OCTANE™

ACTIONABLE INSIGHT
REMARKABLE TOPICS

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enrollmentFUEL

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INSIDE

LETTER FROM OUR

Vice President of Client Services

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Dear *Octane* Booster,

This recruitment cycle has looked and felt like no other. As enrollment professionals, so much of what we do is a dynamic blend of gathered knowledge and cumulative experience. This issue of Octane seeks to acknowledge those areas of enrollment management that, in some ways, look familiar while introducing those new strategies that need attention to keep you ahead of the curve.

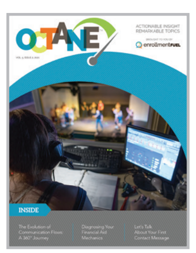
In this issue, I address the need to assess your financial aid operations and efficiencies regularly. Two articles focus on the communication flow. enrollmentFUEL's president, Jacquelyn D. Elliott, shares thoughts on the evolution of the communication flow and how to create an integrated process improving overall response. Guest contributor, Jeremy Tiers, Director of Admissions Services for Tudor Collegiate Strategies, shares research and strategies to improve messaging in his article "Let's Talk About Your First Contact Message." List-buying expert and enrollmentFUEL VP of Enrollment Systems, Lisa Branson, shares how-to advice on finding leads. And we round out this issue with an article from one of enrollment management's rising stars. Jessie Hanson, M.Ed., serves as the Interim Director of Admissions at the University of Minnesota Crookston.

My fun title is the "Enrollment Jedi" at enrollmentFUEL. My role is to use my "Yoda experience" to help colleges and universities solve problems to support their enrollment goals. If you are interested in brainstorming ideas or just talking strategy, please don't hesitate to reach out. At your service, we are.

Partnering Together!

Jay Fedje, M.A.
Vice President of Client Services

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



enrollmentFUEL would like to extend our gratitude to Belmont Abbey College in Belmont, North Carolina 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.

inside OCTANE™

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The Evolution of Communication Flows: A 360° Journey

By Jacquelyn D. Elliott, Ed.D.

Recently, I traveled to visit clients and stopped on my way back home to visit with a former colleague from a previous institution. Over dinner, we reminisced about the good old days when things were tough, but not nearly impossible. And while neither of us really wanted to think about COVID (aren't we all over this by now?), we did talk about the impact on enrollment and what the future of admission will look like as we get closer and closer to the demographic cliff that lies ahead.

These conversations got me thinking about my own college search process. You may be surprised to know that I still have the main recruiting packet my alma mater sent me back in 1988! Check out the picture to the left, and you will see that Mary Baldwin sent me a box instead of an envelope, which I loved. Inside, the pieces were menu choices of all the things I could consider in college. Even years later, I remember how exciting it was to get this box. I felt like I had endless choices, and they were mine to make. The box made my choice of a college feel less like a decision that had to be made and instead turned it into a meaningful ritual marking a rite of passage to true adulthood.

Yes, those were the days when communication flows were comprised of snail mail. There wasn't email, digital advertising, social media, or texting. It was mail and phone. And I loved coming home and knowing that for the first time in my life, I had mail that was really my own (other than a card from the grandparents around holidays and birthdays). It made me feel grown-up. It was my information to pour over or toss.

Like students today, I fast-pitched lots of the material schools sent to me. My keep-or-trash criteria was simple. If the material was different, intriguing, or engaging in some way, I kept it, regardless of my immediate interest in the school. That was because I was inquisitive enough to pause and interact with the materials from the schools that marketed using Hallmark's principle, "When you care enough to send the very best."

Fast forward to 2021, and guess what? Thirty years later, in a focus group with students, they said the same thing. I heard comments like, "Every school sends a postcard, so they all start to look alike. They are boring. And, they never really say anything that matters. Most go into the trash."

I listened, made a note, and then asked, "What DO you pay attention to, then?"

A young woman with a long red braid said, "I know it costs more money, but anything that stands out. I really like it when things don't look too polished. I know it's just marketing. I hate the pictures that look fake. Why don't schools realize our generation relates to raw, authentic photos like selfies and students just being themselves and natural?"

A young man who had been texting on his phone looked up finally and said, "I really like it when I get something that I can engage with—a different shape, something interactive, and unusual."

Another student chimed in. "Honestly, how is anyone supposed to be able to decipher anything when nothing stands out?" She took out her cell phone and showed me a picture of all the direct mail she has received.

After we all took a look, she said, "And one last thing I would say is this: 'Stop sending me emails!' Unless I have applied, I don't care. I had to give up my personal email and open another account just to get away from all the nonsense schools send to me."

These student reflections clearly illuminate that contemporary communication flows are much more diverse (omnichannel) than the few phone calls I received from my admission counselor (Jane Kornegay—I still remember her name) and my snail mail. Today, colleges and universities must use an integrated approach with multiple media choices to crack open doors and get a foot inside. Competition is already stiff. When we reach the demographic cliff in a few years, expect the market to become even more competitive as regional universities open up their admission criteria to meet their numbers.

So, as the market evolves, what do you do to get noticed now?

First, the communication flow isn't a one-and-done task. Much like the website (let me give Aaron Porter at Carson-Newman a shout-out for this observation), it requires constant attention to be updated, refreshed, modernized, and aligned with what students and parents are hungry to know. Sadly, when I consult with most schools, they tell me they don't have the bandwidth or resources to stay on top of their website, let alone the communication flow.

Typically, a calendar of events is made, and the same basic calendar is used year-after-year because emails have been written and mailings have been designed. Emails and mailings get a quick scan to see if any information needs updating, but busy enrollment professionals may not stop and evaluate whether there is a better approach. Someone on the team sets up campaigns in the CRM, and materials go out on a rote schedule. Some schools segment messaging for their audience, but when I survey the market, I find segmentation strategies to be minimal, overall.

Repurposing materials year-after-year is widely practiced because it is seen as a cost-savings tactic. Let me pause here to say there is a big difference between tactics and strategies. Communication flows should be strategic.

An Innovative Thought on Strategic Communication Flow

I have a question for you. What is the number one function of the enrollment office? If you said sales, I would high-five you (well, maybe elbow bump, instead). Yes, sales (especially at small private colleges—but more and more at the nifty fifty and even public universities) is truly the number one function of the admission office. If we embrace this concept, many of us would want to consider revamping our communication flow to match the buyer's journey.

Enrollment Management Buyer-Seller Journey[1]

Student (Buyer)	Awareness	Recognize	Search	Assess	Narrow	Choose (Apply)	Track*	Commit (Deposit)	Integrate
Institution (Seller)	Advertise	Brand	Direct Market	Support	Bond	Accept	Track*	Fulfill	Assimilate

*This is the transactional stage of the process where a large portion of the paperwork is volleyed back and forth.

I am a huge advocate of adopting a communication flow to align with the buyer's journey both in terms of the "architecture" of the flow and also to fit the student/family experience. The theory is sound, and it works. But, it isn't for the faint of heart—it takes grit, tenacity, and resources.

