THE HIGHER ED EXCHANGE

VOL 3 | 2019

5 SIGNS YOU'RE NOT ACTUALLY MAKING DATA-DRIVEN DECISIONS

THE PIEDMONT COLLEGE STORY: A FOCUS ON ENGAGEMENT

GETTING THE MOST FROM YOUR ONLINE APPLICATION

TARGETX

WELCOME

TO THE FALL EDITION

When we set out to write what's now our third edition of the Higher Ed Exchange, we really wanted to challenge the way institutions are engaging with their current and prospective students.

From email and web forms, to your online application, we're sharing the best tips for putting your students first in all stages of the engagement process.

We hope you enjoy (and share!) the content in this edition. To learn more about TargetX or to share this magazine with your colleagues, visit: **targetx.com/exchange**

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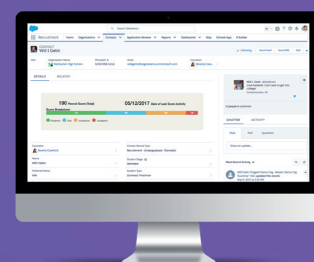
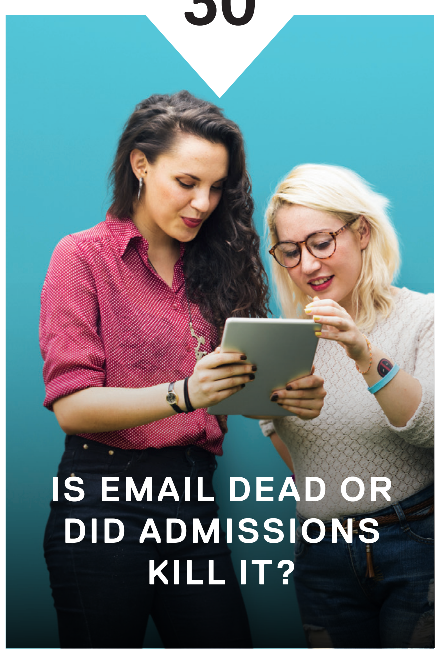
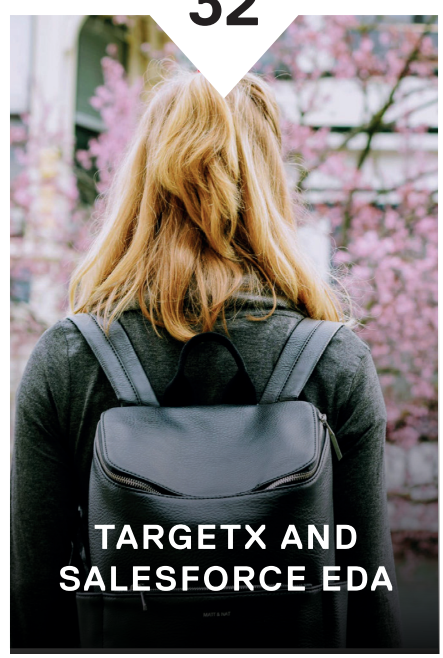






5 SIGNS YOU'RE NOT ACTUALLY MAKING DATA-DRIVEN DECISIONS

BY HAYLEY WOLF, TARGETX

We talk about making data-driven decisions in our industry all the time. It is often added in leadership job descriptions and talked about at length when we think about strategic enrollment plans and getting institutions to the next goal. It is a term that is frequently used, but after working at several universities, and working with countless colleges in my role now, it is clear that this is an area we all still struggle with.

When we think about data, we think about pulling reports and using previous history and metrics to help guide how we move forward. This is great in theory, but we often seem to have muddled data that may be inaccurate, or data that takes forever to drill down into. When you're being asked to be nimble and meet the ever-changing needs of college-going students today, sometimes these data-driven decisions are actually being made based off of partial data or even gut decisions.

5 signs you're not actually making data-driven decisions:

EVERYONE PULLING DATA GETS A DIFFERENT RESULT

One school I worked at kept all final enrollment data in a central data office, which reported statistics for IPEDS. The problem was that the data this office pulled always seemed to be off from what the admissions office had, even if it was only by a few students here and there. There was a lot of time spent reconciling and guesstimating what was and was not accurate from the “official” numbers, and ultimately, no one really knew which report was right since they all seemed to show different counts.

ONLY ONE PERSON KNOWS HOW TO ACCESS YOUR DATA

Another school I worked at implemented a CRM solution, but never did an accurate snapshot of where they were before implementation. The only way to pull historical numbers was to ask the Vice President of Enrollment Management, who would then open up an archived folder from the SIS. She would then mine the data manually to try to pull any relevant information she could find.

There were several things wrong with this scenario: there was one gatekeeper to this data, it took forever to get to the data, and there was no way to verify what was being pulled.

YOU’RE USING YOUR GUT TO MAKE DECISIONS

Other times, I see decisions being made based off of what has been done in the past, or what we think students want. This is what we refer to as a "gut decision," and there is typically no data backing this kind of choice. Sometimes these gut decisions work out great! If you've been in the field for a long time, do a lot of research, and have made prior data-driven decisions, your instincts are probably spot on. Just remember that you sometimes have to get creative or think outside the box and try something new. Sometimes that means making some gut decisions. However it's when we rely only on these gut instincts and not true strategic data driven decisions, that we get into trouble.

YOU'RE NOT LOOKING AT (OR SNAPSHOTTING) LAST YEAR'S DATA

Things change from year to year, whether it's the economy, programs on campus, press (positive and negative) or something else unexpected, things don't always look the same from one year to the next.

With that said, it is silly to think that we can make decisions without looking at the past. Year-over-year data tells a story, and when you're not looking at a few years' worth of data, it can be hard to see trends and outliers. Data weaves together a framework, highlighting trends and themes that could otherwise be missed.

YOUR DATA'S NOT SPECIFIC ENOUGH

The above examples highlight the overall issues that can arise with year-over-year data, but what about when it comes time to schedule an event, and you want to look back on prior records to choose the best date and time possible? Or, what about when you are trying to assign counselor or recruiter territories? What if you're considering retention, and need to compare what current students are doing or not doing, and then compare to the same time last year?

If we don't have accurate and specific data, we can't make data driven decisions.

SO WHAT CAN WE DO ABOUT IT?

Decide what data will be used and standardized on campus. If you have data stored across various platforms, it may make sense to standardize what data is accurate and where it is coming from. Death by committee is a real thing, but data is important, so it's possible that a data governance committee is needed on your campus. There are a lot of offices, and a lot of data, so you want to make sure you are all working from the same set of numbers.

Don't be afraid to dig in. It can be scary and downright intimidating if you find a discrepancy in the data. Just remember that once you figure out what is wrong, you can fix it and find a way to move forward. It's always better to fix errors when you find them, rather than keep using the wrong data.

Make sure you are tracking things accurately. Some questions to ask yourself: Are things reporting over original data? Is your first lead source intact, or are you writing over it? Are you tracking event attendance? Each piece of data paints a story and can help you determine where you are and where you want to go.

Leverage technology. Data analysis is hard, but there are tools out there to help make it easier. The TargetX Insights tool allows schools to easily see their data, and know that they're getting an accurate snapshot of their enrollment and event goals. No more pulling reports and wondering if they're right, or getting different results depending on who pulls the information. (Learn more about Insights at targetx.com/insights and on page 19.)

Finally, it's important to keep in mind that data challenges are incredibly common. Whether a school is big or small, public or private, data can be a problem regardless of size or type. We know data is challenging, but It is also one of the key components to a college or university's success.

"The student experience doesn't start when students set foot on your campus for the first time, it starts the minute they receive a communication from your institution. Too often, we forget that the digital experience is just as important to students as their physical experience."

