

Relationships Matter: Strategies for Connecting with the 21st Century Student

INTRODUCTION

Enrollment management is both an art and a science that encompasses the strategies and tactics used to influence student enrollment and success. From creative print campaigns to predictive modeling, the tactics enrollment managers use to identify, recruit, and engage students are becoming increasingly sophisticated. Of course, the students that enrollment managers are trying to influence are increasingly savvy. From Blackberries to iPads, from Kindles to Netbooks, the tools today's students use to negotiate their worlds are ubiquitous.

Still, the challenge remains: how do we connect with students to influence their decisions to enroll and persist? Colleges and universities face increasing difficulty communicating their unique value proposition in a marketplace saturated with competing messages. To be heard, an institution must move beyond mass communications to relationship building. Institutions that find a way to provide personalized communications to students and so meet their needs are more likely to be successful. And it is the information behind those communications that will help an institution to tailor its approach to connect with the 21st century student.

Having a deep understanding of every student can help institutions align relevant recruiting and retention activities that will make a difference. But, today the network of information, influencers, and decision points is complex. The challenge is to send the right message to each student at precisely the right time. And a growing mistrust of marketing "tactics," particularly among younger students, makes good information and good relationship building even more important.

With every challenge comes an opportunity. Today the proliferation of media is forcing institutions to treat relationship building as an institutional value and an area of competence on which to focus. Institutions that engage in evidence-driven strategy development and planning, and employ technology to gather intelligence and support key initiatives, gain a competitive advantage by fostering relationships that matter.

—Wendy Bolyard, Ph.D.

Wendy Bolyard is a senior strategic consultant for enrollment management at SunGard Higher Education. As a member of SunGard Higher Education's strategic consulting team, Wendy assists colleges and universities in developing and implementing enrollment management strategy and practices.

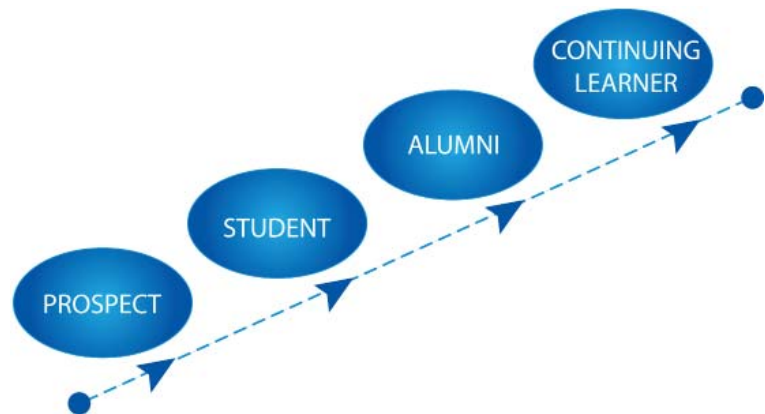
COMPETING IN HIGHER EDUCATION

The message is clear. Demographics are shifting. Projected declines in the number of high school graduates, dramatic shifts in racial and ethnic diversity, and concerns over rising institutional costs are well-documented issues facing colleges and universities. "Build it and they will come" is no longer a viable approach to enrollment strategy as opportunities for easy growth are diminishing. And retaining students is becoming as important as the quest to shape each incoming class. More institutions are moving from a freshman-focused strategy to a true enrollment management approach. Influencing transfer and graduate enrollment, and assigning responsibility for retention, is moving some enrollment managers into new territories.

Those institutions wed to either a mass market view or a traditional recruiting and admissions model will face increasing challenges as core markets for “traditional” populations ebb and a much more diverse market, primarily composed of adult learners, grows¹. In addition, geographical boundaries no longer serve as a competitive barrier with the rise of online and distance learning programs. Retaining online learners presents its own challenges as well.

Savvy institutional leaders will benefit significantly by taking a holistic view of the student lifecycle and implementing a student-centric enrollment philosophy. Such an approach incorporates disparate student intake points into a comprehensive strategy that includes undergraduate (first-year and transfer) admissions, graduate and professional school admissions, workforce development and customized training, continuing education registration, and retention and student success.

At its core, such an approach is about relationships. College and university leaders who act today to identify, capture, understand, and nurture ongoing student and constituent relationships will acquire a lasting competitive advantage. By actively managing the student across the enrollment lifecycle – from prospect to



student, to alum, to lifelong learner – the relationship established provides long-term value to both the student and the institution. This comprehensive view requires colleges and universities to develop, implement, and maintain enrollment plans. To be successful, a clearly documented enrollment plan is a strategic imperative.

