. It serves as the higher education counterpart to the corporate account executive and related management process. Territory managers are assigned to a population of students. In turn, they are responsible for appropriately serving that population for the purpose of moving students through the enrollment funnel and, in the end, meeting institutional enrollment goals.

Territory management divides a university's "market" among available staff members. How territories are defined varies from institution to institution and is based on the college/university's enrollment goals, market position, personnel, and financial resources. Geography commonly defines territories, with territory managers serving students from designated states, counties, high schools and community colleges, regions, and even countries. Territories may also be based on other criteria, such as the student's academic interest, academic achievement, racial/ethnic background, veteran status or life stage (traditional-aged versus adult-learner). For example, a university with a decentralized structure may have staff who only recruit students who are interested in a major in their college or department. Alternatively, an institution that is focused on increasing their academic profile may identify team members who focus solely on recruiting and enrolling students who are eligible for scholarships or honors programs.

Historically, territory management for traditional, first-year undergraduate students was most often focused on students during the senior year of high school. Today, it is much more sophisticated and is a year-round, multi-year process that can begin as early as middle school. Territory managers often serve multiple student types (i.e., first-year and transfer students) and students who wish to enter not only in the traditional fall semester, but also, begin in the spring or summer months. Recruitment now starts well before a student's senior year of high school (first-year) or the semester they plan to enroll (transfer students), since students who engaged early on are more likely to decide to enroll at an institution.

There are 12 interdependent components that comprise strategic territory management

1. *Recruitment/Travel:*

These are the tasks directly associated with travel seasons (most commonly, the fall and spring months) when being "on the road" is in full swing. Attending college fairs or visiting high schools or community colleges are prime examples.

2. *Relationship Building:*

Relationships are established, developed and maintained to keep an institution top-of-mind. These initiatives often go beyond connecting with a prospective student. Parents, high school counselors, independent consultants and others who influence a student's ultimate enrollment decision are also considered.

3. *Communication Management:*

How a territory manager relates and interacts with one's inquiry, applicant, and admit pool using oral and written communication is important. Touches may include emails, phone calls, digital messages, direct mail, and text messaging.

4. *Application Review:*

Admission decisions are made using institutional admission processes and guidelines within one's territory. While very common, application review is not always a component of territory management. Some institutions use either core personnel who focus solely on admission decisions or employ a decentralized structure where, for example, decisions are made by academic units.

5. *Yield/Melt Management:*

Territory managers take actions to convert admitted students into deposited and enrolled students. Some managers are also tasked with maintaining contact with students to minimize "melt," which is the likelihood that a student who showed their intent to

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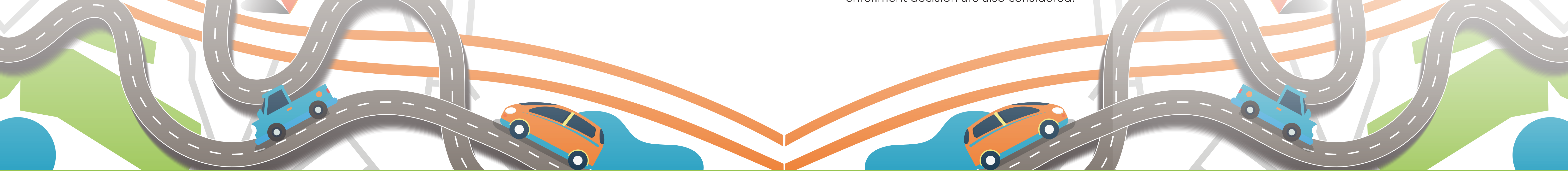


enroll ultimately decides not to. A focus on "summer melt" has increased among enrollment management operations.

6. *Event Management:*

These are on- and off-campus events that are designed to increase engagement and the yield of prospective students and families. Events are typically developed for specific stages – recruitment, yield, and preventing melt. Some territory managers may, for example, host small events at local coffee shops in their region for any of those purposes.

