Discussion Overview

Current Landscape

Three Pillars of Success

Common Challenges and Solutions

Questions/ Discussion

Introductions

- Suzana
  - 13 years of experience in higher education in the private sector, for-profit, and public, non-profit
  - Past institutions include EdPlus (Pearson), UArizona, and UTSA
  - Built online enrollment, advising, and marketing departments from scratch

- Dani
  - Over 20 years in enrollment management
  - Experience includes faith-based, public research, selective private, and regional access colleges and universities
  - Expertise in organizational and leadership development, operational efficiency, recruitment, and marketing strategy

Current Landscape

Landscape for Higher Education

Changing modality trends and expectations among the prospective student pool and the talent pool

- Enrollment downturn/ student cliff

- Increased competition among institutions

- Changing student mix and expectations

- Skepticism about the value of higher education

- Shifting values and expectations among the workforce
  - Work/life balance, remote and hybrid options

- Great Resignation/Reshuffle

- High stress, burnout, and turnover

Landscape for Higher Education

Undergraduate Fall Enrollment by Format
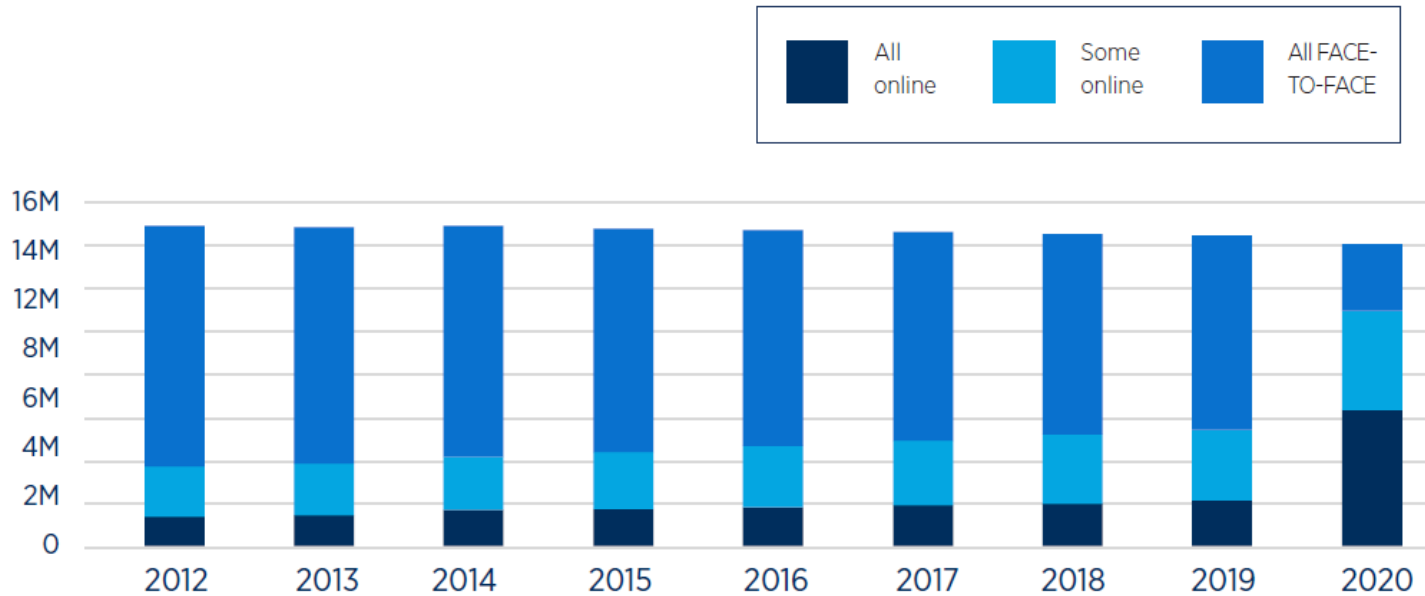
Source: RNL Analysis of IPEDS fall enrollment data, First Look, Degree Granting Institutions. Retrieved April 2022.
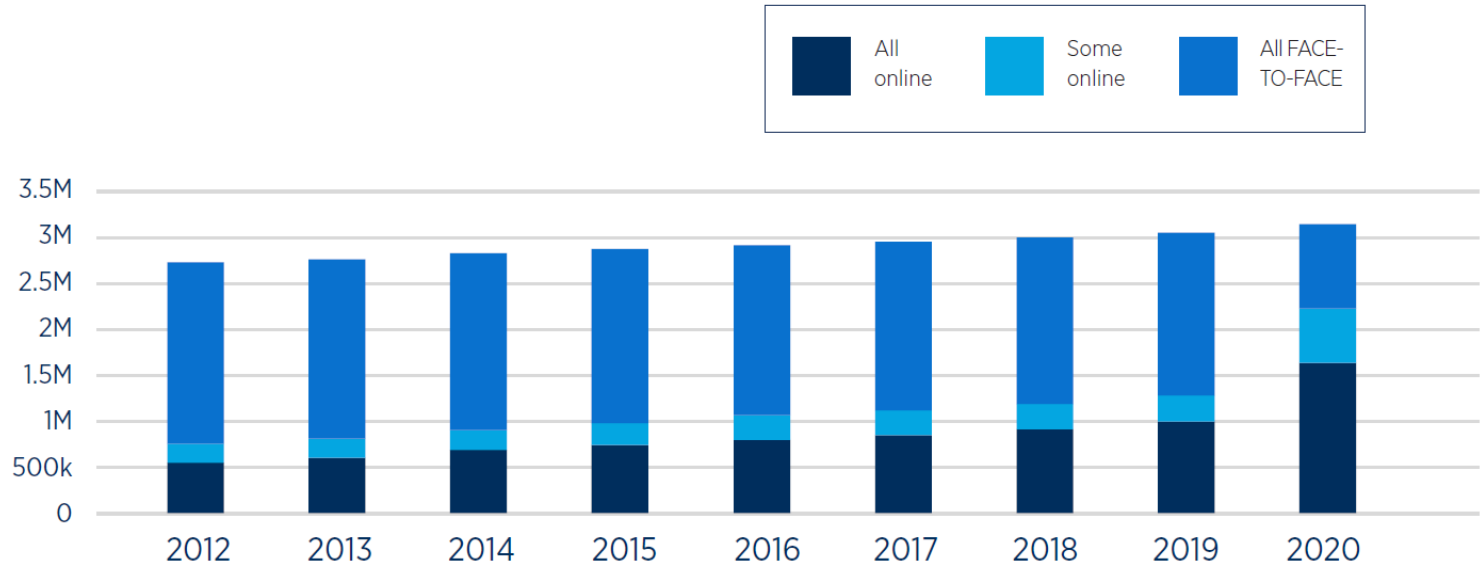
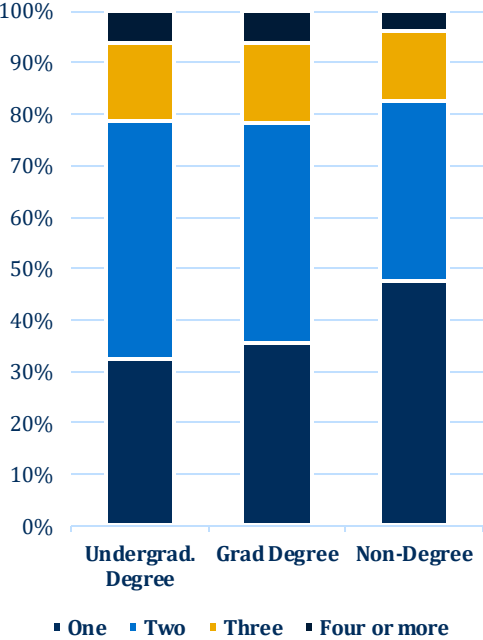# Landscape for Higher Education

Graduate Fall Enrollment by Format

Source: RNL Analysis of IPEDS fall enrollment data, First Look, Degree Granting Institutions. Retrieved April 2022.