This approach, which treats management of student relationships as an essential skill, is increasingly essential for institutions as they seek a competitive advantage in today’s media-saturated world. Fortunately, new enrollment management technologies, developed specifically for higher education, are capable of supporting this relationship-focused approach. Such systems, built on an understanding of relationships as valued assets, reach far beyond the capabilities of transactional systems and data maintained on most campuses today. As a result, enrollment professionals, increasingly challenged to vie for student attention, will be able to make use of far richer, more robust insight into those relationships. They will be able to design, execute, and measure the success of programs that target specific behavior and intent, rather than repeat increasingly ineffective methods that focus on reaching a relatively anonymous, mass audience.

The Path to Enrollment Has Changed

Any professional who has spent any time in enrollment management has heard that things have changed. How? Traditionally, the path to enrollment has been measured by a transactional, largely linear, progression through the enrollment funnel. This progress was defined by the stages of inquiry, applicant, and admitted, deposited, and enrolled students.

¹ “Digest of Education Statistics, 2005,” National Center for Education Statistics

In the traditional model, prospective students follow a lock-step decision process most commonly initiated by mass marketing communication. The model depicts the process as moving from initial awareness, to consideration, to commitment. Achieving success in this model is relatively straightforward. If the top of the enrollment funnel is loaded with as many prospective students as possible, the result would be a largely predictable and targeted incoming class of students. In the model, the potential student enters the funnel as an inquiry and a triggered communication and recruitment plan is pushed out when – and if – the student progresses through the subsequent stage gates within the funnel.

Now, however, many in enrollment management are finding this archetypal model is generating diminishing returns.

By the time a student has identified an interest in an institution, he or she is likely to have already gathered a solid baseline of information about the school. From perusing websites, to learning about institutions from peers, to social networks, to other technologies, students are making emotional attachments to institutions well before college and university staffs are aware of their interest. As a result, fewer students enter the top of the funnel ready to be molded by your recruiting and admissions marketing efforts. And those who do enter the funnel and opt to self-disclose are interested in establishing a relationship immediately.

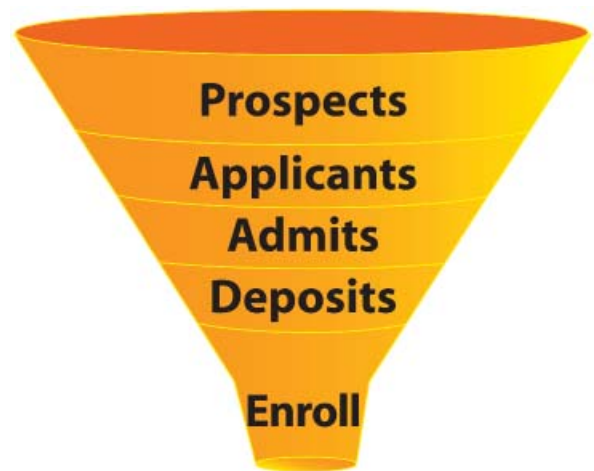
Significantly, this group of prospective students tends to be discouraged by mass communication efforts. We can attribute this phenomenon to numerous factors: the proliferation of media, a growing distrust in marketing messages, and the emergence of new digital technologies that students can control. As a result, fewer students are willing to be passively “processed” through the enrollment funnel. Specific factors challenging the traditional view of the enrollment funnel include:

Fewer Inquiries, But More Applications

Institutions are reporting increasing numbers of students appearing in the funnel for the first time as applicants, not as inquiries. With easier options for the submission of enrollment applications, application consortia², pre-printed and personalized application forms mailed to student prospects, and waived application fees, projecting enrollment is becoming progressively more difficult. Some institutions experiencing a significant spike in applications as a result of these easier options find they are only creating glorified inquiries.

Ineffective Transactional Communications

As a result of students entering the funnel at different stages, communication and recruitment efforts initiated by status changes lose their effectiveness. Because they do not follow a single, institutionally-prescribed path to enrollment, students are not exposed to key messaging delivered at prescribed stages.



² For example, The Common Application membership association provides a common, standardized first-year application form for use at over 300 member institutions.

An Inability to Find the Adult Learner

Adult or continuing learners form the largest segment of potential students in the market. That said, they are not easily targeted. This population has decision time frames that bracket the traditional student population (i.e., the adult learner tends to have a decision time frame that can be either longer or shorter than younger students). In addition, this population is difficult, if not impossible, to target through traditional means such as data purchases or college fairs.

