

# Meet Them All Where They Are: A Persona-Driven Playbook for Modern Enrollment

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# Your Presenters



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# Agenda

1. Why personas?
2. The personas
3. Finding the fit
4. Strategy-first approach
5. Strategy-first framework: supporting every student
6. Key takeaways to meet students where they are

# Why Personas?

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**Today's students  
don't follow a single  
path.**

**They're not just  
digital or traditional.**

**They're diverse in  
how they think, plan,  
and act.**

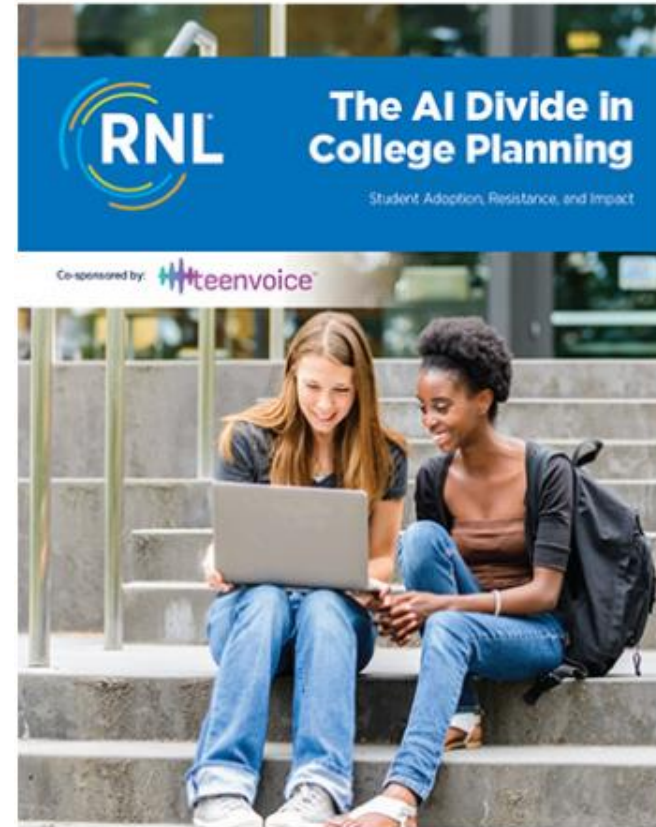


**Uniform outreach leads to  
uneven engagement.  
Personalized strategies  
lead to better outcomes.**

# The AI Divide in College Planning



RNL & TeenVoice (2025). *The AI Divide in College Planning: Student Adoption, Resistance, and Impact*.  
Ruffalo Noel Levitz.



# The Start: AI Personas in College Planning



## AI Pioneers

Embrace AI with enthusiasm,  
balanced approach, trust in AI  
capabilities



## AI Aspirers

Curious but cautious  
majority  
Motivated by tangible  
benefits, prioritize  
accessibility and guidance



## AI Fence-Sitters

Uncertain about AI's role  
Rely on traditional methods,  
open to new information with  
compelling evidence



## AI Resisters

Prefer human interaction and  
traditional methods  
Resistance stems from  
unfamiliarity; open to learning  
about AI from trusted advisors

# College Planning Personas Should Include More Than Just AI

They should include...

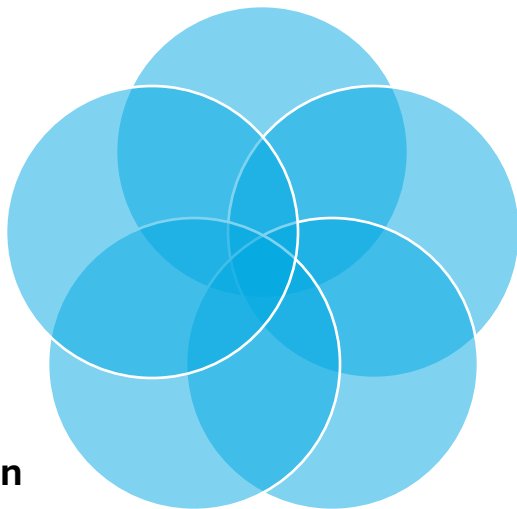
Who they are

Usage of college  
planning  
resources

Classroom  
behaviors

Communication  
preferences

Learning style





# The Personas

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# The Personas

## The Self-Starters

- Independent and tech-savvy. Move quickly if the tools are clear and accessible.