Student Behaviors & Expectations

Programs Applied To

Legend: One · Two · Three · Four or more

Inquiry/Contact Response Expectations

		Within		
	Minutes	**An hour**	**A day**	**More than a Day**
Personal email	22%	20%	27%	27%
Text message	22%	25%	22%	21%
Phone call	24%	18%	22%	25%

Note: No significant differences by intended credential

Likelihood of Enrolling at First to Respond to Inquiry

	Definitely	Likely	Somewhat likely	Not at all
Undergrad Degree	26%	37%	28%	9%
Grad Degree	27%	35%	28%	11%
Non-Degree	17%	32%	36%	15%

Legend: Definitely · Likely · Somewhat likely · Not at all

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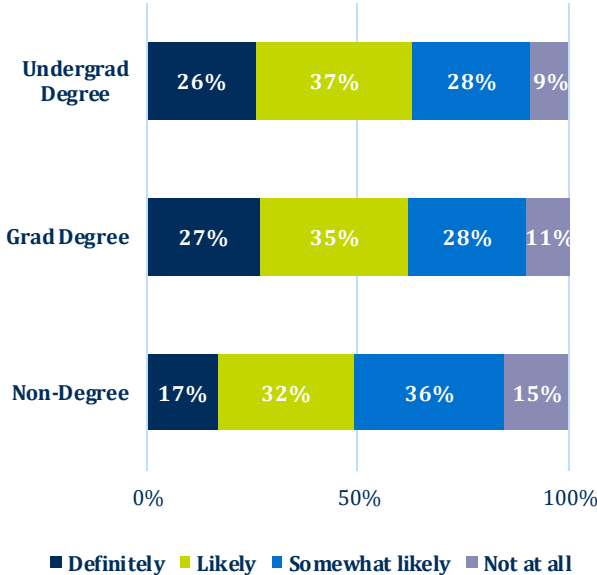
Higher Education Staffing Challenges

46%

Are considering leaving their current position

Recent Survey of Graduate Enrollment Leaders

49% of respondents report that they are extremely or very stressed at work
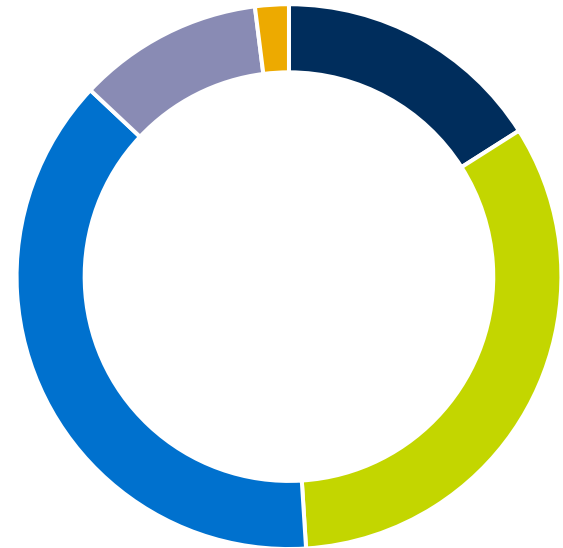
- Extremely
- Very
- Moderately
- Slightly
- Not at all

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3 Pillars of Success
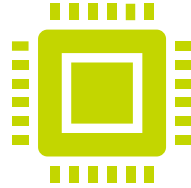
Hiring/Training/Coaching   Technology/Scalability   Conscious Leadership

Pillar 1
Hiring/Training/Coaching

- Hiring Profile - recent grads or those with experience?

- Sales - a dirty word?

- Inspecting what we expect - how?

Pillar 1

Hiring Facts - Employers

- The average U.S. company spends $4,000 to hire a new employee

- 57% of employers have a tough time assessing soft skills (97% say they're more important than hard skills)

- Since 2016, there's been a 78% increase in jobs mentioning "workplace flexibility"

- Average turnover rate for sales/customer service roles is 100%

- 56% of college presidents are not willing to allow more than 25% of their workforce to work remotely

Hiring Facts - Employees

- 43% of new hires quit because it wasn't what they expected = need better training

- "Sales" is in the top five skills that recent graduates are hired for

- 58% of employees report wanting to be full-time remote after the pandemic

- On average it takes 8 months for an employee to reach full productivity

- Employees are 35%-40% more productive than their in-office counterparts

Pillar 1

Hiring Facts II

This raises the following questions:

- Are we going to be able to meet our employees where they are (remote)?

