enrollmentFUEL'S

OCTANE

Vol. 9. Issue 1, 2025

What New Enrollment VPs Need to Know (And What Established VPs May Have Forgotten)

The Real Cost of the Financial Aid Talent Gap

Pipeline Building: THE CRITICAL ROLE OF SOPHOMORE/JUNIOR SEARCH

Letter from our Founder and CEO

Education is transformative, carrying the power to shape lives, unlock potential, and create opportunities that ripple across generations.

enrollmentFUEL would like to thank Fresno Pacific University in Fresno, California, for allowing us to feature this photo on the cover of our magazine.

Dear Colleagues,

As I write this, I find myself reflecting on enrollmentFUEL's remarkable ten-year journey. Education is transformative, carrying the power to shape lives, unlock potential, and create opportunities that ripple across generations. Over the past decade, the value of what *Octane* offers has continued to grow, especially in today's dynamic and ever-changing environment, where the need for innovative solutions has never been greater.

The path forward requires a blend of time-tested wisdom and bold new thinking. At enrollmentFUEL, we've always seen ourselves as both teachers and students. We share what we know, but just as importantly, we learn from you. This knowledge exchange has helped us expand beyond traditional Student Search to offer innovative solutions—from sophisticated financial aid strategies to employee development, from Slate and CRM expertise to empowering institutions to bring Student Search in-house—to help you meet your budgetary goals.

This latest issue of *Octane* captures exciting developments on the horizon. We're exploring how institutions are embracing microcredentials, integrating AI into Strategic Enrollment Management (SEM), and welcoming fresh perspectives through new leadership. These changes represent both challenges and opportunities for innovation.

Your trust in us as a strategic partner has been invaluable, and your push for continuous innovation inspires us daily. My door is always open for a conversation—whether you want to trade ideas, share concerns, or explore new possibilities. Please don't hesitate to reach out to me at Mike.Wesner@enrollmentFUEL.com.

Yours in partnership,

MIKE

Mike Wesner
Founder and CEO

***Octane the Magazine:* A publication of enrollmentFUEL**
A collection of innovative thoughts and ideas from leadership in all areas dedicated to improving your Strategic Enrollment Management and Student Search strategies. Our goal is to fuel creativity and release positive energy among enrollment professionals.

inside OCTANE

SCAN HERE TO SEE PAST ISSUES OF OCTANE

President's Corner

MICROCREDENTIALS IN HIGHER ED: UNLOCKING NEW PATHWAYS TO SUCCESS

Welcome to President's Corner! enrollmentFUEL is excited to introduce this new feature in *Octane*, designed specifically for top institutional leaders. Here, you'll find insights on trends impacting Strategic Enrollment Management, Student Search, and related topics, along with practical tips to leverage these ideas in ways that benefit your institution.

Learners ages **18 to 20** completed more certificates at higher ed institutions than any other age group during the 2022-23 academic year.

CONCLUSION

Gen Z is driving demand.

Source: https://nscresearchcenter.org/undergraduate-degree-earners/

Just 27% of learners thought that they would learn something upon starting a program, but **94%** did learn something new.

CONCLUSION

Students may get microcredentials for career purposes but also find value in learning.

Source: https://www.edresearcher.net/2023-1

42% of BestColleges' 10th annual online education trends survey participants reported that their institution is experiencing increased demand for microcredential programs.

CONCLUSION

Demand is increasing.

Source: https://res.cloudinary.com/highereducation/image/upload/v1/BestColleges.com/2024_Online_Education_Trends_Report.pdf

In a 2022 survey of over 750 professionals, including nearly 600 individuals responsible for hiring or training for their organization, **74%** reported a rise in job applicants listing non-degree credentials on their resumes.

CONCLUSION

Microcredentials have value for career-seekers.

Source: https://www.bestcolleges.com/research/microcredentials-rise-in-higher-education/

40% of respondents reported that their greatest barrier is not knowing where to start to pursue microcredentials.

CONCLUSION

If your institution offers these, you need to market them effectively.

Source: https://www.insidehighered.com/news/2023/03/03/microcredentials-confuse-employers-colleges-and-learners

The United States is home to **more than one million** unique educational credentials, more than a threefold increase since 2018.

QUESTION

What microcredentials are available at your institution?

Source: https://www.highereddive.com/news/unique-credentials-certificates-over-1-million/638130/

67% of administrators said their institution is actively designing stackable learning with courses and credentials.

QUESTION

Are you taking action?

Source: https://res.cloudinary.com/highereducation/image/upload/v1/BestColleges.com/2024_Online_Education_Trends_Report.pdf

Looking to attract more students with innovative learning options?
enrollmentFUEL can help you market the power of microcredentials to boost enrollment.

SCAN TO CONNECT

QUICK TAKES

FAST *reads and* ***INNOVATIVE*** *ideas to* ***BOOST*** *results*

Reddit as a Recruitment Resource

Every day on Reddit, thousands of prospective students gather to share experiences and seek advice from communities of interest. For enrollment leaders, this dynamic platform offers valuable insights and a genuine chance to make connections. Here's why faculty and staff should engage on Reddit:

1. **The AMA (Ask Me Anything)**: Hosting an AMA allows faculty to engage directly with students on important topics like financial aid, student life, and academic programs, building trust and offering personalized insights.

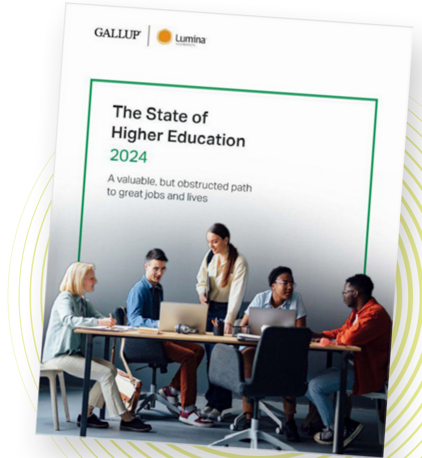
   AMA topic examples include:
   - Department heads discussing their field and related degree programs
   - Financial aid advisors answering aid-related questions
   - Current students answering what a day in their life looks like

2. **Real-Time Research into Student Perspectives**: Directly interact with students and gain an understanding of their concerns during the college application process. Faculty can address these issues in real time, which helps them be better prepared for future inquiries from prospective students.

3. **Threads:** Reddit's discussion-based format uses threads, each covering a specific topic. Students in these threads give first-hand accounts of how they feel about the college search and decision process and discuss determining factors in their final decisions. Popular education-based threads include:
   - r/ApplyingToCollege
   - r/college
   - r/collegeresults
   - r/Professors
   - r/scholarships
   - r/StudentLoans

Scan to schedule.

Contact enrollmentFUEL to learn how your institution could use this powerful social tool to meet your recruiting goals today!



Majority of Americans See the Value in Higher Education

Scan to download the full report.

41% of adults without a college degree believe a bachelor's degree is "extremely" valuable—while 19% merely see it as "somewhat" valuable—totaling to 60% of adults seeing value in a college degree. 94% of non-degreed adults believe some kind of credential—a certificate, degree, etc.—is valuable[1]. Tapping into these value propositions is key to achieving your enrollment benchmarks!

1 Gallup.(n.d.). *The state of higher education*.18 Dec. 2024. https://www.gallup.com/analytics/644939/state-of-higher-education-aspx.

New Podcast: *Accelerate with enrollmentFUEL*

Looking for fresh insights and strategies in higher education? Check out *Accelerate with enrollmentFUEL*, the all-in-one podcast for Strategic Enrollment Management (SEM). Hosted by Susanna Lehman and Dr. Lars Farabee, the podcast offers tools, techniques, and conversations to boost recruitment efforts and support student success. Be sure to tune in and discover how to accelerate your enrollment goals!