## The Steady Navigators

- Trust-driven decision-makers. Rely on relationships and personal contact.

## The Observers

- Cautious but curious. Need low-pressure, flexible, and optional engagement.

## The Seekers

- Motivated but need guidance. Thrive with structure and encouragement.

# The Self-Starters

*Proactive and ahead of the curve*

## Who They Are

Students who embrace new tools and explore independently.

They blend traditional and digital resources and often discover options others overlook.

## In the Classroom

Curious and self-motivated.

They often work ahead, experiment with new platforms, and bring outside tools into classroom projects.

May challenge norms (in a good way).

## Learning Style

Visual, digital-first, and exploratory.

Thrive in open-ended, tech-integrated environments with opportunities for autonomy.

## Communication Preferences

Text, email, chat, or AI tools. Prefer fast, personalized responses.

Comfortable initiating contact when they know it will be efficient.

## College Planning Resources

College websites (62%)

Parents (48%)

Counselors (46%)

Social media (46%)

Friends (43%)

Books/articles (38%)

# The Seekers

*Thoughtful before taking action*

## Who They Are

Students eager to succeed but need guidance before committing to new tools or strategies.

They are open, especially when they see a clear payoff.

## In the Classroom

Rule-followers who ask thoughtful questions.

Likely to try something new if given a roadmap and reassurance.

They aim high but want to be sure.

## Learning Style

Sequential and structured.

Benefit from checklists, models, and guided discovery with chances to reflect before acting.

## Communication Preferences

Email, videos, and personal recommendations.

Respond best to encouragement from adults or success stories from peers.

## College Planning Resources

College websites (43%)

Counselors (41%)

Parents (37%)

Social media (37%)

Friends (31%)

Books/articles (31%)

# The Steady Navigators

## *Confident with familiar paths*

### Who They Are

Students who prioritize people over platforms.

They prefer personal guidance, value predictability, and are skeptical of unproven tools.

### In the Classroom

Dependable and loyal.

Thrive with routine, structure, and direct support.

May resist change until they understand its purpose and feel secure.

### Learning Style

Interpersonal and reflective.

Prefer real-time discussion, printed resources, and demonstrations over digital exploration.

Face-to-face conversations, phone calls, or handwritten feedback.

Need trust and consistency to feel confident engaging.

### Communication Preferences

Face-to-face conversations, phone calls, or handwritten feedback.

Need trust and consistency to feel confident engaging.

### College Planning Resources

Counselors (55%)

Parents (47%)

College websites (39%)

Friends (33%)

Social media (31%)

Online sources (19%)

# The Observers

*Watchful, thoughtful, and selective*

## Who They Are

Students who haven't made up their mind yet.

They're watching, learning, and waiting for the right moment to try something new—if it feels safe.

## In the Classroom

Often quiet observers.

Will engage when invited and feel in control.

Need low-risk entry points and reassurance they won't be left behind.

## Learning Style

Flexible and cautious.

Do best with options, context, and gradual scaffolding.

Prefer trying before committing.

## Communication Preferences

Multi-channel with opt-in options.

Trusts authenticity, prefers personal choice, and may ignore communication that feels forced or inauthentic.