- Are we going to be able to assess and train them appropriately for the job we need them to do (sales)?

- Can we compete with other companies needing the same skillset (pay)?

Pillar 1
Job Description Example

The University of Texas at San Antonio

Job Description

Job Title: Online Enrollment Counselor I

Summary

- Function: Provide high-level customer service to undergraduate online students by matching potential student's needs/wants with the features and offerings of UTSA Online.

- Scope: Our new team member will be responsible for determining a prospect's initial eligibility for UTSA online as well as walk them through the University's enrollment process (applications, transcripts and university onboarding procedures) *after* learning about students needs/wants/goals.

  Our ideal candidate will need resiliency to maintain a high energy level on a high number of inbound/outbound calls daily to and from prospective UTSA online students, interpersonal skills to build a relationship with prospective students on calls, openness to feedback on performance, ability to listen actively for long periods of time, confidence, adaptability and integrity to handle various student situations. They will also be responsible for decision-making that requires initiative and judgment in responding to individual needs of students.

Duties

- Typical:
    1. Responsible for knowing UTSA's Enrollment Process and qualifying features
    2. Responsible for counseling, problem-solving and providing excellent customer service and accurate information to prospective and current students regarding undergraduate admissions policies, registration, financial aid and scholarships via calls, texts, chats, and emails
    3. Advise prospective students on the requirements and procedures for the admissions process primarily via telephone, emails, texting, and chat features
    4. Navigating through and maintaining UTSA Customer Relationship Management (CRM) system and automated phone system (dialer)
    5. Updating student inquiry progression in UTSA's databases
    6. Maintain a pipeline of students, which will include following a prescribed call plan and prioritizing prospective student's needs
    7. Participate in weekly meetings with the Manager of Online Enrollment to identify lead quality issues/tech issues etc.

    8. Participate in weekly coaching sessions to assess skills and functions of role
    9. Make recommendations to manager to improve efficiency and effectiveness for the benefit of our prospective students

- Periodic:
    1. Provide assistance and troubleshooting support to new hires via shadowing
    2. Sit in on meetings with internal staff members and staff members from different departments across campus to provide feedback on online students and recommendations to streamline process
    3. Offer quantitative and qualitative feedback to supervisor on online students so that larger decisions to support our students can be made

Education

Required	Preferred
Associates' degree from an accredited institution.	Bachelor's Degree from an accredited university
Additional experience, on a one to one basis, can substitute for the degree.	

Experience

Required	Preferred
6 months+ experience in a call-center environment and/or 6 months+ customer service experience	1+ year experience in a call-center environment and/or 1+ year experience in a customer service environment
	1+ experience working with online, non-traditional undergraduate students

SDR
Page 1

SDR
Page 2

Last Updated   7.11.22

Last Updated   7.11.22

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Pillar 1
Interview Questions Example

Candidate Name: _____
Interviewer Name: _____
Date: _____

Enrollment Counselor Questions

1. Why are you interested in being in the higher education industry and what interests you in online education?

2. How does Customer Service compare to Sales, if at all?

3. Talk to us about a time that you failed and how you reacted to that failure? Please provide specific examples, names, and explanations.

4. When you don't have enough work hours in the day to complete the workload you're responsible for, what do you do? What have you done in the past (please provide specific examples)?

5. In your opinion, what makes an online student different from a ground campus student?

6. What sets UTSA apart from its competitors? How would you share with potential students the uniqueness of the UTSA?

7. Describe your sales mentality and how you feel sales fits into a higher education environment, if at all?

8. Sell me this pen. (look for them to ask about what you're looking for FIRST before going into all of the features of the pen - if this isn't done, use this as a learning opportunity after they're are finished with this exercise).