In this scenario, the design of the communication flow allows for segmentation on multiple levels. Yes, you can still segment on major, affinity group, or any variety of other known aspects, but the focus in this design is an **intentional alignment with the student's psychology.** As admission counselors work the stages of their funnel, they would identify where the student is on the continuum, denote it as a field in the CRM, triggering a set of communications designed to market, support, or track. These communications would be more than just direct mail and email. They would include texting, personalized mailings from the counselor, and digital ads with calls to action that vary depending on timing within the admission cycle. What do I mean by this? I mean that in April, the student will likely be moving into the *commit* stage of the cycle, so the school would be messaging about their promise to *fulfill* the comprehensive education (whole-person development) that the student and family are purchasing.

IT'S TIME TO REVAMP YOUR COMMUNICATION FLOW WHEN:

- It has been three or more years since you sat down, looked at everything, and performed a major update.
- Average email open rates have dropped more than 15% over the past cycle.
- You have videos, but they are not mentioned or included in emails, print, or texts. Find a way to use them – and if you don't have videos, now is the time to create them. Keep them short and snappy (15-20 seconds).
- You don't have a digital advertising component as part of your communication flow, which means you are missing opportunities to put your institution in front of your recruits when they are online.
- Within your communications, there is minimal information on how your institution prepares practical, career-focused Gen Z students to find jobs.
- Behavioral monitoring shows a significant number of engaged students do not apply, indicating an information gap. What do your recruits need so that early interest results in action? One common gap is found within the presentation of financial aid information. Take a hard look and ask, "Do these communications turn potential students on or off?"
- You have stopped producing and mailing any high-end printed materials, like outcomes brochures. If you are struggling to hit goals, look at the buyer's journey and ask if there is a place when mailing the right piece at the right time would help you win.

3 *Practical Tips to Improve Your Cycle*

TIP 01

At enrollmentFUEL, our team is always looking beyond higher education to gain insight from the larger marketing world. One of the items recently shared was the "State of the Connected Customer" report from Salesforce Research. They found, "68% of customers say they are online more often than not."[2] **This indicates digital advertising should be an integral part of your communication flow** because a well-placed ad that is contextually in sync with your "buyer's" journey could be the nudge a recruit needs to take the next step.

TIP 02

The best Student Search communication flows **use brand storytelling, where every email brings fresh insight to enrich a student's understanding of your institution's value.** No matter what the channel, communications should spark curiosity and the desire to know more. In a study titled, "Circumventing resistance to novel information: Piquing curiosity through strategic information revelation," published in the *Journal of Experimental Social Psychology*, researchers found revealing new information invoking curiosity can substantially impact initial judgments.[3] Curiosity creates a knowledge gap, motivating students and parents to investigate and learn more, leading to a re-evaluation of an earlier perception. To put it in practical terms, by invoking curiosity, you can motivate students to reach out and ask for detailed information on topics like financial aid, internship possibilities, or how to double major and still graduate in four years. If you are doing a great job selling your *value proposition*, students may ask deeper questions relating to their college experience, how their lives will be impacted, and what new knowledge they will gain to successfully prepare them for the job market.

1 The Enrollment Management Buyer-Seller Journey is reprinted with permission from Jacquelyn D. Elliott, Ed.D.

2 Retrieved from: https://www.salesforce.com/content/dam/web/en_us/www/documents/research/salesforce-state-of-the-connected-customer-4th-ed.pdf

3 Wright, Scott A., Clarkson, Joshua J., & Kardes, Frank R. (2018). Circumventing resistance to novel information: Piquing curiosity through strategic information revelation. Journal of Experimental Social Psychology 76, 81-87.

TIP 03

Direct mail is an effective way to give any campaign a lift. Though students dismiss the efficacy of the "lowly" postcard, enrollmentFUEL has accumulated plenty of evidence proving this basic form of communication gives more than 90% of campaigns a lift in email open rates. However, higher education has not paused as an industry to assess the merits of this form of communication in the current landscape. All mail is seeing a much higher interaction. True, email is more economical and has value, but I caution schools to recognize it isn't the one-size-fits-all solution for a successful communication flow. Institutions need to take the stand to appropriately budget for direct mail, as well as texting and digital advertising.

The real magic of direct mail happens when used deeper in the funnel to share information with engaged leads. If you have limitations within your budget, don't discount mail, altogether. Instead, ask, "Who is opening my emails? Communicating with admission counselors? Visiting my website? Signed up for a (virtual) tour?" Look at your data, and determine how you can intentionally send mail to a smaller cohort of the *right* students with a focused message at the right time. This will save you money while still recognizing the actual value of direct mail in moving students through the later stages of the buyer's journey.

Last Thoughts

Maybe your prospective students won't hoard their recruitment material 30 years after the fact, but surely you can hope for your material to elicit the emotion required to move them to the next stage of the funnel. Looking at your communication flow from a strategic lens rather than a tactical lens is the first step to success. And being intentional about updating the content, pictures, and delivery mode is critically important. If you haven't taken time to modernize your flow, or built it to align with your buyer's journey, this summer is a great time to dig in and revolutionize your process.

Dr. Jacquelyn D. Elliott is President of enrollmentFUEL and a thought leader in modern communication flow development. By combining strategy, training, and tactics, she has led multiple institutions to record enrollments. If you would like to share thoughts on this topic or any aspect of Student Search, please contact Jacqui at jacqui.elliott@enrollmentfuel.com.

RECRUITING

Diagnosing Your Financial Aid Mechanics

By Jay Fedje, M.A.

I'm a "baseball guy." In fact, I used to be a youth baseball pitching coach. A few years ago, I attended spring training for my team – the Minnesota Twins. I stood near the bullpen, watching the pitchers warm up and looking for tricks I could pick up to help my young players.

A hall-of-fame pitcher stepped in to go through his routine. Three pitching coaches watched him. The pro threw one pitch, and then he turned around and talked to his coaches. Throughout his career, this guy had thrown thousands of pitches. But spring training meant he was one winter older. Though the act of pitching was very familiar to him, circumstances had changed.

The coaches focused on the pitcher's mechanics. They shared observations on *how* the Hall-of-Famer threw the baseball. Though he was a pro, he couldn't improve simply by practicing. He needed his coaches to watch, make observations, and offer advice to get his pitching right.

In the years that followed, I often thought of this moment in comparison to the enrollment operations I oversaw. When it came to financial aid, I made it my business practice to involve experts outside of my school's roster. I needed critical eyes who could share impartial observations to ensure we were positioned appropriately for changing circumstances.

My "coaches" got me focused on four critical financial aid assessment areas. They helped me optimize operations and institutional resources to maintain a competitive position, while maximizing revenues.

1 Mid-Cycle Assessments and Adjustment

While goals represent concrete targets, you are always working on hitting them in a fluid environment. Midway through the cycle is an excellent time to look at data, assess where you are, and adjust financial aid tactics (as needed) to fit market conditions.

Data are usually displayed in a dashboard. While viewing regular reports on fundamental enrollment key performance indicators is standard operating procedure for enrollment managers, quarterly and mid-cycle reports are often not as standardized as weekly data measures.

Data serves as the needle in the compass indicating when you need to make a directional shift. Do you believe you have the right data to evaluate your current situation and make adjustments? And is that data in a usable format providing insight to make critical, actionable decisions?