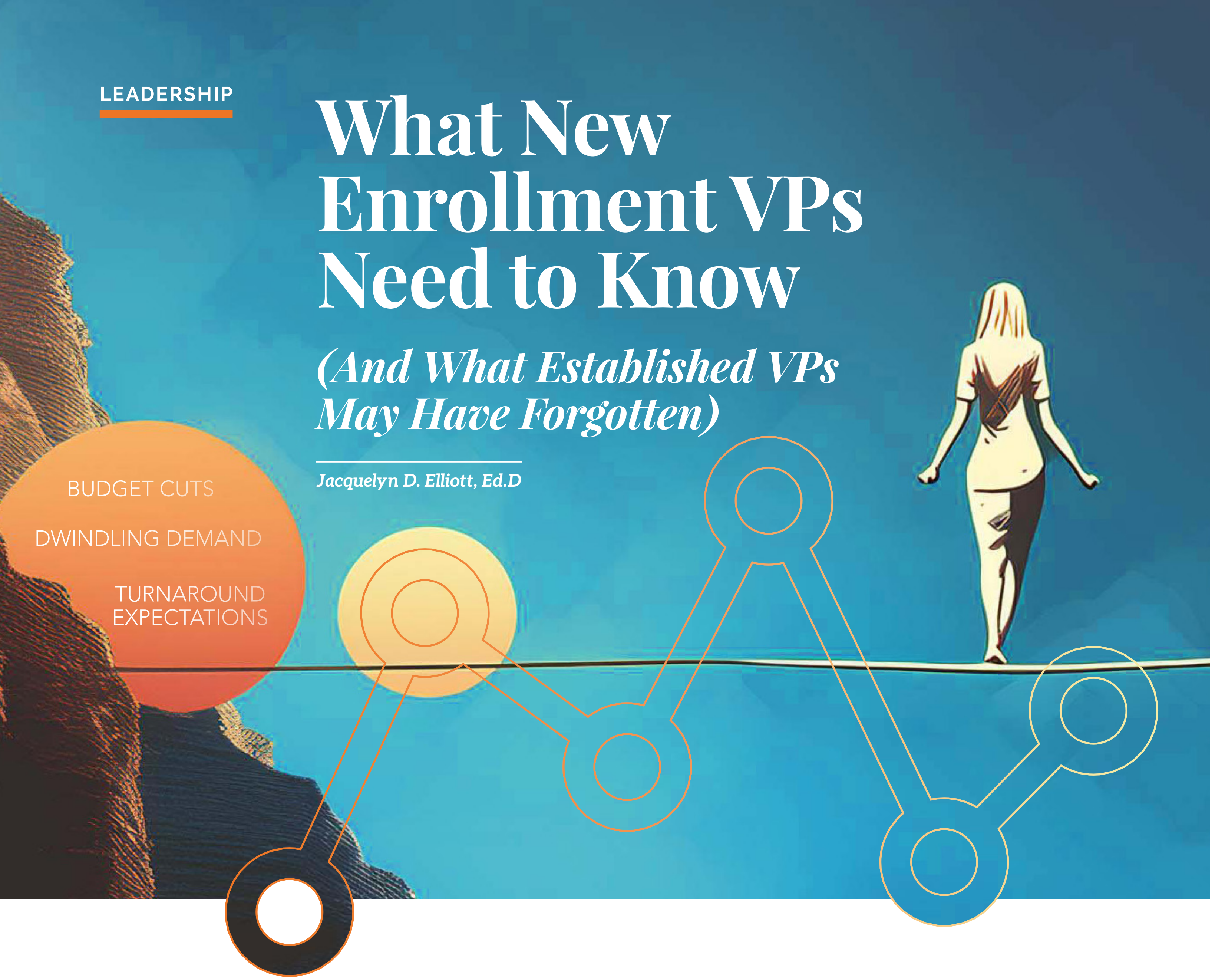
ACCELERATE with enrollmentFUEL

LISTEN NOW

What New Enrollment VPs Need to Know

(And What Established VPs May Have Forgotten)

Jacquelyn D. Elliott, Ed.D



In my role, I'm often in "tip of the spear" meetings with campuses, where I'm constantly reminded of just how many new Vice Presidents of Enrollment are stepping into this role. The turnover feels relentless, with many leaders coming from backgrounds like marketing or faculty—and some without prior experience in higher education. Seasoned enrollment VPs face an evolving set of challenges: decreased budgets, dwindling demand, and thinly veiled turnaround expectations. These hurdles are even more daunting for those stepping in without the benefit of prior experience. So, for all you enrollment VPs out there, this one's for you!

Effective recruitment is one of the linchpins of meeting Net Tuition Revenue (NTR) and budgetary goals, so having a clear sales strategy is critical. Whether you're a brand-new VP (from within or outside the industry) or a veteran looking for refreshed ideas, these concepts can help you navigate today's landscape and achieve your institution's goals.

Laying a Solid Foundation with Key Principles & Insights

Enrollment VPs should start with a careful review of institutional goals and budgetary targets. (I suggest doing this before you even take the position. If you are not set up for success on this front, run the other way.) This ensures that recruitment goals align with the broader institutional ***mission***, values, and financial objectives. In addition to reviewing value-based priorities, enrollment VPs should collaborate closely with finance and administration colleagues to better understand revenue needs and expectations. If you can't get buy-in for this sort of upfront collaboration, I don't think I need to tell you this is a **major** red flag (but I am calling it out because it's a **major** red flag)!

Another tactic for quick success and buy-in is to schedule your listening tour as soon as you arrive. This builds early support from those around you. Just as importantly, take action on what they share with you. Once you've done something meaningful with their input, close the loop by communicating what was done and showing evidence it happened. In-person updates are ideal, but an email with the update works, too, if time is tight. End by thanking each person for their thoughtful contribution—it goes a long way.

Beyond strategic thinking, your foundational planning should heavily emphasize building a **high-performance** team at every level. As an enrollment leader, you must prioritize recruiting highly skilled team members, providing reliable leadership, and fostering a results-oriented culture. Hiring road runners who leave the organization after a few travel seasons will not work as a model for long-term success in the new landscape. Reimagine hires as individuals responsible for the institution's most important aspect—closing sales and bringing in revenue.

Interview these people with clear expectations up front using a behavioral interview methodology. Ask questions about past KPI results and outcome measures, and use the STAR method (situation, task, action, result) to better ensure one's ability to meet the critical goals assigned to them. If your Human Resources Office allows it, consider an assessment like the *Culture or Predictive Index* to help you better forecast if the hire is the right choice. If you want more information on using assessment tools, contact enrollmentFUEL and we can provide information.

Leading a team successfully goes beyond just the hiring phase; it's also about setting clear expectations, providing relevant, **ongoing** training, and setting goals with clear metrics and accountability. Let me pause here to say two more things about this because it's really important. First, ongoing training means you don't spend two weeks in orientation and consider the individual trained. Onboarding in enrollment means the process is done as the various enrollment cycles emerge, and it takes a full year to do it correctly. Again, this is another red flag alert if you feel you have trained someone in a few weeks. New members of your team won't know what they don't know until they have experience in their role.

Secondly, I've noticed that most institutions do a decent job of setting the metrics to track, but they often fall short on accountability. Successful enrollment VPs know how to hold each person accountable for their part in the overall equation. When even one person doesn't pull their weight, it can throw the entire team off course. It's an age-old enrollment challenge—but it's entirely fixable. So, get ahead of that problem and ensure everyone is pulling together.