...but, Recruiting and Admissions Approaches Have Not Adapted

Despite these well documented realities, it is common to find outdated recruiting and admissions planning processes a mile wide in their response generation activities, but only an inch deep in their ability to cultivate relationships. This rote application of legacy tactics is resulting in predictable diminishing returns. By focusing solely on loading the funnel and implementing lock-step communication flows as a means of building consideration and commitment, institutions are missing key opportunities to engage students at crucial points of influence in the decision cycle.

Realistically, most students are likely to visit a campus virtually and conduct their research online somewhat autonomously; they are much less likely to be influenced by broadcast communications. Does this mean colleges and universities should just focus on the website and hope for the best? Not at all. In fact, driven by the emergence of popularized interactive media, innovators in colleges and universities are trying numerous approaches—from blogs to online video to podcasts. Recognizing the need to move from expensive print, radio, and television advertising, to online and social pay-per-click and search engine marketing is as important as establishing success metrics for all marketing efforts. Managing an institution's brand through social media outlets can prove an effective means of building relationships with students. Unfortunately, these types of efforts are often executed without a plan in place to evaluate their impact. As a result, much innovative effort, energy, and expense may well be spent on entertaining, but ineffective, ideas.

The 21st century student multitasks across communication channels, seeks information voraciously, and has the expectation of immediate, customized responses. To be successful with this student, your enrollment path must be reconceived from a "quantity is king" transactional model, to a series of personalized experiences that offer genuine value. The key to success is to be found in advancing and interweaving the relationship building process across both online and offline channels. Institutions must be agile and ready to act quickly in a rapidly changing environment.

RELATIONSHIP BUILDING REMAINS A FUNDAMENTAL COMPETENCY

Despite market shifts, behavioral changes, and innovations in technology, one fundamental truth remains: relationships still matter. The mission of colleges and universities is to support student learning and foster student success. Enrollment results are ultimately driven by an institution's ability to convey that mission in a personalized and compelling way, articulating the value of its offerings firmly within the context of a student's desires and motivations. Students are seeking authentic experiences, not information parceled out by professionals. In the absence of that experience, the decision to attend a particular college is, more often than not, reduced to deal-making in the financial aid process.

Will a renewed commitment to student relationships result in a sea change for your institution? That remains to be seen. Connecting with students in a personal way must be an underlying institutional value before supporting technologies or new ways of communicating can make a difference. Technology is only a tool. Alone it cannot create a relationship. However, in the hands of a skilled professional with a well-designed plan, technology offers significant opportunities.

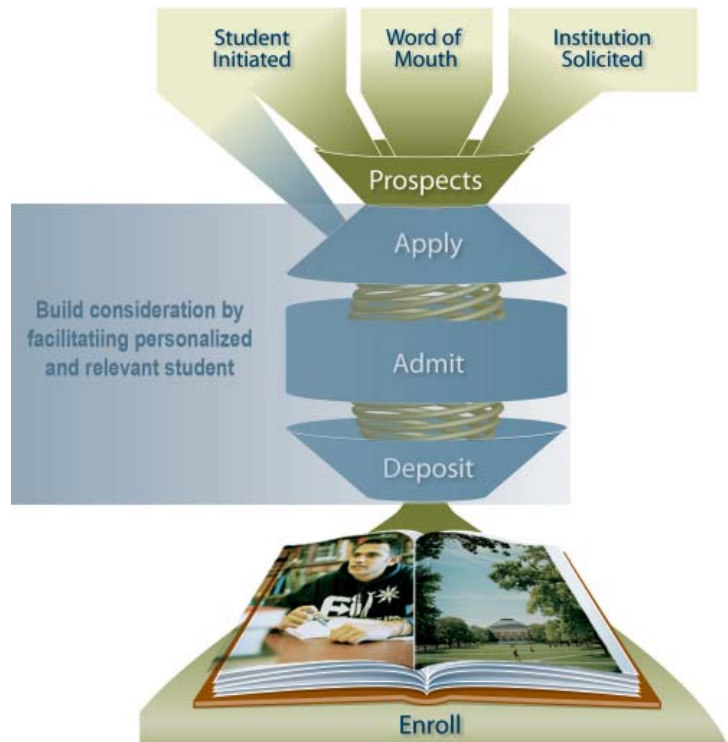
Re-envisioning the Enrollment Funnel

Given the changes in patterns of enrollment, and the impact of more technologically sophisticated student populations, SunGard Higher Education advocates a new model for the enrollment funnel. In this model, institutions rebalance their resources. Rather than focusing on demand generation activities that merely build awareness at the top funnel, this model calls for directing resources to build consideration levels among students who apply for admission or who express interest through online and/or offline behavior. In this "Performance Zone," your impact on relationship development can be truly effective.