7. *Data and Analysis:*

Data must be collected, entered, and analyzed so that it can point the way to strategic action within a recruitment territory. Monitoring the number of inquiries, applications, admits, and deposits are critical to ensuring return on investment, and ultimately meeting recruiting goals.

8. *Tools and Technology:*

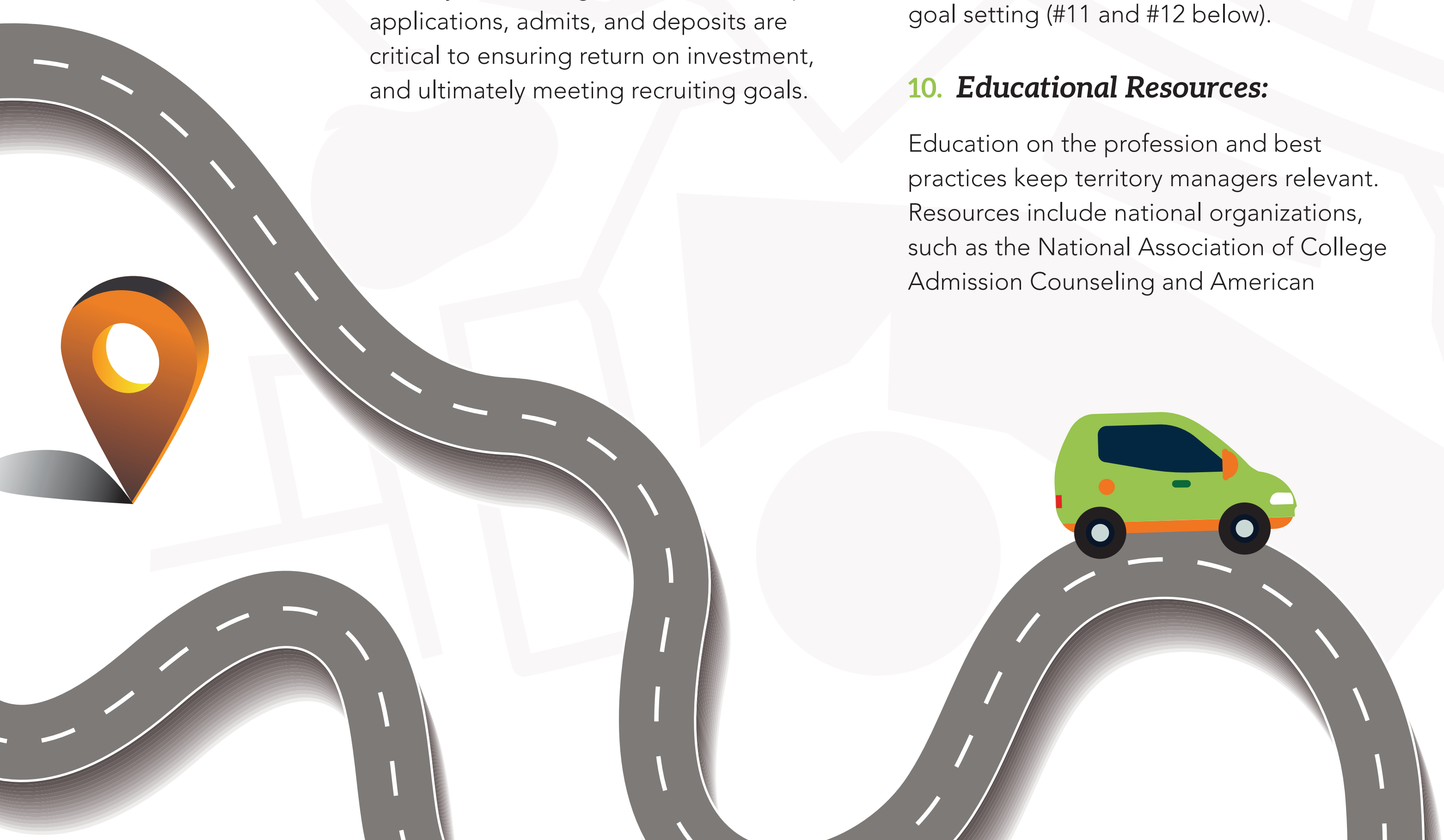
A wide range of tools are used to store and retrieve data. Admissions representatives rely on customer relationship management (CRM) systems, student information systems (SIS), and imaging systems, among others. Mastering this aspect is helpful in getting access to student-level data for managing relationship building and a student's position within the "admission funnel."

