LIAISON
CAS
experience
JULY 24-25 2023
CHICAGO, IL

CAS: Unlocking Opportunities to Attract New Applicants

Learn about exciting new developments within our CAS platform. We will spotlight the upcoming launch of Living Profile, an innovative initiative set to debut in the fall of 2023. Discover the range of resources we are currently developing that will drive traffic to Living Profile and revolutionize the applicant journey.

LIAISON CAS experience
JULY 24-25 2023
CHICAGO, IL

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Meet Our Presenter

Craig Stanford

Chief Strategy Officer

LIAISON

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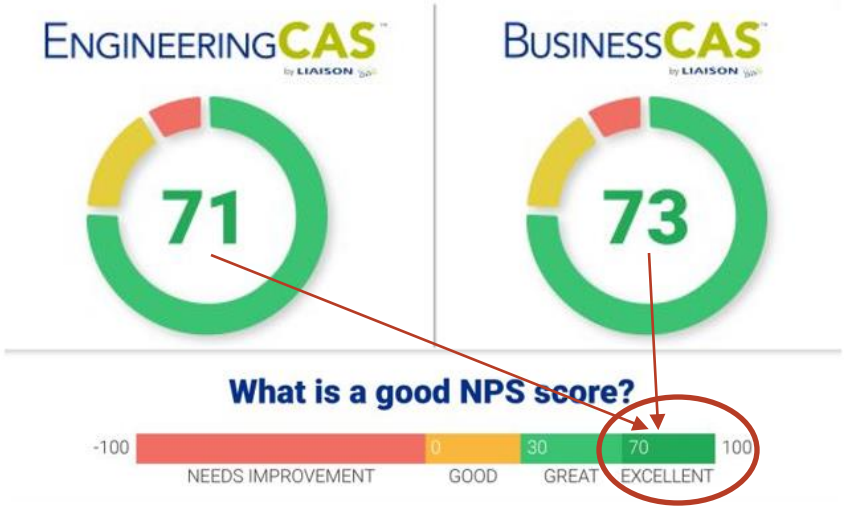
Applicant Satisfaction Says A Lot About CAS



Liaison's performance above 70 is rated "EXCELLENT" in the same category as Amazon, Starbucks and other top NPS performers.

> *This application website has been easier to navigate than any other program I've applied to. I really appreciate the straight-forward layout and clear instructions."*

> *Amazing experience in uploading materials, receiving recommendations. I wish you had more universities on your site. So convenient."*

> *I would definitely recommend EngineeringCAS to other students applying to graduate programs. It's a great resource that can help you stay organized and keep track of your application process."*

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Living Profile and CAS Forward

Current 2022-2023 Cycle

Next 2023-2024 Cycle

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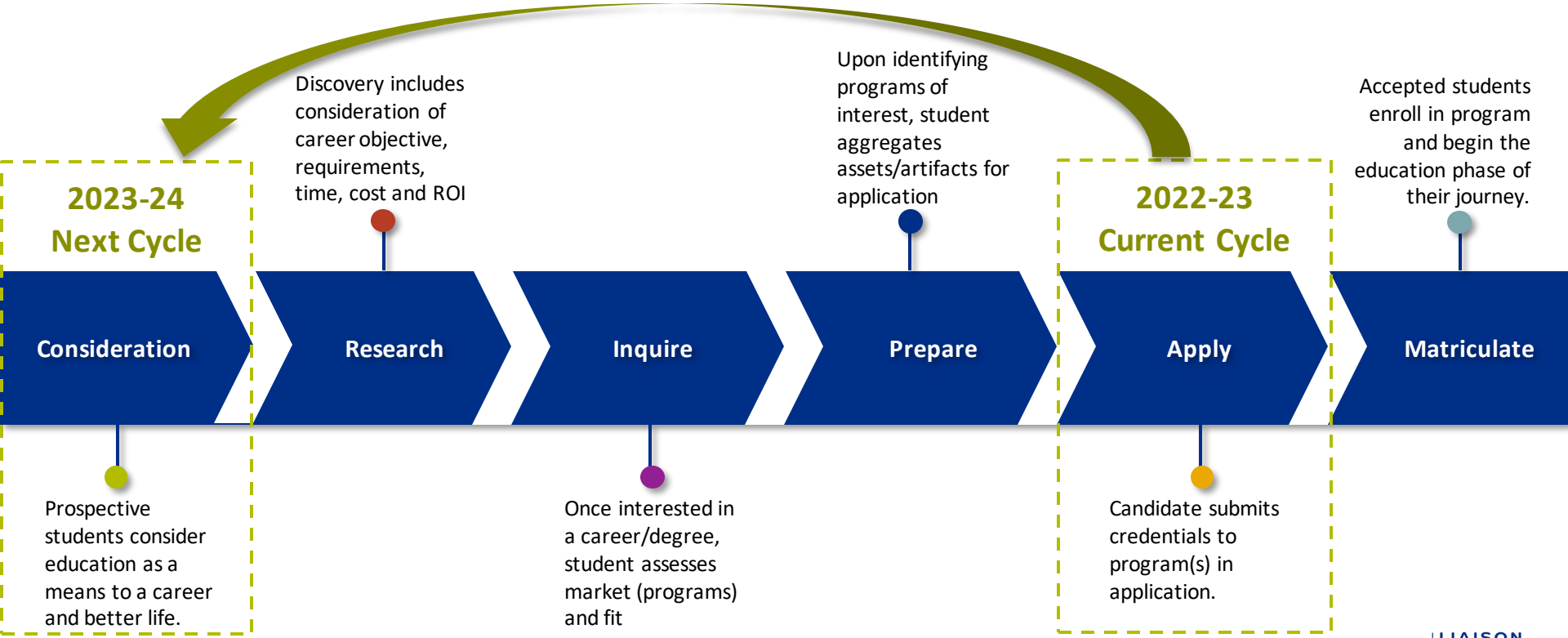
Student Enrollment Journey



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What is Living Profile?

- ✓ **Connect College to Career**
- ✓ **Student-Controlled "Profile"**
- ✓ **Ability to Curate Content Based on Where They Are**
- ✓ **Ability to Share the Profile**
- ✓ **Ability to Pass the Details to CAS to:**
  - Apply to a Degree
  - Apply to a Certificate
  - Apply for a Scholarship
  - Apply for an Internship
  - Apply for a Fellowship
  - Apply for a Career
  - Apply back to Education

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figma.com/proto/DK4pNhbDpR3DgcuanSKr4y/Living-Profile-%7C-Employer-Portal-(Vision)?page-id=0%3A1&node-id=27-1514&viewport=31...

Linked M&A SF.com Crunchbase Similar Ahrefs Liaison Analytics Tableau CAS Status Help Concur ADP Cigna CAS Forward 990s

LIVING PROFILE by LIAISON

+ ADD CONTENT | EDIT PROFILE | •••

Michael Hamilton

Pre-med student at Georgia State University and Lab Intern at PureTest labs

Boston, MA | +1 (631) 292-3677 | mhamilton@gmail.com

Career Goals

Orthopedic Surgeon specializing in Sports Medicine
I understand that it is a long journey. On the way I plan to work on the required education and internships and part time jobs that would help me make progress towards my career goals.

Education

Georgia State University
Atlanta, GA

Bachelor of Science - BS, Biomedical Sciences, General
Started: September 2, 2019 • Present

Diablo Valley Community College
Pleasant Hill, CA

Foundational College Courses
Started: September 2, 2018 • Graduated: June 2, 2019

Las Lomas High School
Walnut Creek, CA

High School Diploma • 3.8 GPA HONORS
Started: September 2, 2014 • Graduated: June 2, 2018

Experience

Lab Intern
PureTest Labs, Atlanta, GA

Physician Shadowing
John Muir Medical Center, Walnut Creek, CA

Clinic Assistant Volunteer
Margo Clinic, Atlanta

Engage

17,526

Total Candidates

RECENT OUTREACH

- 380 — **Entry Level** — 409 Recipients • 9/3/2021
- 658 — **Texas** — 1200 Recipients • 9/3/2021
- 45 — **Atlanta** — 800 Recipients • 9/3/2021