Even when you have the best data on the planet, it's helpful to get the benefit from outside "coaches" who can help you with areas that aren't always as easy to see, such as the impact of general market trends. Like all institutional processes, financial aid can cultivate a "we've always done it this way" mentality unless you build in regular outside assessments. Even when you clearly see what needs to change, there are times when the best way to sell the idea to the Board is to bring in an outside expert who speaks in terms of industry-wide best practices.

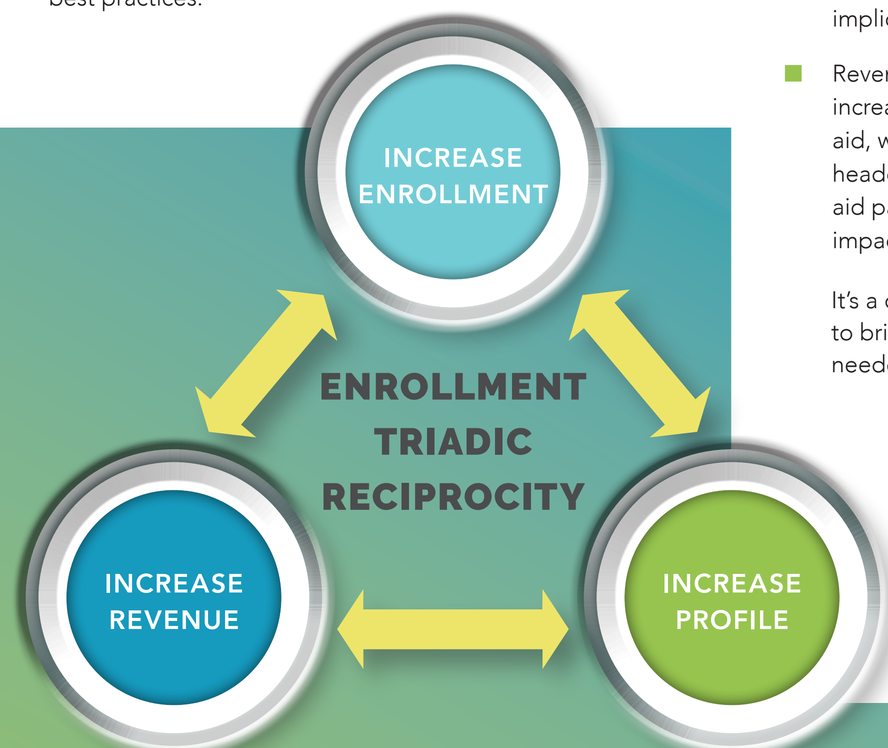
2 Institutional Mandates

Often, new enrollment vice presidents are told, "Your job is to balance student profiles, increase headcount, and increase net tuition revenue." These are the institution's mandates, but achieving all of them in a single year's entering class can be next-to-impossible when dealing with strategic gaps, process problems, and misalignment of tactics and goals. To consistently achieve goals, decision-makers, budget-setters, and quality overseers must come to a common understanding of the current situation, determine what will change, and set realistic targets. Factors to consider:

- The reality of triadic reciprocity: Most schools can achieve two out of the three in any given year. What is most important at your institution? Revenue, headcount, or the student profile?
- Increasing specific student profiles: Honor students, athletes, and artists – no matter what the category, attracting more students can be a pricy proposition. When you need more performance aid to attract high-profile students, it can put net tuition revenue goals at risk.
- The access paradigm: By making more aid available to those who need it, schools can see an increase in headcount, and through volume, an increase in revenue. This price shift often modifies your student profile, which can have short-term and long-term implications.
- Revenue implications: Lowering aid packages, or increasing tuition without an increase in financial aid, will almost always have an inverse impact on headcount. Depending on what elements of the aid package you lowered, it can also have a limited impact on your student profile.

It's a complicated situation. This is an excellent time to bring in the coaches because outside eyes are needed to bring clarity when making tradeoffs.

As an enrollment manager, I once met my profile and revenue goal with a leveraged drop in the discount rate, but I missed the headcount goal. When I gave my report to the Board, I was asked by a Trustee, "Should we consider the year a success?" Trade-offs do not make this question easy to answer.



- In a limited revenue model: 2 of 3 are attainable
- Each will work for and against the other

③ The Mechanics of Efficient Financial Aid Operations

Database and software connections are part of financial aid operations. But we are busy, and often we create process workarounds to patch issues to keep things moving. Patches all too often require your team to invest time to keep pieces and parts sewn together. Patching a solution might work in the short-term, but all too often, it moves your team farther from efficient processes that are streamlined and flexible.

Reports offer key-hole views into progress. Sometimes, the reports we receive benchmark items that are no longer relevant or useful. Regular evaluation ensures you get the data necessary for making good decisions and assessing the health of financial aid processes.

Your prospective students (and their families) expect you be accurate, clear, and FAST! Slow-to-respond institutions with inefficient operations can derail enrollment momentum and lose applicants to competing schools.

Often, slow processes are the result of a cumbersome herd of sacred cows. Here's a real-life scenario. The financial aid staff person prefers that the Director of Financial Aid give them a manilla file of the student's financial aid documents. Why? Because they like to take the folders home at night and process them over a nice cup of chamomile. They've been doing it this way for 20 years, and everyone loves them. That staffer also doesn't like to do financial aid evaluations on a computer – they prefer sticky notes.

Sometimes it is our own internal processes that crush speed and efficiency. Hunt to see if you have any sacred cows hiding in the financial aid office. If you do, it might be time to put them out to pasture for the good of all.