## College Planning Resources

College websites (40%)

Parents (38%)

Counselors (36%)

Friends (27%)

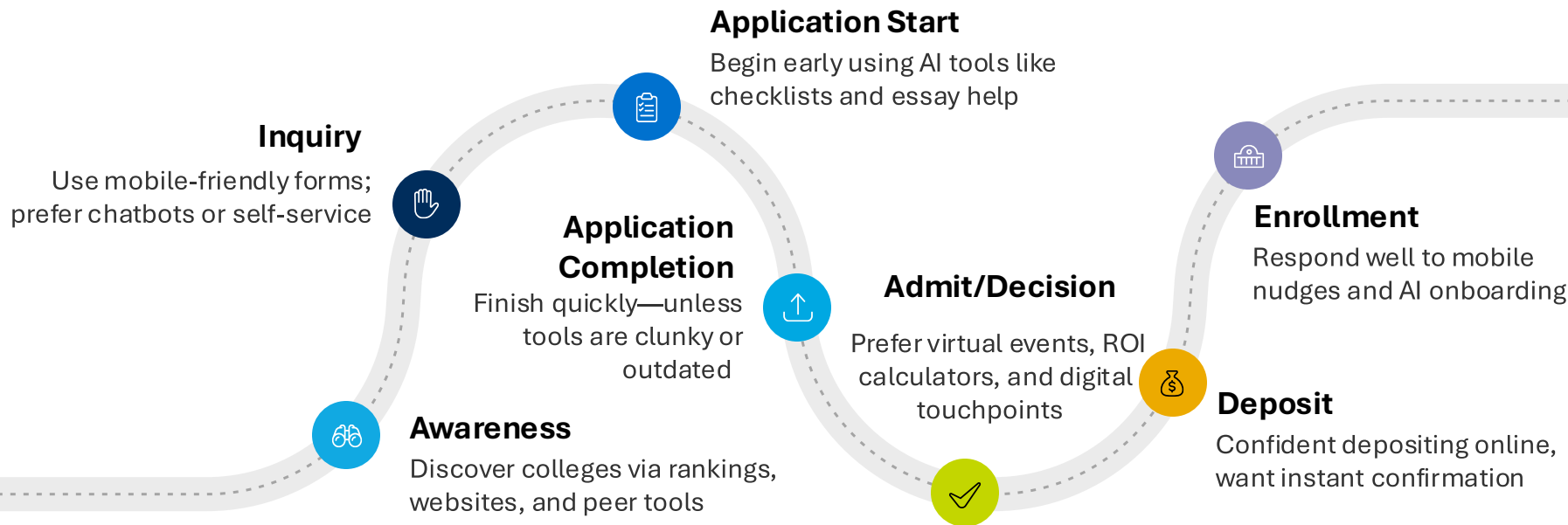
Social media (22%)

Online sources (18%)

