



# Building Connections to Achieve Goals Utilizing Both Traditional and Modern Strategies

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# Agenda

1. Today's Student and Higher Ed Landscape
2. Developing Effective Communications
  - Building Relationships
  - Utilizing the CRM to track the relationship
3. Direct Communication with the Influencers
4. Discussion



# Today's Student and Higher Ed Landscape

# A challenging time for colleges and universities



- Media has been relentless in questioning:
  - Value of higher education
  - Cost of higher education
  - Level of student indebtedness
- Demands for greater transparency and accountability
  - College scorecard
  - College results online
  - Net price calculator
- Performance-based funding is prompting institutions to be more strategic and aggressive in student progress, persistence, and success

# Today's student is constantly changing



## *Student behavior changes every year*

- The way they use email
- The way they interact with digital
- Increased desire to be anonymous
- Increased desire to not be tracked



# Students and Parents expect us to communicate with them based on what we already know

Students and parents expect the engagement of Amazon, Netflix, and Starbucks.

The need for critical data points and analytics to make the best decision possible.

Data integration needs to be easy and seamless.



# Understanding Trends

## *What we know about students and parents*

### Students

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**79** average number of times a student unlocks their phone each day.

**97%** will provide an email address to a campus.

**90%** are open to receiving text messages during the enrollment process.

**68%** cite video as a key influence in their enrollment decision.

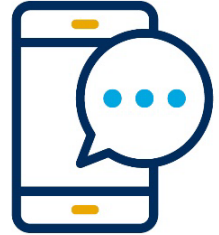
**65%** have clicked on a paid digital ad from a school.