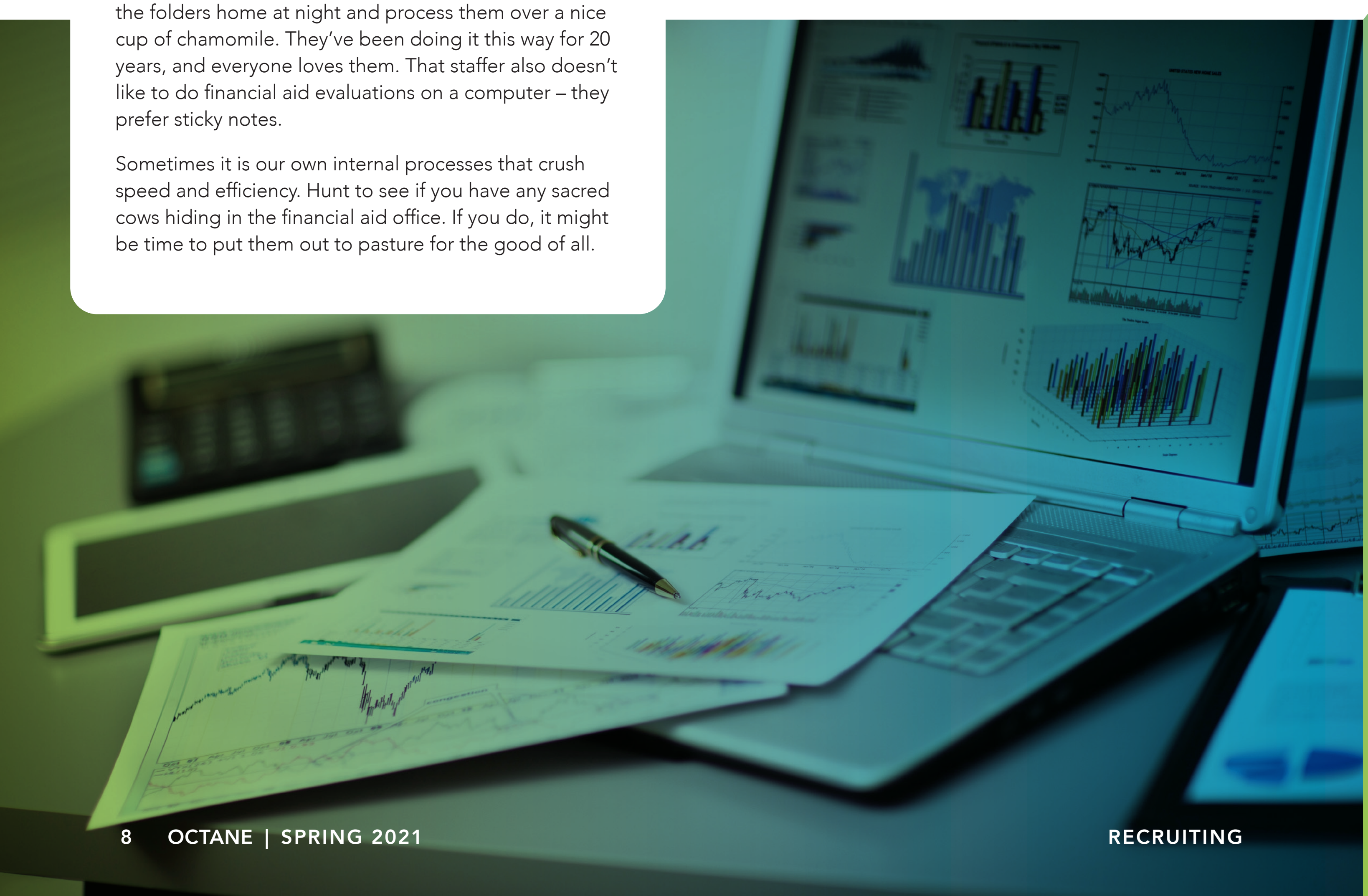
④ Finding Students You Can Afford and Who See Your Value

We all wish this were not a reality, but schools cannot meet the financial needs of *all* students. Choices must be made. Affordability is a two-sided equation where students determine if they can afford us, and we determine if we can afford them.

From personal experience, I know it is heart-breaking when a student wants to attend your school, believes in the value of your institution, but the financial aid package you deliver doesn't even come close to turning their dream into a reality.

The graph to the right was useful when I spoke to my financial aid and admissions teams. The perfect situation is when your targeted prospect sees your value, is willing to pay your tuition, and has the appropriate financial resources to attend your school.

Identifying and strategically recruiting these best-fit students allows you to channel limited financial aid to great-fit and high-need students. These students believe in your value but need significant financial help to come and stay until graduation.



The Case for Outside Eyes

Legendary baseball coach, Tommy Lasorda said, "There are three types of baseball players: those who make it happen, those who watch it happen, and those who wonder what happens."[1]

Enrollment managers make it happen. Every year, you face challenges foreseen and unforeseen. To overcome challenges, you must make regular assessments of enrollment goals, reporting, and operations. Assessments tell you if it is time to pivot in response to market trends, changes in government regulations, and inefficient, yet critical processes.

When you feel your approach to financial aid needs improvement, but you can't put your finger on precisely what you need to fix, consider hiring a good coach. You get an outside view and wise advice on what to change, along with validation for what you are doing right – which is just as important to know.

1 Retrieved from: https://www.baseball-almanac.com/quotes/quolasor.shtml

Jay Fedje, M.A., is enrollmentFUEL's Vice President of Client Services and host of The Enrollment Edge podcast. He is a seasoned leader with expertise in enrollment management, strategic planning, funnel development, university branding, targeted student search, CRM implementation, predictive modeling, financial aid leveraging, communication plan development, retention modeling, organizational structure, and market expansion. To learn more about financial aid consulting and assessment, contact Jay at jay.fedje@enrollmentfuel.com.

LET'S TALK ABOUT

YOUR FIRST CONTACT MESSAGE

by Jeremy Tiers

PROSPECTIVE STUDENTS WANT MESSAGES THAT FEEL PERSONAL, AS WELL AS BEING ENGAGING AND INFORMATIVE.

It's May, and most colleges and universities are still focused on the Class of 2021 – converting admitted students and preventing melt from those who have committed.

There's another important group that also needs your attention right now. Early personalized communication with juniors is critical, especially if you want to differentiate your school.

Let me be clear about what I mean. If you have been sending juniors emails, letters, and postcards from the Office of Admissions stuffed with facts, figures, bullet points, and event notifications, you're not standing out from the crowd. **Prospective students want messages that feel personal, as well as being engaging and informative.**

In fact, personalization is the number one thing students want more of from colleges and universities during their search. They are tired of feeling like they're constantly being marketed or sold to. They want to feel special, and they want to feel that you understand this process can be scary, confusing, and should be all about their wants and goals. It all starts with your first contact message. Let's walk through the kind of communication it should be, who it should come from, and more.

Give thought to the goal of your first contact piece. I would argue it should get a student's attention, create engagement, and start the process of building a recruiting relationship – not to push them to visit or apply, immediately.

When we are asked to audit a college's enrollment communications plan, the biggest problem I see with most first-contact pieces is they look and sound like **99% of their competitors**. Because they are blandly generic, and they scream, "This is a mass message. It is impersonal, and there is nothing special in it for you!"

So what does this generation of students want right from the beginning of their college search? For the past two years, Tudor Collegiate Strategies conducted ongoing focus group surveys, collecting data and insight to improve your first contact communications.

Who should communications come from?

If you're trying to personalize the recruiting process (and that should always be a goal for enrollment leaders), every single email, letter, and text sent, starting with your first contact message, should come from a person, and not a general Office of Admissions account. 74.1% of students said they would prefer to hear from their admissions counselor first, not the Director of Admissions, a faculty member, or a current student. The only exception would be a recruited student-athlete. Their first contact message should come from a coach in their sport.

What kind of communication is best for initial contact?

40.6% of students think a college or university should send an email as their first initial contact message to start the process. A letter was a close second, with 37.7% preferring that medium.

Here is some additional context about our survey on preferred forms of initial contact. For almost seven years now, email and letters remained neck and neck, with a letter holding a slight edge as the preferred medium. In 2020, the email finally surpassed a letter, although it's by a very small margin, as you can see.

Though email "won" by a small margin, students continue to tell us that a letter in the mail is a tangible, low-pressure interaction. Most believe a letter takes more effort than an email, so they view it as a more personalized form of communication.

If you have the budget, my recommendation is to segment your list of students and send a letter to any high-ranking inquiries, with the rest receiving the same message as an email.

What should that first contact message say?