# The Steady Navigators

*Independent and digital-first*

*Proactive and ahead of the curve*

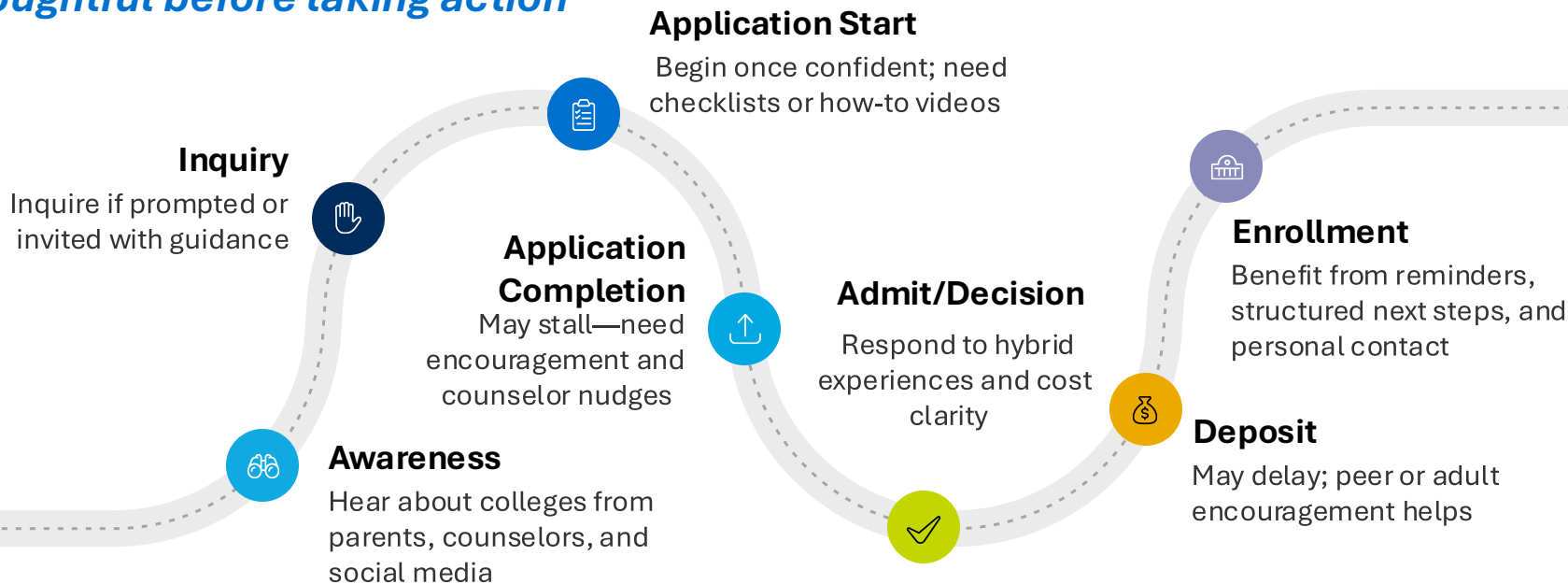


*"I've already started using AI tools to compare colleges and draft my essays. I like figuring things out on my own—but it helps when someone can confirm I'm on the right track."*

# The Seekers

*Motivated but need structure and reassurance*

*Thoughtful before taking action*

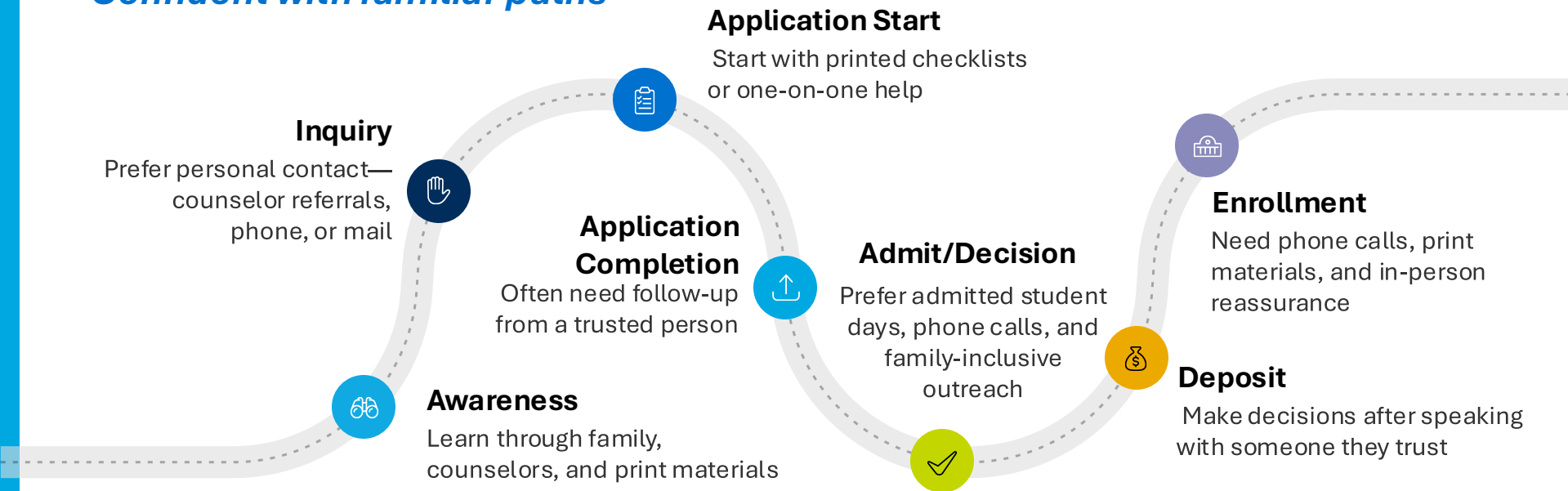


*"I want to go to college, but sometimes I'm not sure what to do next. I really appreciate when someone walks me through the steps or shows me what worked for them."*