Jay Murray
AVP for Enrollment Services
Western Connecticut State University

WHAT'S A SENDER REPUTATION AND WHY SHOULD YOU CARE ABOUT YOURS?

BY TIM HARRISON, TARGETX

When we think about building communication plans and drafting emails the first thought is “okay, what’s the content going to be?” And while it’s true, content is king, if your email lands in the spam folder, even the most carefully crafted content isn’t going to convert.

The foundation of better deliverability is your sender reputation. This is the metric email providers use to determine whether or not your organization is sending spam messages. Sender reputation is an individual metric that’s different for each email provider and is not something that they publish or give access to. You can gauge your sender reputation by looking at things like open rates or bounces, but there is no way to get access to it directly. The better your sender rate, the more likely you are to end up in an inbox rather than a folder or the trash can.

So how can you keep your sender reputation high and ensure your emails are getting to the right place? We’ve compiled some quick tips for making sure your emails land front and center in students’ inboxes.

Clean Your Lists
When you purchase email lists, consider using conditional formatting in excel to look for typos like ‘gmal.com’ or ‘yahooo.com’, as well as bogus email addresses like test@test.com or mickey.mouse@disney.com. Additionally, consider a service like Debounce or Zerobounce that can help remove spam trap addresses that may have snuck onto your list. Removing these before you import your list and begin your campaign can make sure you’re sending to the people you want to reach and help keep your sender reputation up.

Enforce Opt-In
It’s important to get affirmative consent from users on lists you purchase before you begin to send them high volumes of traffic. Every time someone deletes your email without reading it or worse, reports it as spam, your reputation suffers. By checking to make sure a contact wants your content, you can avoid someone marking all your mail as unwanted. This is as simple as tracking opt-ins in your CRM or email manager and sending a welcome email to new list members with a form that checks that asks them to check a box if they’d like to receive your emails. Then, filter your campaign lists on that value. This way you’re only sending repeat messages to people who want what you’re offering.

Consistent Send Volume
If you are sending 100 messages a day six days a week, and 10k on the seventh, providers will generally consider that spammy behavior. Consider breaking your reports up to distribute your send volume throughout the week or month. The more consistent your volume on a day to day basis, the better your sender reputation will be.

Send at Appropriate Times
The longer an email sits in an inbox without being opened, the more likely your sender reputation is to be dinged, even if it is eventually opened and interacted with. As such, try to send as much mail as you can during business hours in a recipient’s local time zone. Consider breaking up your reports based on time zones, which can be derived from state or country info, so that you’re not sending mail to recipients in the middle of the night.

Target For Engagement
One of the best things you can do is send more mail to people who are highly engaged, and less (or no) mail to those who aren’t actively engaged with your content. We recommend only sending every campaign to your most engaged contacts. And for those who aren’t engaging, is there a message you can send that’s hyper-targeted or with a special offer to help get them re-engaged?

While there’s no magic bullet for improving your sender reputation or ensuring that every email gets read, keeping content relevant and sending to only those who want to receive your messages is a good start. Not only does this support sender reputation, but it improves open rates, and provides a better experience for your prospects.

FINDINGS FROM THE

2019 *Digital Admissions Report*

TARGETX & MSTONER

A LOOK AT SOCIAL MEDIA AND THE COLLEGE SEARCH PROCESS

33% OF STUDENTS

did not use social media in their college search and selection process.

AND OF THOSE WHO DO...

only 17%

said social media was "very or extremely" influential in their research.

92%

SAID WEBSITES WERE MORE IMPORTANT THAN SOCIAL MEDIA.

INSTAGRAM IS THE MOST-USED SOCIAL CHANNEL BUT THEY ALSO LOVE YOUTUBE.

59%

OF STUDENTS USE INSTAGRAM AT LEAST ONCE PER DAY.

63%

have liked or followed a college page on **Instagram**

AND 46%

SAID THEY LOOKED AT INSTAGRAM FEEDS OF CURRENT STUDENTS AT THE COLLEGE DURING THE SELECTION PROCESS.

COMPARED TO ONLY

24%

WHO LIKED A COLLEGE PAGE ON FACEBOOK.

COLLEGE WEBSITES, **BROCHURES**, AND **EMAILS** WERE RANKED AS THE MOST IMPORTANT COMMUNICATION SOURCES DURING THE SELECTION AND APPLICATION PROCESS.

5 BEST-PRACTICES OF HIGHLY EFFECTIVE FORMS THAT GENERATE LEADS

BRIAN HEGER, MARYVILLE UNIVERSITY
RYAN BARRESI, TARGETX
CREIGHTON DENT, TARGETX

1. Start with an offer.
"More information" is not an offer, it's a threat.

Professional marketers generally define spam as unsolicited email, but today's consumers (our students) assign the spam moniker to any email they do not perceive contains content of value. There's certainly another lesson here about the importance of quality content and good list management, but let's stay focused on forms. Our point is, students are increasingly wary of signing up for more "spam."

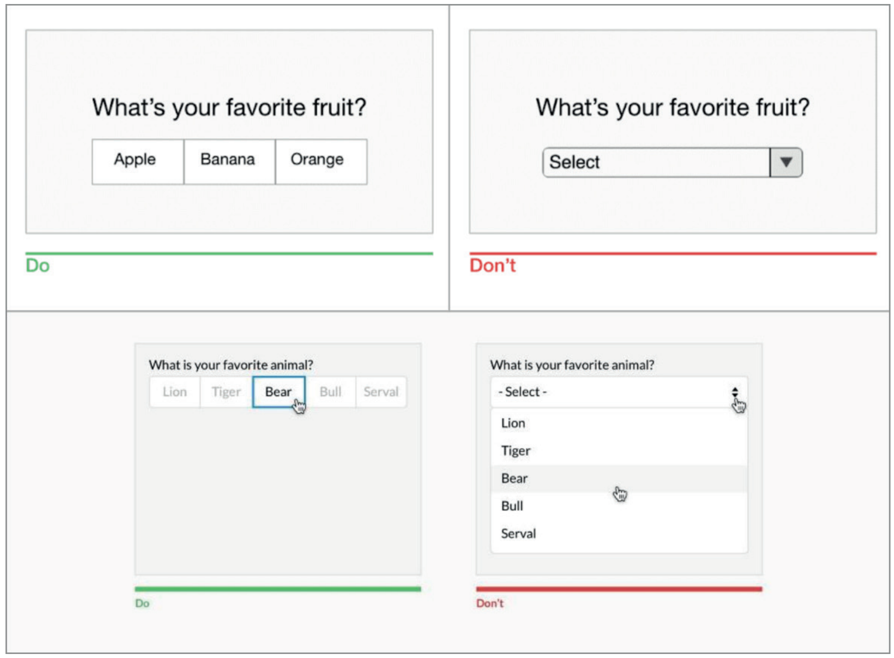
This may explain why universities have reported a decline over the years in the number of leads generated through their websites; especially when so few are offering anything more than the privilege of being added to a generic mailing list. What are you promising your students in return for surrendering their personal contact information?

2. Perception is everything.
The first thing your site users do when they see a new form is estimate how much time is required to complete it. The more complex a form looks, the more likely users will abandon the process.

The more effort it takes to complete a form, the less usable the form is. Bad usability could be the result of data that is difficult to input, an inability to understand the meaning of some questions, or confusion about error messages.

Every field you ask users to fill out requires some effort. That's why the foundation of form design is 'short is better'—get rid of all inessential fields. Be reductionary. Always question how the information you request from your students will be used. Keep in mind that removing non-essential questions reduces user effort and increases completion rates. Also, do not fall into the trap of viewing the exercise of removing fields as a loss of data. This creates more opportunity to engage your leads over time through targeted calls to action with the purpose of capturing additional information.