Use a conversational tone throughout your letter or email. When you use a bunch of big words and phrases or write in an overly formal tone, students tell us that messages sound fake. That leads them to believe your communication is a mass piece written for thousands of other students and not them, individually.

Don't start messages with "Dear." It is outdated and impersonal language that again screams this is a mass message. Start with either "Hi <First Name>" or "Hey < First Name>."

And finally, you should not list a bunch of facts and figures about your school, along with multiple hyperlinks if it's an email, or include multiple calls to action in the body of your message. Facts, figures, and too many calls to action will not aid you in your goal of creating a communication that feels personal.

IF YOU HAVE THE BUDGET, MY RECOMMENDATION IS TO SEGMENT YOUR LIST OF STUDENTS AND SEND A LETTER TO ANY HIGH-RANKING INQUIRIES, WITH THE REST RECEIVING THE SAME MESSAGE AS AN EMAIL.

Instead, consider incorporating these points:

- Acknowledge the college search process can be scary and confusing (even more so because of COVID-19). Share that your goal as their admissions counselor will be to provide information and make the process easier.
- Acknowledge that you don't know much about the student and their interests. You don't know what they already know – or would like to know – about your school. And, you are not sure where the student is at in their college search process either.
- Communicate you would like to get to know the student. Share some brief information about different aspects of your college or university's student experience and what makes it enjoyable. Doing this allows students to figure out if what your school offers will fit with what is important to them.
- Your call to action should be one singular thing — and it should not be an immediate push to visit/do a virtual visit or apply. Here's why. When you tell a student, "Come visit campus," or ask them to "Sign up for a virtual visit" in the first communication, potential students often feel like you are pushing them to take an action they may not be ready to do. Instead, I recommend asking for a response to a direct question. Pick something that would be helpful for you to know, and make sure it's something that isn't hard for the student to answer – meaning they don't have to think too long to come up with an answer. Two examples are, "What scares (or concerns) you the most about your college search?" and "What does the perfect college look like in your mind?"
- Clearly explain how you want the student to respond with their answer. If you're sending a letter, asking the student to send you a quick email back with their answer is effective. If you are sending this message as an email, simply ask them to reply and tell you what they think or how they feel.

When your first contact communication is an email, your subject line should feel personal by asking a question, making a statement, sounding helpful, or creating a sense of curiosity. Examples include, "What scares you most?" or "Tell me about your perfect college." or "Finding the right college is hard – I can help."

It also makes sense to create multiple versions of your first contact message, with tweaks at the beginning to let the student know how they entered your system. Make adjustments for students who were part of name buys, have visited campus, or met a counselor at a fair or high school visit, as well as athletic or alumni referrals. All should get a similar but slightly different message, recognizing individual situations.

For students who complete your Request for Information (RFI) form or enter as a stealth applicant, make this initial communication a combination message where you confirm that you received their interest form or application, as well.

If your school has a robust junior communications flow, and you are preparing to shift engaged junior leads to the senior flow, I recommend creating a transition letter or email. Use this in place of the traditional first contact message that kicks off the senior flow to new leads. Remember, you don't want the messaging to feel mass-produced. By not acknowledging the existing relationship as you transition to your senior messaging, you risk unraveling the great work you have done to this point.

In your transition message, recognize the changeover that's about to take place (from their junior to senior year), and explain that for a lot of students, this is the time when the college search starts to get "real." Then, follow many of the same bullet points I previously outlined.

If you follow the blueprint I've laid out for you, I'm confident you'll see increased engagement, immediately. Plus, your counselors will be able to start cultivating that all-important recruiting relationship before many of your competitors attempt to.

Jeremy Tiers is the Director of Admissions Services for Tudor Collegiate Strategies, a Higher Ed partner that helps colleges and universities grow enrollment through personalized and engaging communication plans and trains their staff to be more effective recruiters and leaders. He is a familiar speaker in college admission, enrollment management, and marketing circles. Contact Jeremy at jeremy@dantudor.com.

I NEVER EXPECTED TO BE *HERE*

By Jessie Hanson, M.Ed.

Like most people, I didn't expect to end up working in higher education. And I certainly didn't picture myself living in rural Northern Minnesota.

Though I grew up in Minnesota and went to college in my home state, I always thought I would move to San Diego and waitress by the ocean until I got serious about my career. Then, I would move to New York and work for a big-name corporation with a towering headquarters surrounded by the big-city hustle and bustle. In the picture in my head, I took trains and carried a briefcase.

Didn't happen. Not even close. I live in Crookston, Minnesota. It's a 30-minute drive to Target and a four-and-a-half-hour drive to a Twins baseball game in the Twin Cities. My husband is a farmer, and I like to give him a hard time about only having two stoplights in town – especially when he complains about traffic as we roll up the ramp for the 94 and 494 highway intersection.

I'm an extrovert. After my husband and I got married and moved here, there were days when I didn't see a single person walking on the street. And I panicked. *Where would I work? How on Earth would I find a career that I love?*

When I got my first job in higher ed, I became revitalized. I worked in a place where there were people (and young people at that)! I discovered I loved the energy of being on a college campus, not as a student, but in a role where I felt I genuinely made a difference.

After about a year, I realized working in Admissions wasn't just a job for me – it was what I wanted to do for my career. The next thing I found myself doing was enrolling in a graduate program and daydreaming about possible enrollment and admission jobs.

Fast-forward four years, and I am now in an Interim Director of Admissions role at the University of Minnesota Crookston. This is where the fun begins.

The University of Minnesota's higher education system comprises five campuses: Twin Cities, Crookston, Duluth, Morris, and Rochester. The Crookston and Morris Admissions offices are collaborating to strengthen recruitment.

Enrollment is extremely competitive in Minnesota, and resources are limited. Since Crookston and Morris are both small campuses located three hours apart in rural regions, the Chancellors at both institutions decided to innovate and combine efforts when a key enrollment leader turned in his resignation. Though the two schools have different campus identities, we made one Admissions organizational chart, allowing us to share resources between Admissions offices.

Through the changes, I have learned a lot about myself and my colleagues. When I first got the news about the collaboration, the thought of a new challenge and a new opportunity to design and build something that had never been done in our University system before got me excited.

I reacted by jumping on board and fully committing. I embraced the change as an opportunity. By choosing that response, I felt like I was an integral part of the change, rather than feeling like it was out of my control and happening *to me*. I saw it as a chance to hop into the driver's seat and guide my career. Some colleagues shared the excitement, but a few were more resistant – or even in denial about what was clearly happening.

I felt myself getting frustrated, wondering why resistors weren't as excited. Then I realized what co-workers were experiencing was *normal*. What dreamland was I living in, thinking everyone would jump right on the bandwagon? I had to remind myself repeatedly that everyone reacts to change differently, and going through another change in a year that had already been flipped upside down by COVID was not something to gloss over.

My next big revelation about the transition came after several months juggling Slate, holistic review processes, separate applications, comm plans, branding, vendor contracts, and BUDGETS! That's when another "aha" moment hit. Somehow, I needed to switch from spending all day spinning plates to focusing on our team's strengths and building each individual's capacity. I needed to invest time in our people, and a successful transition would only happen if we all bought into a shared vision.