# The Steady Navigators

*Trust relationships over tech  
Confident with familiar paths*

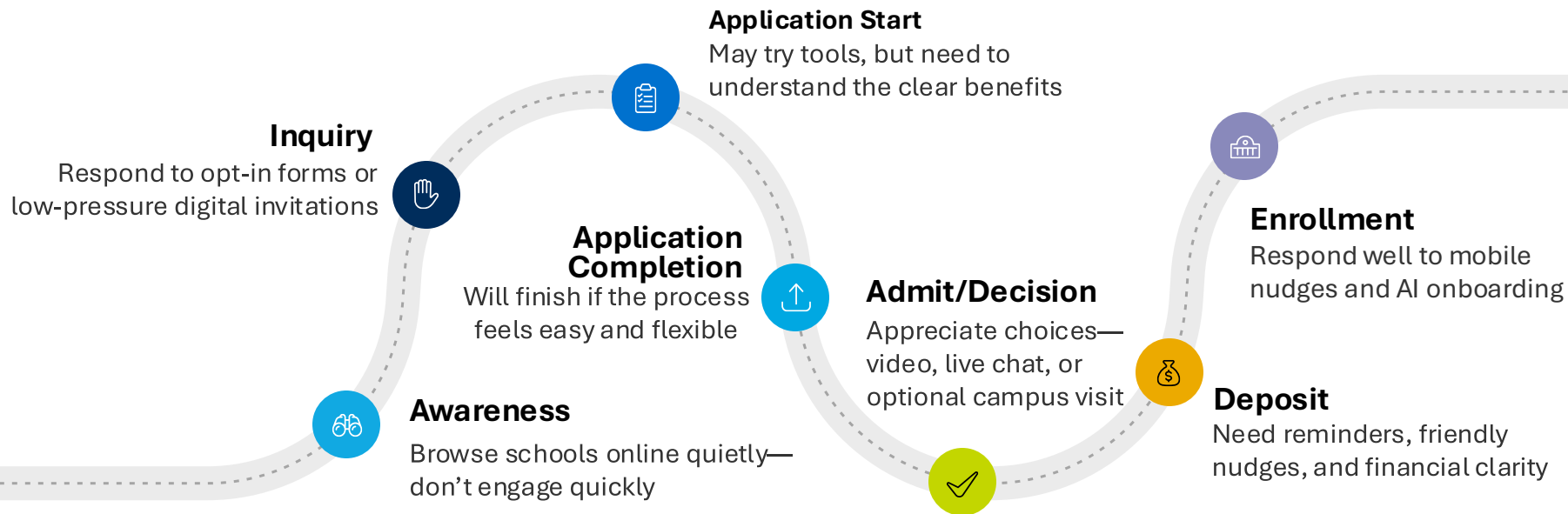


*"I don't really trust all the online stuff. I'd rather talk to my school counselor or my parents about college—it just feels more real that way."*

# The Observers

*Cautious, observant, and open to options*

*Watchful, thoughtful, and selective*



*"I'm interested in learning about colleges, but it gets overwhelming. I like being able to explore things at my own pace without pressure. Just give me clear options, and I'll get there."*

# Finding the Fit

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# Flexibility is Strategy

A strategy-first framework is designed around students rather than campaign formats.

Your channels, content, and engagement should flex, but the core support remains consistent.



A chatbot isn't the strategy.

*It's a tool Self-Starters use.*



A printed guide isn't old school.

*It's how Steady Navigators build trust.*



A checklist isn't hand-holding.

*It's how Seekers feel confident.*



An opt-in video series isn't optional.

*It's how Balancers decide.*

# Finding the Fit: How to Determine Each Student's Persona

## Direct Ways

Advisor/Counselor Interactions

Embedded Persona Quizzes

Short Self-Assessment Surveys

Feedback and Follow-Ups

## Indirect Ways

Behavioral Data Tracking

Application and Portal Behavior

Communication Channel  
Analytics

# Best Practices for Persona Assessment



Combine two or three of these approaches for the most accurate picture.