Once your goals are set and your team is aligned, what's next? Bring a data-informed focus to your enrollment strategy. Being data-informed goes beyond just gathering numbers; it means having the literacy to leverage data for smart decision-making. Use psychographic and demographic data to create your "ideal student" profile and shape recruitment strategies that target leads who match. Your team can tap into data to understand regional, national, and international enrollment trends, while also gaining insight into competitor strategies—and identifying how your institution can stand out.

If you haven't identified true differentiators, make this your top priority in your new role. Figure it out—FAST! If they don't really exist, that's a serious tocsin. Act quickly to share this with your executive leadership team and work together to identify (or create) a few core differentiators to build your pitch around.

(And remember, it is a sales pitch—one that has the power to transform your students' lives.)

Building a Sales-Minded Culture in a Non-Sales Environment

One of the biggest challenges I've seen among enrollment VPs is pivoting to a sales mindset. Enrollment leaders are essentially managing a sales team, and the "product" they're selling is the value of the educational experience. Many admissions counselors and other enrollment staff may not view themselves primarily as salespeople, yet their role requires similar skills to engage, persuade, and build relationships with prospective students and parents. They have to ultimately get the sale across the finish line by securing an enrollment deposit and having the student matriculate.

Enrollment VPs have the responsibility of shifting this mindset—but how? Here, I recommend five concrete strategies for success. (If you want help with any of these, reach out, and I will talk through any of them. This is *so* my jam!)

1. Train for a Sales-Oriented Approach

Provide real sales skills training for admissions teams, focusing on active listening, relationship building, empathetically handling objections, and articulating benefits. It's essential to train your staff to communicate value persuasively. This training should underscore the importance of follow-ups, responsiveness, and personal engagement in securing student commitments. Why? Because if we claim to deliver value, yet prospects don't feel that value from the very first interaction, they'll doubt it exists on campus when they enroll. Remember, we're in the experience business.

2. Foster a Collaborative, Goal-Driven Team Environment

Establish specific, data-driven goals and expectations for individual and team performance, with enrollment targets and benchmarks assessed and shared daily, weekly, and monthly. You need a director or AVP focused solely on one mission—"Meet our goal and pivot quickly if we're off track." Don't distract them with endless small tasks. Foster teamwork and knowledge-sharing by allowing experienced team members to mentor others on relationship-building techniques. Consider using incentives, gamification, or recognition programs to keep the team motivated and focused on hitting enrollment targets. This approach should even influence staffing decisions: assess and, if necessary, restructure the roles of direct reports. While it's hard to acknowledge (and even harder to execute), saving a non-performer can't come at the expense of the institution's entire budget—a choice that is all too common for many smaller schools.

3. Use CRM and Sales Tools for Tracking and Personalization

Implement CRM tools to track student engagement, tailor communications, and manage follow-ups in a structured way so nothing slips through the cracks. As previously discussed, encourage a data-informed approach, using CRM data to identify high-interest prospects, customize messaging, and optimize the timing of outreach for better results.

4. Create a Student-Centric Sales Pitch

Train your team to understand each prospective student's needs and interests, giving them the tools and training to craft individualized conversations that showcase how the institution can meet those needs. Focus on outcomes, student experiences, and campus community aspects that align with students' aspirations. These elements can more successfully communicate your institution's value proposition.

5. Harness the Power of Social Media and Technology

Strategic use of cutting-edge technology can transform your enrollment team's approach. Beyond leveraging CRM tools to personalize communications, consider using social media, virtual events, and targeted digital marketing campaigns to enhance student engagement. Ensure your team is prepared to stay ahead of digital recruitment trends, including chatbots, AI-driven analytics, and immersive virtual experiences.

While building a sales-minded culture is essential, it's important to recognize that this approach may feel foreign to others within the institution. It's time to re-educate the administration on the changing landscape and the need for a more business-like approach in recruitment to stay competitive. As the VP of a school that relies on meeting recruitment goals, ensure you have clarity upfront about whether your president supports this philosophy and is willing to champion it as part of the institution's evolving culture. If not, it may signal a misalignment that could impact your success in the role.

Opportunities a Seasoned VP Might Overlook

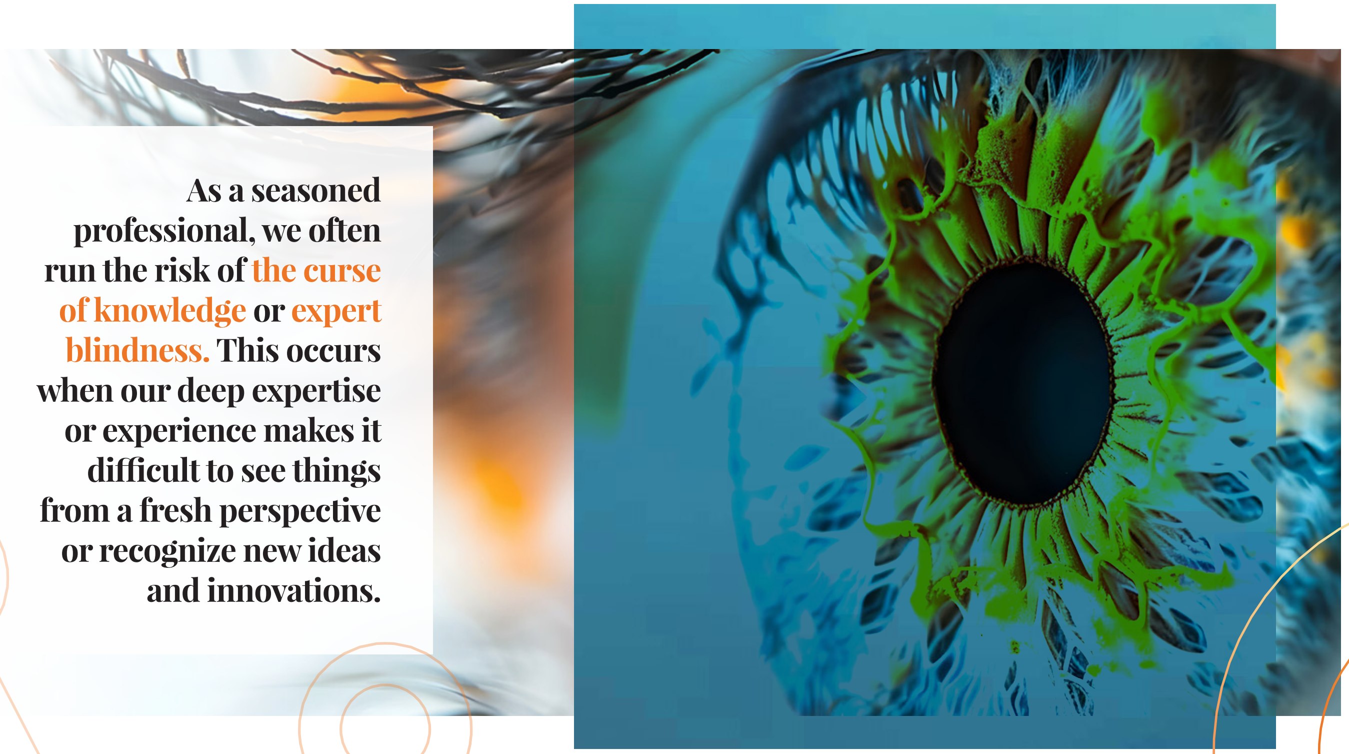
If you're an experienced VP of enrollment, you might look at these strategies and think, "Of course, I know that already!" However, even the most seasoned leaders can benefit from an occasional rethink and reconsideration.