GROUPS

Christopher Malstat
Entry Level • Boston, MA

Christopher Meyer
Entry Level • Atlanta, GA

Margeaux Thergood
Entry Level • San Antonio, TX

Jaxson Franci
Entry Level • Smithfield, RI

Ryan Curtis
Entry Level • Austin, TX

Francois Gruier
Entry Level • Binghamton, NY

Michael Hamilton
Entry Level • Boston, MA

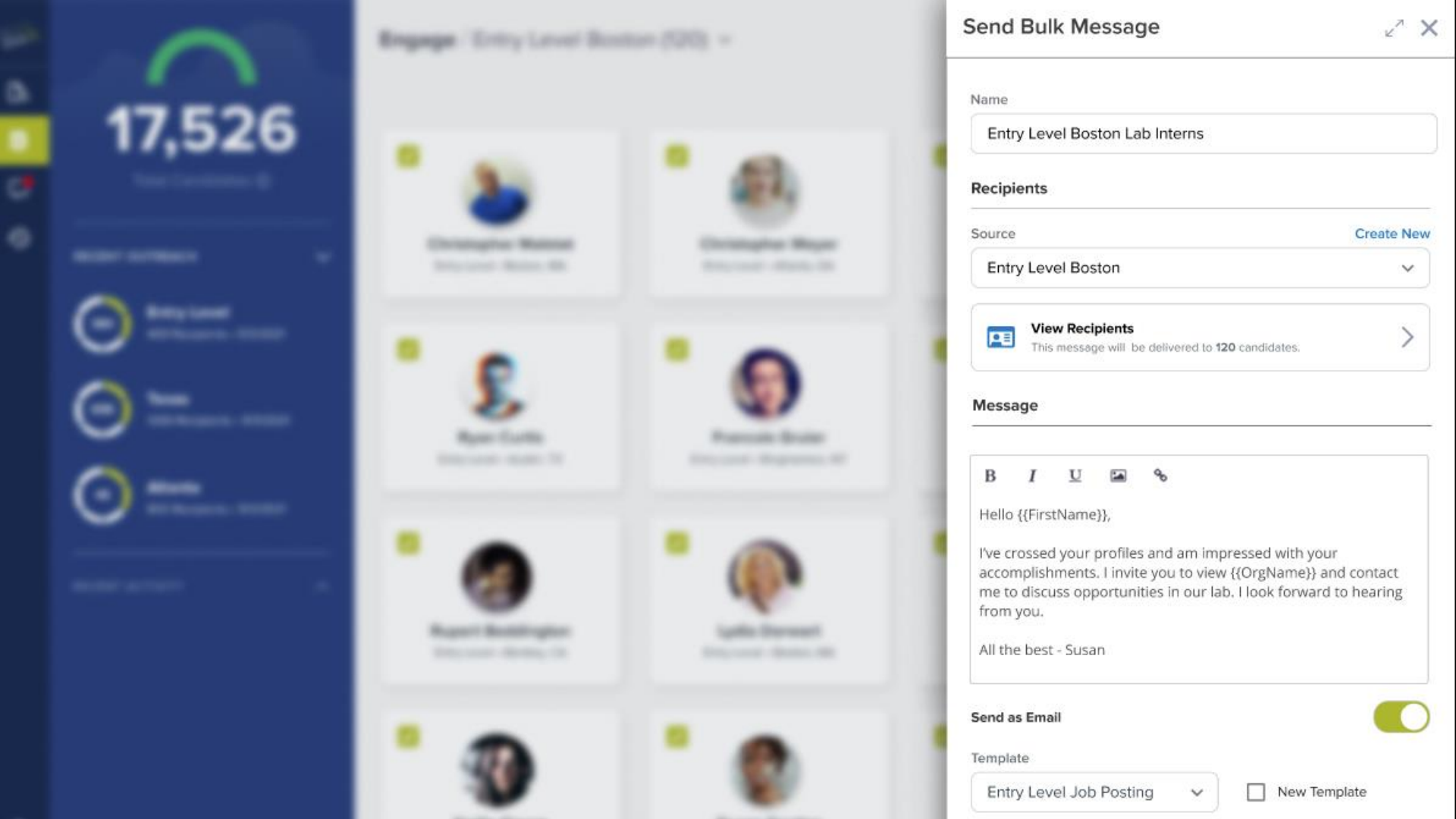
Chris Amaro
Entry Level • Baltimore, MA

Rupert Beddington
Entry Level • Berkley, CA

Lydia Dorwart
Entry Level • Boston, MA

Alfredo Dokidis
Entry Level • Baltimore, MA

Brandon Herwitz
Entry Level • Boston, MA


17,526
Send Bulk Message
Name
Entry Level Boston Lab Interns
Recipients
Source
Create New
Entry Level Boston
View Recipients
This message will be delivered to 120 candidates.
Message
Hello {{FirstName}},
I've crossed your profiles and am impressed with your accomplishments. I invite you to view {{OrgName}} and contact me to discuss opportunities in our lab. I look forward to hearing from you.
All the best - Susan
Send as Email
Template
Entry Level Job Posting
New Template

Conversations

Updated Today 09:00am

Bulk Messages

All | Unread 60

MESSAGES

Michael Hamilton
Thanks! This sounds ex..
15 minutes ago

Angel Cambre
Great! What's the next steps.
18 minutes ago

Mary Smith
When can we talk?
20 Minutes ago

Julia Marcus
I look forward to learnign more.
20 minutes ago

Peter Grosso
My schedule is open Thursday ...
23 minutes ago

Addison Holst
Thanks! I can't wait to connect

Susan Barber (Employer)

We'd like to schedule an introductory phone call for this Wednesday at 9 AM – will that work for you?

5 minutes ago

Michael Hamilton

Thanks! This sounds exciting and I'd love the opportunity to connect.

12 minutes ago

Susan Barber (Employer) View Bulk Message

Hello Michael,

I've crossed your profiles and am impressed with your accomplishments. I invite you to view Watertown Labs and contact me to discuss opportunities in our lab. I look forward to hearing from you.

All the best - Susan

25 minutes ago

Michael Hamilton

Pre-med student at Georgia State University and Lab Intern at PureTest labs

Boston, MA

+1 (631) 292-3677

mhamilton@gmail.com

VIEW LIVING PROFILE

Project “CAS Forward”

October 2023

CENTRALIZED APPLICATION SERVICE CAS by LIAISON

Project CAS Forward

Six Month Project

Go-live for Fall 2023 application cycle

Phase 1 build: April - September 2023

Future phases to immediately follow

Budget has been approved and project is staffed

Project Sponsors

Craig Stanford
Chief Strategy Officer

John Abbatico
Chief Product Officer

Lea Cadieux
VP, Marketing

Project Manager

Rishab Malhotra
Strategy Team

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What is CAS Forward?

- ✓ **Proactive aggregation and engagement** of prospective applicants, sourced directly through Liaison's efforts on behalf of our partner programs while still in "consideration stage"
- ✓ Phase 1: A **six-month project** (full first phase) and $1.1m investment
- ✓ Transcends **all Liaison products**, CASs and GTM effort worldwide, consolidating all traffic to a single domain
- ✓ Content manages the visitor's journey based on persona to **drive inquiry and application outcomes**
  - Prospective student lead conversion
  - Prospective student application conversion
  - Expanded CAS program participation

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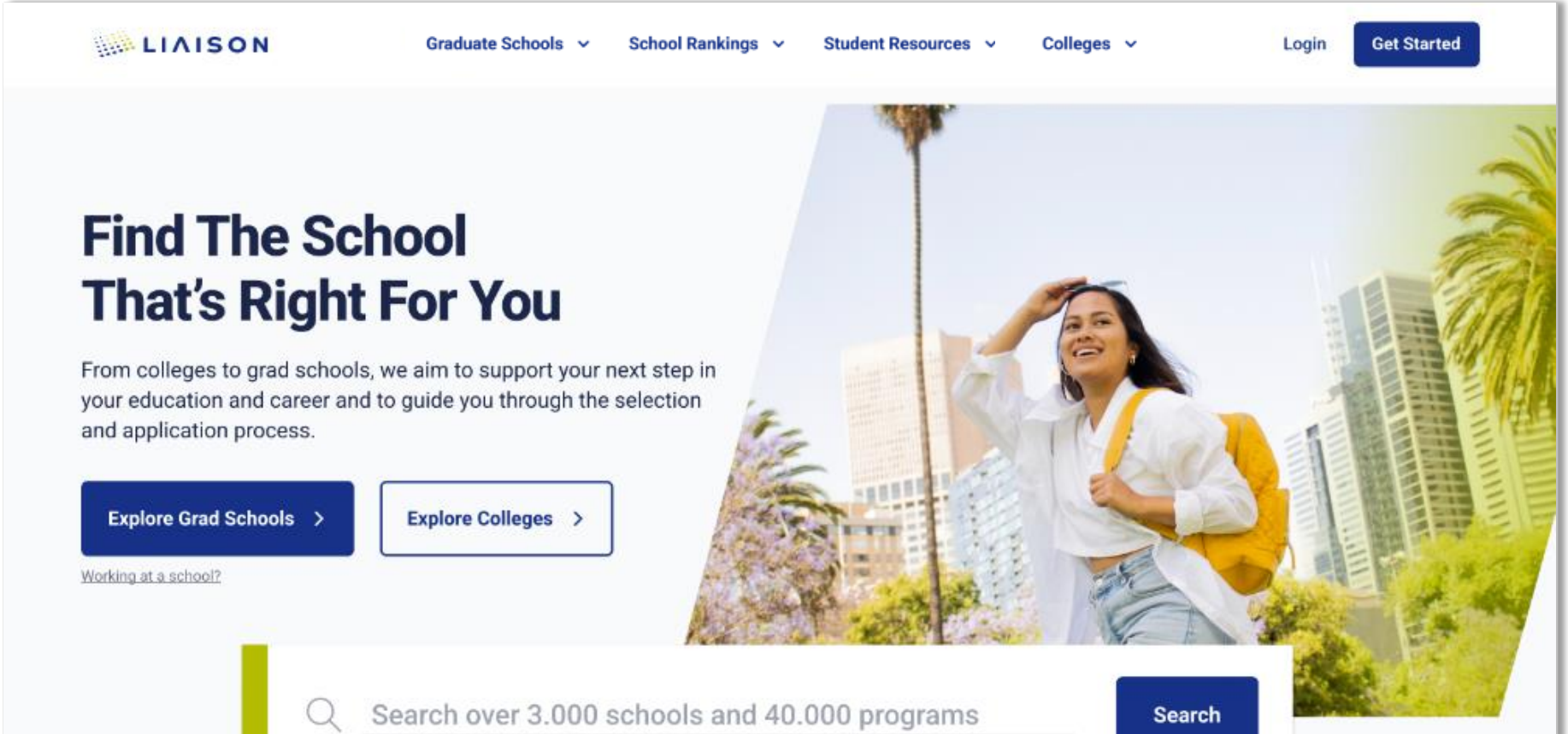
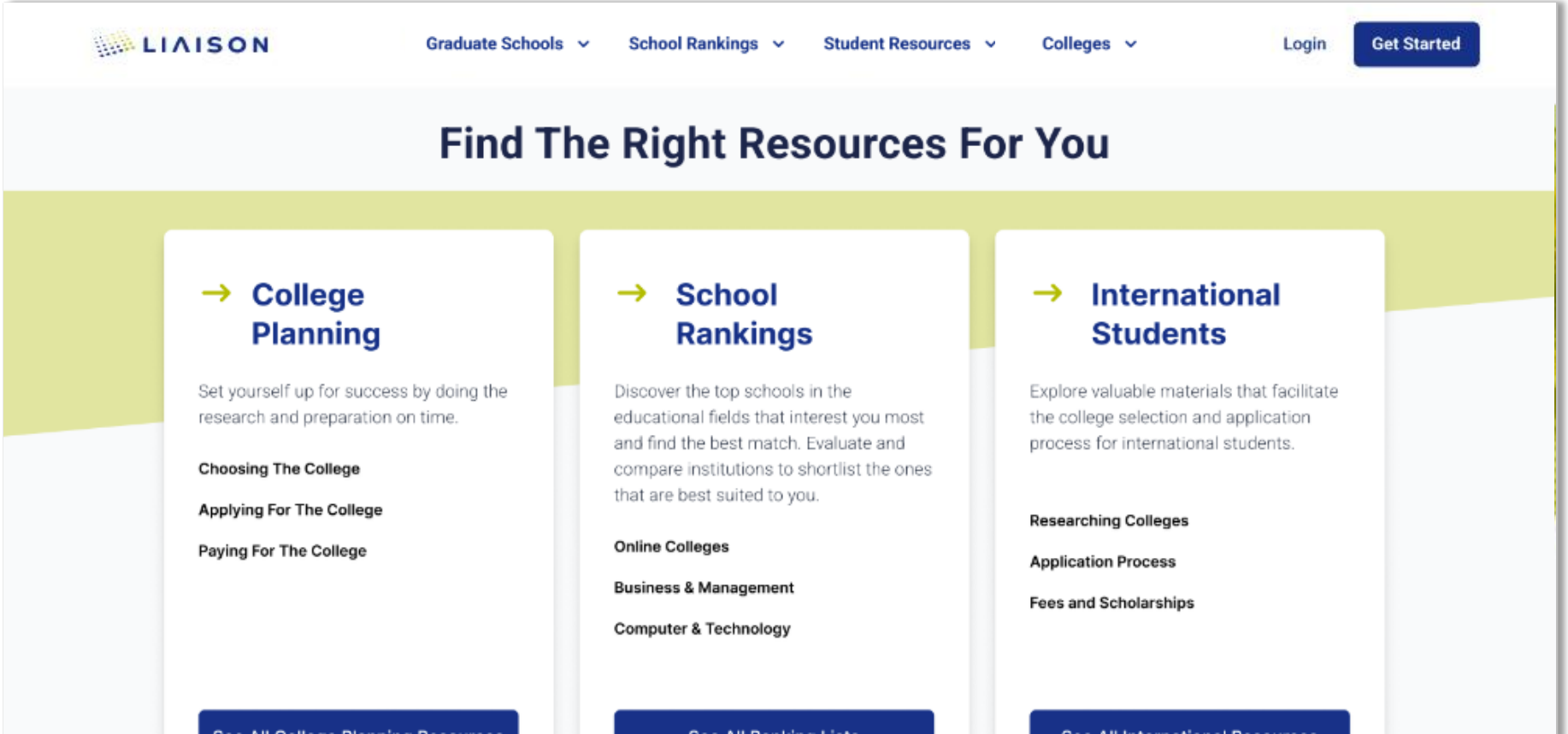
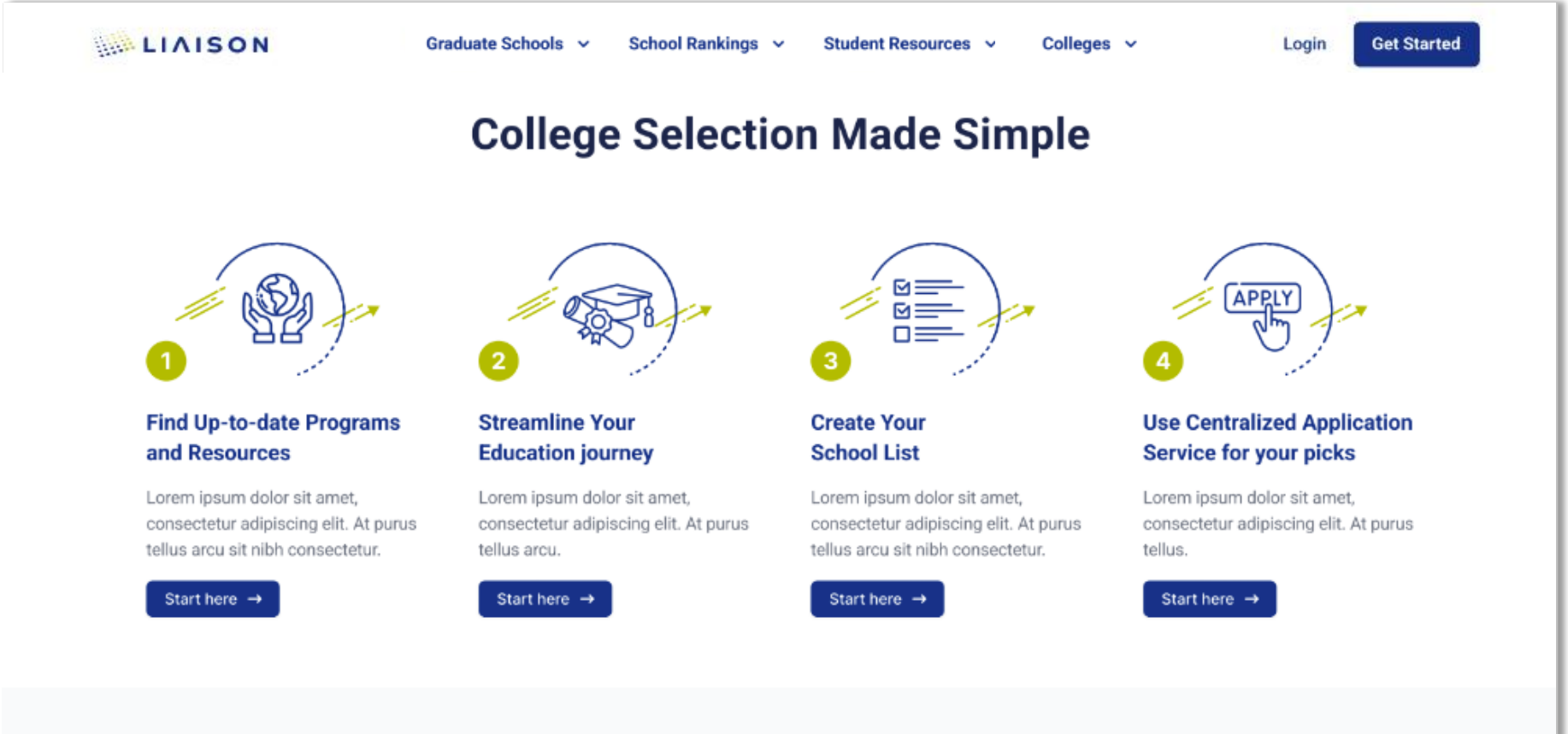
First Look at CAS Forward