End of document ▪

Pillar 1

Training – 69% of employees say good onboarding=3 years

Week 1 Training Plan: 8:30 – 5:00 Monday through Friday

Time	Day 1 – Mon Training Room	Day 2 – Tues Training Room	Day 3 – Wed Training Room	Day 4 – Thurs Training Room	Day 5 – Fri Training Room
8:30-9:00 am	Welcome, Intro's, Agenda Review and Classroom Expectations, #'s	Review Beach Ball – something learned about ASU	Review 6 Things you want to know	Review Discovery 2 Categories	Review
9:00- 10:30 am	New Hire Orientation Module Policies Office Tour Ice Breaker – 2 Truths , 1 lie	Listen to WOW call **Brainstorm Obstacles & Discuss** –always did this 1st to get them thinking about what will happen in the call. Typical objections – time, $, fears, talk to spouse, etc. At the end of the list we discuss that these are things that should be covered in the conversation.	Listen to WOW call Review – open ?'s Paper chains game (like what kids make at Christmas)– how many open-ended ?'s – good for competitive classes, great practice for turning closed ?'s into open ?'s	Intro and Agenda: discuss, write and practice agendas **Should include reps name, the school, call recording disclosure, agenda (purpose of the call) and transition to Discovery "Tell me what has you thinking of school now?"**	**Buddy Cord** – Activity 1
10:30-10:45 am	BREAK	BREAK	BREAK	BREAK	BREAK
10:45 am – 12:30 pm	Ice breaker - Dream Vacation? 11 – 11:30 Leadership Team: Introductions & Overview of project **Industry Overview –**I started this b/c so many the new hires didn't even have college degrees and didn't understand the difference between a trade school vs. university, and private vs. public, etc.	**Activity** – Friend Traveling Overseas, what's he/she thinking!?!- this scenario was to demonstrate that the call isn't a sales pitch, it's almost all open-ended questions **Begin Big Pic/Discovery** 1. **Activity** - Page 2 & 3 of Adm process tab – discussion around things to find out: motivation, goals, needs, wants,	**Activity** - AK or HA? Brainstorm list of ASU features – have them get into small groups and brainstorm as many as possible – by memory Discuss Benefits Activity with Big Picture and Value Props – complete the list as a class	Objections, Problem Solving/LAER in Big Picture conversation- listen, acknowledge, explore, and respond Brainstorm objections for very beginning of call. Apply LAER to this situation and role play.	Discuss BC Activity 1 Introduce Talk Tracks – just an outline: Intro and Agenda Discovery – what topics to discuss while peppering in benefits, lifes as a student - # of classes, hours, cost, terms, etc. **End of WK 1 Assessment: Role Play** When not in role play, write talk track

		admissibility, etc 2. Discovery – pgs 12-14			
12:30-1:00 pm	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
1:00 – 2:30 pm	**Account Overview-** brief description of the school, online programs and history **Listen to WOW call –** gives an idea what we're working toward	**Group Role Play** **Communication** –pgs 23-24 of Adm tab –this focused a lot on active listening skills. Would be easy to integrate customer service here **Role Play** with a partner	**Group Role Play** Role Play with a partner and work on integrating bene's into conversation – think of "peppering" into the conversation, as it comes up	**Activity:** Building Value and Uncovering Objections – created typical student scenarios and discussed what benefits would matter to them **Role Play** with Common Objections	Begin Program Activity – divide programs and begin research Each rep researches a program and presents to the class
2:30 – 2:45 pm	BREAK	BREAK	BREAK	BREAK	Break
2:45 -4:45 pm	**Website Challenge** - this is to become familiar with the website and navigating through it	**Activity:**"Tell me about yourself" – dual purpose – class tells more about themselves and bonds, but also demonstrates this prompt as a great transition 2 to get students talking.	**Paper Chains Activity:** open-ended questions – I have no idea why I had this on here again	**Trial Closes,** - check ins **Recommendation and Close** – sounds like this is a great fit (tell why) so let's get started…open your email… practice	**Week 1 Quiz** Program Activity **Jeopardy** – just google search, there are some great games to fill in that are free
4:45 – 5:00 pm	Review /Wrap Up	Review /Wrap Up: Begin with the end in mind	Review /Wrap Up	Review /Wrap Up	Review/Wrap up