**47%** have used Instagram for college planning.

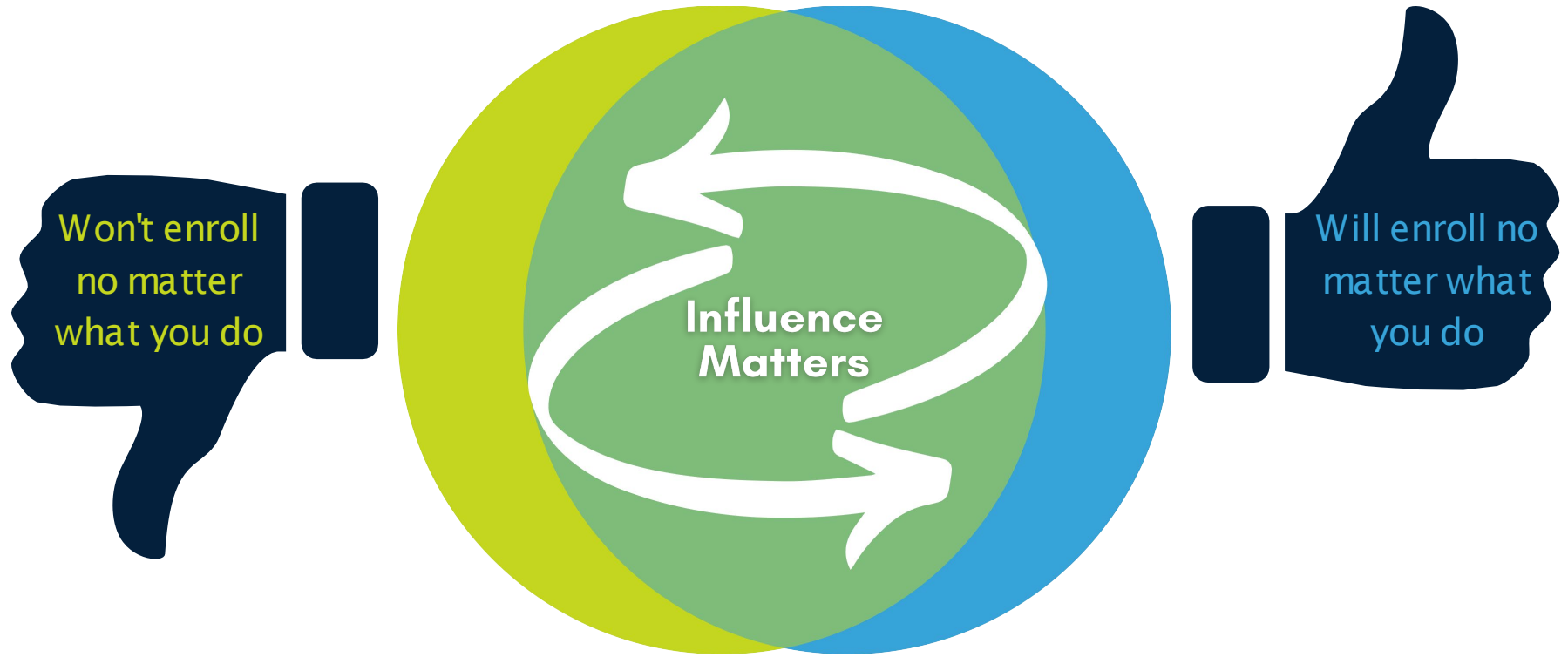
### Parents

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**99%** say they are involved in the search process.



# Convince the Movable Middle



Communications and campaigns should address "what else" the moveable middle needs to know to take the next step.





Develop  
Effective  
Communications

# Number of written communications a typical prospective student receives from marketing and recruitment offices by stages.

	PURCHASED NAMES/ PROSPECTS	INQUIRY STAGE	APPLICANT STAGE	ADMIT STAGE	DEPOSIT/ CONFIRMED STAGE
<b>FOUR-YEAR PRIVATE INSTITUTIONS</b>					
25th percentile	6.0	10.0	6.0	10.0	6.0
<b>Median</b>	<b>10.0</b>	<b>15.0</b>	<b>9.0</b>	<b>15.0</b>	<b>10.0</b>
75th percentile	12.0	19.0	18.0	21.5	18.0
<b>FOUR-YEAR PUBLIC INSTITUTIONS</b>					
25th percentile	5.0	6.0	5.5	6.5	5.5
<b>Median</b>	<b>7.0</b>	<b>9.0</b>	<b>9.0</b>	<b>12.0</b>	<b>10.0</b>
75th percentile	12.5	18.0	14.5	22.0	14.0

In other words, it's noisy out there.





## It's all about building relationships

- Virtually everything done in an admissions office is designed to set-up a **personal interaction** with a prospective student (e.g., phone calls, letters, electronic correspondence).
- The best opportunity to change student behavior exists when an admissions counselor has a **face-to-face contact** with a prospective student or parent.
- Many admission representatives miss this important opportunity. Next time you are at a college fair, listen to your neighbor; how are they making the most of their time with students and parents?
- Are they answering questions with a yes/no or telling a story?

# Many recruiters focus on information, rather than influence

All too often, recruiters feel the need to share “information” with the student.

The better approach is to **consider** “**why**” the information is important and how can our activities/contacts with students influence them to move through the funnel.