I am a doer, so changing from a manager role to a leadership role is not easy. But when I step back, let others take charge, and watch people evolve and grow in their roles, it is exciting; and I love mentoring as part of my job.

HIGHLIGHTING ENROLLMENT'S RISING STARS

Long ago, when I first joined FUEL as president, I said to Mike Wesner, our founder, how important young professionals are to the enrollment ecosystem. After all, it is these people who will step into the director and VP slots one day, carrying the torch forward. So, I am particularly excited to start a Rising Star submission in *Octane*.

It's important to provide an outlet for young professionals who want to dip their toe in writing and publishing. (If you are one such individual, reach out to me at jacqui.elliott@enrollmentfuel.com so we can get you going!)

Jessie Hanson is our first Rising Star submission. I met Jessie when she reached out to me in her new Interim role for a discussion about the next steps for her office. During the past months, she has wowed me with her insightful questions, her drive, and her passion to evolve and advance as a leader. Enjoy reading about her personal journey.

Like most colleges, change is the only constant. When I say that our Admissions Office has been through a lot of change, I mean we have been through MASSIVE change year after year. This experience is aptly described by Dr. Bruce Tuckman's "Stages of Group Development" model. According to Tuckman, as teams mature as a group and develop abilities, leaders change leadership styles, and groups progress through five stages: Forming, Storming, Norming, Performing, and Adjourning.

For the past few years, the degree of change has locked us in a vicious cycle of Forming, Storming, Forming, Storming, Forming, and Storming. As a team, we needed some anchors of stability and a culture shift. Changing a culture doesn't happen overnight, and I knew I couldn't change it alone.

I formed a Strategic Admissions Team, consisting of me and four employees who had displayed exemplary leadership over the last few years. The team's purpose was to review our unit's performance and develop strategies aligned with our University's mission, vision, and goals. We needed to move our team out of our Forming/Storming funk and into Norming and then Performing to create synergy.

We collaborated to develop our core values, goals/objectives, and rules of conduct for our leadership meetings. In meetings, we discuss admissions goals, set policies, and look at data. More importantly, we check in on everyone's wellbeing, gauge positivity within the office climate, squash rumors, and keep an eye out for burnout.

These meetings last two hours and take place every week. We are a lean staff. At first, I was worried I was asking for too much time out of people's day when we already have a lot on our plates. But as the weeks passed, we started to notice improvement within the office. Things began to normalize, helped by planned team-building activities and small changes that brought cohesiveness into focus.

Every person in our office is committed to the overall success of the team and campus. To face the avalanche of changes compounded by the pandemic's difficulties, we need a strong, resilient team. The biggest lesson I've learned over the last several years is that strong teams start with a healthy culture. People can implement change or block it. A healthy culture creates commitment and trust, and both are needed during times of change, so the rails of revision don't fall off the track.

I am proud of our team and the direction we are headed. The collaboration with the Morris campus will make both campuses stronger. Have we reached a point where we can expect no other significant changes to occur? That is unlikely, but as a colleague said, "We're always shooting for the moon, and though we'll continue to get set back, we are always a little further than when we first began."

One other point to mention…I am a recovering perfectionist who has had to learn to be comfortable with imperfection at times because sometimes what gets done is better than missing opportunities because you need a task to be perfect. I encourage people to make good mistakes.

Much has already come from the exciting collaboration between the Admissions departments at Crookston and Morris. We are getting further faster than if I had to build teams and systems from the ground up. I am committed to building a strong foundation on the bedrock of transparent communication, my commitment to the development of our team, and making time to foster relationships.

I have also learned I will achieve more as a leader if I am willing to step out of the way.

Jessie Hanson, M.Ed., held her first position in enrollment management when she took a job as a Data & Communication Specialist. In that role, she discovered she loved the challenges and energy of enrollment management. Today, Jessie serves as the Interim Director of Admissions at the University of Minnesota Crookston and will soon be transitioning to the "Director of Outreach Initiatives" for a campus admissions collaboration between the University of Minnesota Crookston and the University of Minnesota Morris campuses. Jessie's husband, Wade, farms sugar beets, beans, and wheat, and they have two young boys, Cass and Haydon. Contact Jessie at jmhanson@crk.umn.edu.

Tuckman's Stages of

GROUP DEVELOPMENT

Bruce W. Tuckman, Ph.D., was a psychological researcher who studied group dynamics. In 1965, he published a theory known as "Tuckman's Stages of Group Development" with four phases (Forming, Storming, Norming, Performing). A fifth stage, named Adjourning, was added in 1977.[1]

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

01 STAGE 1: FORMING

- Highly dependent on the leader, telling people what to do
- Individual roles and responsibilities are unclear
- Little agreement on objectives
- Processes are often ignored
- Members test the tolerances of the leader and the system

02 STAGE 2: STORMING

- General lack of agreement on group decisions
- Compromises must be made to enable progress
- Clarity about purpose increases, but still many uncertainties
- Factions form and power struggles can occur
- The leader coaches to "sell" members on changes

03 STAGE 3: NORMING

- Consensus forms among the team members
- Roles and responsibilities are clear and accepted
- Unity emerges with group agreement on big decisions
- Processes develop
- The leader facilitates and enables
- Leadership responsibilities are shared amongst the team

04 STAGE 4: PERFORMING

- Strategic awareness supported by a shared vision
- The team has a high degree of autonomy, making decisions based on agreed-upon criteria
- Disagreements result in favorable resolutions
- The team works toward achieving the goal in harmony
- The team does not need to be instructed or assisted on tasks
- The leader delegates and oversees and focuses on personal development for their staff

05 STAGE 5: ADJOURNING

- The task is completed, and the group's purpose is successfully fulfilled

Your Lucky 13

Finding Leads for Undergrad Programs

By Lisa Branson, M.Ed.

Undergraduate recruiting success depends on building a list of viable leads who show interest in attending your school so that you can market to the list. When I was tasked with building the a pool of inquiries in my enrollment management positions, I depended on four tried-and-true methods: purchasing lists of test-takers, visiting high schools, manning booths at college fairs, and hosting campus visits. My efforts were supported by those of the marketing department, who ran advertising campaigns and managed the website.

Though this worked well for years, the foundation of my then approach has begun to show cracks. They are caused by shrinking marketing budgets at many institutions, resulting in the need for enrollment professionals to have a broader understanding of lead generation channels so they can advocate for the resources necessary for success. The "Lucky 13" provides a top-level view of what should be considered when building a lead list for your school.

1 Buy a List

If you are recruiting traditional students, this is still every school's go-to starting point for Student Search. Buying a list is easy and efficient, with budget considerations being one of the main determinants of the number of names purchased.Traditional list buying is not going away. However, student populations will shrink over time, and fewer students are taking tests as more institutions join the test-optional bandwagon. This indicates enrollment professionals need to prepare for future impact.

Student Emails

When leads have been in your CRM for more than 6 months, use software to check the validity of emails. If you send too many emails to invalid addresses, it will impact your institution's domain reputation score, resulting in more emails going directly to the spam folder.