Pillar 1

Coaching –$37 billion is spent on employees who don't get it

Agent Name				**UTSAOnline QT MONTH/YEAR**	
Call Date				**Rating System**	
ID Key				91% and Above	**Exceptional (5)**
QA Type (Remote, Side by Side, Calibration)				83%-90%	**Exceeds (4)**
Campaign Name				75%-82%	**Meets (3)**
Monitored By				67%-74%	**Needs Improvement (2)**
Score	0%			66% and Below	**Unsatisfactory (1)**
Red Flags / Legal Compliance					
Did Call Result in Transfer?	Y/N				
All Calls Basic Requirements		**Points**	**Total**	**Comments**	
Introduction & Information Gathering		**22**	**0**		
Introduction (agent name, school name and confirm speaking with student)		na/0/3			
Spoken with one of our enrollment counselors before?		na/0/2			
POI		na/0/2			
Highest level of education		na/0/2			
GPA		na/0/2			
Interest in online		na/0/2			
High speed internet access		na/0/2			
Are you planning to use military benefits?		na/0/2			
Explains Transfer and/or ends call on a positive note		na/0/5			
All Calls Skill Competencies					

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Pillar 1

- *Training – Create a Promotional Track Training Program*

    - Allows for the front-end sales team to grow with the company skill-wise and salary-wise

    - Improves the tenure and effectiveness of your front-end team

    - Promotes a positive culture

    - You are continually able to pivot with the avenue this provides

Pillar 2

Technology/Scalability

- Speed to lead
  - Around 70% of students are applying to more than 1 school
  - About 75% of students expect a call/text/email back in less than 1 day
  - Students who are contacted within a few hours convert through the funnel at a rate 3x the amount of those that are not

- Managing a remote workforce
  - Call recording/tracking and CRM are crucial

- Track calls (# and content)
  - Qualify and Transfer team
  - Automated Dialer
  - Only way to make a dent in the part of the enrollment funnel that is hardest to convert – LEAD TO APPLICATION

Pillar 3

Conscious Leadership

- Are we above or below the line?

- Have we learned enough about our teams to lead them?

- Have we assessed what's holding us back in order to being effective leaders?

Pillar 3

Conscious Leadership

[Above or below the line?](#)

Pillar 3

Conscious Leadership

- Are we centered as leaders?

- Do we actually 'know' our team? – Myers Briggs/Strengths Finders

- Leadership and Executive Coaches – they exist!