# To reach these students, you must...

Be honest

Appreciate the  
influencers



Be persistent

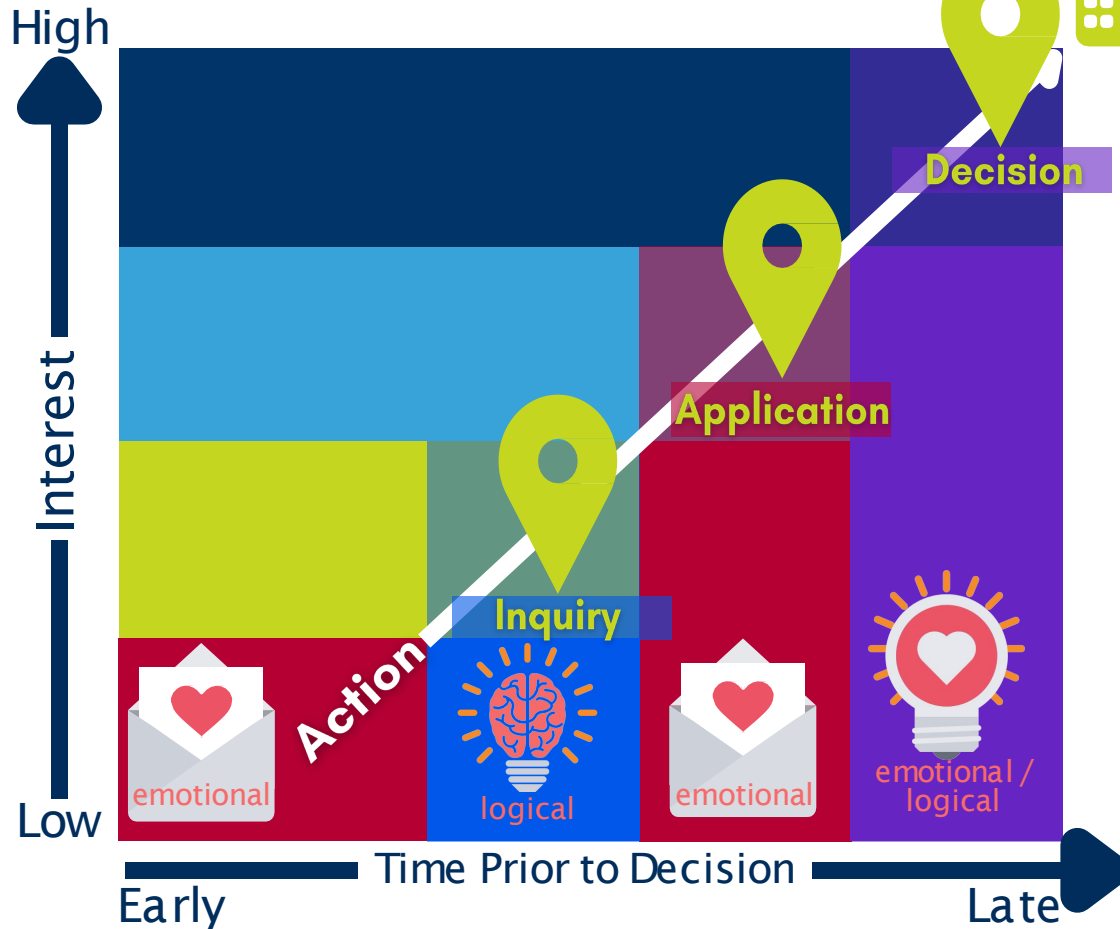
Recognize students  
as individuals

Respond quickly

Communicate "their" way

Preferred channel and language that  
resonate (tone, appeals, vocab)

# Shift Appeals Over Time: Logical / Emotional



The focus for decision making shifts across college inquiry, search and selection.

Messages and mode must adjust to ensure resonance and to compel action.



# Strategy: Constant Connection

Automatic  
Personalized  
Segmented  
Just-in-Time  
Short Calls to Action  
Build Trust



Campaigns  
through the CRM



Email

Personal, university, FAFSA



SMS

Mobile number SMS  
Allows for SMS response



Chat

Allows for auto responses



Print

Permanent mailing address for  
letters and postcards



Phone

Call center surveys and personal  
calls from peers, faculty and staff

Workflow, Forms, etc.

Allows for smart navigation through forms populating the CRM properties

# The CRM is your hub, but cannot replace Counselor Interactions



## Automated Communications and Engagement

- Email, Text, Phone, Digital, Direct Mail
- Performance Metrics
- Re-engagement micro campaigns

## Institution Hosted Application

- Automated processing
- Application review
- Common App Integration

## Dashboard Reports

- Full funnel reporting
- Sub population and other data metrics (source, geo, major)
- Counselor specific query capabilities

## Event Management

- Pre/Post Events
- Virtual Engagement

## Student, Parent, College Advisor Portals

- Live Chat
- Micro- Campaigns

## Territory Management

- Counselor Outreach tracking metrics
- Daily/Weekly Workflows

# Are writing samples relevant to the admission process?

## *An opportunity to build the relationship*

- Use information in the essay to make a connection with the student
  - Left-hand turns!
- Use information to connect students with groups or people on campus that will yield the student
  - Service entrepreneur student



# Videos are gaining traction with students!

## *E-Expectations Survey 2023*

## *Slate allows us to send videos to students*

### **Videos**

More students are watching videos from institutions



- This is a great way to reach out to a student “individually”
  - Encourage a campus visit
  - Follow up to a campus visit
  - Congratulate them on being admitted
  - Talk about next steps for enrolling
  - FAFSA encouragement
  - How-to videos (paying your deposit, submitting checklist items, etc.)

