

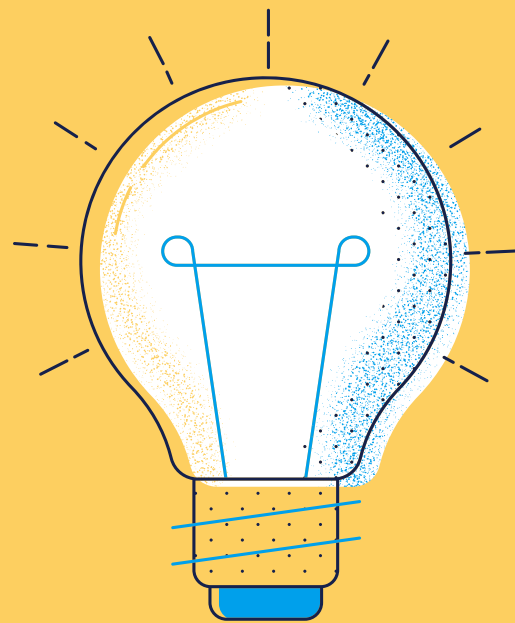
# An Agile Approach to Enrollment and Retention:

—  
11 Ways to  
Use Data  
Quickly and  
Creatively

**TARGET** 



# TABLE OF CONTENTS



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**Introduction:** What is "Agile" and How Does it Apply to Your Data?

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**Recruitment:** Use Data to Build Relationships With Prospects

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**Admissions:** Know Your Funnel to Make Data-Driven Decisions

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**Student Success:** Measure the Impact & Effectiveness of Support Services and Processes