9. *Reporting:*

Reports must be written and shared, documenting actions that were taken. Reports are often created using the data entered and managed in CRM or SIS systems and prepared for and reviewed with an Associate Director and/or Director of Admissions. Reporting goes hand-in-hand with evaluation and goal setting (#11 and #12 below).

10. *Educational Resources:*

Education on the profession and best practices keep territory managers relevant. Resources include national organizations, such as the National Association of College Admission Counseling and American Association of Collegiate Registrars and Admissions Officers, professional conferences, webinars, etc. Staying apprised of emerging developments can enhance effectiveness.



11. *Evaluation:*

Territories are evaluated based on all known information and data. Evaluation frequently happens after an enrollment cycle is complete and all activities and data for the cycle are known. This in-depth understanding is then used to inform future territory management decisions and actions.

12. *Goal Setting:*

These are the guidelines and procedures for setting and meeting goals within one's recruitment territory. They are ideally created by layering historical data and institutional goals with outside projected information.

Skilled territory management professionals are able to successfully produce results in each of these 12 areas. New admissions professionals will demonstrate a basic understanding of these areas while a veteran admissions representative performs at an advanced level. To be executed effectively, territory management requires an organizational structure and resources that support this model, as well as purposeful training in the above areas.

Using geography as an example, each country, state, or region is unique and has its own culture and norms. Part of the rationale for a territory management model is to allow team members to fully engage in their territory and to become "experts" in how to best navigate the expectations of their students, families, and counseling colleagues, while still meeting institutional goals. This level of understanding takes time, and is the reason why many admissions offices attempt to keep the same manager in a territory for multiple years.

Effective territory management is linked to optimized enrollment. By considering these twelve aspects, the admissions office can structure a comprehensive model for executing enrollment responsibilities, in accordance with an institution's strategic enrollment plan and for developing professional standards that inform practice, guide execution, and maintain college counseling ethics.

Alicia Kornowa has many years of experience in enrollment management, and now serves as the Director of Admissions at Western Michigan University (WMU). Her passion for the profession began when she worked in the admissions office as an undergraduate student, serving as an orientation leader. Alicia earned both her bachelor and master degrees in organizational communication from WMU. She can be reached at alicia.kornowa@wmich.edu.

Christopher W. Tremblay, Ed.D.is the Director of the Strategic Enrollment Management (SEM) Endorsement Program for AACRAO and also serves as the Director of External Engagement for the Michigan College Access Network. He is an expert in enrollment management, as well as a published author and speaker. Dr. Tremblay can be reached at sem-ep@aacrao.org.

A Seat at the Table:

Nurturing a Winning Relationship with Your Board

By Mike Wesner

It is no secret that a college board of trustees wields an enormous amount of power over the strategic direction and financial decisions of an institution. What is less clear, is how those in enrollment management can ally themselves with their board to advocate for the resources necessary to meet the challenges of recruiting, admitting and retaining the best students every year.

The importance of a well-intentioned, mutually-respectful relationship with your board of trustees cannot be overstated. Positive, consistent interaction with them, only serves to strengthen the viability and reputation of your institution, making your job and the job of your staff that much more rewarding.

What Do They Do, Exactly?

While the roles and responsibilities of a college board of trustees can differ slightly from school to school, there are some prevailing functions that all boards share. First and foremost, the board, often made up of 30-40 members, is instrumental in the school's strategic planning and long-term institutional goals.

In addition, the board maintains complete oversight of the university president, ensuring that he or she and the board have a healthy, symbiotic relationship centered around the best interests of the students and the institution.