First Look at CAS Forward



First Look at CAS Forward



Why Would Liaison Do This?

To be the **graduate pipeline** to education and eventually to employment

To **provide leads** from CAS to participating programs, **not just manage applications**

To further **establish "Liaison" across disciplines**, markets, and personas

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How Does It Work?

1. Traffic

Liaison currently manages ~30m high-quality annual visits via Liaison web assets which will be consolidated into a single Liaison domain, with thousands of quality backlinks (.edu sites) and high-quality, relevant content.

2. Personas

Clear navigation by persona manages their journey and incentivizes profile creation (lead capture).

3. Content

Useful resources will feature high-value content, relevant to students, who are seeking education and careers (connection to education and employers).

4. Persistence

Our marketing resources allow Liaison to continue to nurture (nudge) profile owners forward in their pursuit of education, experiential learning, and eventually careers.

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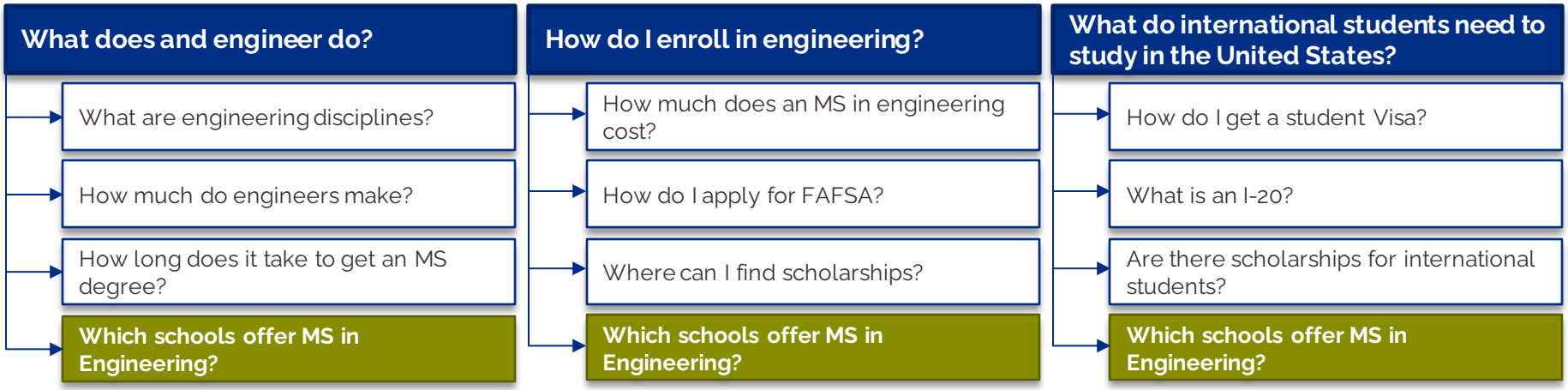
Examples of Resource Content

- **Non-biased** curation of information for would-be students to inform and encourage
  - Content will **inform but not influence students to specific programs**. It is intended to drive students from consideration of education by nudging them forward.
  - Student preference details are saved in a profile along with their "favorites," **allowing Liaison to pass "opt-in" candidates as leads/inquires to our programs**, well ahead of them starting their app. *Engineering example:*



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Examples: Resources That Will Drive Participation

CAS Forward resources, combined with ~30m visits, will drive SEO rank/position and earlier participation in CAS.

• Program/School Directory	• Resume Builder	• Experiential Learning App (SlideRoom)
• Career Information	• Mock Interview	• Posting Internship
• College Information/stats	• Program Reviews	• Posting Residency
• College/Program Rankings	• Advisor Bot	• Posting Career
• Program Details	• Loan Information	• Net Price Calculator
• Paying for College	• Hour Tracking (T2T)	• Degree Cost Comparison Calculator
• Scholarships	• LOR - Letters by Liaison	• Career ROI
• Application to Enroll Checklist	• Assessment/Strength Finder	• Chance of Acceptance
• International Resources (Visa, I-20)	• Application to Career Checklist	• Advisor/Mentor Staffing

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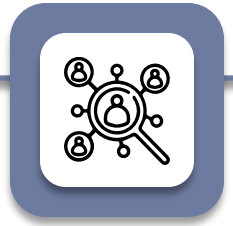
Liaison-Sponsored Scholarships

Promote scholarships **directly within the CAS**

Engaging general, as well as **students with financial need**



Awarding will be **non-biased** (lottery draw)

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Additional Marketing

Opt-in omnichannel "Nurture and Nudge"

Digital marketing efforts targeting hard-to-reach cohorts

International engagement

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Enhanced Program Profiles

Drive **SEO** rankings

Enhanced participant profiles

Headline programs featured

Participating programs' ability to **post content**

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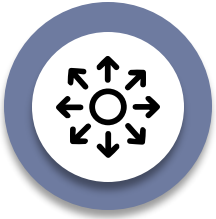
The CAS Marketplace

Sourcing Applicants for Programs

Living Profile and CAS Forward will generate awareness of CAS and earlier participation by providing broad informational resources to prospective students, ahead of starting their application activity.



GTM to Continue Participation Growth

Adding more participating programs: Continued expansion of Liaison GTM staff and updated training of field resources targeting graduate programs to participate in CAS.

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Q&A
LIAISON
CAS
experience
JULY 24-25 2023
CHICAGO, IL