It's easy to get caught up in the avalanche of daily tasks and overlook the importance of investing time in relationship-building with key stakeholders. Actively engage faculty, alumni, and current students in the recruitment process and find ways to partner more effectively with departments across campus to create a unified recruitment message. (It's an obvious goal, but delivering a best-in-class effort is challenging yet essential for maximum impact.) Consider how others outside the enrollment office can help shoulder the weight toward the shared goal of NTR. This also includes understanding your role in relation to the chair of your BOT committee and securing adequate budget allocations to drive results.

It may also be helpful to revisit your yield and retention strategies. Retention is just as important as new recruiting for maintaining revenue. Evaluate and improve yield activities to convert admitted students to enrolled students. And remember—it's always better to react early and get a plan in place so you're not caught off-guard later.

As a seasoned professional, we often run the risk of **the curse of knowledge** or **expert blindness**. This occurs when our deep expertise or experience makes it difficult to see things from a fresh perspective or recognize new ideas and innovations. Our familiarity with established practices, models, and solutions can create a mental "blind spot," making it harder to consider unconventional approaches or disruptive ideas that don't fit within our existing, well-established frameworks.

So, I remind everyone in this seat (including me) to stay alert to **innovation blindness** or **status quo bias**. As experienced individuals, we can sometimes resist change because the new idea seems risky, unnecessary, or less effective than the proven methods we already know. Stay alert, open, and energized to and by these new opportunities, a sales mindset in higher education being one of them.



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Final Thoughts

An enrollment VP's ultimate aim is to establish a sustainable enrollment model that fosters a successful, diverse, and inclusive student body. Achieving this means implementing attractive academic and co-curricular programs, strategically managing financial aid, and building a team committed to continuous improvement. Set measurable KPIs to evaluate each initiative and review data regularly to refine and adapt strategies.

If there's one takeaway, let it be a reminder of just **how essential you are to your school's success** and the livelihood of those who work there. Whether you're newly appointed or a seasoned pro, you have the power to drive that success! Embrace continuous learning, be open to change, and stay focused on balancing financial sustainability with student success. You've got this!

Jacquelyn D. Elliott, Ed.D, is President of enrollmentFUEL. Her Strategic Enrollment Management expertise has led multiple colleges and universities to reach record enrollments. She consults with various institutions on a wide variety of C-Suite topics with a focus on developing strategies to achieve financial objectives. Her driving passion is creating educational foundations to support the diverse dreams and goals of student populations. She can be reached at Jacqui.Elliott@enrollmentFUEL.com.

THE REAL COST OF THE FINANCIAL AID TALENT GAP

Tony Erwin, BA

It's been a challenging few years for higher education professionals, with financial aid offices nationwide facing an unprecedented talent exodus. The sweeping changes to FAFSA, coupled with mounting regulatory complexities and multiple "once-in-a-career" challenges, have pushed many seasoned professionals to their breaking point. These aren't just routine staffing concerns—we're witnessing decades of institutional knowledge walking out the door.

The numbers tell a sobering story. One May 2024 study found that over half of financial aid professionals report being likely to seek new employment in 2025, largely over concerns surrounding pay and flexibility.[1]

For institutions, this brain drain comes at a critical moment in an increasingly complicated and surveilled landscape. The 2024 FAFSA transformation demanded expertise precisely when seasoned professionals became hardest to find, and the effects are still ongoing as the next cycle kicks into gear. Many offices are now staffed by well-meaning—but less experienced—professionals, creating a knowledge gap that ripples through every aspect of student service.

The question isn't just how to fill empty seats, it's how to rebuild sustainable financial aid offices that can weather the next storm while supporting both students and staff. The solution requires a top-to-bottom rethinking of how we value, support, and retain these essential higher education professionals.

The Risks of Losing Qualified Staff

A lack of qualified, experienced financial aid leaders and staff creates several oft-discussed institutional risks, including:

- Potential for lost enrollment because of diminished customer service and lack of timely financial aid offers and/or disbursements.
- Fines and liabilities levied because of non-compliance with Title IV federal student aid laws, regulations, and sub-regulatory guidance.
- Reputational impact for possible public-facing financial aid failures, such as delayed student refunds or major compliance findings.

The growing talent and experience gap was on full display last year, when a second once-in-a-career challenge arrived: the 2024-25 FAFSA rollout. This process strained every part of the financial aid delivery system, including the demands for outreach and support to students and families. Many financial aid professionals are still working with families to resolve 2024-25 FAFSA issues at the same time that they need to ramp up efforts to help with 2025-26. The botched rollout not only caused enormous headaches and lost opportunities for students and institutions alike, but it also disproportionately impacted low-income, Black, and Latino communities at a particularly tumultuous time for college diversity and inclusion.[2]

These ripple effects illustrate a less-discussed aspect of underinvestment in financial aid professionals and processes: the loss of opportunities that are hard to get back. While institutions are struggling to fill existing financial aid leadership and staff roles, the need to expand the work that is often associated with financial aid professionals is growing. Too often, institutions see only the technical elements of the financial aid process and not the full picture of the duties of a financial aid professional, which include relationship building and counseling.

Building Connections as a Core Job Duty

As far too many institutions struggle with enrollment, we simply cannot miss the chance to provide meaningful, personal, and long-term engagement with families regarding college financing. Simply put, we worry about the students we lose when financial aid isn't done well, but should we not also think about the students we could gain if it was done exceptionally well?

Making an enrollment decision involves **trust** that the institution is the right choice. Admissions professionals work tirelessly to build those relationships and that trust with prospective students and families—in many cases, for years before the final decision is made to enroll. Building the same

1 "Over Half of Financial Aid Professionals Likely to Seek New Employment in the Next Year." National Association of Student Financial Aid Administrators. 8 May 2024. https://www.nasfaa.org/over_half_of_financial_aid_professionals_likely_to_seek_new_employment_in_the_next_year.

2 Carrasco, Maria. "Report: FAFSA Rollout Disproportionately Affected Low-Income Black and Latino Students." National Association of Student Financial Aid Administrators. 3 July 2024. https://www.nasfaa.org/news-item/34066/Report_FAFSA_Rollout_Disproportionately_Affected_Low-Income_Black_and_Latino_Students.

We worry about the students we lose when financial aid isn't done well, but should we not also think about the students we could gain if it was done exceptionally well?

trust needs to happen in the financing process. Financial aid professionals and the knowledge and skills they bring to the table need to be part of the relationship-building process.

We ask families to take a leap of faith and apply for admission often without knowing what their actual cost would be. There are virtually no other major purchases we make that we don't know the price of when we decide to pursue the purchase. Long-term engagement in financial planning for college, the financial aid process, and in financing options are needed to support that leap of faith. One student survey found that 76% of students said the financial aid amount awarded to them and **the overall financial aid process** impacted their college decision.[3] The current model at most institutions does not provide adequate resources for financial aid professionals to get to know families early enough to help them effectively plan, navigate the process, and make good enrollment decisions.

It's also true that the financial aid process is perceived as daunting for families, even those who will likely have few problems getting to the finish line. Who doesn't have a friend, coworker, or relative who has a horror story about the process? Access to assistance is critical: 83% of students say they value having 24/7 support for financial aid questions, while 73% say they would enroll elsewhere if financial aid processing took more than four weeks.[4] In reality, for some families (often the most traditional families), the new FAFSA actually is much simpler. The problem is that the student and family's fear of the process is based on perception and not on the reality.

3 "The Student Voice Report: How Financial Aid Impacts U.S. Higher Education Enrollment and Retention." Ellucian. 2024. https://lp.ellucian.com/whitepaper-student-voice-report.html.

4 Ellucian, 2024.

Finding More Effective Solutions

If we understand the problem, then how do we solve it? Focusing on four key actions can build a solid foundation from which each institution can then address its own distinctive needs.