# Not a one size fits all strategy

## *Segmentation is key!*

- Campus Visits
  - Do we offer customization?
  - Different experiences for Sophomores, Juniors, and Seniors, Admitted Students?
- It takes a campus!
  - We are all recruiting and retaining students
  - Train everyone!
- Athletes vs non-athletes, especially for early fall arrivals

## *Let's not confuse anyone!*

- Differentiate Slate Content
  - FY, Transfers, Internationals should have different messages
  - In-state and OOS segmentations
  - Parent Comm Flow – don't just CC parents, we can tell – parents need to know all the things
  - Guidance Counselor Comm Flow (Institutional Contacts in Slate) – monthly newsletters

“

Are phone calls effective  
in reaching students and  
parents?



# The data says yes.

*Improving conversion and engagement in the smartphone era*

Engaging students where they are...



**55%**

of Gen Z use their smartphones for **5 or more hours** per day

**26%**

are glued to their mobile devices for **over 10 hours** per day



## How It Helps You

*Active, not passive tactic* with singular goal to get a conversation with student and/or parent

*Strengthens data quality*, and helps you focus conversations on those most interested in your institution

*Increases student and parent engagement* and improves conversion

# Latest E-Expectations Survey Results

*Students want to hear from an admission counselor*

**Students who said calls from admissions counselors were helpful in college planning**

**77%**

12<sup>th</sup> Grade

**77%**

11<sup>th</sup> Grade

**75%**

10<sup>th</sup> Grade

**77%**

Continuing generation

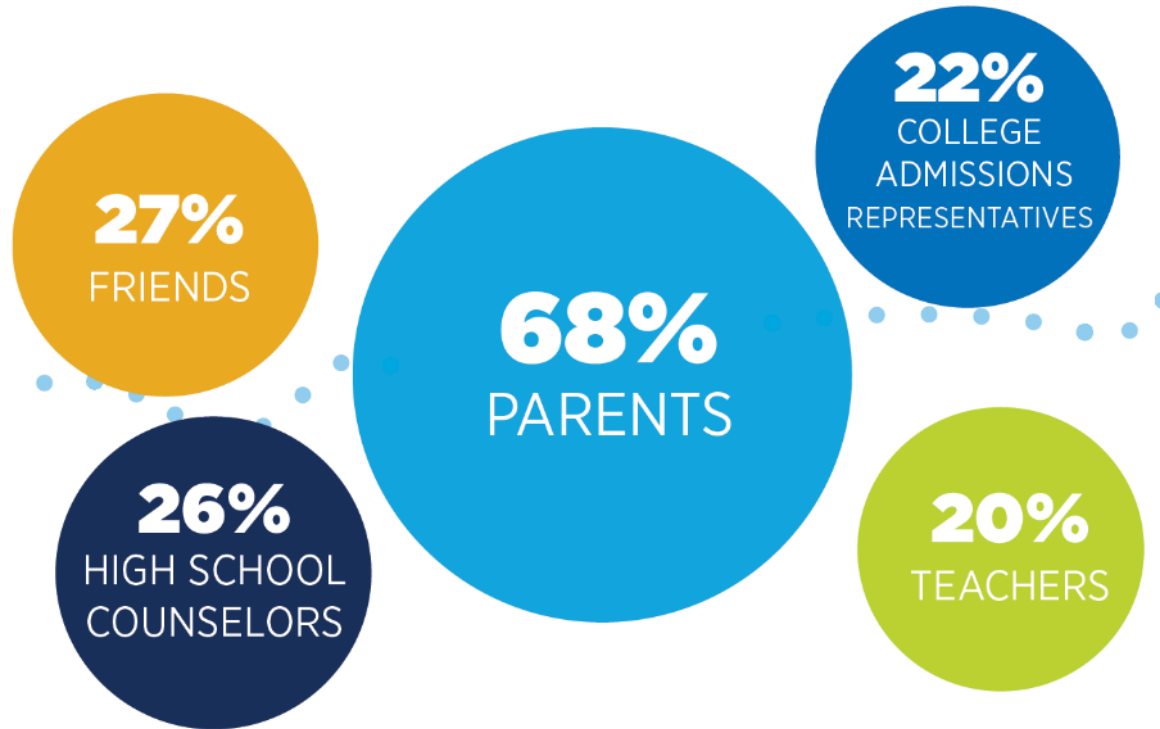
**74%**

First generation



# Direct Communications with Influencers

# Who are influencers for students?



# Parent involvement



Have your parents been involved in your college search?