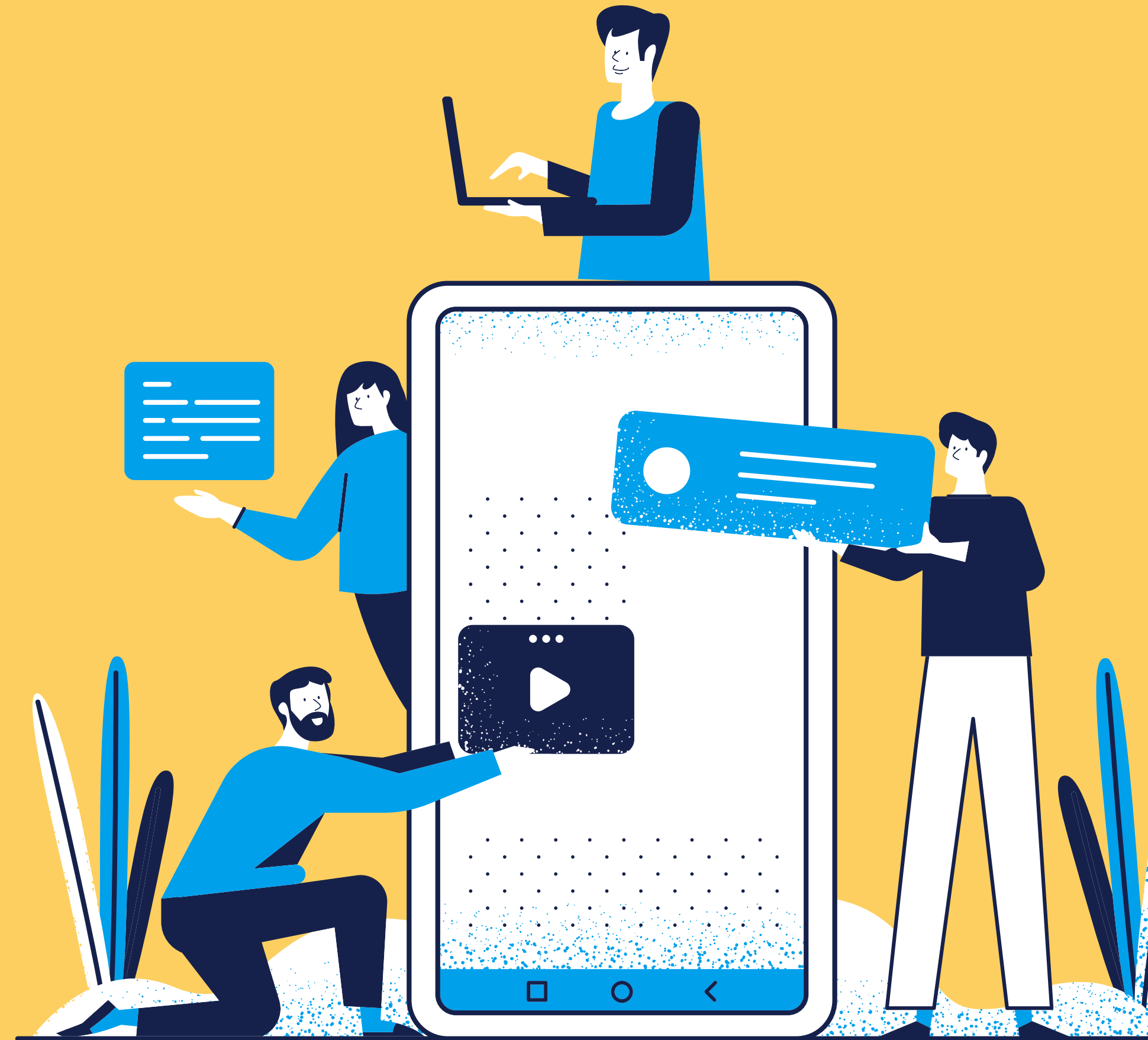
# INTRODUCTION

If you subscribe to higher education newsletters, emails, blogs, or podcasts, the storyline of late has been fairly consistent and rather bleak: decreasing enrollment, stiffer competition, colleges closing their doors. To stay competitive and relevant (and open!) in this landscape, institutions need to be not just well-informed, but also agile. You need to be in tune with the data — not only the data in front of you in your CRM or SIS, but all the data that's available — and more importantly, be able to act on it quickly.

In this eBook, we'll walk through some examples of creative and effective ways you can use data agilely to support your recruitment, admissions, retention, and student success efforts.