New list providers are already entering the market to fill the void. Generally, names on the new lists have been identified using self-reported information or compiled data. Before buying a list from an untried source, investigate how the leads were collected. Did the lead request information from a school like yours? Or visit your school's profile on a third-party website? And how recent was the activity?

If you decide to try a list from a new source, reduce risk by limiting financial investment. Assign a source code and track lead activity from start to finish to evaluate success and determine if results warrant another purchase.

2 Organic List Development through Web Visitations

Today, a potential student is looking for a school just like yours. If your website is well-optimized for search, they will find you. Now imagine the interested student visits several pages, likes what they see, and bookmarks your website for further consideration before jumping off to visit YouTube.

Websites are powerful lead generation engines, when:

- You invest in SEO, so potential students find you based on "fit"
- You have the technology like enrollmentFUEL's inquiryDETECTOR™ in place to help identify visitors
- A website visit triggers communication flow activity to motivate leads to take the next step

Keep in mind the marketing department often measures success by the number of website visits. While more activity is good, enrollment vice presidents care more about finding ***leads they can convert***. To convert leads, you need to know who visited your site and set up a response path for further communications.

3 College Fairs

For smaller, private colleges and universities, the opportunity to meet and interact with students individually to share information about their institution has been one of the most potent ways to connect with prospective students. In the virtual environment, this has not been replicated. Virtual fairs have visitation "rooms" for students to interact with colleges. In conversations with the admission staff at different colleges, they report few students visit the virtual rooms, possibly because students are burned out with online interactions in a virtual environment.

At enrollmentFUEL, we are optimistic about the return of "normal" college fairs in the future, though timing will vary depending on state mandates governing public gatherings. We expect to see more "hybrid" approaches as well, where college fairs will combine live and virtual events, leveling the playing field so students who can't afford to travel to a fair (or have no transportation options) still have access to information.

4 High School Visits and Local Events

Many high schools are opening back up and allowing high-school visits, with small group interactions. However, it is still essential to follow due diligence protocols before counselors hit the road.

Start by sending communications to potential leads from specific high schools, letting them know you are coming to visit. Postcards are effective because parents often see these in the mail and encourage students to visit your traveling team.

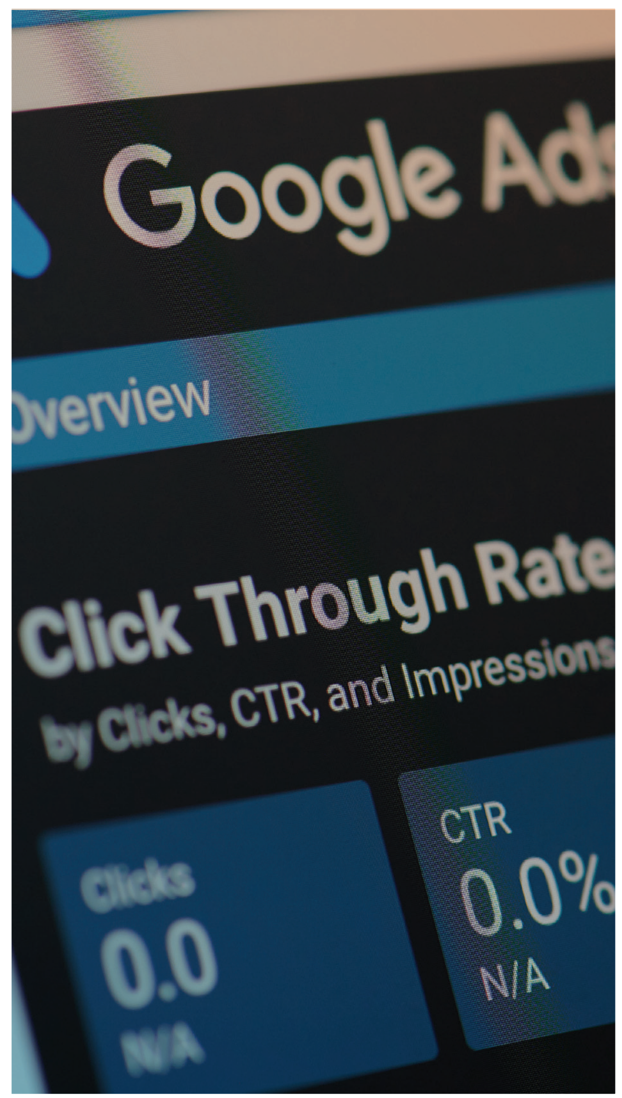
Where possible, classroom visits are a great way to communicate your message to large groups of students. Contact your college and career counseling offices from your feeder high schools. See if there are classes of students with whom you can talk. Perhaps a college preparatory course is being offered where you could deliver your message, or even have a faculty member present a "mock lecture" to showcase your product.

Most of all, think of ways you could be helpful to the high school. Are there admissions topics school counselors would like you to discuss, like changes in school admissions processes due to COVID? At enrollmentFUEL, we believe people recruit people. As a former sitting VP, presenting general information at local high schools on parent's night was one of my best channels for finding leads who were likely to convert.

5 Campus Events and Tours

Attending an event or taking a tour, either on campus or virtually, indicates interest because it requires planning and time. Visit campaigns are still effective, and leads who come in through this channel deserve plenty of attention.

Many campuses have developed great self-guided tours – but you want to be sure you can capture these leads. For example, if you offer an audio tour, ensure you capture your lead by requiring potential students to complete a simple online form in order to download the recording (or video).



6 Running Ads in Directories

If you are particularly strong in an academic area, or have a distinctive that would connect with a specific audience, you may want to consider running ads in a directory. To make this strategy pay off, you need a directory optimized for search in the specific area that will benefit you—and an ad that is well-matched to your intended audience. The goal is a click, as that indicates interest. For example, if a university wanted to find more bioengineering students, they would want to find an online directory referenced by students searching for STEM or bioengineering programs.

7 Look-Alike and Profile-Based Modeling

Running look-alike modeling and profile-based lead generation campaigns can be effective ways to develop a lead pool. In look-alike modeling, historical data is run through regression analysis to identify a best-fit lead profile. Household-level data is analyzed, with criteria such as geography, educational level, occupation, and many other identifiers to develop the model. Then, once the model is created, similar households are identified and targeted (most often for digital advertising), though you could also use direct mail.

Profile-based lead generation is primarily built through display and social media advertising platforms. These campaigns allow colleges and universities to select from hundreds of attributes to build a target audience that fits the institution. This strategy is one to try when there is not enough historical data for a statistically valid model.

8 Digital Advertising

At enrollmentFUEL, we work with multiple schools on Student Search for graduate programs. As enrollment professionals know, list buys in the graduate space can be problematic. There are fewer names available, and timelines between test-taking and attending school can vary widely by individual.