1. Operate systems more effectively.

Strong, efficient systems can help relieve a bit of the pressure while staffing ramps back up (and even after). Too often, institutions do not invest in or maintain efficient financial aid delivery systems, resulting in professionals doing far too much manual work. Instead, engage with internal or external experts to identify and address systems-related inefficiencies and inaccuracies.

2. Manage people more effectively.

Even the most successful organization can benefit from periodic review to determine what is being done well, what can be done better, and what doesn't need to be done at all. Internal or external experts can conduct a review of the policies and processes associated with admissions and financial aid delivery to determine where improvements and efficiencies can be found.

3. Draw from a larger talent pool.

As with many post-pandemic industries, financial aid can benefit from casting a more creative net instead of relying solely on "what has always been done." Good financial aid professionals are both technically proficient and people proficient. Institutions need to draw talent from both existing and expanded pipelines. For example, institutions might consider using professionals in other enrollment areas, such as admissions or student affairs, to fill existing roles and to expand capacity.

4. Provide more professional development and training.

Talent from all sources can benefit from ongoing development. Harness existing training and professional development opportunities from national, regional, and state professional associations, ensuring your financial aid team is up-to-date with the latest technologies, policies, and trends. Additionally, it may be worthwhile to bring in outside experts to train, coach, and support professionals at every level.

So how do we close the talent gap? It starts with reimagining both the role and the workplace. Smart institutions are already automating routine tasks, enabling hybrid work arrangements, and creating clear career advancement paths. They're also looking beyond traditional hiring pools, tapping into adjacent industries where professionals already understand compliance and customer service. The key is building a sustainable operation that can weather future disruptions while keeping your aid warriors engaged and growing. Because let's face it—your enrollment goals are only as strong as the financial aid team behind them.

Tony Erwin, BA, has nearly 30 years of enrollment management and student services expertise. Tony currently serves as Vice President of Financial Aid Partnerships at enrollmentFUEL. He previously worked as the Principal Consultant of Blue Icon Advisors, NASFAA Consulting. Tony has served as the Vice President for Enrollment Management and Student Affairs at Merrimack College and the Associate Vice President of Enrollment and Dean of Student Financial Services at Northeastern University. In addition, Tony worked with the U.S. Department of Education as a school trainer for 12 years. He actively participates in professional associations, serving in many volunteer roles, and is a proud Certified Financial Aid Administrator who has earned all 17 NASFAA professional credentials. Contact Tony at Tony.Erwin@enrollmentFUEL.com.

PIPELINE BUILDING:

THE CRITICAL ROLE OF SOPHOMORE/JUNIOR SEARCH

Jazmane Brown, MA

Imagine your admissions team facing another enrollment cycle with fewer applications, tighter budgets, and mounting pressure to meet ambitious targets. Does this sound all too familiar? You're not alone. Across the country, institutions are grappling with shrinking demographics and limited resources, making it clear that the traditional senior-year recruitment push is no longer sufficient. But there's a solution.

In today's increasingly competitive higher education environment, reaching students earlier in their decision-making journey is not just an advantage—it's a necessity. A proactive sophomore and junior outreach strategy is now essential for building a robust applicant pipeline. By engaging students and their families early, your institution can foster meaningful connections, stay top of mind, and gain a critical edge. The key to success lies in leveraging technology to deliver tailored experiences that meet the diverse needs of all stakeholders, ensuring your institution thrives in the face of new challenges.

What Are Students Thinking About?

Reaching students earlier during high school requires a better understanding of what's on their minds at different points in time. In the sophomore/junior years, students engage in exploratory thinking.

Exploratory thinking is the practice of openly considering multiple possibilities and paths without immediate judgment, allowing our minds to wander beyond conventional boundaries to connect seemingly unrelated ideas. This expansive mental approach naturally fuels inspiration (by uncovering novel connections) and aspirational goals, helping your potential students envision an alternative future.

Exploration triggers questions. Every question is a window into the student's dreams, fears, and aspirations. By understanding and authentically addressing these questions, you transform from just another college

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option into their ideal partner in achieving life-changing goals, bridging the gap between "Where can I go?" to "This is where I belong."

Establishing Brand Recognition

Early engagement with sophomores and juniors isn't just about getting your name out there—it's about becoming part of their evolving story. When students transition from dreaming about college to actively planning their future, the institutions they trust are the ones who have been genuine partners in their journey, not last-minute arrivals. By weaving your institution's values, opportunities, and unique strengths into their exploration phase, you create lasting mental real estate that's difficult for competitors to displace.

Why is this mindshare so critical? Because in today's oversaturated market, students aren't just choosing between institutions, they're choosing which ones even make it onto their radar. The schools that fail to establish this early presence risk becoming invisible, regardless of their actual merit. Simply put: if you're not in their minds during the exploration phase, you likely won't be in their applications during decision time.

In general, Gen Z is less "brand" loyal than previous generations. Research from *AdWeek* found that 6 in 10 Gen Z consumers report not being loyal to brands at all.[1] Instead, their decision-making starts by consuming content that interests them, then taking inspiration from that. 75% of Gen Z consumers make online purchases based on "creator recommendations."[2] More importantly, these recommendations and influences go beyond traditional advertising of attributes; instead, young shoppers (which students are!) want to see how their choices fit into the lifestyle they aspire to and imagine for themselves.

This translates to "brand recognition" and "brand loyalty" for colleges and universities, too. Marketing to them is less about steering a typical customer journey and more about creating inspirational guideposts along the path they're already interested in. Colleges must meet Gen Z with moments of inspiration and big-picture thinking, delivering content that resonates emotionally and aligns with their vision of the future.

Encourage Students to Explore

Visits are a key component of fostering exploration, but not all students can arrange in-person tours due to financial or logistical constraints. Virtual visit options, which gained significant traction after 2020, are now a necessity rather than a luxury. Robust virtual tools like 360-degree tours, live Q&A sessions, and interactive campus maps make your institution more accessible to students and their families.

These tools allow students and families to connect no matter where they are, broadening access and creating meaningful engagement. When integrated with the "experiential" brand approach described above, this strategy transforms higher ed marketing into a shared experience that guides rather than sells—and that can be key to standing out to today's marketing-savvy students.

Engage with Parents

Parents play an influential role in the college decision-making process, often acting as partners in guiding their children's choices. Effective communication with parents should lean heavily on the institution's value proposition, addressing concerns about affordability, career outcomes, and the overall student experience. By emphasizing a commitment to student success, safety, and support, an institution can build trust with parents and help them see the long-term value of choosing the school.

A multifaceted approach to outreach is critical. Email marketing has become less reliable due to increased restrictions on deliverability, making it essential to diversify communication channels. Creative strategies like targeted digital advertising, compelling direct mail campaigns, and gamified content can help the institution stand out. Digital marketing allows admissions offices to meet students where they already spend time, while direct mail offers a tangible and personal touch that resonates in a crowded digital space. Engaging students with interactive tools, such as quizzes or personalized online journeys, also helps visualize themselves at the institution.

To maximize the outcomes of a sophomore/junior search strategy, refinement is key. Use engagement metrics—such as open rates, click-through rates, and participation in virtual events—to monitor the impact of all efforts. Personalization should drive every communication, as students and their families are more likely to respond to messages that align with their specific needs and interests. Adjust the strategy as needed, using data insights to fine-tune messaging and outreach methods.

Ultimately, a sophomore/junior search strategy is about staying ahead in an evolving higher education marketplace. By prioritizing early engagement, leveraging technology for exploration, and meeting the needs of parents and students through personalized outreach, institutions can secure their place as leaders in the college search process.