Additional responsibilities include:

- Making all legal and fiduciary decisions
- Developing and improving the school's mission, goals, and objectives
- Establishing policies related to programs

What Can They Do for You?

Since the board of trustees is responsible for many of the functions that will impact how effectively you present your institution to prospective students, their families, and other key influencers, it makes sense that you, as an enrollment manager, take an active role in lobbying for the resources to meet looming enrollment goals.

In short, the board holds the purse strings. However, to be clear, your interaction with them is not about begging for more money or badgering them for resources. It is about forming a relationship with the board, as a whole, as well as with individual trustees, so that they have a clear understanding of what it takes to do your job, and to do it well. It is also about you understanding how and why the board makes its decisions.

What Don't They Know?

During my years of visiting college campuses around the country, I have uncovered a bubbling frustration among enrollment leaders, who assert that trustees are often uninformed, through no fault of their own, about the intricacies of enrollment management, including the day-to-day operations, the recruitment cycle, name buys, emails, direct mail campaigns, and the digital strategies. The list goes on.

One particular area of concern among enrollment leaders is the board's lack of understanding regarding the current competitive landscape in which their institution resides. This is not true in all cases, of course, but a deep understanding of what enrollment managers and their staff are "up against," is crucial to the long-term goals of the university. You are, after all, on the front lines. It behooves you to share a few war stories.

Perhaps the biggest chunk of knowledge that the board needs to swallow, however, is why and how students are making their decision to attend your university. Many enrollment leaders have expressed concern that some, and in many cases, all, members of the board do not fully understand a student's decision to "buy" and the factors that impact it.

What Can You Do?

Even in the best of situations, where trustees have a firm grasp of enrollment management, there will be gaps in their knowledge. They are not the experts. You are. Therefore, to succeed, and to secure the resources you desperately need, you must make a solid case

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that is appealing to all board members. Educating the board is a process, not a one-time event.

Here are a few suggestions garnered from our own experiences, as well as those of our clients.

Make a list. Take 10 minutes to list everything you need the board to know and understand about the work you do. Do not forget that they are making the decisions that affect you and your team directly, so be sure to review and update the list prior to each board meeting. Actively seek opportunities to weave your needs and concerns into conversations and presentations.

Talk to the leader. Seek permission to speak directly, and regularly, to the chair of the committee. It is ideal to do this at least once a month. It is a good idea to ask if such meetings are possible before accepting a position with the university. If your president denies this request or attempts to block your access to the chair, consider this a "red flag," before accepting a position, and a topic worthy of a deeper conversation, if it happens after you are hired.

Keep the board informed. Numbers are not a secret. You have them. They need them. Therefore, by sending a weekly admission report, even if it is not a pretty picture, you provide the board with the most up-to-date figures from which they can make decisions. Keeping them in the dark will only hurt you in the long run.

Bring in your A-Team. As the VP of Enrollment, you have built a stellar team of directors, including Financial Aid, Student Life, Admissions and Retention. Bring them to the meetings, on a rotating basis. This is a two-fold strategy. Not only will your directors have the opportunity to present and discuss needs specific to their area, but they will leave the meetings with a better understanding of the institution as a whole.

Build a case. You need resources, which means you need funds. To get them, you will need to build an airtight case. Anecdotal evidence, if presented properly, can be convincing. However, most boards respond best to facts and numbers. Therefore, give them what they want: enrollment data and ROI estimations. Comparative facts that explore historical enrollment trends can also be effective in making your case.

Build consensus. Reaching a consensus with 35 people is no easy task, but through active listening, succinct summarizing, and strategic planning, it is possible to get all board members on…board. Start by appropriately introducing and clarifying ideas. Be open, however, to issues and concerns. Then identify allies in the room willing to speak to your needs. Be prepared to continually clarify and amend proposals. Remember that reaching a consensus relies on your ability to negotiate.