LIAISON CAS experience
JULY 24-25 2023
CHICAGO, IL

Thank You

Craig Stanford
Chief Strategy Officer
Liaison

cstanford@liaisonedu.com

LIAISON CAS experience
JULY 24-25 2023
CHICAGO, IL

Appendix

LIAISON CAS experience
JULY 24-25 2023
CHICAGO, IL

CAS Enhancements

Mike Margitich

CAS Enhancements

Mike Margitich

Vice President, CAS Products

Liaison International

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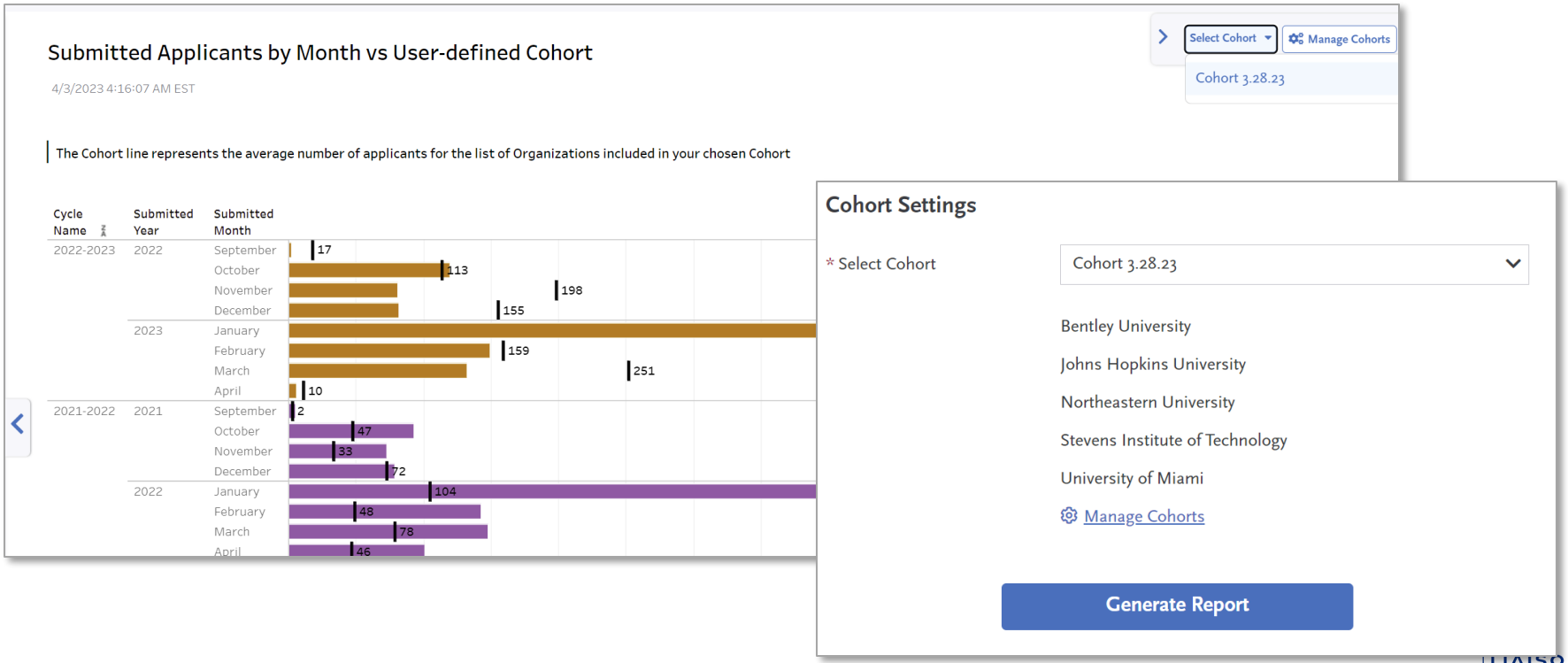
Analytics by Liaison – Cohort Reporting



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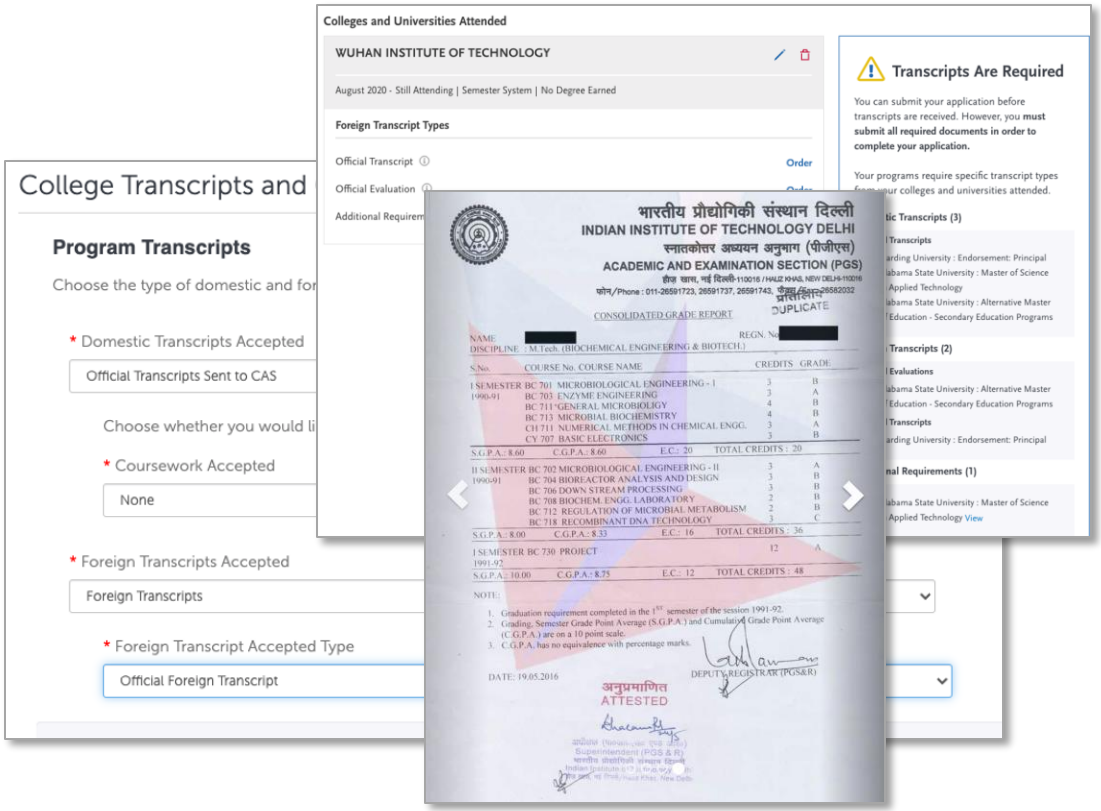
International Documentation Flexibility



* Domestic Transcripts Accepted

Official Transcripts Sent to CAS

- Please Select
- Official Transcripts Sent to CAS
- Applicant Uploaded Unofficial Transcripts
- Custom Transcript Sending Instructions
- No Transcripts Required

* Foreign Transcripts Accepted

Foreign Evaluation

- Please Select
- Foreign Evaluation
- Foreign Transcripts
- Custom Instructions
- None

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Official IELTS Integration

Official IELTS Scores

This section applies to the 2022-2023 cycle.

Overview

Official IELTS scores are submitted electronically to EngineeringCAS directly from IELTS (run by British Council, Australia and Cambridge English). Paper copies are not accepted.

Official IELTS scores can be rec... submitted; however, some prog...

Submitting Your O...

1. Self-report your IELTS sc... application.
2. Go to IELTS and request ...
3. After IELTS processing, s... section of the Check Stat...

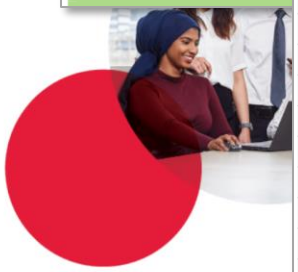
Missing Test Score...

It is your responsibility to follow... EngineeringCAS.

If you confirmed that IELTS sent... following details:

IELTS

IELTS Results Service Score Delivery Guide



Verification, E-Delivery, and...

E-Delivery with API Integrat...

ACADEMIC HISTORY

STANDARDIZED TESTS

OFFICIAL IELTS

Date	Candidate Number	TRF Number	Module	Listening Band	Reading Band	Speaking Band	Writing Band	Overall Band
05-05-2022		22CN011469LIY002A	Academic	6.0	7.0	6.0	6.0	6.5

UNOFFICIAL IELTS

Date	Candidate Number	TRF Number	Listening Band	Reading Band	Speaking Band	Writing Band	Overall Band
05-05-2022	011469						

CAS	Self Reported IELTS	Self Reported TOEFL
Cal State Apply	14994	12799
University of Southern California	8152	24581
EngineeringCAS	**4895**	**8625**
The Common Application	4343	10347
GradCAS	**2974**	**1877**
SOPHAS	2780	3896
Indiana University Graduate CAS	2712	5448
BU-MET	1809	3180
BU-QST	1279	2530
BusinessCAS	**1268**	**2279**
BU-GRS	1247	4851
UofM Graduate School	1071	537

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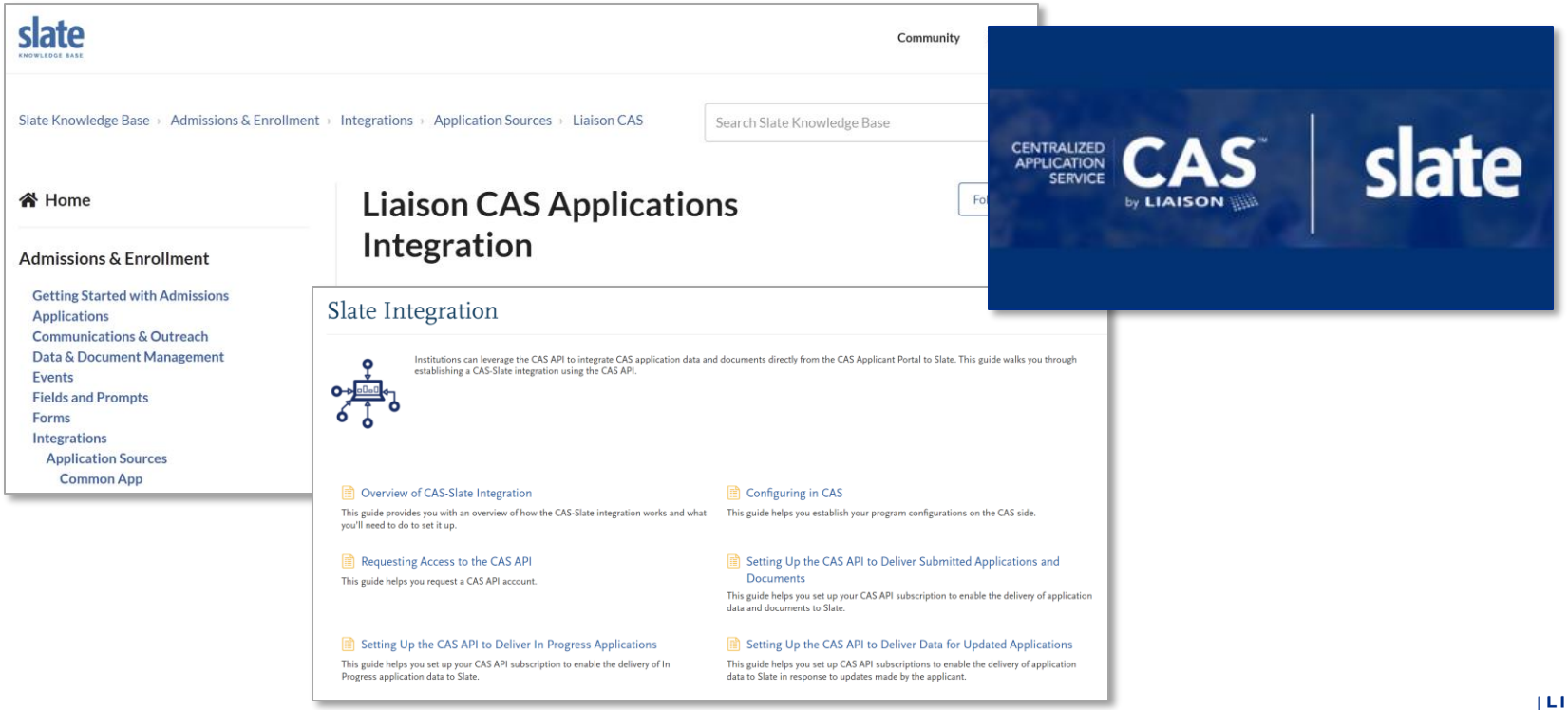
Standard CAS – Slate Integration Templates