1 Baer, Ian. "The Right Way to Target Gen Z: Meeting This New Generation Of Consumers At The Point Of Inspiration." *AdWeek* (via The Free Library). 1 Aug. 2023. https://www.thefreelibrary.com/The Right Way To Target Gen Z: Meeting This New Generation Of...-a0762900860.

2 Baer, 2023.

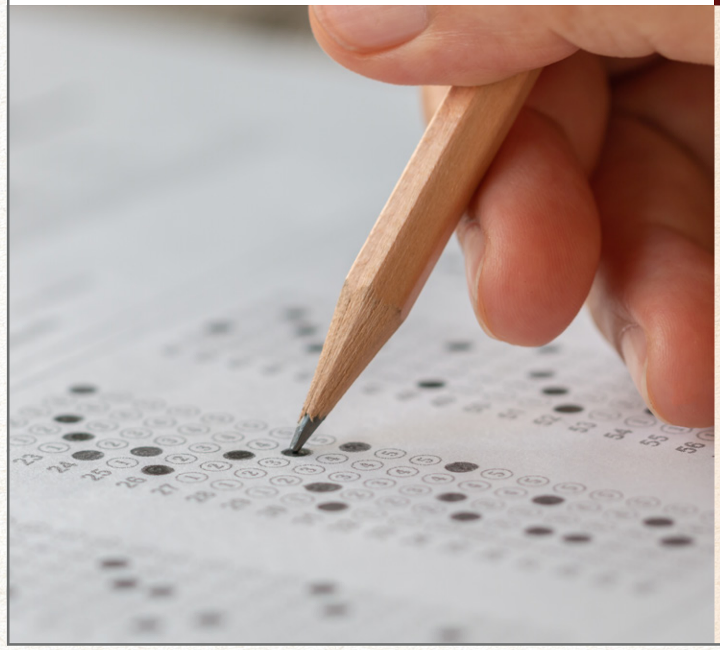
Jazmane Brown, MA, serves as an Account Manager at enrollmentFUEL and has worked in higher education for 17 years. Before joining the organization, she served as the Assistant Vice President for Enrollment Management and Director of Admissions at Xavier University of Louisiana, with prior collegiate leadership roles. Jazmane holds a BA in Communication, and a master's in Public Relations from the University of Miami, Florida. She has served on several SACAC committees, including the Board, and has presented many times. In her spare time, she enjoys listening to the latest hip-hop gospel artists and exploring Europe, where she resides with her active-duty military husband, two daughters, and son. Contact Jazmane at Jazmane.Brown@enrollmentFUEL.com.

What Are Students Exploring?

Students in different years have different questions in mind that your early Student Search should address. The following are some of the most common things they're likely to be thinking about as they explore college options.

SOPHOMORE EXPLORATIONS

- What kind of career might I want?
- What kinds of colleges are there (community, state, private, technical)?
- How can I keep my GPA up?
- Which extracurriculars would look good on college applications?
- Should I take Advanced Placement (AP), International Baccalaureate (IB), or honors courses for junior year?
- Should I try to make informal campus visits if I'm in the area?
- What are my financial aid options?
- Which teachers might write me letters of recommendation later on?
- What do I do to prepare for the PSAT?



JUNIOR EXPLORATIONS

- Am I registered for the PSAT, SAT, or ACT?
- When are there college fairs near me, and should I go?
- Which colleges will I apply to and what admissions requirements do they have?
- What should I major in?
- Which summer programs, internships, or community service should I do?
- When are college campus visits?
- How do financial aid forms like FAFSA and CSS Profile work?
- What's on my resume for applications?
- Have I reached out to recommenders for letters of recommendation?

How to Build a Strategic Case for a Bigger Enrollment Budget:

A GUIDE FOR ENROLLMENT LEADERS

Aaron Porter, MA

Today's colleges and universities are facing budget challenges across the board. In response, a wide range of institutions are looking for places to trim, whether by scaling down faculty sizes, cutting underperforming academic programs, or significantly limiting expenditures.[1]

It's easy to pin the blame on different causes. Some, for instance, might point to the botched FAFSA rollout last year as directly causing some prospective students to drop their enrollment pursuit. Others might note recent studies that show the perceived value of a college degree has declined; a study by HCM + Edge Research, for instance, found that more students believe a certification is "enough" for a good job (as opposed to needing a college degree for a good job).[2]

Regardless of cause, these issues need adequate funding to make changes and keep the institution competitive. Securing larger budgets in an already tight environment is a real challenge for enrollment leaders. That's why we're providing a roadmap to building a strategic case that aligns your budget asks with institutional goals and clear outcomes.

1 Use Data to Tell a Story

When building your case, start with the language everyone speaks: cold, hard data—and plenty of it. Making an impact, though, means doing more than just rattling off numbers. You'll need to be able to place those numbers in context, tracing a narrative that supports your argument and proves your point.

Effectively leveraging data means looking at the past, present, and future through a data-driven lens. Start by analyzing historical trends, including gaps between past targets and actual outcomes. Look at recent data about your current student base and prospects to identify successful (and unsuccessful) approaches with a demographic similar to your current targets. You can use enrollment data to predict coming trends, potential challenges, and demonstrate how your proposed budget would help.

Finally, look beyond just recruiting and enrollment metrics. Leverage retention and ROI data as well. The people who hold the power of the purse are looking for confidence that their spending on enrollment will pay dividends. To convince them, assemble data from your own institution that connects enrollment success to long-term institutional health.

2 Benchmark Against Competitors

Enrollment doesn't happen in a vacuum—your institution is competing with countless others for a limited pool of prospects. When making your case for a budget increase, point to the need to stay competitive as a key reason for your asks.

Start by identifying your peer institutions—that is, your greatest competition—and researching what they're investing in. This can involve the use of more specialized research tools and databases, or it can be more informal, like analyzing their websites and marketing collateral to see what they emphasize. From there, your presentation can compare your institution's spending (and ROI) to those competitors, highlighting where there are gaps and missed opportunities. You can also use competitors as positive support: look for cases where you can point to competitors' investments yielding success and make the case for increasing your resources similarly.

1 Moody, Josh. "September College Cuts Include Jobs, Programs and Athletics." *Inside Higher Ed*. 7 Oct 2024. https://www.insidehighered.com/news/business/cost-cutting/2024/10/07/college-cuts-september-include-jobs-programs-athletics.

2 "HCM + Edge Research Release Follow-Up Learner Research: Continuing to Explore the Exodus from Higher Education." HCM Strategists, https://hcmstrategists.com/resources/hcm-edge-research-continuing-to-explore-the-exodus-from-higher-education.

> **Be sure to highlight the most relevant metrics, such as Cost Per Acquisition (CPA), Lifetime Value (LTV) of students, and enrollment-to-revenue ratios.**

3 Build Contingency Plans

Your budget proposals will likely meet with more success if you come prepared for multiple scenarios. Be ready to be flexible and offer different potential roads, depending on the initial mood and feedback you get. A smart approach is to prepare three budget scenarios, which you can present as needed:

- **Minimal increase:** A proposal pared down to the bare bones, focused on the lowest budget to address critical, non-negotiable needs.
- **Moderate increase:** A middle-ground proposal that goes beyond basics and prioritizes funding key initiatives that align with enrollment goals.
- **Aggressive investment:** A proposal for larger budget increases, with significant investments and a plan for long-term growth opportunities.

For each scenario, bring data-driven projections that emphasize ROI and overall risk versus reward.

4 Align Your Ask with Institutional Goals

Success in your budget requests is more likely when you can connect your asks to larger institutional goals. Your proposals should highlight how enrollment directly connects to strategic priorities and how your asks for increased funding can support key institutional objectives like diversity, new market growth, or improved retention.