# Recruitment: Using Data to Build Relationships With Prospects



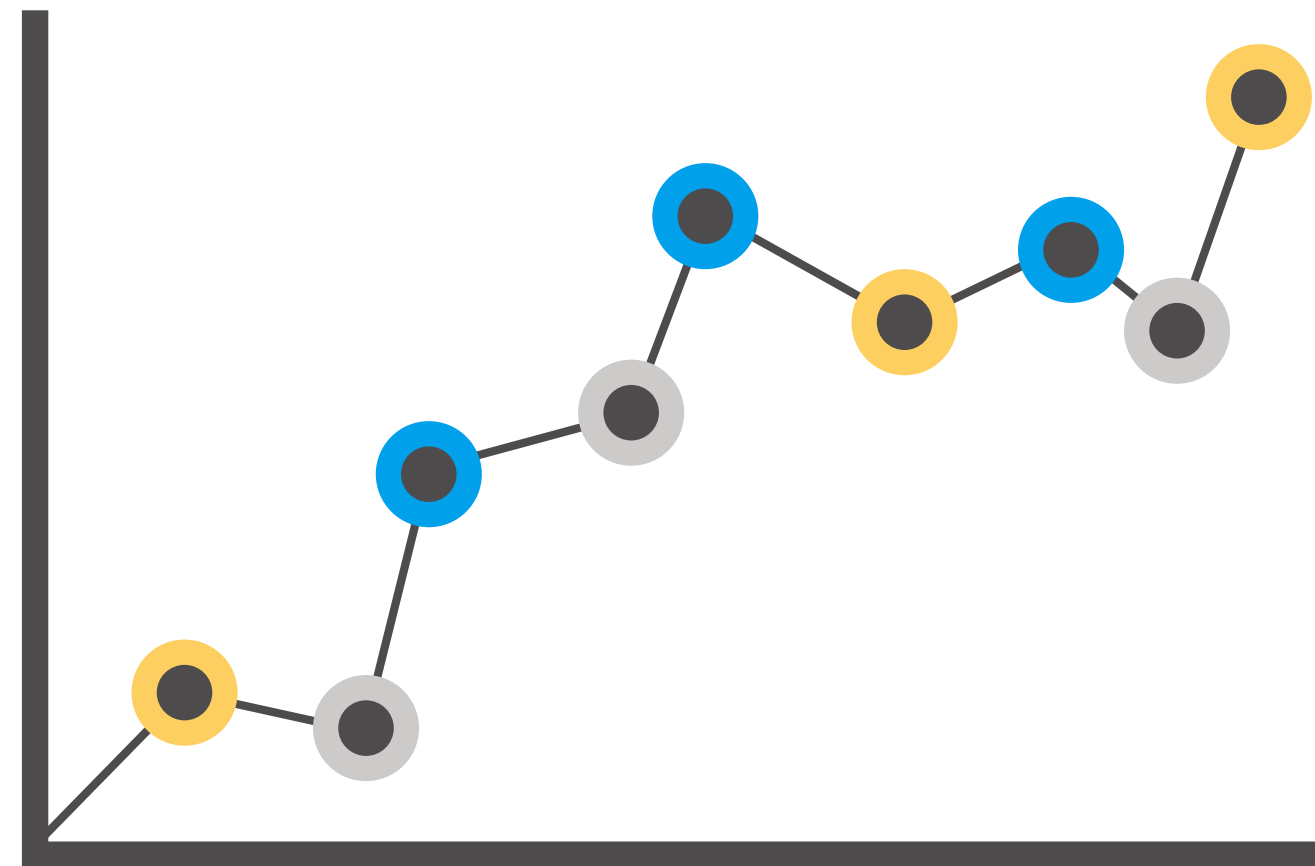
# 1. TARGETED AND TIMELY CONTENT



Deliver targeted and timely content with dynamic campaigns and student portals. Your content should speak to a student's needs, interests, and concerns, and evolve as those things evolve — and they inevitably will. You can start by leveraging tools that provide dynamic, conditional content in your email templates and student portal, so the moment a data point changes on the student's record, your messaging to them also changes.

## 2. MEASURE THE IMPACT

Measure the impact and cost-effectiveness of events and marketing. Western Connecticut State University and other schools, including those not using the TargetX CRM, use TargetX Insights to assess source effectiveness, and to see the effectiveness of each event they are hosting. This allows them to make decisions on future marketing and recruiting expenditures.