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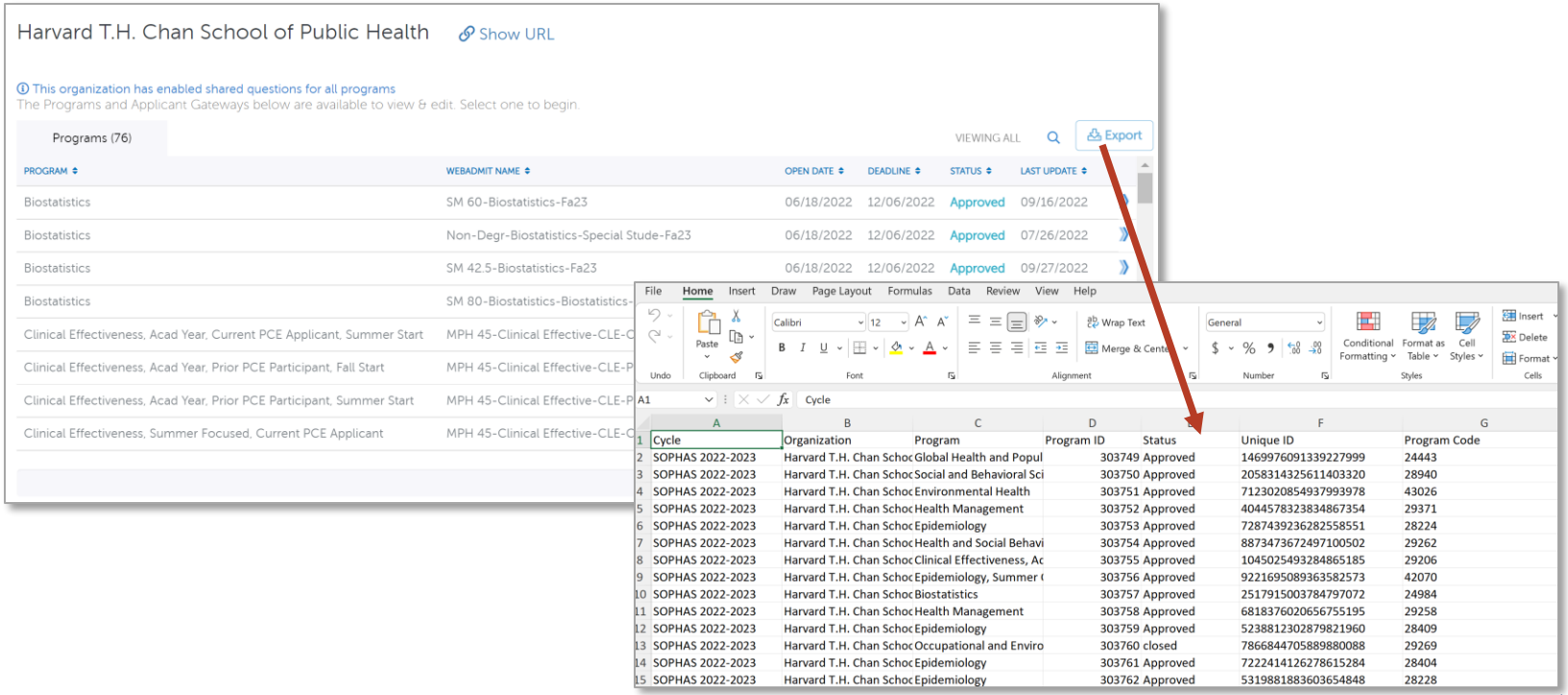
Simple Push-Button Configuration Reports



Harvard T.H. Chan School of Public Health Show URL

This organization has enabled shared questions for all programs
The Programs and Applicant Gateways below are available to view & edit. Select one to begin.

Programs (76) VIEWING ALL Export

PROGRAM	WEBADMIT NAME	OPEN DATE	DEADLINE	STATUS	LAST UPDATE
Biostatistics	SM 60-Biostatistics-Fa23	06/18/2022	12/06/2022	Approved	09/16/2022
Biostatistics	Non-Degr-Biostatistics-Special Stude-Fa23	06/18/2022	12/06/2022	Approved	07/26/2022
Biostatistics	SM 42.5-Biostatistics-Fa23	06/18/2022	12/06/2022	Approved	09/27/2022
Biostatistics	SM 80-Biostatistics-Biostatistics-				
Clinical Effectiveness, Acad Year, Current PCE Applicant, Summer Start	MPH 45-Clinical Effective-CLE-C				
Clinical Effectiveness, Acad Year, Prior PCE Participant, Fall Start	MPH 45-Clinical Effective-CLE-P				
Clinical Effectiveness, Acad Year, Prior PCE Participant, Summer Start	MPH 45-Clinical Effective-CLE-P				
Clinical Effectiveness, Summer Focused, Current PCE Applicant	MPH 45-Clinical Effective-CLE-C				

File Home Insert Draw Page Layout Formulas Data Review View Help

Undo Clipboard Font Alignment Number Styles Cells

A1 Cycle

	A	B	C	D	E	F	G
1	Cycle	Organization	Program	Program ID	Status	Unique ID	Program Code
2	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Global Health and Popul	303749	Approved	1469976091339227999	24443
3	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Social and Behavioral Sci	303750	Approved	2058314325611403320	28940
4	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Environmental Health	303751	Approved	7123020854937993978	43026
5	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Health Management	303752	Approved	4044578323834867354	29371
6	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Epidemiology	303753	Approved	7287439236282558551	28224
7	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Health and Social Behavi	303754	Approved	8873473672497100502	29262
8	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Clinical Effectiveness, Ac	303755	Approved	1045025493284865185	29206
9	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Epidemiology, Summer (	303756	Approved	9221695089363582573	42070
10	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Biostatistics	303757	Approved	25179150037847970 72	24984
11	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Health Management	303758	Approved	6818376020656755195	29258
12	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Epidemiology	303759	Approved	5238812302879821960	28409
13	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Occupational and Enviro	303760	closed	7866844705889880088	29269
14	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Epidemiology	303761	Approved	72224141262786152 84	28404
15	SOPHAS 2022-2023	Harvard T.H. Chan Schoc	Epidemiology	303762	Approved	5319881883603654848	28228

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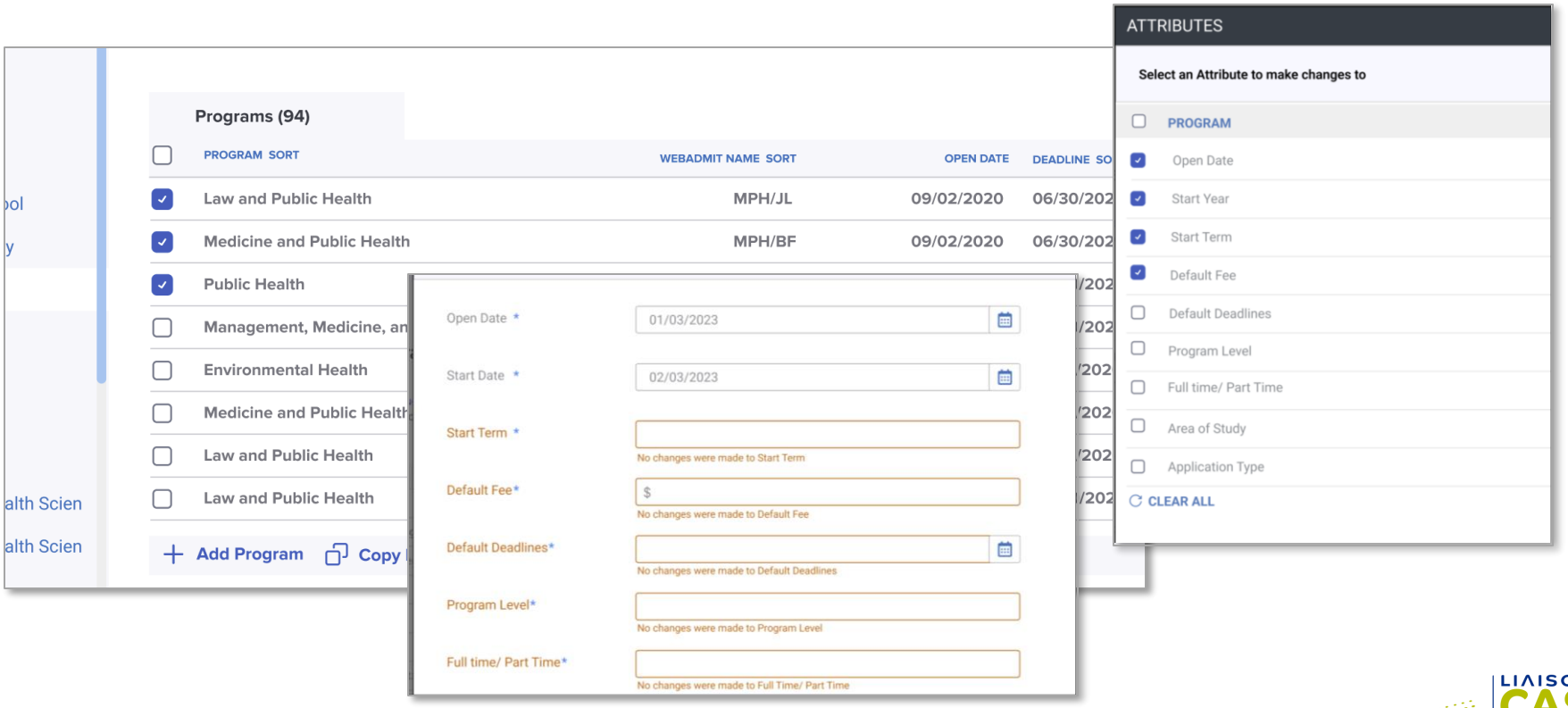
Simple Bulk Editing of Program Attributes



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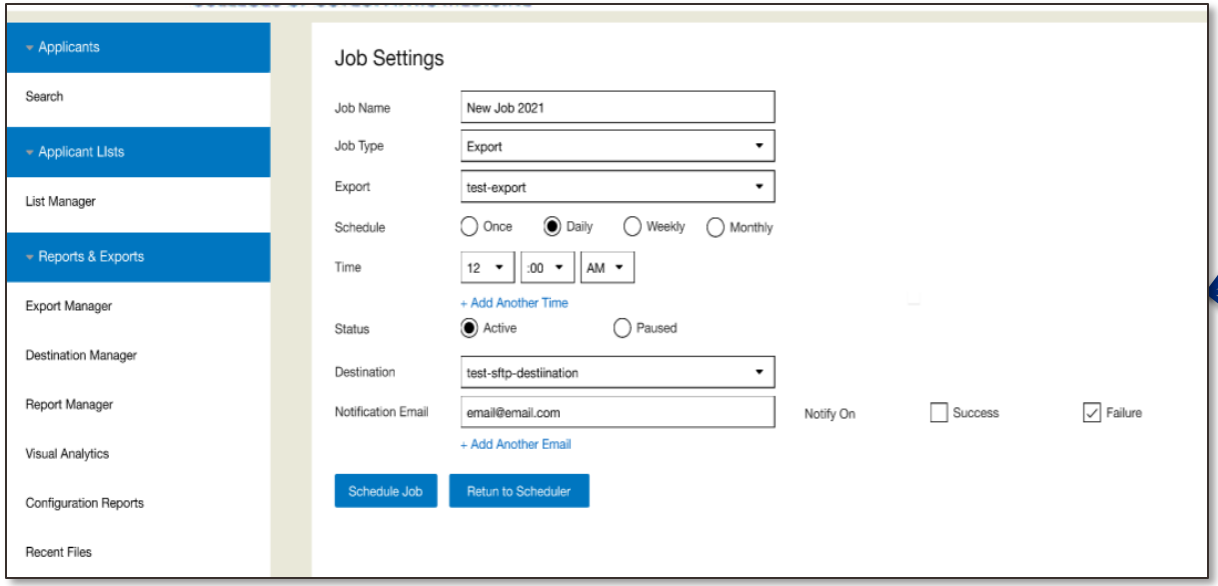
Automated SFTP File Delivery via WebAdMIT