- Implicit bias training and awareness
  - Power and gender dynamics
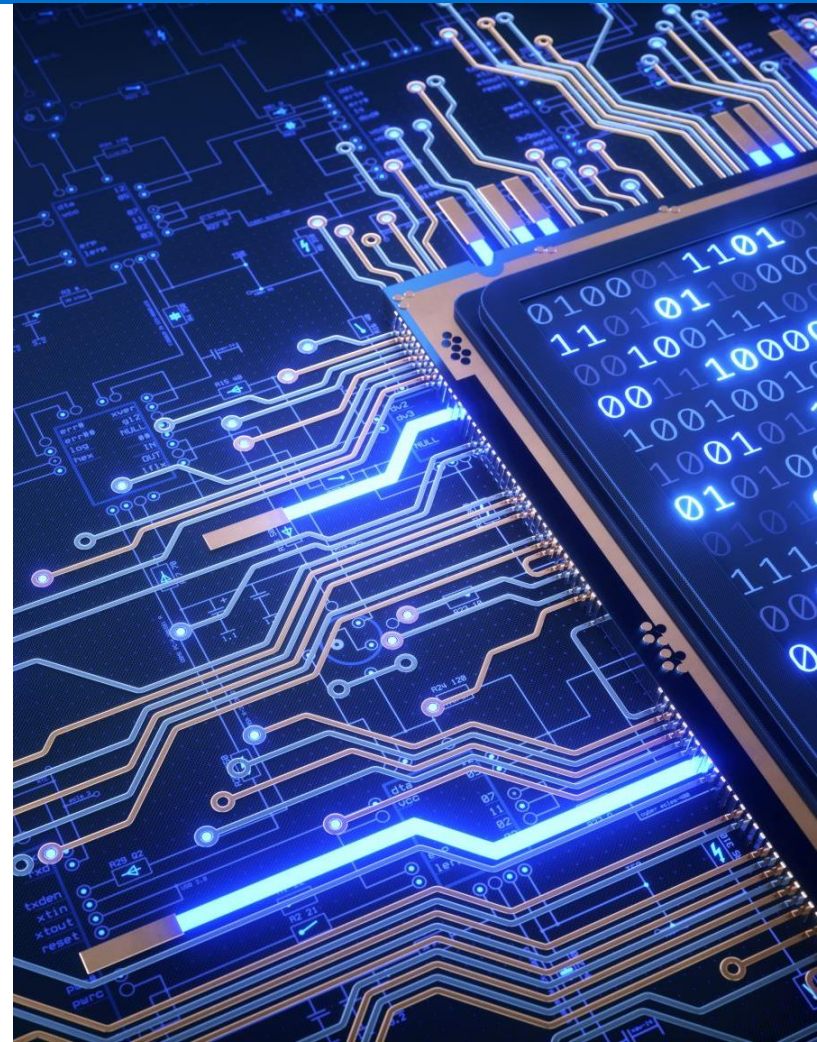
Common Challenges & Solutions

Common Challenges and Solutions – Hiring/Training/Coaching

- Hiring
  - Directly address customer service/sales roles and responsibilities.
  - Keep the hiring committee as small as possible – people are more genuine.

- Training
  - Have an official onboarding process and training program.
  - Incorporate sales and customer service into skills learned.
  - Have a Promotional Track Training in place so front-end staff can move up as they demonstrate higher-level skills.

- Coaching
  - Purchase technology where you can monitor calls.
  - Create Quality Assurance Metrics that encompass what is important to qualify and support students.
  - Have someone regularly provide feedback on calls, pipeline, and the quality of both.

Common Challenges and Solutions - Technology

- Invest in softphones and technology where you can:
  - Record calls for training purposes
  - Live listen into calls for coaching opportunities
  - Track number of calls made/received
  - Track remote workforce on who is logged in/out and active/inactive

Common Challenges and Solutions – Conscience Leadership

- Continually assess and evaluate yourself and your team

- Invest in an executive and leadership coach for higher-level leaders

- Confront implicit biases within your teams and your leadership

- Be honest with yourself

RNL

Key Takeaways

Primary Elements for Success in The New World of Enrollment Management

- Leaders will need pragmatism, a high level of comfort with ambiguity, objectivity, and grit

- It's all about the talent: dedicate time to *authentic* onboarding, training, professional development, and self-reflection

- Cross training and succession planning should be the standard

- Embrace the new consumer and technological realities and use them to your advantage

grit
[grit] · noun

Possessing indomitable spirit. Having a drive for achievement regardless of upbringing or situation. Earning success in the trenches through hard work

Thank you!

For additional questions

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Citations & Further Reading

- https://www.apollotechnical.com/surprising-hiring-statistics-to-know/

- https://resumelab.com/job-search/

- https://clickboarding.com/18-jaw-dropping-onboarding-stats-you-need-to-know/

- https://www.insidehighered.com/views/2021/06/02/colleges-shouldnt-expect-their-employees-work-same-ways-they-did-pandemic-opinion

- https://www.nature.com/articles/d41586-021-03041-0

- https://www.insidehighered.com/quicktakes/2022/06/17/report-graduate-admissions-officials-are-stressed

- https://www.nagap.org/resources

- https://www.wittkieffer.com/blog/reducing-implicit-bias-in-candidate-evaluation