For those who struggle with eliminating fields, try prioritizing fields into a multi-page form that submits data to your CRM with every click. Only your most critical fields make the cut for the first page. This ensures you capture the lead with the first click, but provides an optional path for users to submit additional information if they feel so inclined.



Ideally, the number of optional fields in your form should be zero. Still, should the argument for adding optional questions to your form win out, avoid the common mistake of distinguishing between required and optional fields by adding a red asterisk next to those that are required. Instead, assuming the required fields outnumber the optional, try appending "(optional)" to the label for those fields not required.

Above all else, the fields on your form should follow a logical structure. Create a conversational flow with your questions. Fields should be ordered based on how one might introduce themselves. Grouping related fields together can also assist in perception and add important context. And if no meaningful sequence seems possible, place your fields in alphabetical order.

3. Adopt a mobile-first strategy.
The data continues to show that for most sites, the majority of traffic comes from mobile devices. Mobile-friendly is no longer enough; in fact, let's flip that on its head. We must design forms from a mobile-first perspective that are in turn desktop browser-friendly.

It's time to abandon your multiple column forms. This format has grown in popularity as a perceived cheat that provides the illusion of a shorter form without having to sacrifice fields in the process. The truth is, you're fooling no one with your multiple columns, and single column forms are simply faster to complete. One column is excellent for mobile because the screens are longer vertically and vertical scrolling is a natural motion for mobile users.

Use top aligned labels. Putting labels above the fields in a form improves the way users scan the form. This is especially suitable for phones with smaller screens. This allows form fields to extend the full width of the screen, making them large enough to display the user's entire input.
Also, when possible, avoid dropdown lists. Placing options in selector dropdowns requires two clicks and hides the options. Dropdowns are especially bad for mobile because collapsed elements make the process of data input harder on smaller screens. Use radio buttons instead for a better experience.

In summation, keep your form simple. Pay attention to user effort; typing is error prone and time consuming. Consider most mobile users are utilizing thumbs to interact with your site. Build sufficient space between your fields to optimize ease of selection and navigation.

4. Design for all.
1 in 12 men are color blind. 1 in 30 people have low vision. 1 in 188 are blind. If you're overlooking accessibility when designing your forms, you're inherently creating barriers to completion for a legitimate segment of the population and limiting your pool of prospects.

What does this mean? To begin with, confirm your field labels are descriptive, instructions are clear, validation and error messages are prescriptive, and your form is navigable by keyboard alone.

Do not use color as the only visual means of conveying information. Ensure sufficient contrast exists between text and background. A quick google search for "contrast checker" will turn up a number of free tools to help you test.

Also, do not fall for this design faux pas rising in popularity: replacing labels with in-field placeholders. This attempt at sleekness impedes the ability of your site visitors using screen readers to complete your form, and complicates matters for everyone. The minute a person inputs data in a field, the placeholder disappears and you've lost the only visible indicator of your field's purpose. Labels remain useful during and after completion of a field; don't replace them.

5. Qualify through Pre-fill.
So your shorter, smarter forms start generating more leads. Now what? Continue to repurpose and reuse your forms to transform your marketing from a one-way communication plan into a two-way engagement strategy.

As suggested earlier, starting with only a limited amount of data on a lead is not a handicap, but an opportunity to include regular calls to action in email, SMS, and student portals for leads to return to your forms to tell you more about them. Each click-thru and form submission should be reflected in your qualification scoring and drive funnel conversion efforts. And now through the modern power of form and CRM integrations, the links you provide known leads to your forms can and should pre-fill content. Not only do pre-filled forms perform better, but you're providing a self-service method to cleaning bad or outdated data.

"Students expect a smooth, comprehensive mobile experience that is easy to navigate and gives them the functionality they need. We strive to give that to them in every interaction."

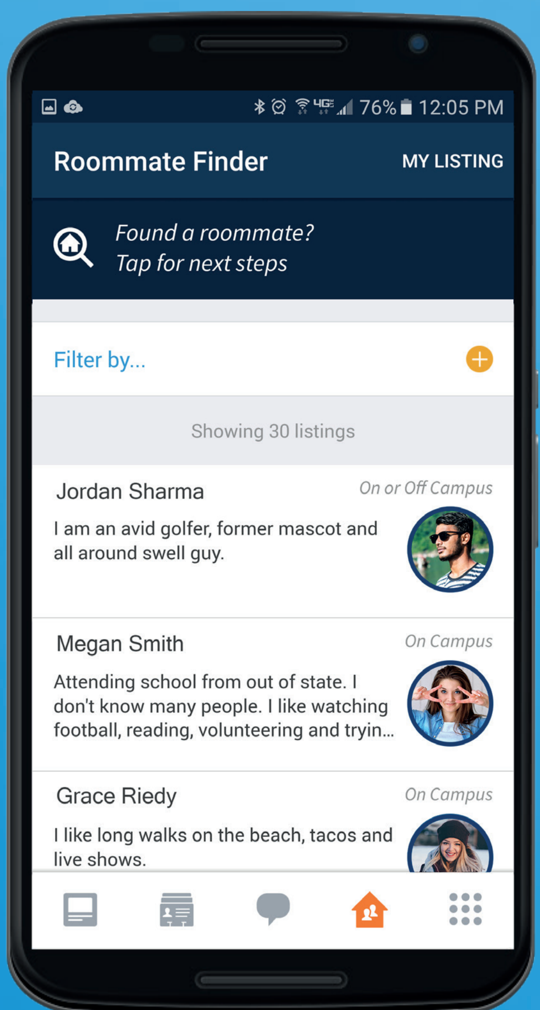
Mike Roe
Director of Information Technology
Western Michigan University

[PRODUCT FEATURE]

SCHOOLS APP

"Students who join Schools App are about four times more likely to enroll at George Mason than students who don't use the application."

Matthew Boyce
Director of Enrollment Management, George Mason University



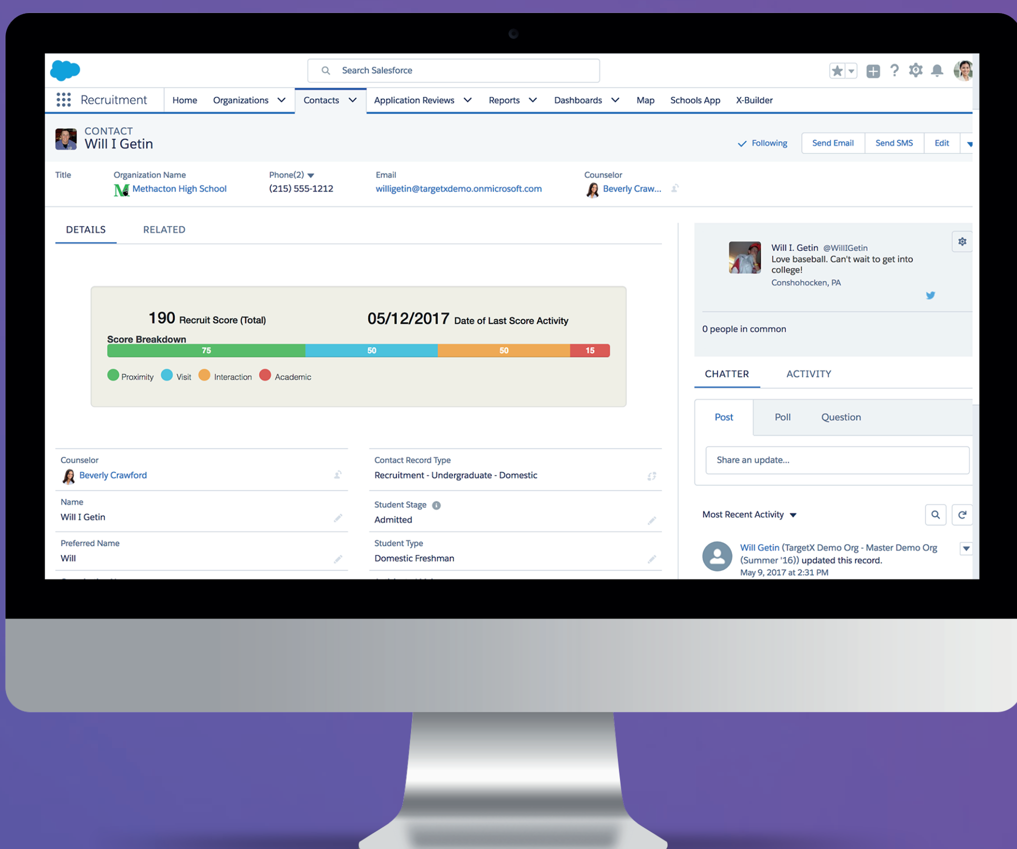
Institutions that facilitate private, digital communities via mobile apps are gaining a competitive advantage and seeing increased enrollment conversions as a result. These apps allow students to connect with one another as well as staff, form cohorts based on shared interests, and send messages all in one dedicated place. "Something we've found is that students don't want to just find someone who is in their college and has their major. They want to find someone who is in their college, has their major, is from where they are from, and likes the same music and movies. They are really trying to find their best friend before they even come to campus," says Casey Thomas, Assistant Director of Digital Engagement at Arizona State University. The more engaged students are with your university, the more likely they are to enroll, and university-sponsored mobile communities are continuing to move the needle—a fact that Matthew Boyce, Director of Enrollment Management at George Mason University, can attest to.