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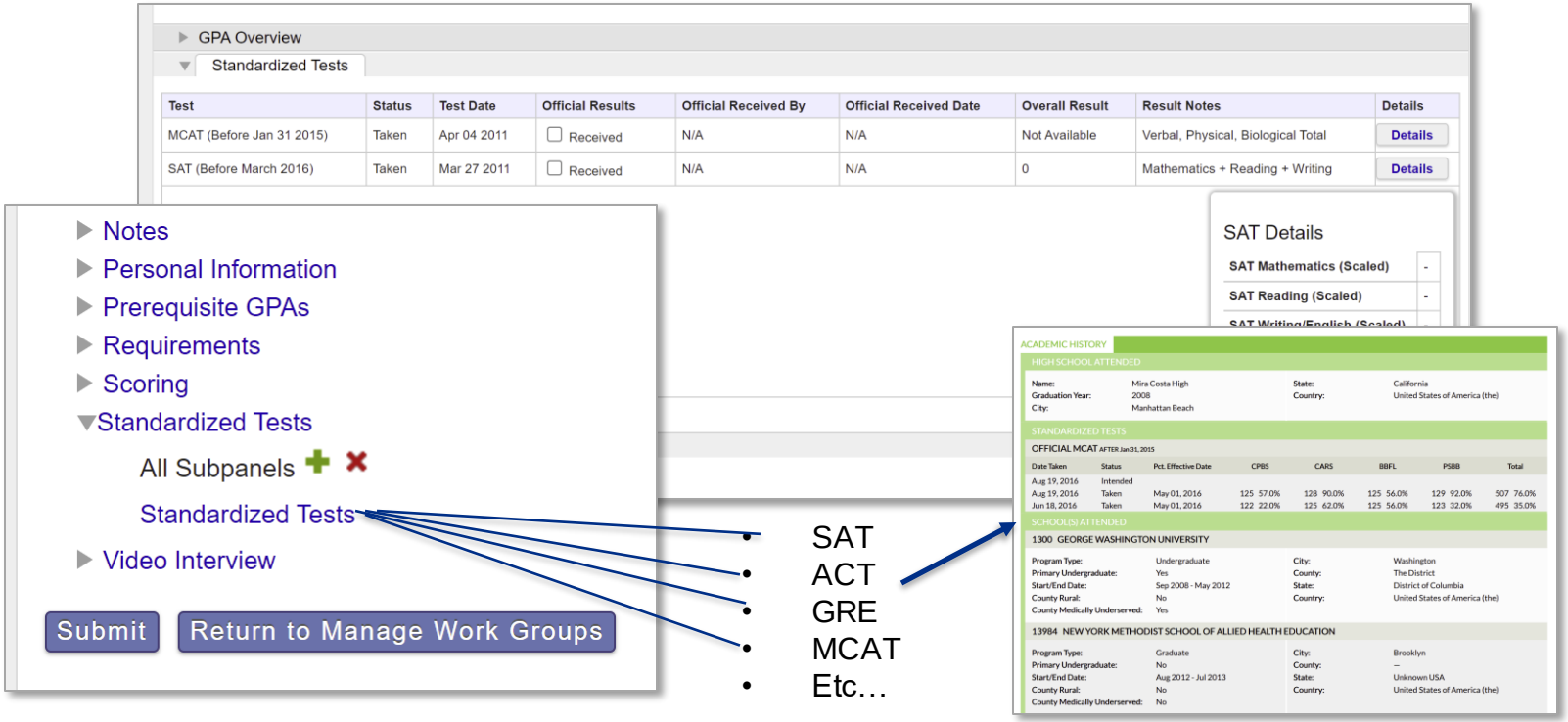
Better Test-Optional Review in WebAdMIT & PDF



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LIAISON CAS experience
JULY 24-25 2023
CHICAGO, IL

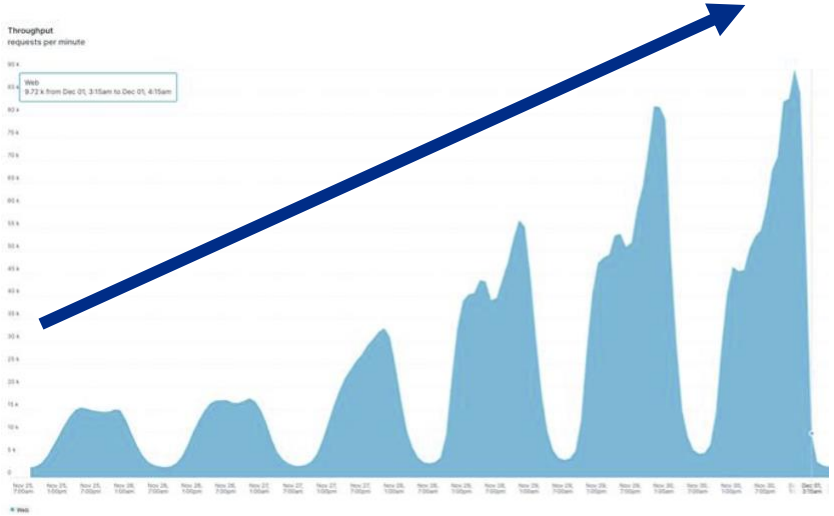
CAS Platform

Upcoming Roadmap Highlights

Cloud Upgrade – CAS & WebAdMIT Applications

CENTRALIZED APPLICATION SERVICE CAS™ by LIAISON

In Progress - Summer 2023



WebAdMIT™ by LIAISON

Completed May 2023

Access to massive amounts of **storage**, simple **scaling** up of capacity for major deadlines, and enhanced **redundancy / resilience**

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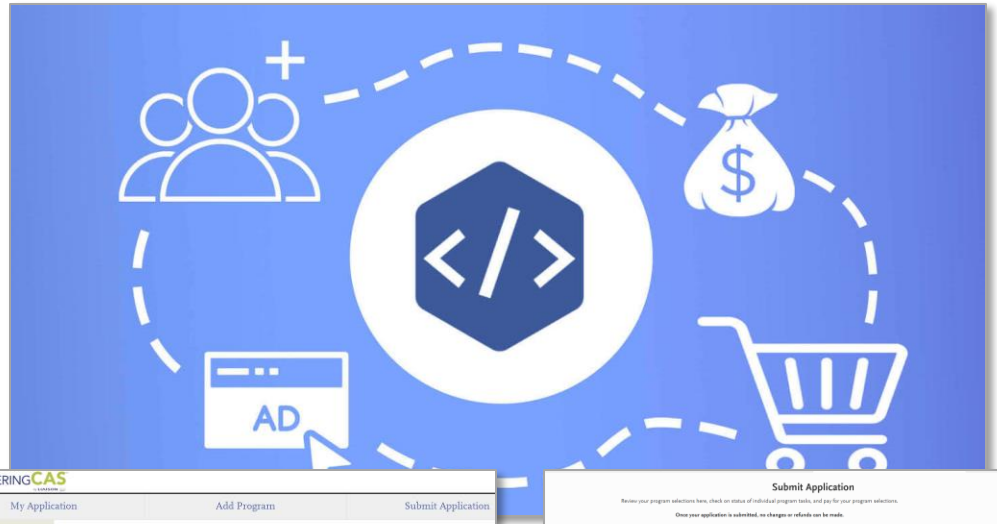
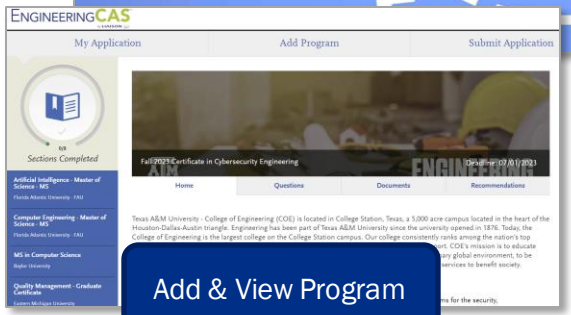
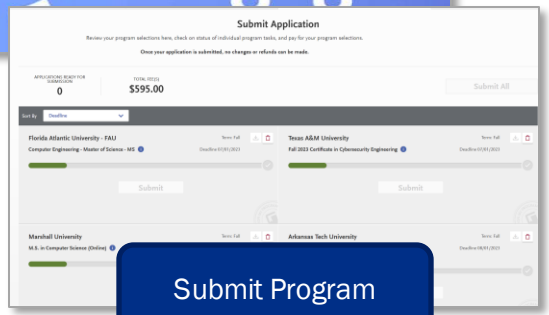
Standardized Tracking Pixels per Program





Add & View Program



Submit Program

Target Pilot
Summer 2023

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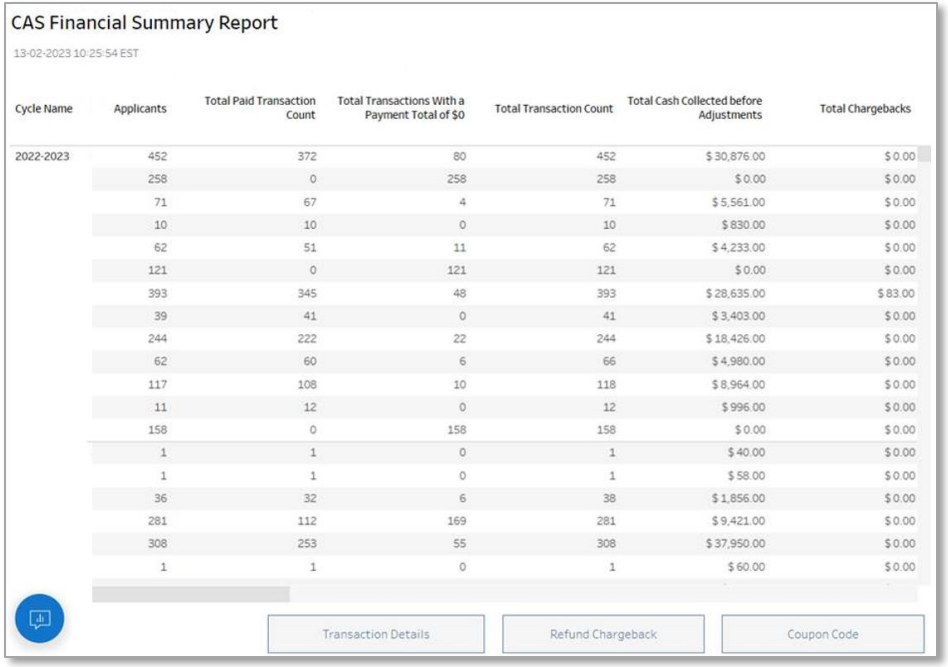
School Financial Reporting in Analytics by Liaison