While pointing out the benefits of acting, it's also helpful to note the opposite: **the costs of *inaction***. Outline the risks of maintaining the status quo. For instance, you might note that a lack of increased funding could lead to continued enrollment declines, revenue losses, or the need for a damage-control approach, whereas the strategies you're presenting offer a chance to get ahead of the game and craft a more positive narrative.

5 Engage Stakeholders Early

Presenting a united front is a solid way to elevate your case for an increased budget. From the start, involve both academic and finance leaders, and look for opportunities to collaborate with other departments to ensure your requests and plans align with overall strategy. Similarly, it's a good idea to secure "champions" at higher levels; try to identify key supporters in leadership ranks who can (and will) advocate for your proposal.

It's not just colleagues who can provide valuable support and perspectives. Student insights can be powerful to incorporate into your proposal. Use their testimonials alongside carefully chosen data to humanize the impact of enrollment investments.

6 Prepare for Objections with Strategic Responses

Once you've presented your initial case, the next step begins: responding to the inevitable concerns or even outright objections. Being well-prepared for these questions could make or break your proposal.

Start by ensuring you've anticipated common objections. Make a list of the likeliest challenges you think you'll hear based on your existing experience or your research. Then, prepare data to address those concerns, whether they're aimed at budget efficiency, timing, or other competing priorities. In addition to current data, bring examples of past successes and incremental wins that you can showcase to build further support for your request.

7 Focus on Outcomes, Not Just Inputs

It's always a challenge to ask for "more" of something, especially when budgets are strained to begin with. To get past that, focus your pitch on the positive outcomes—in other words, what the institution will get, not just what they'll give.

Be sure to highlight the most relevant metrics, such as Cost Per Acquisition (CPA), Lifetime Value (LTV) of students, and enrollment-to-revenue ratios. It's also helpful to keep practicality front and center. Focus on measurable goals and present clear enrollment and revenue targets tied to your requested budget.

8 Create a Plan for Continuous Monitoring

Your case will be even stronger if you come with an accountability plan ready to implement. Explain how you would use specialized dashboards or reports to monitor the impact of your new budget, and propose assigning responsibility for key initiatives and tracking progress toward enrollment goals. And, as always, have a backup plan in place! Be prepared to pivot based on early results or changes in institutional priorities.

Building a strategic case requires you to tie together the "emotional," human appeal with data-driven, logical arguments. As you develop your plans and requests for increased enrollment resources, focus on long-term growth and align your requests with the institution's mission and current financial health. At any stage, proactive planning is always a positive—and when we build strategic partnerships, success is absolutely within reach!

Aaron Porter, MA, is enrollmentFUEL's Associate Vice President of Client Relations. He has spent his career devoted to enrollment management with positions including the Director of Admission at Tusculum University, Director of Admission at Bryan College, and most recently, Vice President for Enrollment Management at Carson-Newman University. Over the past 16 years, Aaron has helped close to 25,000 students gain access to transformational experiences at four-year private institutions. Connect with Aaron at Aaron.Porter@enrollmentFUEL.com.

> **Building a strategic case requires you to tie together the "emotional," human appeal with data-driven, logical arguments.**

To AI OR Not to AI:

What Higher Ed *Really* Thinks of Tech's Latest Leap

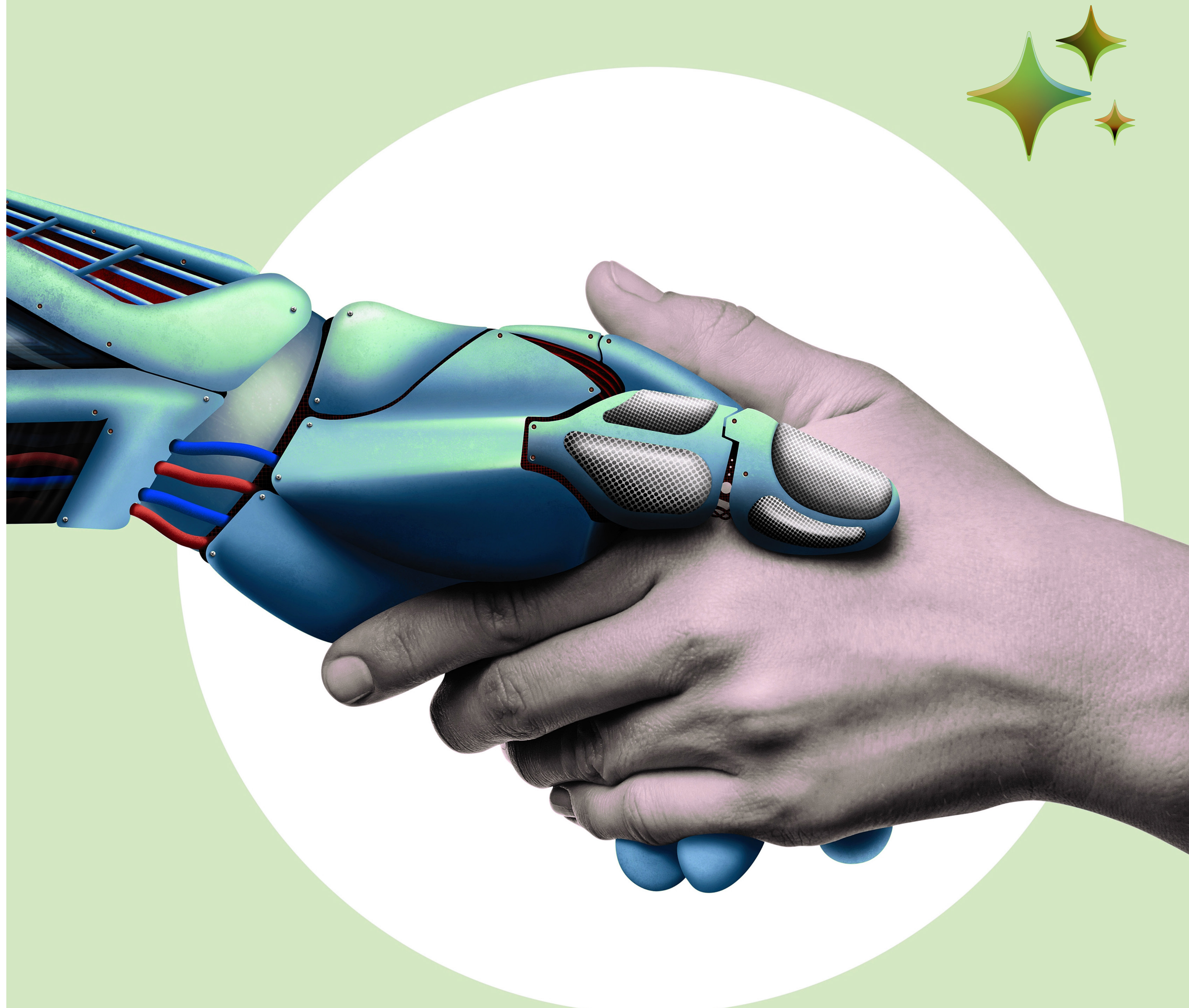
Lisa Branson MSEd & Seth Miller, MBA

AI is everywhere—there's no escaping. As with other areas, higher education is seeing a boom in tools that promise to harness the power of AI to improve everything, including enrollment strategies. Can today's buzziest solutions actually help your team improve your approach—and if so, how? Let's take a closer look.