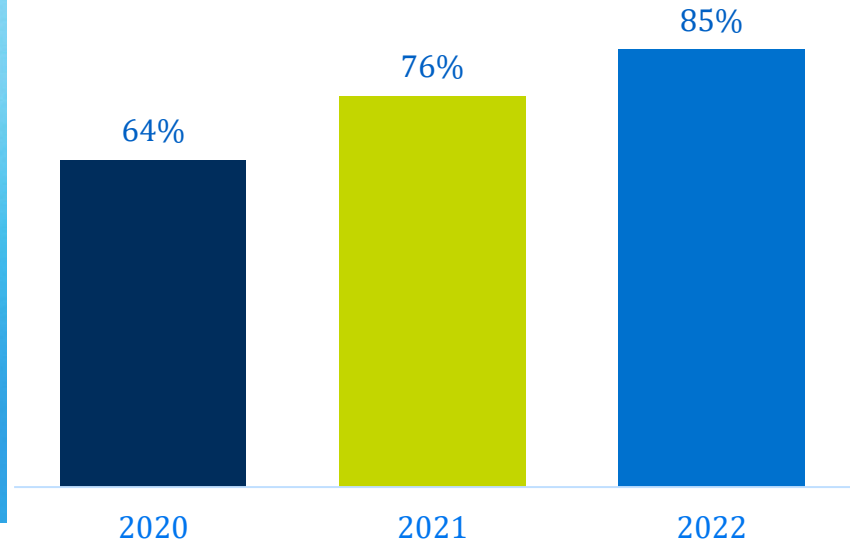


72% males

58% females

Good news!

They want to hear from institutions!  
A LOT -- at least once a week!





# How are we communicating to our parents?

*Parent emails specific and customized to them and their student*



At PC, we're serious about helping Pedro transition to college life. Having a child in college is a big change and a big deal for a family. You want to know that Pedro is well taken care of and that PC will truly feel like a home away from home for him.

Pedro will move onto campus in less than two months. Here are three ways you can help him transition to life as a PC student.

#### **Encourage Your Student to Complete the Blue Hose Checklist**

The [Blue Hose Checklist](#) is the list of required paperwork that must be completed before Pedro can move in and begin taking classes at PC. Pedro has access to the Blue Hose Checklist on his admissions portal. Please encourage Pedro to clear items off the checklist this summer to make moving in and beginning classes easier -- and more fun!

[Go to the Blue Hose Checklist >>](#)

Contact the Financial Aid Office if You Have Questions about Your Bill

Pedro's bill must be paid in full or there must be a payment plan in place before Pedro can move in on August 16. Please contact the Financial Aid Office if you have any questions about your bill. We're happy to help and will answer any questions you have-- from determining what your bill is to setting up a payment plan.

Do we have a separate comm flow specifically for parents?

Parents do not just want to be copied on the same email that you are sending to students

Are we building the relationship with the parents or just providing information?

How can we use parents to "get the job done?"

Do we change our messaging as they move through the funnel -- early build the relationship, later the logistical information that is needed (ie. Move-in Day!)?



Spring Break is almost here! We know you deserve it! Thank you as always for all you do for your students. We have a few exciting opportunities for you to share:

### **ACCEPTED STUDENT DAY**

Your students who have been accepted to PC are invited to campus for Accepted Student Day on Saturday, March 25. They'll be able to meet professors and current students and learn about the opportunities available for them at PC. Nearly 200 students have already signed up! Encourage your students to as well! [Register now >>](#)

**Guidance  
Counselors:  
how do we  
make it easy for  
them to relay  
information to  
their students?**

# Time to share....

- What traditional strategies are you still using?
- What modern strategies are you using or thinking about using?
- What is working?
- What's not working?
- How do we train new staff on strategies that we know are effective, but they are not necessarily comfortable doing or understand the importance?
  - Sidewalk chalk
  - Confetti letters
  - Be authentic!

# Thank you!

*Please feel free to reach out to us.*

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