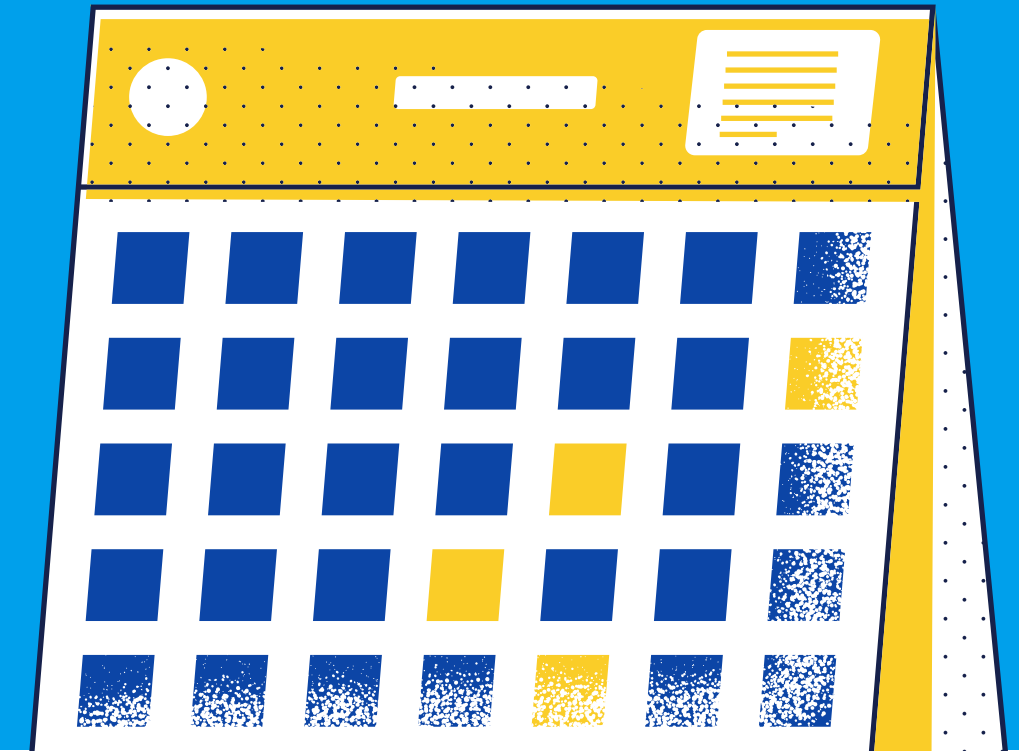
# 3. ASK FOR FEEDBACK



Follow up every campus visit or event with a survey, and ensure thoughtful responses — good or bad — get an acknowledgement. Use that feedback to coach tour guides and hosts, adjust schedules and timing, or expand your offerings. Have you ever filled out one of those “how was your flight?” surveys, only to share a litany of issues, then hear nothing back? You wouldn't want to do that to your students.



# 4. ADAPT YOUR COMMUNICATION



Adapt *how* you communicate with prospective and current students based on data. You should always ask how a student wants to hear from you upon initial engagement, but keep monitoring things like email interactions, and responsiveness to texts and push notifications.

Send fewer emails to less engaged students. This will help keep your email sender reputation — and thus your deliverability — intact, and will also help you meet students where they are, on the platform of their choice.

Think of it this way: Your super-shopper friends might love all those sale emails, but if you hate shopping and delete most of what they send without even reading, it's not very effective, is it?



# Admissions: Know Your Funnel to Make Data- Driven Decisions



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# 5. KEEP YOUR FINGER ON THE PULSE