Always keep privacy top of mind.



Be transparent with students about why you're asking and how it'll help them.



Continue assessing, students will change.

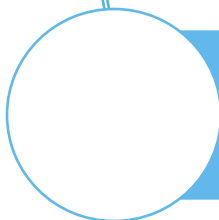


Over time, you'll build a profile that lets you “meet them where they are”—and adapt as their preferences evolve.

# Who Are Your Students?



Which persona do your current strategies serve best?



Which one(s) are you unintentionally ignoring?



What simple change could make a big difference?



# **Strategy-First Framework**

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# Strategy-First Approach

What makes this strategy-first approach powerful is:

## Scalability:

Core strategies can be implemented at any institution

## Flexibility:

Easy to adjust as student preferences evolve

## Inclusivity:

No student feels forced into using methods they're uncomfortable with

## Efficiency:

Resources can be allocated based on student group sizes

## Measurement:

Easier to track success across groups using consistent metrics

## Training:

Staff can be trained on strategies first, then learn adaptations

## Budget-Friendly:

Many resources can be repurposed across groups

# Strategy-First Framework: Supporting Every Student





# **Strategy-First Framework: Supporting Every Student**

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# Information Delivery Strategy



## The Self-Starters

- AI-enhanced information sessions with real-time tool demonstrations
- **Interactive chatbots embedded in college websites for research & FAQs**
- Technology-enabled campus tours with AI assistance
- Personalized videos



## The Steady Navigators

- Hybrid information sessions combining traditional and AI methods
- **Step-by-step introductions to AI tools with clear benefits**
- Focus on financial aid and scholarship information
- Personalized videos



## The Observers

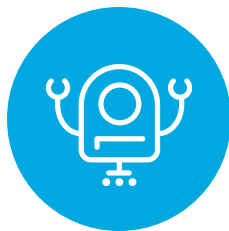
- Traditional in-person information sessions
- Telephone calls, text messages
- Printed resource packages
- **One-on-one counselor meetings**



## The Seekers

- **Mixed-method presentations**
- Side-by-side comparisons of approaches
- Self-paced exploration options
- Personalized videos

# Peer Connection Strategy



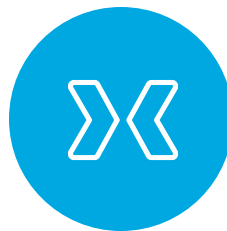
## The Self-Starters

- **Peer-led AI tool workshops or demos in digital collab spaces (Discord)**
- Social media engagement groups
- *Online student community*
- Virtual tours



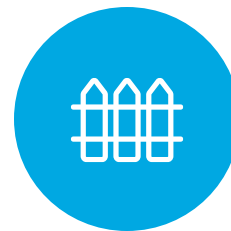
## The Steady Navigators

- Mixed peer groups with AI pioneers
- **Success story sharing sessions featuring peers who benefited from AI**
- *Online student community*
- Virtual tours



## The Observers

- In-person peer mentoring
- **Face-to-face networking events**
- Student-led campus tours
- *Online student community*



## The Seekers

- **Flexible peer group options**
- Mixed-method study groups
- Cross-group discussion forums
- *Online student community*

# Professional Guidance Strategy



## The Self-Starters

- AI-integrated counseling sessions
- **Technology-enhanced planning meetings**
- Digital tool demonstrations
- **Virtual office hours**



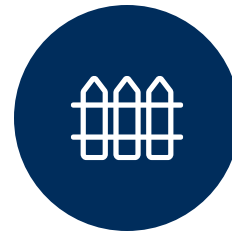
## The Steady Navigators

- Gradual AI introduction sessions
- Balanced counseling approach
- Financial aid-focused guidance
- **Tool exploration support**



## The Observers

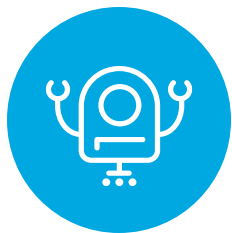
- **Traditional counseling methods**
- **Telephone calls**
- High school counselor outreach
- Personal relationship building