"Students who join Schools App are about four times more likely to enroll at George Mason than students who don't use the application," says Boyce. "For example, 60% of students from outside of Virginia (who we yield at a much lower rate) who joined Schools App enrolled at Mason. Only 4% of students who didn't join the app did so. We think that speaks volumes," says Boyce.

[PRODUCT FEATURE]

TARGETX RECRUITMENT SUITE

Empower your institution to improve the recruitment process and increase enrollment with our comprehensive CRM solution. Transform enrollment management and drive admissions productivity with intuitive, higher ed-focused functionality.

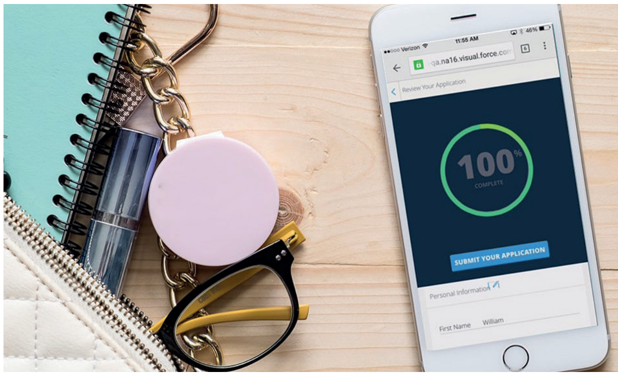


RECRUIT YOUR BEST-FIT STUDENTS

The TargetX Recruitment Suite gives you the ability to build relationships with prospects, track engagement and manage your recruitment efforts — all in one place. Send targeted email campaigns and SMS messages, organize, execute and evaluate all of your events, and manage walk-in appointments. The best part is, you can automate and track those engagement touchpoints and interactions seamlessly in the CRM.

GET STUDENTS ADMITTED AND ENROLLED

Streamline the admissions process with our mobile-first Online Application, which allows students to easily track their progress, complete and submit their application anywhere, from any device. Then easily review applications, share notes and notify students of their application decision using our Application Review tool and Student Portal. Once students are admitted, continue engagement in our branded mobile community, Schools App.



MANAGE YOUR DATA, ALL IN ONE PLACE

The TargetX Recruitment Suite allows you to track every touchpoint your staff has with students, from emails and events to applications and enrollment deposits. The CRM also integrates with your Student Information System and other data sources, giving you a true 360-degree view of your prospects.

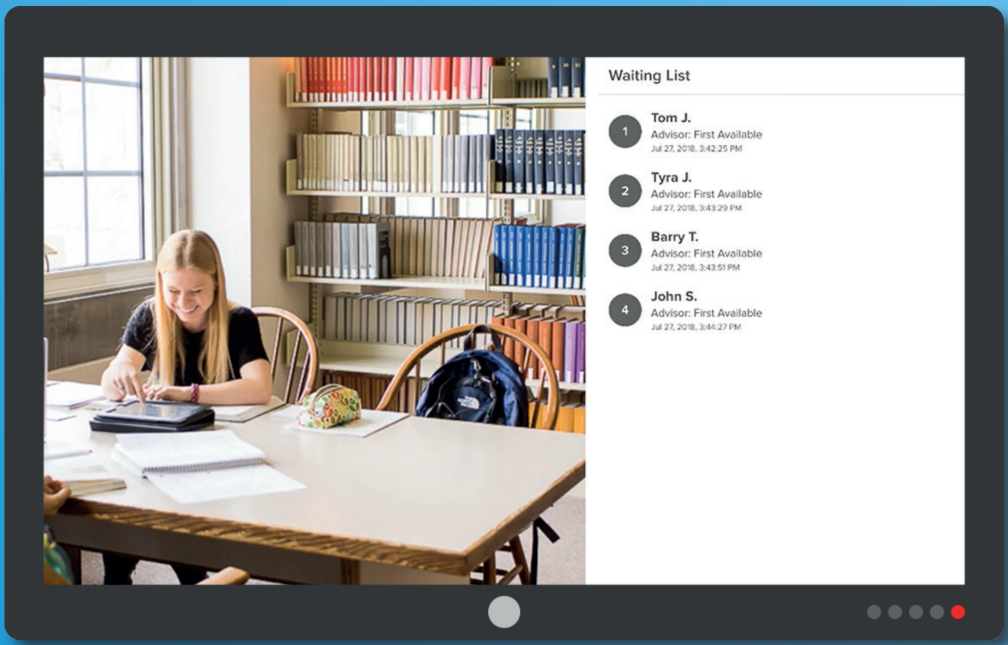
[PRODUCT FEATURE]

TARGETX ENGAGE

TargetX Engage allows you to manage your walk-in appointments while helping your advisors partner with students to achieve their goals and aspirations.

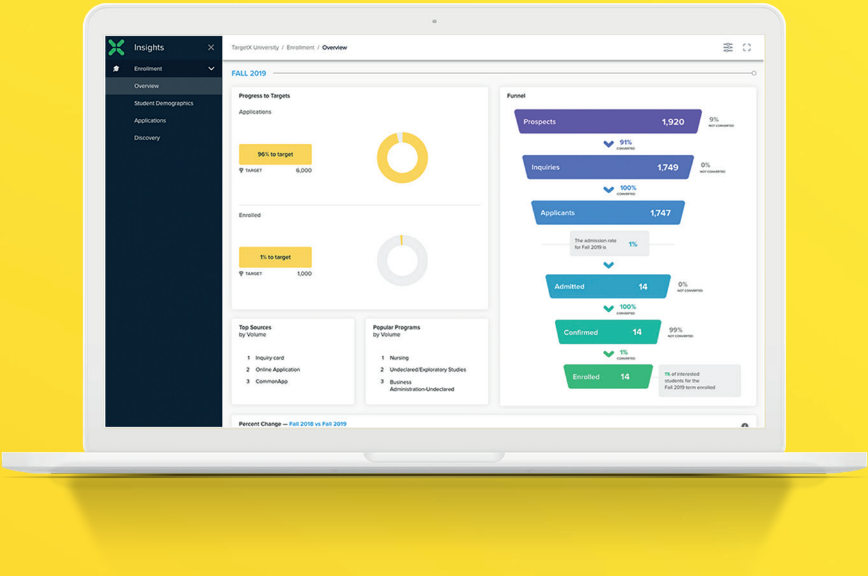
TargetX Engage provides a multi-faceted platform for advisors and students. On the student side, it allows students to sign up for meetings with their advisor and provides a dynamic, real-time display view of the waiting queue so students can track their place in line. It even triggers SMS notifications when a student reaches the top of the queue or has been called in by an advisor so they can arrive on time and make the most of their session.