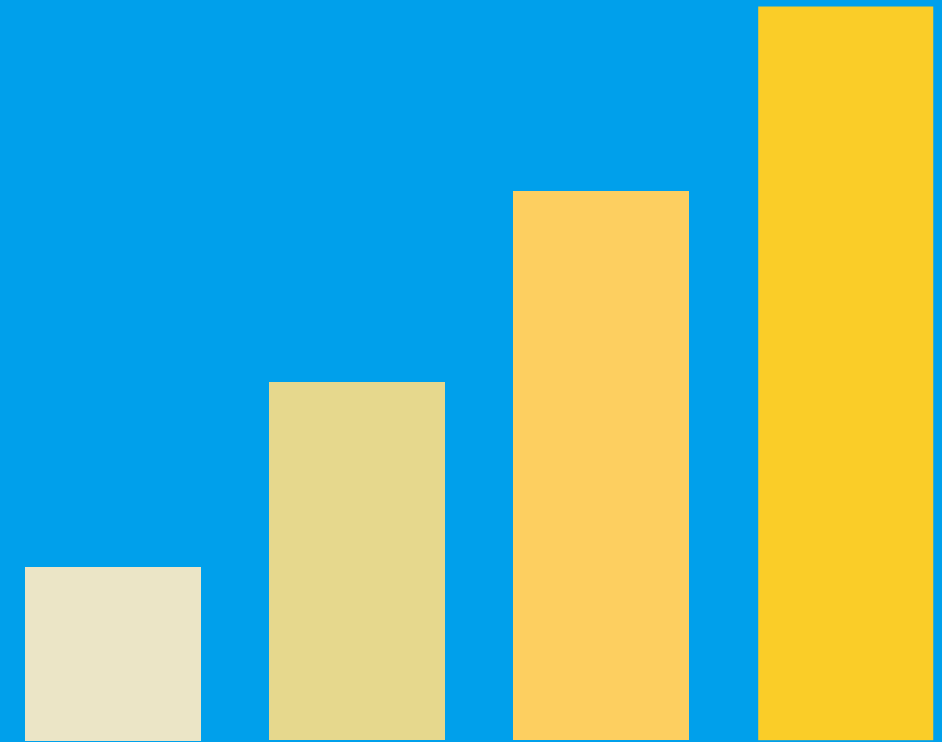
When it comes to student engagement, keep your finger on the pulse; this can make a world of difference in preventing students from being poached. This is more important than ever after May 1, given the recent changes to the NACAC rules of engagement. Have students stopped engaging with you or with their future classmates? Leverage tools that offer social listening and engagement metrics, like TargetX Schools App, which allows you to see how engaged students are, and what they're talking about. If engagement drops or you see a change in tone or affinity, perhaps a personal call from a VP or department head, or a shout out from a current student is warranted.

Use analytics on your website and on email campaigns, and let the results drive change. Are students responding to your calls to action? Finding what they need in a click or two? Completing your forms? TargetX customer, UC Santa Barbara, noticed their inquiry form completion rates were not what they hoped, so they shortened their forms, and applied some web form best practices to boost user and mobile-friendliness. And it worked! Are you monitoring the effectiveness of your calls to action on every email campaign? Ensuring it's easy for students to inquire or find what they need on your site? If the data tells you what you're doing isn't working, try something new!

## 6. LET RESULTS DRIVE CHANGE



# 7. USE REAL-TIME ANALYTICS



Leverage real-time analytics tools like TargetX Insights to monitor territory performance year-to-date, so you know if a territory is underperforming before it's too late. Cross-reference that with events and other activity data to adjust course. For example, if applications for a region are down, did you hold fewer events in that region, visit fewer schools, or call fewer students? Were events well-attended? If not, did you communicate about them as early and using as many channels as last year (or more)? Did you send reminders? If you don't have this kind of data at your fingertips, start looking for a tool that provides it.

# Student Success: Measure the Impact & Effectiveness of Support Services & Processes



# 8. THINK LIKE A CUSTOMER



Think about the student experience from the perspective of a customer, and respond accordingly. As our CEO, Sasha Peterson, asked recently, *why aren't we prepared to give students the same experience we expect as consumers?* Think about where you go for the best service, and then ask: Are you monitoring social media? Are you responding to tweets? Are you acknowledging Instagram posts? Students take to social media and offer an inside look at what they're thinking and feeling — don't be afraid to use that information!

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When it comes to student success, we know that one big life change can make or break a student's progress. Ensure that you have the means of knowing when that happens, and ways to reach out in response. Quick, concise surveys about progress and well-being — ideally, using a CRM-connected tool, like TargetX Surveys — can capture this data efficiently (and in a way that's easy for the student). Use triggered, meaningful follow-up in the form of emails, text messages, or even phone calls, pointing them to the right resource — preferably a human being.