Create trust. Jay Fedje, enrollmentFUEL's Vice President of Client Services, has worked with trustees at three institutions. He said, "The end goal is for the board to trust the enrollment manager and the enrollment manager to trust the board. The two-way trust must extend to data, motives, agendas, knowledge, expertise, insight, governance, resource prioritization, and so on. Earning the trust of the "trustees" (there's something to that nomenclature) is the end game. Once trust is established (and it's continually being established), then other pressure points can be negotiated with a higher level of resolution."

There's One (or Ten) in Every Crowd

Finally, what do you do about the Debbie Downers in the boardroom? You can do everything right. The right words. The right stats. The right idea. But inevitably, there will be doubters and naysayers. (Or haters, as the kids say).

According to the Harvard Business Press' *Managing Difficult Interactions*, conflict arises from differences in positions and interests, as well as conflicting perceptions, motivations and styles. Throw in the vast array of life experiences and cultural backgrounds at the table, and it is easy to see why some solutions are never reached.

Thankfully, the book offers some tips for navigating the Negative Neds and Nellies who may be keeping you from the resources and support you need.

Understand your emotions and manage them. Sounds easy, right? It is not. You love what you do, and you want to do it well. Therefore, removing emotion from the equation is difficult. But you can manage your emotions and use them to your advantage, by asking three simple questions:

1) What are you feeling?
2) Why are you feeling this way?
3) How will your audience perceive this emotion?

Invest the time in understanding the other person. The first, and still the best, step in overcoming negative attitudes, is to listen. By employing empathetic and reflective listening strategies, you are letting the speaker know they are being heard. Positive body language and direct eye contact are also a must.

Dare to bring forth the negative. In multiplication, two negatives make a positive, right? The same can be said when dealing with a naysayer. Be brave enough to address the downsides to your proposal, in moderation, of course. The truth is, you are more likely to win people over when you present a fair and balanced view of the situation.

Perspective is Everything

The board of trustees can be your biggest supporters, so give priority to those relationships. Be prepared, at any moment, to discuss the challenges and successes associated with the work you do. It is your responsibility to build a relationship with the board. Take individual members to lunch and get to know them. By seeking to understand their perspective, they will soon be clamoring to have you at the table.

Mike Wesner is the founder and Chief Imagination Officer at enrollmentFUEL. After graduating from college, he served as a naval officer in charge of operations and experienced the challenges of building relationships with senior staff. He built on those lessons while working with a board during his time as the leader of a faith-based campus organization. Then, as now, Mike believes in innovating to improve, listening to understand and that organizations are better when everyone pulls from the same end of the rope. Email him at mike.wesner@enrollmentfuel.com.

ACTIONABLE IDEAS

Complaints, Frustration, and Opportunity

By Jeremy Tiers

It's a fact – many people hate meetings. Full disclosure – I'm not one of those people. I believe meetings can lead to real growth, and often see this take place when I travel to schools around the country, leading recruiting workshops for Tudor Collegiate Strategies (TCS).

During those visits, I always meet one-on-one with Admissions personnel at all levels, and occasionally, school presidents. Many admissions counselors have specific questions about aspects of their job and ways to do it more efficiently. I also hear about their frustrations. In this article, I will share some common themes, and my recommendations for improvement.

- Admissions counselors, particularly newer ones, continue to voice their frustration about taking ideas to their boss and being told, "No." If you're the boss, you may have a good reason for that answer. Even when that is the case, consider pausing before you respond. Shooting down suggestions discourages people from bringing attention to problem situations and stifles ideas for improvement. When you must respond negatively, offer context, and you will promote understanding.

- Lack of initial training continues to be a major talking point. Many new counselors, regardless of their age, are frustrated that they receive little to no actual training regarding things like planning fall travel, how to engage prospective students effectively through different communication methods, and having conversations with students and parents on cost, value, and financial aid. Instead, they're often told to look at what the previous counselor did, review the data (assuming any data exists), and talk to their colleagues, if they have questions.