For advisors, it provides the ability to view the current waiting queue, re-prioritize that queue, and select students from the queue to conduct a timed meeting. This ensures that your team can facilitate high impact conversations with as many students as possible. Best of all, advisors can take notes from each session that are automatically uploaded to the student record in the TargetX CRM.



[PRODUCT FEATURE]

TARGETX INSIGHTS



TargetX Insights makes your data actionable—helping your team make more informed decisions using out-of-the-box dashboards designed specifically for higher education.

We know that many offices struggle with challenges like year-over-year and complex reporting when it comes to visualizing existing data today. We built TargetX Insights to provide higher ed institutions with robust dashboards and analytics based on real-time data from multiple data sources (like your SIS and CRM) to help departments make data-driven decisions.

Since the privacy of your prospects and the security of your information is a top priority for us, TargetX Insights will only be pulling anonymized or aggregated data. It's built on top of Amazon Web Services' infrastructure, which is known for its encryption and stability. This infrastructure also allows you to receive updates automatically as new dashboards and analytics are vetted by our data science team, without package installations or hassle.

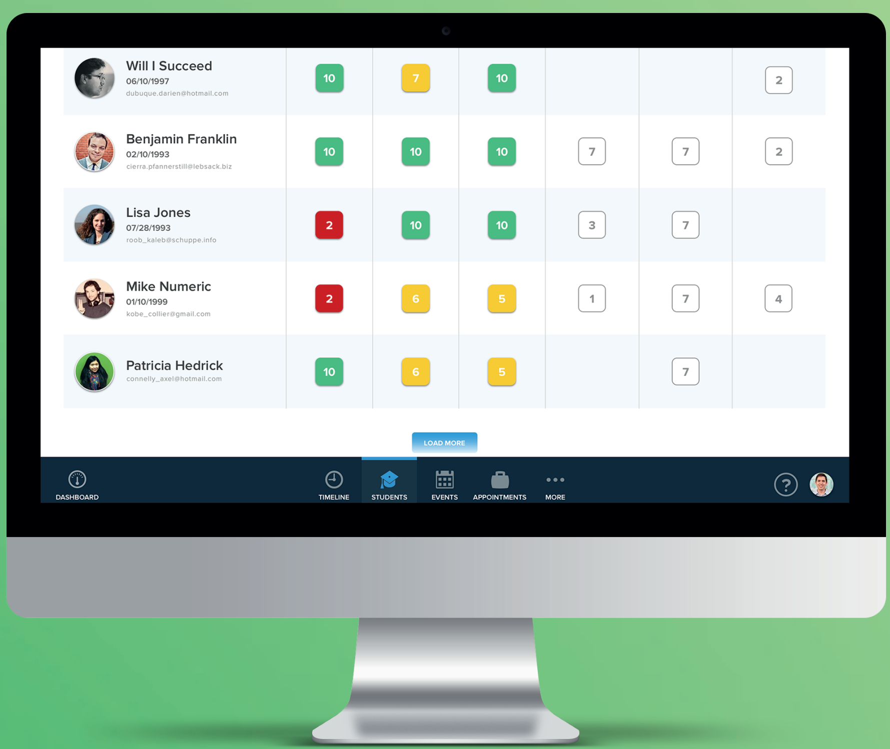
As Insights evolves, it will bring together the data you collect every day using the CRM, third-party data like higher-ed specific roll-ups and research, as well as general census and regional statistics. These additional pieces of information will be layered together in order to paint a better picture of what the landscape looks like and what you need to do to effectively recruit your future classes.

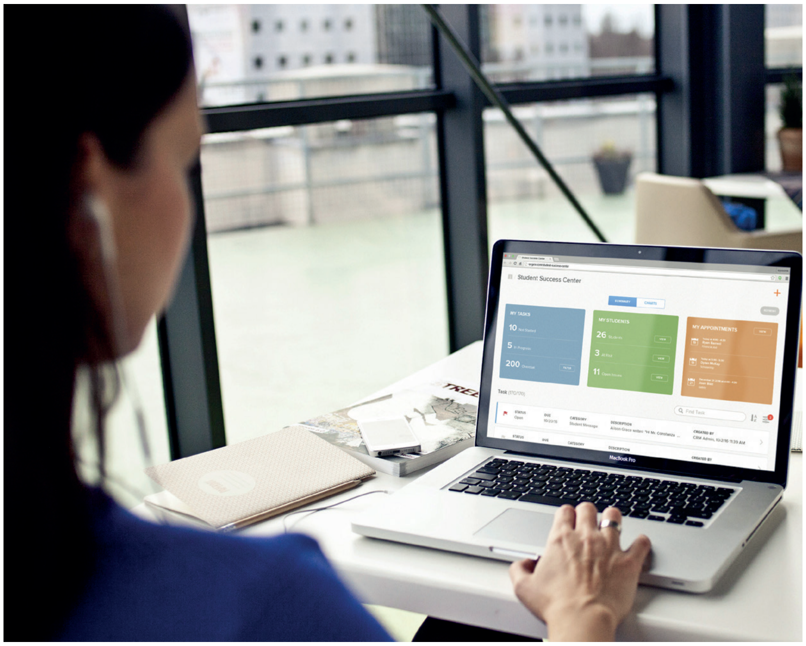
From interactive, YoY enrollment funnel visualizations to historical campus visit registration comparisons, your team will be empowered to draw conclusions from your data and take action accordingly—all thanks to TargetX Insights.

[PRODUCT FEATURE]

TARGETX RETENTION SUITE

Renew your school's focus on student success by providing a more personalized student experience with our all-in-one Retention CRM solution. Motivate lifelong success and delight students with robust tools to support your retention efforts.



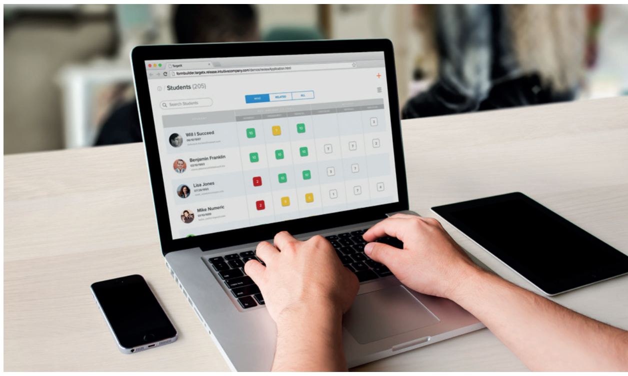


PROACTIVE STUDENT ENGAGEMENT

Many institutions face a retention problem with an average of 1 in 3 students not returning for their sophomore year. The TargetX Student Success Center compiles critical student data so that advisors and faculty can take a proactive approach, anticipate student needs, and easily identify who might be at risk.

SET YOUR STRATEGY, SEE IT THROUGH

The TargetX Retention Suite gives advisors, faculty, and other campus members who support student success the tools they need to engage students earlier and quickly identify areas of concern like financial or academic issues. Our tools allow you to build relationships with students through targeted email campaigns and 1:1 text messages, easily schedule appointments with our mobile-first Appointment Scheduler, and build a virtual community in Schools App to foster student success on your campus.