## The Seekers

- Choice-based counseling options
- Flexible planning approaches
- Telephone calls
- **Encourage optional trial use of AI tools with human support on standby**

# Campus Engagement Strategy



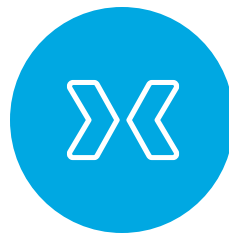
## The Self-Starters

- Tech-enhanced campus events
- Virtual reality tours
- Interactive digital workshops
- **AI-powered personalization**



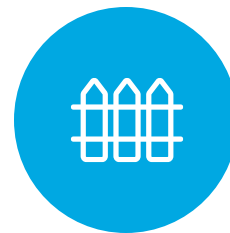
## The Steady Navigators

- Hybrid campus events
- **"Try-it" technology stations**
- Financial aid workshops with AI options
- Virtual tours



## The Observers

- **Traditional campus visits**
- In-person information sessions
- Traditional group tours
- Paper-based activities



## The Seekers

- **Multiple tour options (tech-forward, traditional, or hybrid)**
- Choice-based activities
- Self-directed exploration
- In-person information sessions

# Family Engagement Strategy



## The Self-Starters

- Tech-savvy family workshops
- Digital family resources
- Virtual family sessions
- **AI tool family guides**



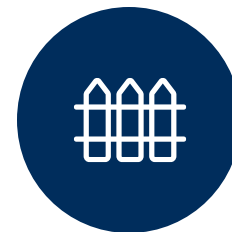
## The Steady Navigators

- Hybrid family events
- Gradual technology introduction
- Combined traditional/digital resources
- **Family exploration sessions**



## The Observers

- Traditional family nights
- In-person parent workshops
- **Paper resource packets (bilingual)**
- Family counseling sessions

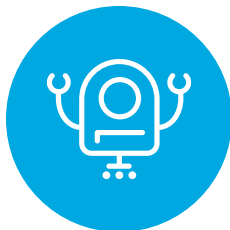


## AI Fence-Sitters

- Mixed-method family resources
- Flexible engagement options
- Individual family planning
- **Create shared planning folders that can be print or digital**



# Communication Channel Strategy



## The Self-Starters

### Channel Preferences

- Digital-first approach
- Social media integration
- College websites
- AI-enhanced communications

### Recommended Approaches

- Interactive digital communications
- Real-time chat support options**
- Multi-platform digital presence
- Mobile-first communications**
- Automated but personalized follow-ups



## The Steady Navigators

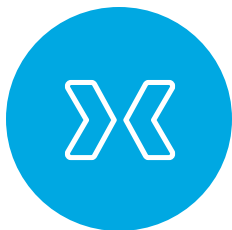
### Channel Preferences

- Traditional digital channels
- School counselor communications
- Parent/family channels
- Selective social media

### Recommended Approaches

- Gradual digital engagement
- Cost-focused messaging
- Combined digital/traditional outreach**
- Easy-access digital resources
- Step-by-step guidance

# Communication Channel Strategy



## The Observers

### Channel Preferences

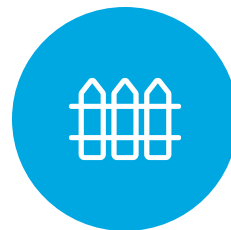
- School counselor communications
- Parent/family channels
- Traditional college websites
- Limited social media

### Recommended Approaches

#### **Print materials**

#### **Personal letters**

- Direct counselor communications
- Family-inclusive messaging
- Traditional email campaigns
- Phone calls and text messages



## The Seekers

### Channel Preferences

- College websites
- Parent communications
- Counselor channels
- Limited social

### Recommended Approaches

- Multi-channel options
- Choice-based communication preferences
- Balanced digital/traditional mix**
- Opt-in technology features
- Flexible contact methods

# Enrollment Funnel Support Strategy

## Inquiry To Application Stage



### The Self-Starters

#### Support Approach

- AI-powered application checklists
- Automated progress tracking
- Chatbot application support
- Smart deadline reminders