CAS Financial Summary Report

13-02-2023 10:25:54 EST

Cycle Name	Applicants	Total Paid Transaction Count	Total Transactions With a Payment Total of $0	Total Transaction Count	Total Cash Collected before Adjustments	Total Chargebacks
2022-2023	452	372	80	452	$ 30,876.00	$ 0.00
	258	0	258	258	$ 0.00	$ 0.00
	71	67	4	71	$ 5,561.00	$ 0.00
	10	10	0	10	$ 830.00	$ 0.00
	62	51	11	62	$ 4,233.00	$ 0.00
	121	0	121	121	$ 0.00	$ 0.00
	393	345	48	393	$ 28,635.00	$ 83.00
	39	41	0	41	$ 3,403.00	$ 0.00
	244	222	22	244	$ 18,426.00	$ 0.00
	62	60	6	66	$ 4,980.00	$ 0.00
	117	108	10	118	$ 8,964.00	$ 0.00
	11	12	0	12	$ 996.00	$ 0.00
	158	0	158	158	$ 0.00	$ 0.00
	1	1	0	1	$ 40.00	$ 0.00
	1	1	0	1	$ 58.00	$ 0.00
	36	32	6	38	$ 1,856.00	$ 0.00
	281	112	169	281	$ 9,421.00	$ 0.00
	308	253	55	308	$ 37,950.00	$ 0.00
	1	1	0	1	$ 60.00	$ 0.00

Transaction Details | Refund Chargeback | Coupon Code

Target Summer/Fall 2023

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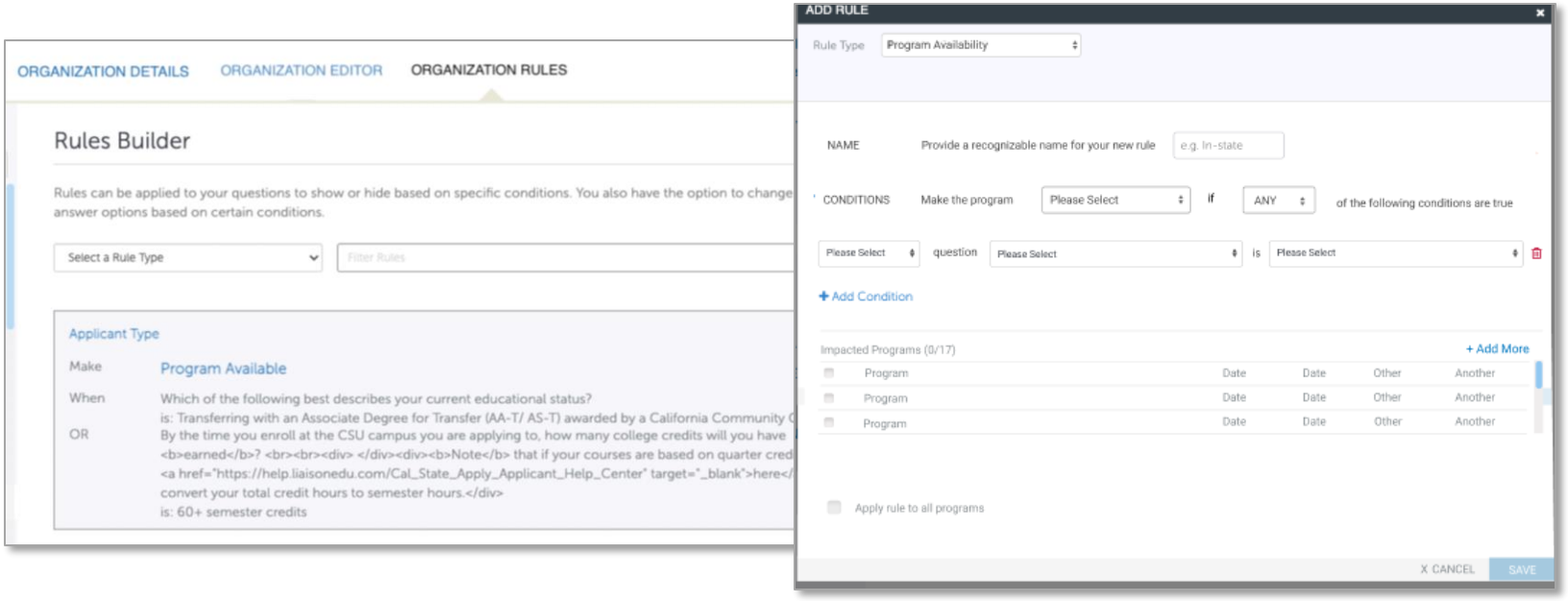
Organization-Level Deadline & Program Availability Rules



Target
July 2023

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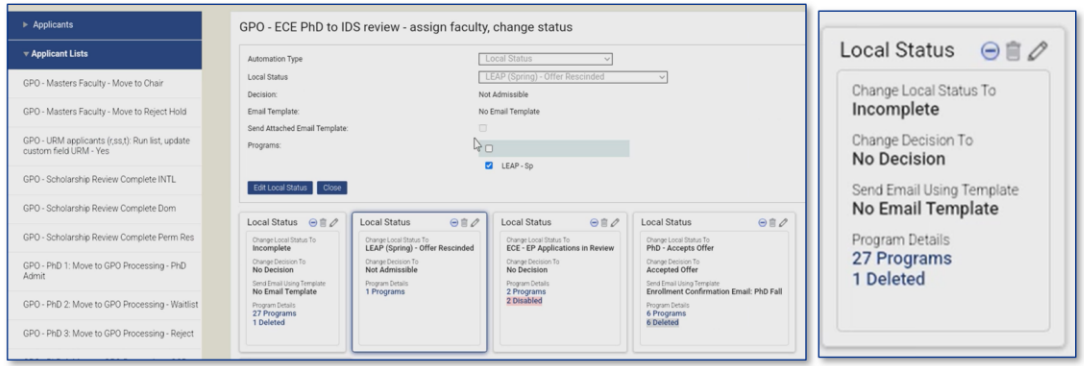
JULY 24-25 2023
CHICAGO, IL

WebAdMIT Automated Rules & Workflows – Phase 1

Example Triggers	Automations
Applicant Moves to an Application Status	Assignment is Created for Specific/Random Reviewer(s)
Assignment is Completed	Interview is Created for Specific/Random Interviewer(s)
Interview is Completed	Email is Sent
Applicant Meets List Criteria	Complete a Requirement Change Local Status Email is Sent
Ideas for automations are welcome!	



Target - Fall 2023

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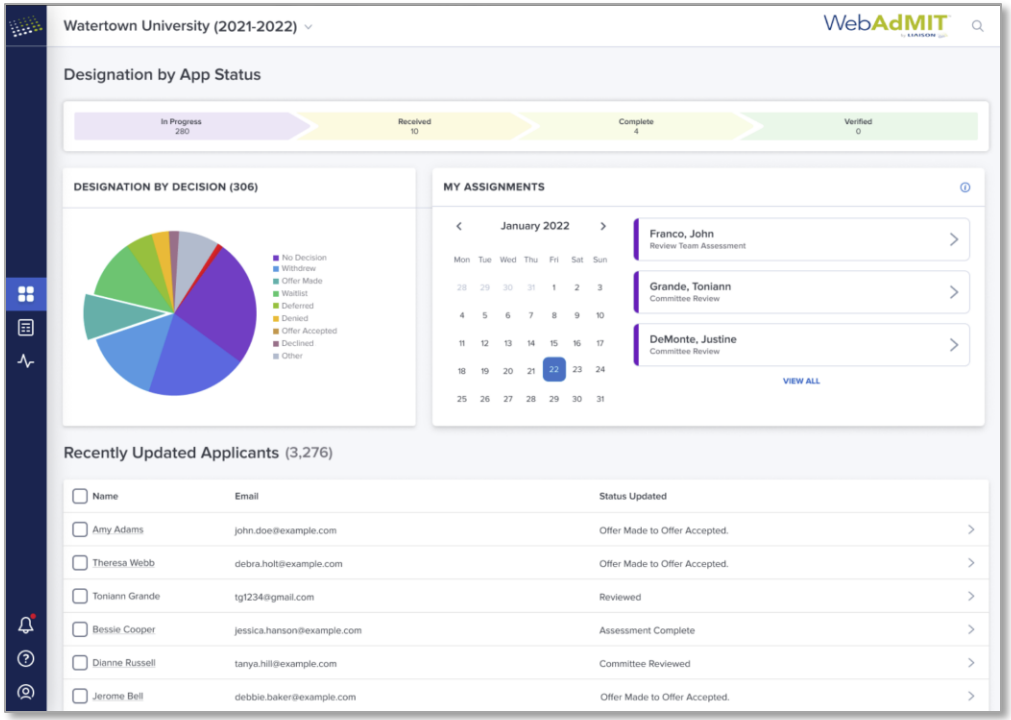
WebAdMIT Next-Generation User Experience Upgrade (Concept)



Target 2024-2025

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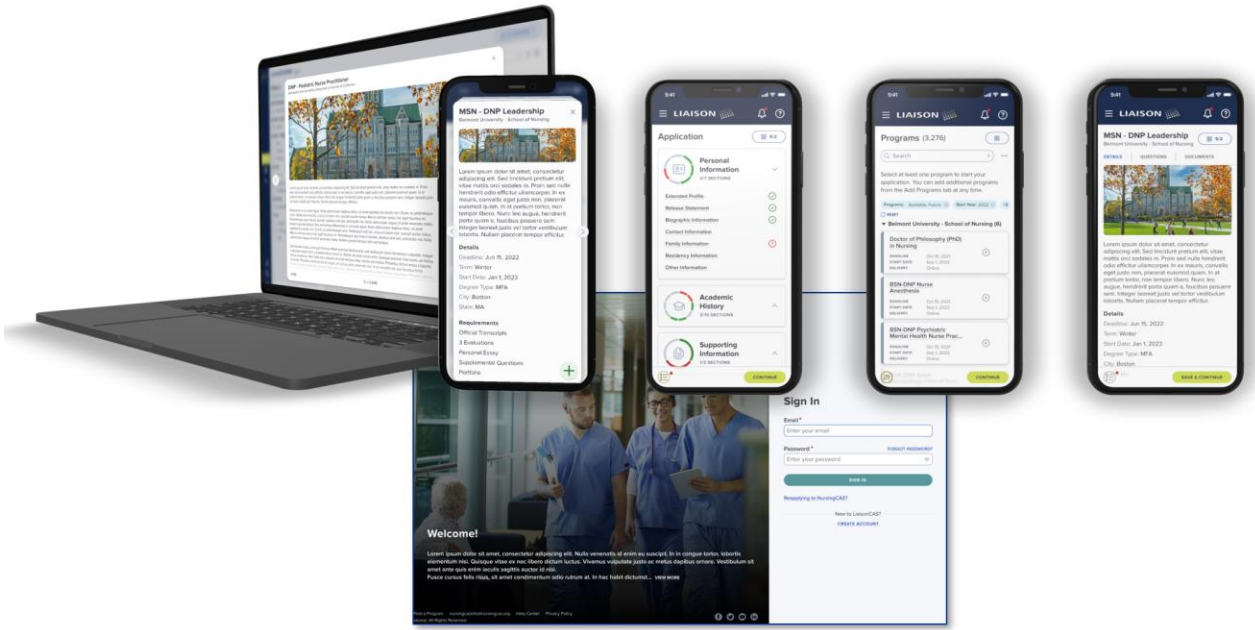
NEW UX – Mobile First Upgrade 2024