MOBILE-CENTRIC SOLUTIONS

Students today expect a mobile experience in all aspects of their life. Impact your persistence and retention rates and connect with students by leveraging the tools they use most. Meet them where they are with solutions built to be viewed from a mobile device.

SIGNS YOU NEED A NEW ADMISSIONS CRM

BY NICOLE BALDASSARRE, TARGETX

Is your admissions CRM working for you, or do you find yourself working for your system? If you've been experiencing the latter, it's time to consider your options. These solutions are designed to make your life easier, not harder, that way you can minimize administrative tasks and maximize time spent recruiting and engaging students.

It's no secret that it's harder today than ever before to successfully recruit students. The reality is, enrollment goals are growing while the prospective student pool (and corresponding budget dollars) are shrinking. It's important for institutions to keep an edge in order to stay competitive, which means knowing when to let go of strategies or solutions that aren't taking us where we need to be, especially when we consider the student experience.

Take a look at the scenarios below. If you can relate to one or more, it might be time to upgrade your admissions CRM.

1. Your student-facing applications, inquiry forms, or event registration interfaces are dated.

Okay, let's be honest, we all know that you're subscribed to admission drip campaigns from your top competitor institutions and check out their websites every other month. But, when's the last time you secret-shopped your own university?

From the 2018 Social Admissions Report, we know that over 75% of students engage with schools through their smartphone first. Try googling your school and register for an upcoming event as any prospective student would—or better yet, start the online application process—and take note of what that experience is like. Are your highest converting pages easily accessible, and are they mobile friendly? Or, do students have to click through multiple pages to find where to apply and pinch-and-zoom to fill out your forms?

2. Your data is inaccurate because it's scattered across disparate systems.

If you have to wash your hands every time you pull a report from your CRM because you know your system's data is that dirty, know you're not alone. Four in ten admissions professionals surveyed admit they cannot access the data they need to make informed marketing and enrollment decisions. Data collection processes, departmental silos, and the need for better reporting tools are cited as the most common barriers to access.

Another indication of poor CRM hygiene is the amount of manual data entry occurring within your office. If your admission counselors are tasked with manually logging their emails and calls, your engagement data is unreliable — because at the end of the day, we're only human and humans make mistakes. Likewise, if you have to manually alter reports on recruitment activities because you have redundant data entered in multiple formats (think: New York, NY, N.Y.), your data isn't reliable either. Luckily, modern systems help eliminate human error with seamless contact imports, auto-completion of student records, instant activity logging, and built-in deduplication tools.

Pro-tip: If your institution's own online application is housed outside of the CRM — why? There are so many benefits to an all-in-one approach. Aside from the initial cost savings from eliminating your application vendor by moving this area to your CRM provider, you'll have better, cleaner data at your fingertips. Instead of waiting until a student hits "SUBMIT" on their application, you will receive a student's contact information in real-time, as it's entered.

3. Automation is a distant dream rather than a day-to-day reality.

Do you find yourself saying "set it and forget it" in your sleep? Automation doesn't only have to exist in your dreams. With modern CRMs today, you can make it a reality.

Automatic activity logging, student engagement tracking, custom notifications, reminders, and specific features for certain roles are standard functionality. This means less time spent in the weeds and more time making an impact on the lives of your students.

And let's not forget the beauty of automated communications — it's now possible to trigger communication plans and nurture campaigns based on enrollment criteria that you set. For instance, if a prospect attends an information session for a specific program, an email drip campaign can automatically launch providing more information on that program to encourage that student to apply. Not only does this save staff time, but it improves the student experience by delivering personalized, relevant messaging at the right time — making students really feel known by your institution.

4. Overall staff adoption is low and frustration is high.

If you see your faculty and staff working around the system by using excel spreadsheets, dropbox, or even paper files, your current CRM is holding your team back instead of inspiring growth. User adoption is the foundation to a successful implementation of any major technology solution. And, if you're doing it right, you'll never be done implementing your CRM! Yes, you heard that right — as your vendor releases new updates and functionality, your team should be continuously evaluating and refining its processes.

So, if your current system makes you *eyeroll* upon login, either because it's an unstable, buggy software in which features don't consistently work, or it has a generally clunky user experience, it's time to upgrade.

Pro-tip: If training is an issue, compare vendors based on their implementation and on-boarding approach. You may need to pay extra for it, but the higher baseline of expertise it grants your team, and the resulting improvements in data integrity and productivity are well worth the investment.

5. Your system won't allow you to think outside of the box.

If your vendor doesn't think outside of the box when it comes to their industry vision or product roadmap, chances are you're using a system that's not built to support innovation, either. It's important to use a CRM with scalability — one that can grow alongside, and even beyond, your office.

This also means that your CRM should play nice with others as you come across new tools you'd like to incorporate into your admissions tech stack. Seamless integration with third-party applications is a strong sign of a scalable solution.

Scalability is also apparent in solutions that empower users to make changes and refine strategies. Gone are the days of having to contact your vendor to make edits to your online application or events forms, and waiting weeks before seeing those changes. A modern CRM encourages you to own every piece of the student journey.

6. You can't measure the ROI of your admissions activities.

The term ROI gets thrown around a lot in higher ed. But, do you actually have a dashboard configured that provides a clear picture of progress toward your enrollment goals? Or, are you still having to cobble together v-lookups and pivot tables in an Excel doc outside of your system to make "informed" decisions?

This is where things start to feel like inception — the return on your CRM investment is in its ability to uncover the ROI of your admissions activities. Wouldn't you like to know if that open house you've been running on that same Saturday for the last ten years is actually driving applications? In a modern CRM, at the event-level, you can see how event attendance contributes to applications for your current and subsequent enrollment cycles. From there, you can even drill down into the other touch points that influenced how those attendees progressed through your funnel. There's nothing quite like having attribution data at your fingertips when going into your morning meeting.

If any of these scenarios are applicable to you, know that there is a light at the end of the tunnel. Implementing a new CRM may seem like a heavy lift at first, but the cost of staying in your current solution and falling further behind will be far greater than the cost of making a change. Plus, you'll alleviate a lot of the frustrations you're experiencing today with a more modern, robust system that energizes and empowers your team to better serve students.

BUILDING STRONGER RELATIONSHIPS AND INCREASING ADMITS AT PIEDMONT COLLEGE

BY KATELYN SILVA, TARGETX

In 2017, after struggling to increase admission rates with systems that were admittedly "dinosaur-like," Piedmont College set out to revamp their admissions process and strengthen their relationships with students and prospective applicants alike.

Piedmont College is a small, private liberal arts college in Georgia that typically attracts students who are in-state residents. Instead of competing with other liberal arts schools, Piedmont tends to spar for students with the larger state schools that historically have more staff and resources to focus on building relationships with prospective students.

The college needed a CRM tool with an online application that would free its admissions staff to focus on deep, personalized relationships with students. Before finding that CRM, Joanna Tucker, Assistant Director of Undergraduate Admissions, says Piedmont's "systems were dinosaur-like, to say the least."

Like many small institutions, the admissions staff at Piedmont spent years doing communications and event management through painstaking manual processes. Emails were sent out individually and without automated scheduling. SMS messaging wasn't possible. Campus visits were scheduled with antiquated tools that weren't user-friendly for students. There was an online application, but it didn't integrate with other systems, which meant staff had to manually upload student information. And, worst of all, that application created a significant barrier to completion.

"Our application didn't allow students to create an account and return to their application in any way. Prospects would lose all their work, get irritated, and not finish the application," explains Tucker. "It certainly wasn't an encouraging process for them" Piedmont's low-tech tools and processes meant fewer touches with prospects, slower responses to student queries, fewer nudges to complete applications, increased prospect frustration, and ultimately, more students going elsewhere.