In this model, enrollment management professionals use online and offline student behavior to gather intelligence to more effectively target and personalize their efforts to smaller, more carefully identified audiences. By intentionally planning for and measuring the interactions between a student and your institution, you can gain a dynamic view of the student as he or she moves closer to making an educational choice.

With powerful technologies that help enrollment professionals understand interactions and behavior across the institution and not just within the admissions office, they can quickly identify and pursue targeted student segments. With appropriate tracking and metrics in place, they can identify sequences of interactions to maximize response levels. This insight allows institutions to develop compelling offers – that can be easily tested and validated – while simultaneously connecting more effectively with students.

Enrollment Marketing Paradigm



TO CONNECT WITH STUDENTS, START WITH ENROLLMENT PLANNING AND STRATEGY

Enrollment professionals working to transform their planning efforts are quickly abandoning their reliance on historical precedence, or worse, on their “gut,” and adopting a more strategic approach to recruiting and admissions planning that:

- Links enrollment strategy to institutional mission and enrollment-drivers
- Provides a mechanism to align people and processes to deliver and sustain recruiting and admissions performance
- Uses performance data as evidence to substantiate or to modify recruiting and admission activities
- Leverages technology in support of key activities
- Builds intelligence to support relationship-building across the student life-cycle
- Considers retention and student success in determining strategic target markets and the development of services and activities

Start with the End-Game in Mind

As with many most important endeavors, achieving your enrollment goals depends on knowing which road to take. Without a map, it's easy to take a wrong turn along the way or start out in the wrong direction altogether. Knowing where to start, and where you hope to end up, is fundamental to a successful trip. In enrollment management, plotting a strategic path can save you missed turns and missed opportunities. In today's multi-channel world, successful efforts cannot be left to chance, but require thoughtful, evidence-based planning.

Of course, no one disagrees that planning is integral to enrollment management. And no one who values a career would announce in a meeting that enrollment direction for the next five years will be based on chance. That said, the more familiar proclamations we hear in enrollment management to “increase quality” or “expand diversity” are equally meaningless without corresponding definitions and appropriate metrics. In contrast, clear goals, accompanied by measurable enrollment objectives and carefully considered tactical plans, are imperative for institutions engaging – or planning to engage – in competitive recruiting and admissions. Planning, articulating, and documenting an enrollment strategy are essential steps in creating successful strategic plans. Disciplined effort is key. In Edison's words, “Genius is one percent inspiration and 99 percent perspiration.”

Unfortunately, many see technology as a shortcut that can somehow alter that ratio. But technology is not a magic solution, just a new toolset. And when powerful technology is implemented without understanding or acknowledging that it can only be as effective as the processes and people supporting it, organizations often experience the painful magnification of problems that have always existed. This has been validated consistently in the corporate world, where the litany of failed technology efforts to leverage customer relationships into long-term competitive advantage is legion.³ While higher education works differently from most other industries, the underlying dynamics are consistent. Poor processes result in poor outcomes, no matter what the toolset.

³ Interested readers will find many articles by searching for “CRM failures,” but a good quick read is available in IT Toolbox Research. Boardman, Richard. (2004). Doomed from the start? Why 90% of CRM implementations fail to achieve their potential. <http://hosteddocs.ittoolbox.com/RB121004.pdf>

Does this mean technology should be avoided? Certainly not. When organizations acknowledge that it takes more than technology to succeed, outcomes are typically positive. The additional factors they consider include: establishing a business strategy with clear goals and measurable outcomes, securing executive support, aligning people and processes to established goals and objectives, and committing to staff involvement and training. Organizations that commit to these principles position themselves to achieve. In short, a clearly articulated strategy must be in place before technology can matter. Managing student relationships is a strategy first, and a solution second.⁴

Align People and Processes to Deliver Performance

Managing prospective student interactions across any institution can be complicated. Consider the simple example of the various touch points a prospective student may encounter during the enrollment process. The admissions office nurtures the relationship through student application. The financial aid office processes student aid paperwork and awards funding. The housing office requires an application for on-campus housing and makes assignments. The student services office invites students and their families to campus for an orientation and preparation for class enrollment. In effect, each functional office “owns” the student at various points in the process. Yet for the student, with offices competing for attention, the end result may be a disjointed and uncoordinated experience.

From the student’s perspective, each of those offices is simply “the institution.” Considering this perspective is important to effective recruiting and admissions activities, but all too often overlooked. For many institutions, improving enrollment management strategies will require identifying and even redefining how you interact with your students. Ideally, roles and responsibilities will be aligned to the student experience so that business practices will effectively support those developing relationships.