- Territory management is a serious challenge for many admissions counselors. (for more insight on this topic, read "*Components of Territory Management,*" on page 8). I often hear things like, "Jeremy, my boss wants me to make 100 phone calls this week (or send 100 emails). Where do I start? Who should I call first?" Without predictive modeling, a clear rating system, or some direction from leadership, many counselors end up spending the same amount of time and using the same strategy with each prospective student on their list. That is inefficient. It is OK if you don't have predictive modeling. It is still possible to formulate a list of key items and to develop a rating system. Taking this approach allows counselors to segment lists and make better use of their time.

- Whenever an email or letter is sent out with an admissions counselor's name on it, they need to be aware that this has occurred, whether it came from the admissions office or the marketing staff. Counselors don't enjoy receiving phone calls or getting emails from prospective students or their parents referencing communications that the counselor is unaware of. I encourage you to put a system in place (if you don't have one already) for counselors to view all communications sent to students in their territory.

- Tension and inconsistent communication between admissions, financial aid and athletics have a negative impact on productivity. It often results in confusion or poor customer service for families. In your office, is there a clear strategy of how financial aid discussions will take place, and who will lead them?

- **Can you explain your school's value proposition? I ask that question a lot, both in workshops and in individual conversations. The majority of the time, the answer is, "kind of," or "not really," – a major red flag, considering the rising cost of college and the need for schools to differentiate themselves from their direct competitors. More training and discussion on this topic needs to occur. You can't treat the value proposition as a one-time conversation.**

- Not having parent information, including their first name(s) and contact information, makes it hard for schools to personalize parent communications. Since parents are the primary influencer for almost every prospective student in your system, greater attention should be paid to gathering this information. Think about adding this on your inquiry card, or making it the call to action in an early email, and start the communication early in the process.

- Intensive tour guide training and a thorough discussion of how to conduct a campus visit should be ongoing. Our focus group research at TCS indicates that the "feel" of a campus is the most important factor influencing the student's decision. Training should focus on storytelling and creating engagement (i.e., asking the right kinds of questions). Think beyond the history of your school and the buildings that make up your campus. Prospective students want to know what happens inside those buildings and how that impacts their student experience. Tour guides are a critical point of contact for your school. They should understand why their role as a tour guide is so important, and how to effectively collaborate with the admissions counselors to provide a better visit experience.

continued on next page

- Focus group research also indicates that graduation outcomes are becoming more important to parents and prospective students. In fact, for many people outcomes are more important than rankings. Generalized information about recent graduates is no longer adequate to make a strong case for future success. Think about finding a way to create a campus-wide commitment to gathering stories about recent graduates, and information about specific majors.

- Students continue to make it clear in surveys conducted by TCS, that the most confusing part of the college admissions/college search process is financial aid and the FAFSA. Keeping that in mind, I continue to have conversations about colleges and universities, waiting until their school's financial aid packages are distributed, before starting real conversations with families about costs and how to pay for college. Those conversations need to happen much earlier and should never be a one-time discussion. If you truly want to make this part of the process easier and less stressful for students and families, you need to have a strategy built around multiple "mini conversations" that continue throughout the cycle.

- Phone calls and high school visits continue to offer an impressive ROI to admissions counselors willing to adjust their strategy and get creative. Voice and face-to-face contact build quicker and deeper relationships.

- If you want to increase engagement levels when sending out emails to prospective students and parents, make your tone more conversational and change your call to action from "visit or apply," to a request for input on a topic, or an answer to one specific question.

- Fear drives just about every decision that students make during their college search. According to our surveys, the two biggest fears for students are making the wrong decision about where to go, and not being able to afford their dream college. Yet, few counselors address these fears in conversation. I implore you to please make addressing these fears a part of your regular recruiting conversation with prospective students (and parents). I'm making this plea, because your target audience continues to tell me through surveys and face-to-face conversations that it is important to them. They want help with this. If you don't offer it, it will hold some of them back or delay them from taking the next step.

When I am consulting, I often hear complaints. Whether frustration is felt by your staff or the student and their family, it drags down the recruiting process. Staff training, open lines of communication, and improved processes reduce friction, help you move people smoothly through the funnel, and improve overall recruiting and morale.