In 2017, a technology consultant was invited to Piedmont to audit the education management system. He quickly discovered the challenges faced by admissions and made a firm recommendation for a CRM.
His recommendation? The TargetX Recruitment Suite with Online Application — built on the Salesforce platform.

The TargetX Recruitment Suite empowers admissions teams to build stronger relationships with prospects by leveraging leading communication tools that automatically track student engagement throughout the recruitment cycle — all in one comprehensive CRM. With TargetX, Piedmont drove more conversions with less effort by nurturing prospects with robust email campaigns that are customized with easy drag-and-drop features and fully automated.

"Now, we have automatic communications and data syncs. If we receive an inquiry, the prospect gets a message. If they've stalled on their application, they get a prompt. When an application is complete, a student immediately gets a warm, customized congratulations email from us," says Tucker. "Beyond that, every piece of a student's data is at our fingertips when we need it—no heavy lift required."

Perhaps best of all, the new online application with drag-and-drop customization has improved Piedmont's admissions process by leaps and bounds. The application gives students the flexibility to begin their application, save their progress, and return to complete remaining requirements from any device, including smartphones. Now, prospects can complete at their own pace and on the device of their choosing, all while receiving improved support from admissions staff.

"TargetX allows our admissions advisors to have more time to build relationships with applicants because they don't have to do all the back-end stuff that TargetX does automatically," says Cindy Peterson, Dean of Admissions and Undergraduate Enrollment Management. "It has made our office much more efficient and intentional in pushing students to complete their applications."

Peterson continues, "SMS is another game changer. The ability to check in with students via text message is generating far more responses than past methods." That's not surprising since 70 percent of students report wanting text messages from their institution, according to the Social Admissions Report.

Another much-appreciated feature is the TargetX Events tool that allows staff to create, manage, and execute events that delight prospects. At Piedmont, visiting students receive personalized campus tours and one-on-one meetings with faculty. Tucker says the Events tool allows the team to "list all available visit times for visitors to self-select easily. The options disappear once the slots are filled, which saves visit coordinators a lot of time and effort."

The result?: Admission numbers grew 26 percent at Piedmont College following the adoption of the TargetX Recruitment Suite with Online Application! This allowed Piedmont College to scale back on non-student-facing work and build stronger relationships with prospects.

"I definitely credit TargetX with a lot of our growth and success," says Peterson.

Up next for Piedmont? CRM expansion for the next recruitment season, with the launch of student portals to serve up content based on a student's unique interests.

HOW TO GET THE MOST FROM YOUR ONLINE APPLICATION

BY ABE GRUBER, TARGETX

Next to filing your taxes and getting married, applying to college is one of the most important and complicated moments in life. For many people, the college application is the gateway into adulthood—yet it's almost as complicated a solving a Rubik's Cube.

We expect students to seamlessly navigate a cumbersome process peppered with weird terminology and acronyms—all while serving as their own version of FedEx making sure test scores, transcripts, and recommendations get delivered on time and to the right place.

Despite what can be a daunting challenge for students, we often lose sight of the fact that these students, their applications, and ultimately their enrollments are the lifeline of nearly every institution. We rely heavily on our online applications and administrative processes to keep everything running—often through the Common Application, locally centralized services like GAFutures and ApplyTexas, CRM-based applications, homegrown apps, or a combination of different applications. (And hopefully, you've moved away from paper applications; if not, give us a call—we promise not to judge.)

At TargetX, we're firm believers in embracing the Student Delight Cycle where we purposefully focus on the student experience and approach everything we do with a student-first mindset.

Which is why we want to share these 5 tips to make the most of your application process, and improve the experience for your students. We sincerely hope these help both your students as well as your staff (who ultimately help your students).

1. Focus on engaging experiences from students, accessible from any device.
Ensure your online application is device agnostic and works on both mobile and desktop browsers. (Bonus points for a truly mobile-first experience!) Utilize your institution's branding to maintain a consistent look and feel from your website and other digital properties, but most importantly, make sure your application complies with all national and local accessibility regulations and adheres to accessibility best practices.

2. Personalize the application with dynamic content for your constituents to increase completion rates.
Embrace your unique populations, and don't force everyone down the same impersonal path; deploy separate applications for different audiences when needed. Utilize dynamic content and sections within your application to keep questions relevant and don't be afraid to provide help text or videos where needed. Leverage your CRM to pre-populate application fields with data you already have on file. As an added bonus, this helps maintain data integrity and reduce duplicate applications.

3. Automate all of your application-related communications.
Take advantage of workflows and automation in your system for important messages like: application started but not completed notifications, completed application confirmations, or checklist item reminders. And don't limit your communication to email. Be sure to utilize a mix of email, SMS, letters, and calling campaigns for a truly diversified communication plan.

4. Harness the power of automation & workflows for application processing.
When possible, automate admissions decisions. Routing applications automatically to reviewers and triggering automated reminders and notifications to your review staff and faculty ensures that nothing falls through the cracks, and keeps your process flowing properly.

5. Make your application data actionable across campus.
Identify who on campus needs access to what data, and then make sure they have the right access. Counselors should be able to see territory analytics, faculty and reviewers should see application processing metrics, and administrators want to look at key performance indicators. Leverage your CRM to automate report delivery to key constituents and keep everyone informed, every step of the way.

These tips are just the 'tip' of the iceberg (pun intended) when it comes to improving the online application experience.

If you want to hear more insightful perspectives from your peers in enrollment management, take a few minutes to watch our recent webinar with the College of Charleston and Piedmont College at:
targetx.com/online-app-webinar

At best, you'll pick up a few more nuggets you can use in your department. At worst, you can keep working at that Rubik's Cube.

IS EMAIL DEAD OR DID ADMISSIONS KILL IT?

By Hayley Wolf, TargetX

I want to preface this article by saying one thing: Email isn't dead, but perhaps we're abusing the medium. According to the 2018 Social Admissions Report, we know that 86% of students prefer to communicate with colleges via email on their mobile devices. We can't take that for granted.

There was a post earlier this year added by a high school senior to the r/ApplyingToCollege thread on Reddit titled, "A Brief Analysis of 2,347 College Emails."

This particular student decided to scour his email inbox for every email he's received from a higher education institution and shared a detailed analysis of his findings.

Here's a highlight reel of the college email stats this high school senior uncovered:

- Emails were received from 115 different institutions
- Total number of emails received was 2,374
- Total number of unsolicited emails received was 2,175
- Out of 115 total colleges, the average number of unsolicited emails sent was 18.9
- 17 colleges sent a "custom application" or deadline extension — none of which he had applied to
- 9 colleges sent emails with subject lines like "Is this you?" or "Am I reaching [First Name]?" or "Is this your email address?" and 6 colleges sent emails with the word "urgent" in the subject line

...So, what's wrong with this picture?

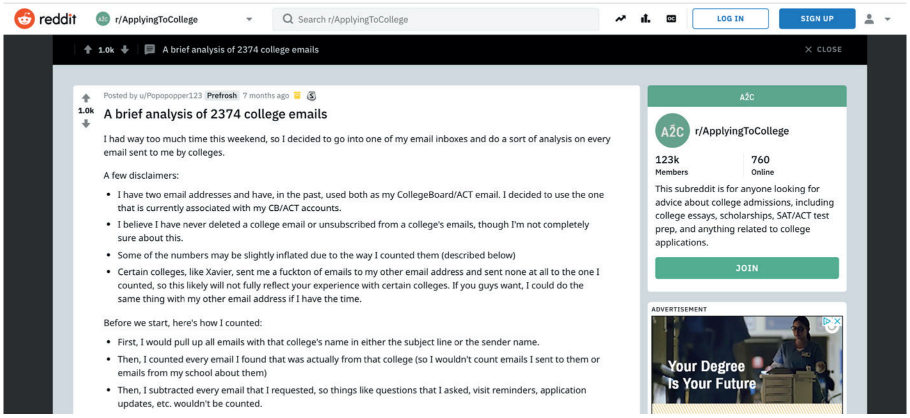
First of all, email is a fantastic way to communicate with students. We have proven metrics that show that. But, too often we bombard students with an array of emails pushing them to apply.