Evidence-based Recruiting and Admissions Planning

By using data and trend analyses, enrollment professionals can evaluate and substantiate the recruiting and admissions strategies they employ. By planning to measure performance, institutions may execute smaller, yet more effectively targeted campaigns, based on how students actually engage with the institution through online behavior and offline response versus simply selecting which tactics to employ.

Just as a pilot monitors many instrument settings to keep the plane aloft, colleges and universities can utilize gauges—dashboards and scorecards—to monitor recruiting and admissions performance and effectiveness. An enrollment dashboard is a collection of performance indicators that represent point-in-time measurements valued by the institution. The scorecard presents assessment measures in the context of enrollment strategy—the expected outcomes versus actual results.

By synthesizing student information, colleges and universities can analyze trends, model predictive behavior, and use the resulting insight to build stronger student consideration and enrollment commitment, not just design the next campaign. An important question in enabling this capability is determining the data and metrics to track. More often than not, the answer depends on specific institutional strategic enrollment objectives and other unique factors. Developing a clear understanding and resulting data plan is an imperative as measurement for the sake of collecting data might only serve to leave you well-informed on a flight path to nowhere.

⁴ Engelbert, Nicole. (2007). AACRAO Tech 2007 Conference. Datamonitor, PLC.

Leverage Technology

Technology, used correctly, can be powerful. When aligned to the goals of a well-crafted enrollment strategy, skilled professionals will be able to use technology to deliver carefully designed and compelling experiences that engage students not merely in a campaign, but in a relationship.

In combination with existing systems that manage student information and financial aid, new enrollment management technologies present the opportunity to significantly enrich available information and expand the existing data set. This provides increasingly useful insight into the relationships that are developed and maintained across the institution and the student lifecycle. This rich data, when coupled with appropriate analytics offers potential to improve enrollment performance in targeted, measurable ways. Ultimately, such an approach allows professionals in the institution to evaluate and track the most valuable asset they possess, their relationships to prospects, students, and graduates.

Today's sophisticated contact, communication, campaign, event, and performance management technologies help those in colleges and universities deliver personalized interactions. At the same time, these technologies allow for the management of larger and more diverse prospect and applicant pools as well as timelier and more highly targeted communications. Combined, the potential to improve the productivity of recruiting and admissions teams is dramatic. Rather than focusing on administrative tasks and repetitive functions to assess enrollment performance, enrollment managers and teams making effective use of current technologies are freed to design and develop experiences that engage students and key constituents, building better relationships.

Given the technical sophistication of most professionals in higher education, and the experience over the last decade of employing data systems on college campuses, installing new technology to support this kind of targeted and engaged relationship building should be simple, right? But of course, it isn't. Institutions are often unable to deliver the benefits and potential that enrollment management technology can provide.

Why would this be true? Often, institutions lack the layered expertise needed to maximize technology potential. Enrollment management professionals know their area in depth, but they are not generally deeply skilled in technology. Likewise, most campus technology professionals have a somewhat limited view into the art and science of enrollment management. These islands of expertise all too frequently create an unbridgeable gulf between the potential that exists in the toolset an institution has on hand and the way it is actually used by the enrollment management staff.

To maximize the potential of technology and leverage the investment the university has made in its people and processes, a commitment to wise governance is critical.

Succeeding in a Challenging Enrollment Environment

Building and maintaining student and constituent relationships should be an important institutional value for colleges and universities seeking an advantage in today's competitive and increasingly complex environment. Improved performance goes hand-in-hand with engaging in a student-centric approach. In order to connect with the 21st century student, enrollment professionals must:

- Have a clear recruiting and admissions strategy
- Engage in data-driven planning
- Monitor and adapt plans throughout the enrollment cycle
- Leverage enrollment management technology to deliver benefits

Today's enrollment management environment presents significant potential accompanied by new challenges and potential risks. To ensure success, enrollment management professionals will need a clearly documented and measurable strategy that is supported by the institution's people and processes. Once these components are in place, an institution is well positioned to take advantage of the powerful tools today's enrollment management technology provides.

EWHT-043 (03/10)

SunGard, the SunGard logo, the Open Digital Campus, Banner, Luminis, and PowerCAMPUS are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. © 2010 SunGard. All rights reserved.

About SunGard Higher Education

SunGard Higher Education serves colleges and universities worldwide, helping them build the resources they need to support new communities of learners. Every day our customers rely on our broad portfolio of solutions and expert guidance to find better ways to teach, learn, manage and connect. To learn more, please visit www.sungardhe.com

www.sungardhe.com

SUNGARD HIGHER EDUCATION

4 Country View Road

Malvern, PA 19355

800-223-7036

610-647-5930