Jeremy Tiers is the Director of Admissions Services for Tudor Collegiate Strategies, a Higher Ed partner that helps colleges grow enrollment through engaging email and letter campaigns, and trains their staff to be smarter, more effective recruiters and leaders. He has been a speaker at the NACAC National Conference, a guest on Admissions Live and is the editor of a well-known, weekly college admissions email newsletter. Reach Jeremy at jeremy@dantudor.com

Building Relationships with Independent Educational Consultants

By Linda Bishop

Mark Sklarow is the CEO of the Independent Educational Consultants Association (IECA). He joined the organization in 1994. "Ten years ago," he said, "we had a handful of members. Most clients who used Educational Consultants were wealthy, and they hired consultants to help with the college application process. Today, the average student served will attend a public school, and is in a middle-class family looking for personalized help beyond what a student can get in a large public school."

Sklarow said that early on, consultants often played a nanny role, helping students with essays and shepherding young people through the application process. Parents now expect more and, therefore, seek out professionals who help their student identify and gain admittance to institutions, where the student will thrive, and ultimately graduate.

The IECA is a long way from where it started in 1976. It now has nearly 2000 members. It is one of two professional organizations for Educational Consultants. The other is the Higher Education Consultants Association (HECA), which started in 1997.

Meet the Experts

Mark Sklarow joined IECA as its first full-time director in 1994. He is now its chief executive officer. Under his leadership, membership in the Association has grown by 450%, while maintaining standards that lead the profession. He regularly presents on admission and consulting issues across the United States and leads workshops and seminars to train those newer to the profession.

Chris Teare has taught, coached, counseled, and been an administrator in education for 35 years. He has worked in college admissions and will soon be back in an independent secondary school. He is a subject matter expert on all aspects of the admissions process, and has contributed articles on the topic at *Forbes.com*, *The Chronicle of Higher Education*, and *The New York Times* blog, "The Choice."

IECA is experiencing tremendous growth, adding new members at a rate of 20% per year. There are now members in every state, and in 35 countries. The impetus behind this growth has a lot to do with funding issues in public schools.

Chris Teare has more than 30 years of experience in private school counseling, independent consulting, and college admissions. He has written about Educational Consultants for *Forbes.com*. "In public schools, counselor caseloads are increasing. Today, it is not unusual to see counselors who are assigned to help 300 to 500 students," Teare said. "With these caseloads, there are not enough hours in the day to give any single student much individual attention."

According to Teare, this reality is spurring growth. "In affluent areas – particularly in the suburbs – parents have resources. Kids have ambitions and ability," he said. "Parents with children in public school recognize that their child is going to get a limited amount of help to decide where they will go to college. Some parents will hire an expert to assist with the process."

Educational Consultants spend between 30 to 40 hours with individual students. They assist with career exploration, and often assess psychological preferences, and learning and social styles, using tools like the Myers-Briggs Type Indicator. For the student, working with a consultant offers an opportunity for exploration and self-discovery.

The consultant's goal is to find the right place for the student, where they fit in and feel at home. "Consultants care about the student's success," Sklarow said. "They use their knowledge to create an interesting list of options for the family."

Earning Your Spot on the Interesting Options List

The HECA website reports that they have more than 1000 members, who work with over 23,000 students annually.[1] IECA is larger, with over 2000 members. Combined, the members offer a significant channel of referral opportunities for colleges and universities.

Effective referral strategies are built around brand activation, top-of-mind awareness, and personal relationships.

The American Marketing Association's website defines activation as, "The essentially automatic process by which knowledge and meanings are retrieved from memory and made available for use by cognitive processes."[2]

With an activated brand, educational consultants know who you are, what you stand for, and the type of student who thrives at your institution. One way to activate your brand, is by participating in school visit events sponsored by IECA and HECA.

Sklarow said, "I have personally visited more than 700 colleges and universities over the years. IECA requires our members to make visits, so they can understand what a campus is all about and discover what makes a school unique."