Unfortunately, higher ed admissions is a world where everyone is looking at what their competitors are doing and wants to one-up them or at least meet them toe-to-toe, which has undoubtedly led to email overload and spammy behaviors.

I remember working with vendors during my time in admissions that would come to me with 60+ prewritten emails pushing inquiries to apply that they would automatically send on my behalf.

One thing we seem to forget is that a student is not just looking at our institution during their search. This means that the average student is contacted 30 to 40 times per day by schools who may in fact be using the same exact vendor to write and send their emails. Taking this one step further, those schools are typically using the same exact subject lines, P.S. sections, and even bodies of emails. This equates to a lot of clutter in students' inboxes and could hurt your ability to attract students.

Now don't get me wrong, some vendors are great resources for pushing prospects to inquiries, and even inquiries to applicants—especially when an institution has limited resources—but we need to think about how we are executing this vendor-led strategy. So, while I'm not suggesting we stop using vendors or emailing prospects, this student's Reddit post highlights an immense deficiency in



our industry, and it's not only hurting a few colleges, but the industry as a whole.

What can we, as an industry, take away from articles like this? Don't get discouraged if this is you. There are a lot of easy steps we can take to make this overall experience better for our prospective students.

1. Know your students and segment your communications accordingly.
Stop using blanket P.S. statements to push a second call to action in your emails. Instead, utilize your CRM solution to personalize calls to action. If you need to add a little caveat in an email, then you should probably rethink sending that email to begin with.

2. Read through all of your planned application emails to prospects, and then cut the number of emails in half.
Think strategically and put yourself in the recipient's shoes. If a company emailed you all the time about buying something, especially if you did not ask to be on their mailing list in the first place, would that drive you to purchase it? My guess is probably not. In fact, it may have the opposite effect. Scale back and think strategically — less can (and should) be more!

3. Ditch the generics.
When you use conditional logic for a student, like including information that's based on their actual interests or needs, they are more likely to feel a connection to your college or university. We really need to evolve beyond the tired {{First_Name}} merge field and make students feel special and sought after, and help them see themselves at your institution.

4. Emojis are cool, but do they speak to your academic integrity?
While emojis may work for your school, we have to remember that college is a huge investment and life changing decision for most students. Thinking through when and where you incorporate emojis should be a priority for your team. While it's definitely a case by case basis, I generally recommend reserving emojis for 1:1 texts or emails.

5. Be authentic and maintain consistency.
If an email is not actually sent from your iPad or iPhone, then it's probably best not to add that line in the email. This generation of students is savvier than you think. They specifically talk about this tactic in the comment section of the Reddit response, and how it reeks of phoniness to them. My mantra is authenticity over everything.

6. Make sure to exclude students from receiving duplicate emails.
Repetitive emails have a negative impact on a student's perception of a school. Reporting and cross-filtering can be your best friend in this scenario. We keep saying this, but put yourself in their shoes. How would you feel if you received the same (or even a really similar) email several times?

7. Don't overuse your school's motto
This holds especially true when it comes to subject lines. This can give off the impression that it's a duplicate email. Keep it original and grab their attention for the right reasons.

8. Always use proper grammar.
Using the number "0" instead of letter "o", does not make your message look "c0oler" or more relatable to today's generation of students. Students are going to your school for an education, so grammar is always important.

9. Deadline extensions or gimmicky application discounts do not elevate your institution's brand.
Students read between the lines and may perceive a deadline extension or "sale" as an act of desperation. Even if you're struggling to hit your numbers or planned on extending the deadline from the very beginning — don't make this obvious or you'll be met with skepticism from prospects.

10. Subject lines are important.
Make sure you're coming up with thoughtful and descriptive email subjects. When working with an outside vendor, it's best to come up with unique subject line variations pertaining specifically to your school's brand identity and campus culture, rather than taking the copy and paste approach.

Above all, we need to put the Excel marketing calendar down and take a step back. Remember that we're in the business of serving students — not spamming them. When you approach recruitment efforts from a position of best serving students in their search , it demonstrates care, thoughtfulness and, most importantly, helps you stand out from all the noise.

Prevent your institution from landing on the list of schools sending the most emails or using the same old subject lines. And if you are, that's okay, but now is the perfect opportunity to reflect and inspire action accordingly. Students are at the heart of what we do, so let's recruit them with the level of attention and care they not only expect, but deserve.

TARGETX AND SALESFORCE EDA

BY ABE GRUBER, TARGETX

Last year, TargetX was announced as one of the first Salesforce EDA Core Compatible Partners. At TargetX, we've been proudly building higher ed-specific solutions on Salesforce for nearly a decade, embracing the power of the Salesforce platform while adapting and innovating for the evolving needs of higher education.

TargetX is known for our student-focused and mobile-first technology, allowing tomorrow's college students to progress through the entire enrollment funnel from the palm of their hands. We're eliminating silos on campus and allowing departments to collaborate better, while simultaneously centralizing processes in order to make it easier for people to do their jobs.

At the core of all of this, however, is a topic most people stay far, far away from: data architecture.

To most people, data architecture isn't fun, but for CRM admins and techies like me, it's the addicting puzzle that never ends. Data architecture is the underpinning to every CRM solution, and despite how good your functionality and tools are, your data — and how it's organized — makes all the difference.

So, what is EDA?

EDA is the Education Data Architecture: a community-driven data architecture and set of best practices designed to configure Salesforce out of the box for colleges and universities. It's been developed in collaboration with

Salesforce partners (such as TargetX), and colleges and universities from around the country.

What does EDA do?

- Provides objects and fields to capture data most commonly used in higher ed
- Prioritizes students and other campus constituents, and provides deep connections and relationships with other people and organizations
- Allows for scalable management of course enrollments
- Encourages data consistency across and within institutions

Think of a CRM like a giant filing cabinet; when you first get one, it's essentially a huge box to store things, but it's up to you how you organize it. EDA provides an initial framework for organizing and managing your data, specifically around people, relationships, and courses. It allows for complex connections between people and organizations.

How does TargetX work with EDA?

At TargetX, we're focused on ensuring that our new and existing clients can combine the full range of benefits of TargetX products with the advantages of EDA. Our products have the flexibility to allow institutions to use the TargetX data model alone, or combine it with EDA.

To ensure that institutions can take advantage of EDA with minimal effort, over a year ago, we introduced the TargetX EDA Toolkit, a software package that mirrors like-data between the TargetX and EDA data models. This allows institutions to take advantage of EDA without having to do a full data migration or extensively update existing workflows and data import processes.

SO, SHOULD I USE EDA?

While no two schools are exactly alike, below are our high-level recommendations around utilizing Salesforce EDA:

1

MY SCHOOL IS EVALUATING TARGETX/SALESFORCE

We encourage all new TargetX clients to install EDA, and it can be easily installed during your implementation. TargetX installs EDA as a default.

2

MY SCHOOL IS IMPLEMENTING TARGETX/SALESFORCE

Most schools currently implementing TargetX should already have EDA installed. For those who don't have it installed, you should consult with your project manager to determine what, if any, impact this could have on your project timeline and the best way to proceed.

3

MY SCHOOL IS LIVE WITH TARGETX/SALESFORCE

Since TargetX's data architecture has many of the same data fundamentals as EDA, there may not be a need for EDA based on how your school uses CRM. Installing EDA after being live for a while can be a project of notable size and may not be appropriate for all schools. We recommend a conversation with our team to determine what's right for your school.

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