Mike Margitich

In 2022-2023, 30% of all CAS applicants completed part (or all) of their applications on a mobile device



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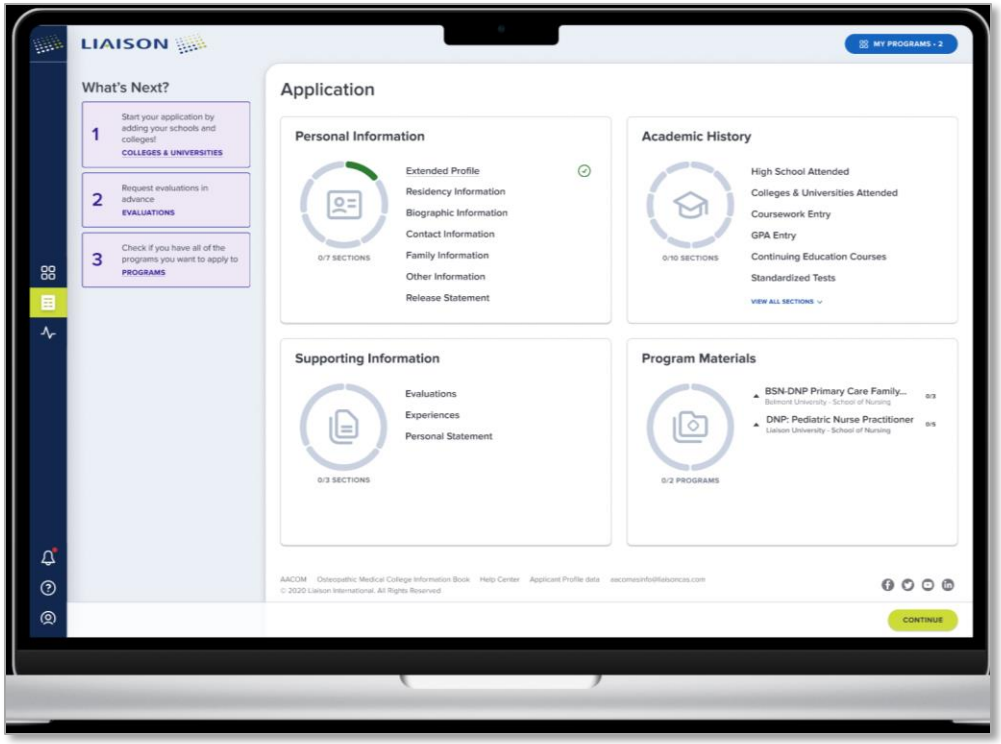
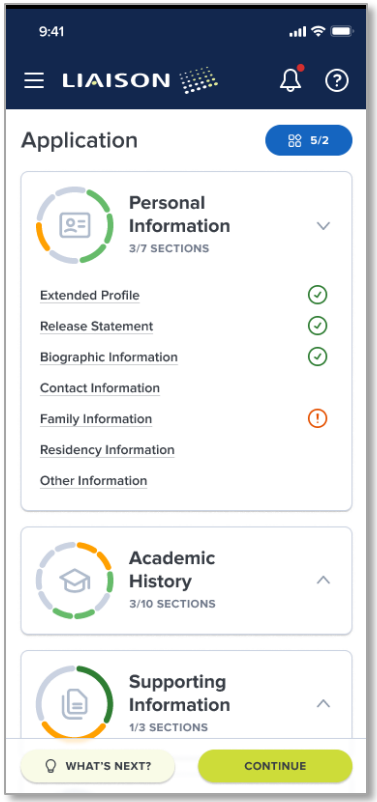
A Mobile-First Application Experience





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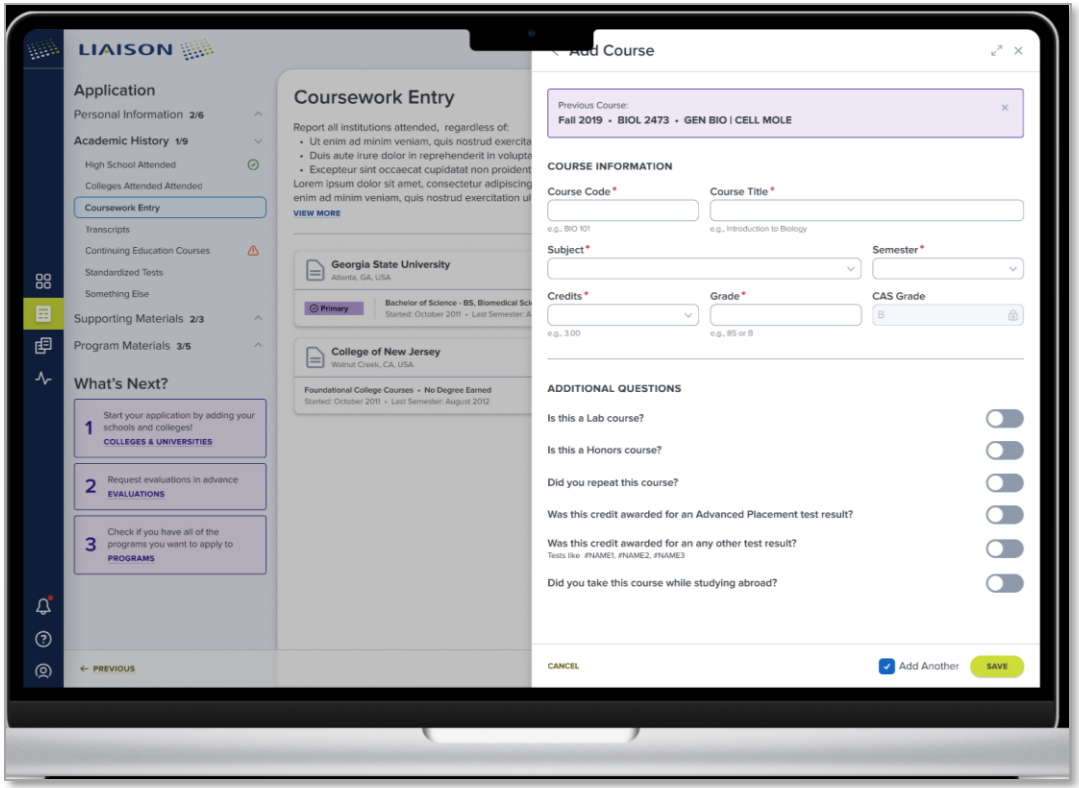
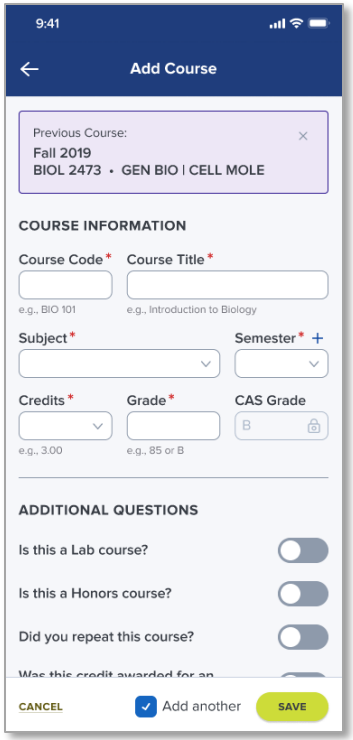
A Mobile-First Application Experience





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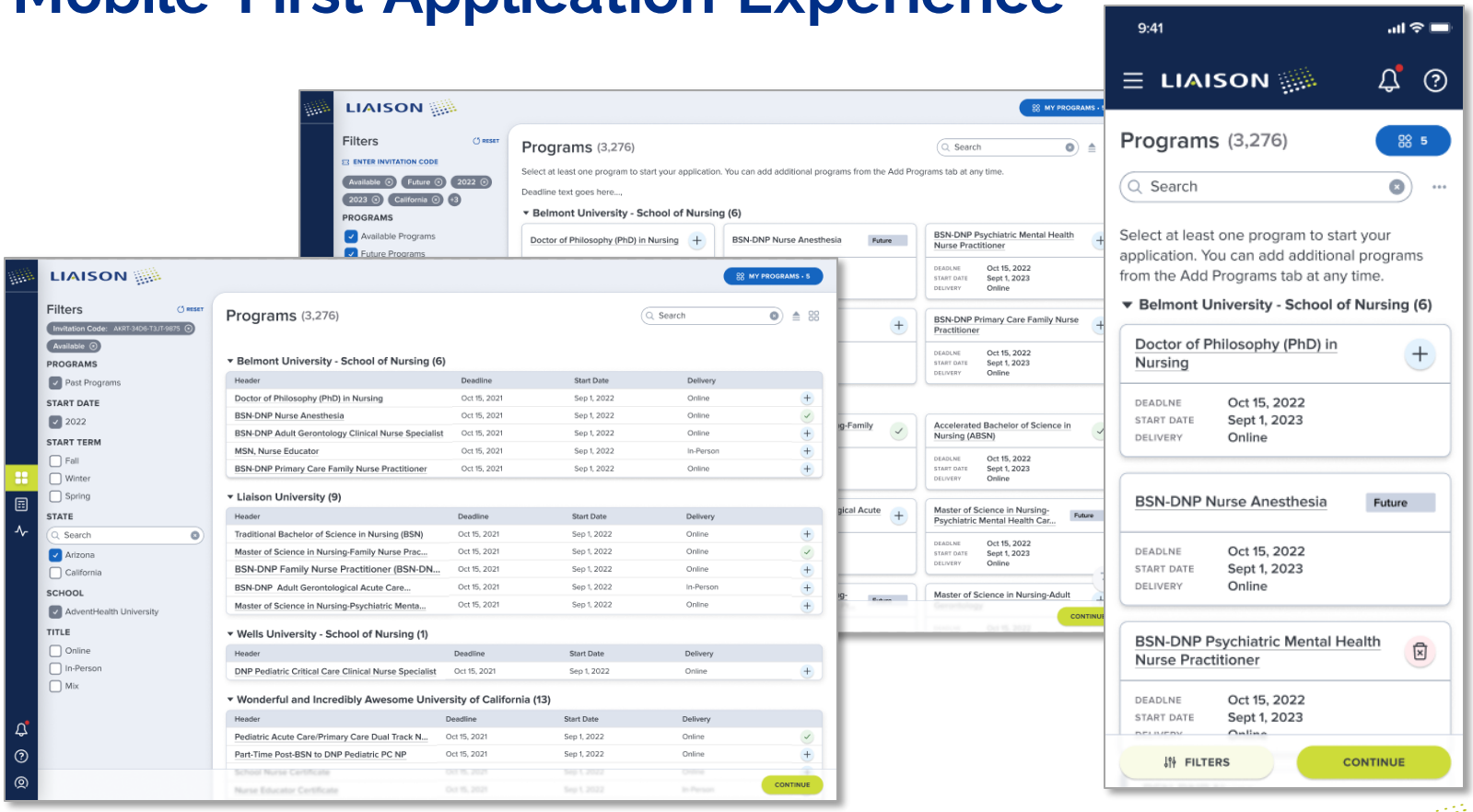

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Questions?

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Thank You

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