While hosting a tour is a highly effective form of experiential marketing, top-of-mind awareness can be developed using other tactics.

- Build a list of educational consultants in your CRM.
- Tag all consultants. Note who has visited, referred students, or had students who chose to attend your school.
- At the beginning of each enrollment cycle, mail informational materials to consultants. Use data to personalize letters.
- Find student-focused stories that demonstrate your school's distinctive attributes. Use the stories to create an email commFLOW. It is important to include practical information, like open house dates, early admission deadlines and dates when your team will be hosting events or visiting schools in specific areas.
- Include consultants in other mailings, when appropriate.
- Use other awareness-builders, such as teleconferences and webinars.

Along with brand activation and top-of-mind tactics, the third ingredient in a successful referral strategy is building relationships. One starting point is involvement with IECA and HECA. Both organizations welcome enrollment management professionals at their annual conferences and regional events.

You can also increase the ROI on traveling by using recruiting trips as a way to connect with consultants.

When Chris Teare was the Senior Associate Director of Admissions at Drew University in Madison, New Jersey, he often met consultants, individually and in groups, for coffee or lunch during recruiting trips. Teare said, "You have to invest time to build relationships, and always put the student at the center of the process. Do the right things for the right reason, and help the consultant do their job."

Last Thoughts

Mark Sklarow, CEO of IECA said, "Getting into a school is a one-minute celebration. Choosing the right school is a lifelong measure of success."

A family who hires an educational consultant is more likely to seek the many benefits of the traditional college experience and appreciate the unique value of your institution. As times change for enrollment management professionals, so must strategies. In the competitive higher education market, there is no better time than now to take a hard look at your referral pipeline from this channel.

1. Retrieved from https://hecaonline.org/about_heca
2. Retrieved from https://www.ama.org/resources/Pages/Dictionary.aspx?dLetter=A

Linda Bishop is the Marketing Strategist at enrollmentFUEL. She is a subject matter expert on marketing campaign strategies, content marketing, integrated marketing using both online and offline tactics, and marketing automation. Contact her at linda.bishop@enrollmentfuel.com.

enrollmentFUEL
306 West Franklin Street, Suite F
Chapel Hill, NC 27516

enrollmentFUEL

About enrollmentFUEL

Reach your enrollment goals with **enrollmentFUEL**. We're on a mission to create a better Student Search experience—one that is more efficient and more effective. Using tools and creative thinking, we provide results and actionable insight to the **people who recruit people.**

enrollmentFUEL has extensive expertise in geodemographic research, predictive modeling and web analytics. We combine these techniques with creative design and messaging to tell your story to your target audience. Our approach amplifies your targeted message through intelligent integration of all communication channels, including email, direct mail, online advertising, IP targeting, retargeting, geotargeting, and social media advertising.

If you're looking for innovative thinking, and new options to achieve success, **enrollmentFUEL** can help.

microSEARCH™

A smaller, focused Student Search campaign that is created to test new ideas or attack a very limited challenge, such as promoting a new program or fixing a deficiency that the school may be experiencing.

clickCAPTURING™

Learn which inquiries consistently return to your website with clickCAPTURING™ technology. By leveraging behavioral data with triggered communications, we can motivate prospective students to take the next step.

bannerDIRECT™

Research shows banner ads directly reach suspects and prospects at the top of the funnel. We can help you use this "billboard" strategy to create interest at the top of your funnel before and after sending mail and email.

matchBACK™

Similar to our clickCAPTURING™ solution, this emerging technology represents a futuristic way of identifying additional hand-raisers in your Student Search program without the use of tracking cookies. Enrollment leaders are often unaware of these leads, and by capturing this stealth activity, you're developing an additional and continuous flow of more qualified leads each month.

For more information contact

Mike Wesner, Chief Imagination Officer
mike.wesner@enrollmentfuel.com
919.306.8122

Jacqui Elliott, President
jacqui.elliott@enrollmentfuel.com
919.228.8122

enrollmentFUEL.com

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