FUEL uses digital advertising to help institutions find new leads for graduate programs, and it works well for undergraduate programs, too. Three options to consider for lead generation are:

- Google Ads: Your text-based ad pops up when potential leads are searching for information on the web
- YouTube Ads: When a potential student decides to watch on YouTube, pre-roll ads gives you the dual benefits of reach and targeting
- Contextual display ads: An ad with an image and call to action appears when it is contextually appropriate to show the ad
- Social advertising: Display ads in social channels show up in an individual's social feed based on defined parameters

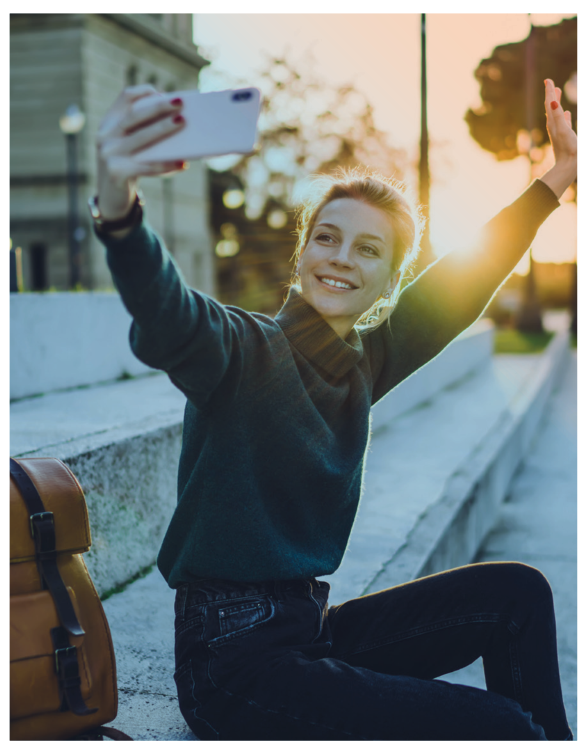
Ad clickers can go to your website or a landing page. Digital advertising works best when landing pages are developed to match the "promise" made by advertising content. Landing pages must deliver a good user experience, have a strong and **obvious** call to action, and make it easy to complete the next step. Beware of lackluster pages requesting an overabundance of information. Potential students lead busy lives and quickly lose interest in burdensome processes.

9 Traditional Advertising

Radio, TV, and billboards are traditional advertising channels. If you have the budget, they can create brand awareness while helping you find leads in a large audience. Asking interested leads to "text this number for information" is a simple and effective call to action.

10 TV Advertising

Connected TV (CTV) advertising refers to placing ads on Roku, Sling TV, Hulu, and other streaming channels. For many schools, reaching "cord cutters' is a better option than traditional TV advertising because you can start with a smaller budget. You can also target your ads at households based on location, or by using behavioral or demographic criteria. We are currently running these campaigns for clients and will be sharing more about best practices for this option in the coming months.



11 Building Relationships with Independent Educational Consultants

An independent educational consultant's goal is to find the right place for the student, where he or she fits in and feels at home. Since these professionals represent a direct pipeline to recruits, it is worth including them in your CRM and marketing to them. Regular email and direct mail touches keep you top-of-mind, and specific events to this group can also be beneficial.

12 Referral Programs

Your alumni, board members, administrators, and professors are passionate about your institution. These brand ambassadors are already talking your school up in their communities and encouraging students to apply. Consider what is already taking place, and look for ways to support their efforts. Think about adding a page about referrals to the website, giving referred students a financial incentive, and marketing to key stakeholders to increase referrals. Getting key stakeholders on board for a "recruit a student" campaign will pay off for you.

13 Influencer Marketing

More and more colleges and universities are quietly joining the ranks of institutions that use influencer marketing to attract new leads. Either current students or alumni qualify as influencers if they have relatively large social media followings. Influencers either post furnished information or create their own posts about campus. In return for posting, influencers receive financial remuneration. Students generally trust peers, so they may find influencer information more believable than campus communications because it is built on word-of-mouth advertising and "social proof" marketing.

Where Do You Go From Here?

There are never enough resources to do everything you want to do. To craft a plan for the upcoming cycle, ask three questions:

- Do I expect to have problems generating enough leads in the upcoming cycle?
- If I need more leads, what am I doing ***now*** to get them?
- Based on the thirteen lead generation options presented here, what gaps should be filled?

As the old maxim goes, what can be measured, can be managed. Be sure every lead has a source code, identifying where the lead originated so you can assess the channel's effectiveness.

No matter your approach to getting leads, the best conversion strategy is a multitouch, omnichannel approach. Why? Because communicating with prospective students is a lot like trying to get my 21-year-old son to put dirty clothes in the laundry hamper. The first time I ask him, he tells me he forgot. The second time I ask, he claims he didn't hear me. The third time, he ignores me. If I am lucky, the fourth time I ask, the clothes end up in the hamper, reminding me that it takes multiple communications (digital ads, emails, postcards, etc.) to convince any lead to take action.

Lisa Branson, M.Ed., is the Vice President for Enrollment Systems at enrollmentFUEL. She is a strategic enrollment manager with expertise in all aspects of Student Search, including forensic lead generation, look-alike modeling, landing page development, and digital advertising, including Connected TV advertising. If you are looking for new and creative ways to energize your lead list, Lisa would love to share ideas. Contact her at lisa.branson@enrollmentfuel.com.

HOW TO IMPROVE ONLINE PRESENTATION SKILLS

By FUEL Staff

WHEN PRESENTING ONLINE, the screen doesn't have to create a barrier between you and your audience. Here are seven tips to make a positive connection.

1. **Present with passion.** Expressing passion doesn't mean you have to adopt an over-the-top delivery style. Passion comes from heartfelt words. When you believe in what you say, it comes across.

2. **Posture matters.** We all spend a lot of time sitting, and it is easy to slouch. Instead of sitting, think about standing when you present online. Keep head and eyes up – and smile!

3 **Practice improving pacing and inflection.** The perfect time to do this is when you are alone in the car. Turn off the radio and practice voice control instead.

4. **Eliminate verbal fillers.** Many of us are in the habit of saying "um" or "you know" when we communicate. These phrases dilute the impact of a presentation. With practice, we all can eliminate them.

5. **Know your "Most Important Thing (MIT)."** Think of your MIT as the headline for your presentation. It is the one thing you want people to know and remember. To be remembered, your MIT must matter to your audience, and offer a vision for a better future when they choose to attend your institution.

6. **Change things up.** People get bored when you are not in the same room. Look for ways to add interest by showing a video, asking people to take a quiz, starting discussions, soliciting feedback, or sharing a story.

7. **Place notes where you can see them without looking down.** Place them on an easel stand or standing clipboard where you can glance at notes without appearing to look down and away from the audience.

The presentations you give can be powerful and life-changing. Along with information, they are an opportunity to demonstrate how your institution transforms lives. It's a moment that matters to your potential students, and giving an excellent presentation makes that moment more satisfying for you, too.

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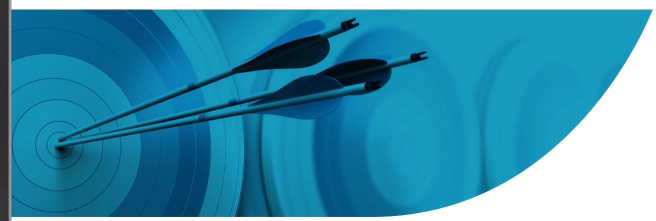

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How do you find leads when fewer students take tests? Look-alike modeling is a solution to consider. Talk to the FUEL Student Search experts about how you can use this tactic to find new leads.

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