#### Engagement Methods

- Interactive application guides
- AI essay writing support (53% use AI for essays)**
- Digital application workshops
- Peer connection platforms



### The Steady Navigators

#### Support Approach

- Hybrid application support
- Financial aid focus (55% scholarship interest)
- Step-by-step application tracking
- Combined human/AI support

#### Engagement Methods

- Cost-benefit breakdowns
- Scholarship opportunity alerts
- Counselor-supported digital tools
- Email nudges that invite students to explore specific tools like scholarship finders**

# Enrollment Funnel Support Strategy

## Inquiry To Application Stage



### The Observers

#### Support Approach

- Traditional application guidance
- In-person document submission
- Direct counselor support
- Family involvement opportunities

#### Engagement Methods

- Personal check-in calls
- Printed application guides**
- Face-to-face workshops
- Family support sessions



### The Seekers

#### Support Approach

- Multiple submission options
- Flexible support channels
- Combined digital/traditional tracking
- Optional tool usage

#### Engagement Methods

- Multi-channel reminders
- Choice of workshop formats**
- Mixed progress tracking
- Optional digital tools

# Enrollment Funnel Support Strategy

## *Admitted To Deposit Stage (Yield)*

### **The Self-Starters**

- Virtual reality campus experiences
- AI-powered student matching
- **Digital admitted student events**
- Personalized ROI calculators

### **The Steady Navigators**

- Financial aid clarification tools
- Combined virtual/in-person events
- Guided cost comparisons
- **Downloadable checklists and a recorded walkthrough of the next steps**

### **The Observers**

- **Traditional admitted student days**
- In-person financial counseling
- Personal phone calls
- Family campus visits

### **The Seekers**

- **Multiple visit options**
- Flexible decision tools
- Combined support approaches
- Optional digital resources

# Enrollment Funnel Support Strategy

## *Deposit To Enrollment Stage (Melt Prevention)*

### **The Self-Starters**

- **AI-powered task management**
- Digital community building
- Smart progress tracking
- Virtual support networks

### **The Steady Navigators**

- Combined support channels
- Financial planning tools
- Structured digital support
- **Access to guided tutorials for registration and orientation**

### **The Observers**

- **Traditional task checklists**
- **Personal check-in calls**
- In-person support
- Family involvement

### **The Seekers**

- **Multiple support options**
- Flexible task tracking
- Choice-based engagement
- Combined check-in methods



# **Key Takeaways To Meet Students Where They Are**



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# Key Takeaways To Meet Students Where They Are

## **Multi-Channel Flexibility:**

Offer digital, traditional, and hybrid support to match each student's comfort zone.

## **Family & Peer Networks:**

Leverage each group's unique mix of family and peer influences.

## **Personalized Financial Info:**

Deliver aid and scholarship info in digital, traditional, or hybrid formats.

## **Flexible Support Systems:**

Provide high-tech, gradual, traditional, or choice-based supports as needed.

## **Adaptive Communication:**

Communicate through channels and formats that students trust most.

## **Build Trust:**

Address accuracy, privacy, and effectiveness concerns directly for each group.

## **Scalable Resources:**

Ensure digital, traditional, and hybrid resources are available and accessible.

## **Progressive Engagement:**

Start at each student's comfort level and offer pathways to new tools.

## **Consistent Core Support:**

Keep essential info and quality consistent—only the delivery changes.



# Final Thoughts

One size does not  
fit all

Meet students at  
their comfort level

Provide multiple  
pathways to  
success

Maintain  
consistent core  
support

Allow for  
movement  
between  
approaches

Respect individual  
preferences

Support family  
engagement

Enable peer  
connections

Ensure equal  
access

Measure and  
adapt regularly

# Supporting Every Student, Every Step

*It's not about complexity—it's about clarity and care.*

*A flexible, persona-informed approach helps:*

**Students feel  
seen**

**Outcomes  
improve at  
every stage**

**Institutions  
build trust**

**When we meet students where they are, we  
help them get where they're going.**

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# Want to stay in touch?



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