## 9. KNOW THE SIGNS



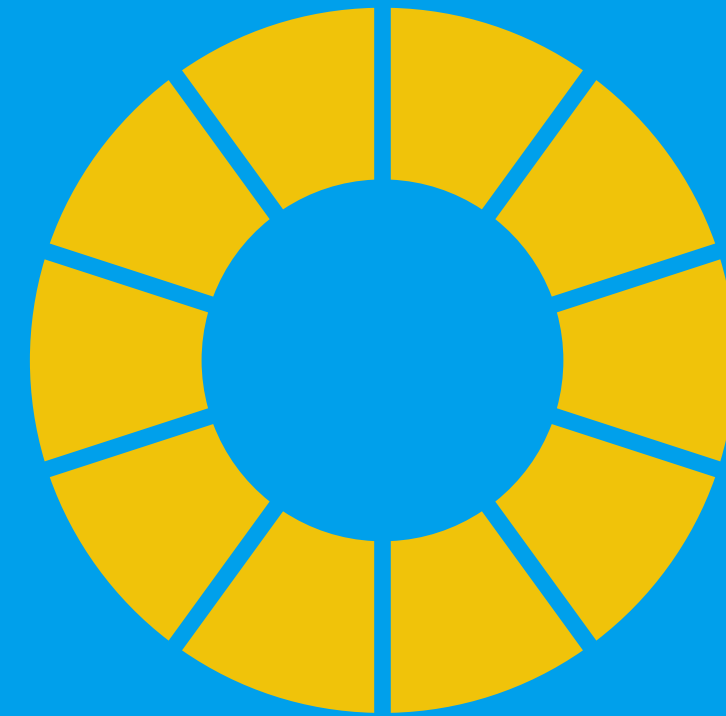


# 10. ANTICIPATE STUDENT NEEDS



Use available data to anticipate student needs at large, like course demand. For example, Skagit Valley College knows that missing one core class can completely derail a student's progress. They use data on incoming students and their goals to project the types and numbers of courses needed, ensuring that there are sufficient sections available. Since they've started requesting courses based on data, not just a hunch, the college adds courses appropriately to meet incoming class demand.