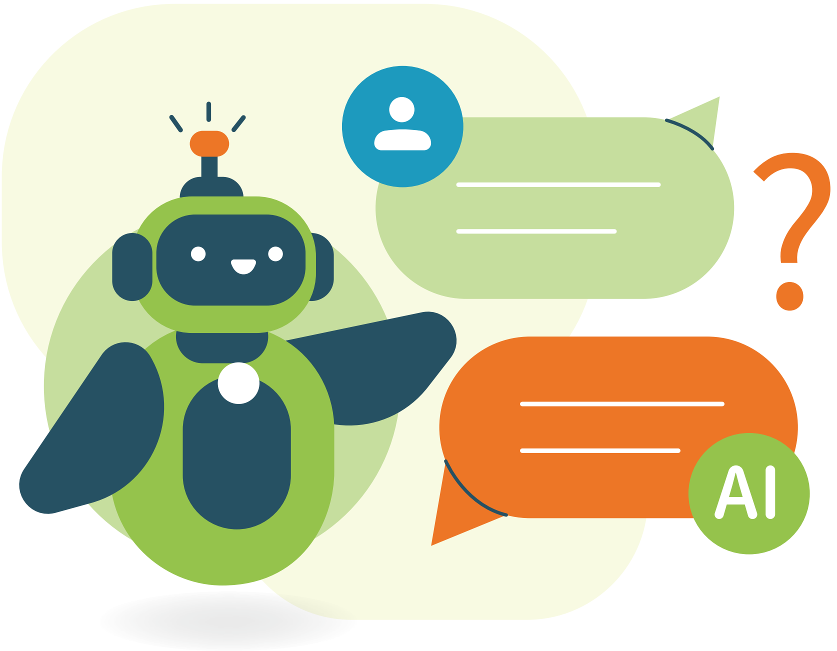
Combating Trust Issues and Uncertainty

Perhaps unsurprisingly, higher ed—like many other industries—is dealing with a certain level of reluctance when it comes to AI adoption. A recent survey by Slack found that over two-thirds of desk workers around the globe hadn't tried AI tools; more significantly, 93% said they didn't consider AI outputs completely trustworthy.[1] Combine this lack of trust with very real concerns over data privacy, environmental impacts, and uncharted legal territory, and it's not entirely shocking that the potential of AI is often met with equal reluctance.

1 Vereckey, Betsy. "Slack CEO: How to roll out artificial intelligence internally." *MIT Sloan*. 5 Nov. 2024. https://mitsloan.mit.edu/ideas-made-to-matter/slack-ceo-how-to-roll-out-artificial-intelligence-internally.



ENROLLMENT STRATEGIES



For higher ed teams looking to incorporate AI, the key is introducing AI as an assistant and an enhancer, not a replacement. One of the most effective options is leveraging AI as a *literal* assistant—that is, implementing custom AI chatbots and data analysis. In this way, your use of AI derives trust from individuals' existing trust in your brand. Rather than "conjuring" the information, it simply helps analyze existing information or point people in the right direction.

AI and Enrollment

In the enrollment space, the introduction of AI assistance can look like a few different kinds of things, such as:

- **Student-facing chatbots to navigate website journeys**
- **Automated reminders to complete application and/or enrollment tasks**
- **24/7 Q&A capabilities**
- **Personalizing communications to prospective students**
- **Pinpointing high-potential leads to target**

An effective, conversational AI tool acts like a 24/7 admissions assistant, providing instant responses to guide prospective students through every stage of the enrollment journey. Then, behind the scenes, it also analyzes, summarizes, and syncs meaningful data directly to your CRM in real time. Together, these tools can empower colleges and universities to turn organic website traffic into engaged and enrolled students.

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Ultimately, integrating AI solutions is about finding the pain points where your team could use a little extra help and taking advantage of today's technology to streamline those tasks and improve personalization.

For Enrollment Teams and Students Alike

AI-powered tools, like Edulla and others, can provide valuable assistance on both sides of the enrollment and recruiting process. For enrollment teams, these tools can offer trends on common areas of inquiries, track metrics, and provide insights into demographic data.

These insights enable enrollment teams to better understand student needs, optimize their communication strategies, and allocate resources effectively. By identifying trends and refining messaging, schools can improve lead conversion, enhance student support, and create a more streamlined enrollment process.

AI-powered tools can also be enormously helpful to potential and current students. For prospective students and in-process applicants, these tools serve as a personalized virtual guide. Students are easily able to get the information they need regarding application steps, deadlines, submissions, and financial aid questions—often with personalized responses rather than a static FAQ. Once enrolled, the same tools can serve a similar purpose, only now to provide information and reminders on class registrations, orientation, campus information, and so on.

Importantly, all of this can be done by automating the repetitive, formulaic tasks (like reminder notes and document submissions), thus freeing up your human enrollment team to focus on tasks that require a more personal connection.

What to Consider

If your institution is considering implementing AI solutions, what should you keep in mind? Here are a few recommendations for things to prioritize to get the most effective and meaningful experience for everyone:

- **Set Clear Objectives:** Define what you want to achieve, such as improving response times, increasing lead capture, or enhancing the onboarding experience to ensure the solution aligns with your goals.
- **Ensure System Integration:** Choose a platform that can be implemented quickly and integrated seamlessly with your existing systems, such as CRMs and marketing automation tools.
- **Ease of Maintenance:** Select an AI assistant that requires minimal ongoing maintenance, freeing your team to focus on strategic tasks rather than managing updates.
- **Customize the Experience:** Tailor the solution's tone, knowledge base, and workflows to reflect your institution's values and culture.
- **Support a Student-Centric Experience:** Look for a solution that is accessible, intuitive, and capable of responding to both prospective and current student needs. It should create a seamless and engaging experience that reflects your institution's values.
- **Monitor and Improve:** Ensure the platform provides actionable insights, like inquiry trends and student engagement metrics, so you can continuously refine your strategies and optimize outcomes.

Ultimately, integrating AI solutions is about finding the pain points where your team could use a little extra help and taking advantage of today's technology to streamline those tasks and improve personalization. With a data-driven approach and a focus on informing and connecting, you can implement AI solutions that truly do support your enrollment goals.

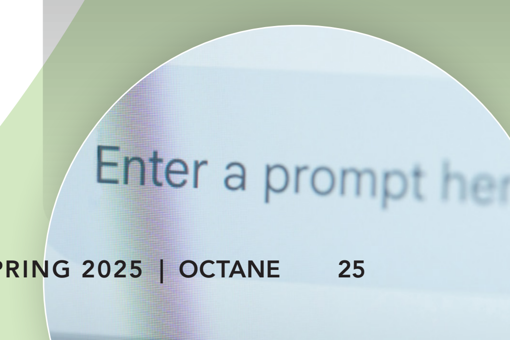
Lisa Branson, MSEd, is enrollmentFUEL's Senior Vice President of Client Relations and is currently enrolled in a doctoral program. She is an expert in recruiting, financial aid, and all aspects of Student Search, including adult and online learners. Lisa has worked with many schools to develop comprehensive strategies to grow in their market, and she is happy to share her experience with you. Feel free to contact Lisa at Lisa.Branson@enrollmentFUEL.com and start a conversation.

Seth Miller, MBA, is the co-founder of Edulla AI. He has nearly a decade of experience in engineering, specializing in the development of artificial intelligence and machine learning products. With a background in higher education, he blends technical expertise with a deep understanding of the academic sector.

Use Cases Are Key to Smarter AI Choices

A Use Case is a specific scenario or example illustrating how a tool or system—like AI—can solve a particular problem or achieve a goal. In higher education, identifying clear use cases is essential to ensure AI investments align with your institution's strategic objectives.

For example, if your goal is to improve student recruitment, a use case might involve using AI to personalize email campaigns or predict enrollment probabilities. By clearly defining the problem you're solving or the process you're enhancing, you can evaluate AI tools based on their ability to meet these needs, ensuring they deliver measurable value.



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