# 11. ENSURE THAT PROGRESS IS BEING MADE

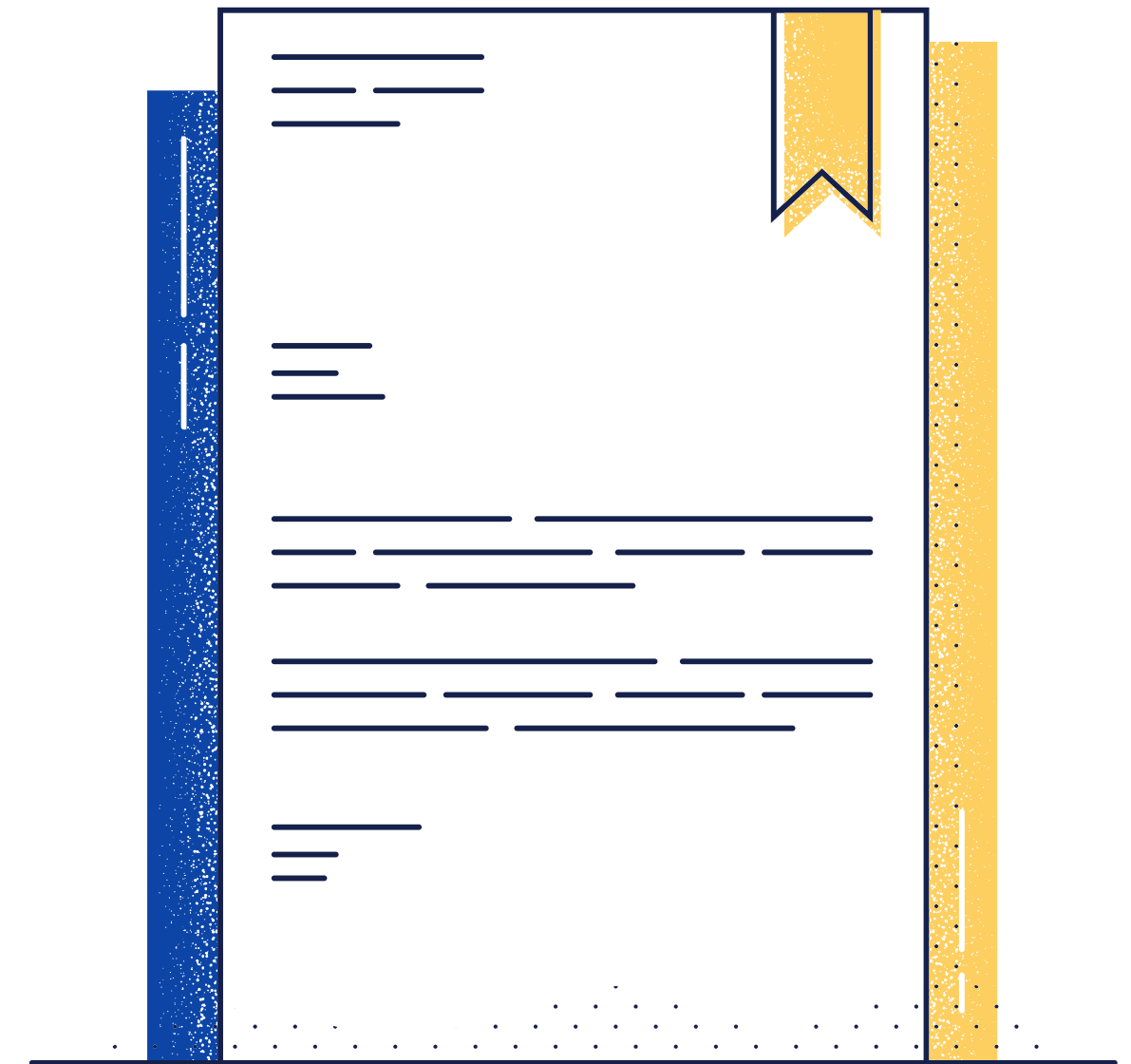


Use data to ensure students are progressing toward their desired degree or certifications and not just earning credits. Monitor key benchmarks to ensure satisfactory progress and build on momentum. For Skagit Valley College, it's not just about getting students to come back for year two, but getting them to completion. To monitor this, they've implemented a 45-credit "check-point." It's not entirely automated yet, but that threshold triggers a review, and an advisor confirms that a student's earned credits are towards their desired degree or certificate. They also ensure the student has an education plan on file, that it's valid, and that it's being followed. The data triggers a "check," which might involve some manual effort, but at least ensures it's not happening too late.

# WRAPPING IT UP

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Trends can change on a dime. For better or worse, our 24-hour news cycle and proliferation of social media means one bad story or tweet can impact your enrollment overnight. Heavy public scrutiny in 2012 brought the virtual death of for-profits. The full impact of the “Varsity Blues” scandal is still shaking out. Will fall-out from the recent grad-instructor strike impact applications or enrollment this fall at UC Santa Cruz? New drinking and hazing stories emerge almost daily, and the hottest app or platform can shift in the middle of a single admission cycle. It’s more critical than ever to stay on top of all the available trends and data, and put mechanisms in place to leverage it quickly.



# ABOUT TARGETX: Student-Centric Solutions For Higher Ed



# TARGETX



Enhance the admissions process, increase enrollment, and prioritize student success with TargetX's comprehensive suite of HEDA Core Compatible CRM solutions, powered by the Salesforce platform and trusted by over 400 institutions. Our Recruitment and Retention Suites are specifically designed for higher education and built mobile-first, empowering your campus to meet today's students where they are.



# INSIGHTS



TargetX Insights empowers institutions to make more meaningful, data-driven decisions with easy-to-read dashboards that show how your enrollment activities are performing, and how you're tracking to your goals. With out of the box, best practice-driven dashboards, easily see things like point-in-time funnel reports, event attendance to enrollment metrics, progress to application and enrollment targets and academic performance dashboards.

Ready to put data to use on your campus? We're here to help: **[Request a Demo](#)**