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Adapting to Change:
*How OCU Revitalized Its
Enrollment Strategy*

The 2024-2025 Enrollment Cycle:
Trends, Challenges, and Predictions

From Contact to Commitment:
*Ten Tips for Upgrading Your CRM
and Communications Strategy*

A LETTER FROM THE SENIOR VICE PRESIDENT OF CLIENT DEVELOPMENT



**We'll need all
our collective
expertise,
innovation, and
dedication to
attract, engage,
and retain the
next generation
of students.**



enrollmentFUEL would like to thank Oklahoma City University in Oklahoma City, Oklahoma, for allowing us to feature this photo on the cover of our magazine.

Dear Octane Booster:

As we begin a new enrollment cycle, we're at the threshold of a significant moment for higher education, with both opportunities and challenges ahead. We'll need all our collective expertise, innovation, and dedication to attract, engage, and retain the next generation of students. Octane is here to help you shape your strategy in the cycle ahead as you search for the approach that will get results and drive your institution forward.

The latest issue is jam-packed with expert advice from our team and beyond. We're pleased to feature two guest articles by exceptional colleagues. Kevin Windholz, MLS, shares a firsthand account of how to refresh an enrollment strategy in "Adapting to Change: How OCU Revitalized Its Enrollment Strategy." And Mark Campbell, MAT, and Rachel Schrieber, PhD, offer tips for building your strategic enrollment plan in "Aligning Enrollment Strategy with Institutional Vision: The Importance of a Strategic Enrollment Plan."

Our team is also back with practical insights for this installment of enrollmentFUEL's Octane. Mike Wesner, MEd, looks at some of the biggest challenges and trends in recruiting for the cycle ahead, while Susanna Lehman, MBA, shares tips for recruiting and communications. Jacquelyn D. Elliott, EdD, tackles questions of leadership and staffing shortages, and Laralee F. Harkleroad, EdD, looks at ways leaders can turn small wins into big successes.

At enrollmentFUEL, we're proud to be a teaching-learning organization. Even as we share our insights and experiences with you, we're always on the move, looking for opportunities to continually learn, grow, and innovate. Thank you for being a part of that constant pursuit of knowledge and for being part of our Octane community. Reach out to me at Lisa.Branson@enrollmentFUEL.com if I can help.

Yours in partnership,

Lisa Branson
Senior Vice President of Client Development

Octane the Magazine: A publication of enrollmentFUEL

A collection of innovative thoughts and ideas from leadership in all areas dedicated to improving your Strategic Enrollment Management and Student Search strategies. Our goal is to fuel creativity and release positive energy among enrollment professionals.

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OCTANE

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COMPREHENSIVE COURSE



QUICK TAKES

FAST reads and
INNOVATIVE ideas to
BOOST results

Planning for the FAFSA

Everyone knows about last year's FAFSA disaster—including this year's inquiries and their parents. From technical glitches to unclear requirements, inadequate support, and long-delayed results and financial aid offers, the rollout made headlines in all the worst ways. Last year's juniors, who watched their friends' frustrations the previous year with growing horror, are this year's seniors, and they need to feel confident that the same problems won't plague them.

Your institution can help by addressing this issue preemptively. Initiate early communications and host online FAFSA workshops well before the deadlines, inviting parents once you have their contact information. enrollmentFUEL's Forensic Lead Generation™ can help you identify which website visitors engaged with the financial aid page—the "serious shoppers." You can then take action, putting them into a new flow or even sending an old-fashioned letter. Establish dedicated support channels and proactive outreach to assist students with FAFSA and financial aid applications, and ensure your staff and student ambassadors are well-trained to provide accurate guidance on financial aid questions.

Your team can help make the financial aid process smoother—and you can make a positive impression on prospective students and families while you assist!

Boost Enrollment with Financial Aid Strategies

Increase net revenue, streamline processes, and improve recruiting results with enrollmentFUEL. As enrollment pressures mount, our NASFAA-Certified consultants tailor financial aid solutions to balance your mission and strategy. We help your team connect aid to value, ensuring a competitive edge in today's challenging landscape. From award assessments to staff training, we retool your systems for success.

Contact us to start your transformation.



**SCAN TO
SCHEDULE
TODAY!**

Lessons from Nestlé's Marketing Playbook

Today's enrollment pros need an agile strategy that resonates across varied educational offerings and appeals to diverse student segments. So, what can higher education learn from Aude Gandon, the global Chief Marketing Officer at Nestlé, a company known for iconic food brands like KitKat® candy bars, when it comes to creating a cohesive and powerful strategic enrollment strategy?

A recent *Think with Google* article revealed three keys to Nestlé's successful digital marketing efforts—and they can be highly effective when formulating your enrollment strategy:¹

1. Tech is like plumbing—you might not see it, but if it doesn't work, you can't do anything else effectively.
2. Get in the habit of collecting first-party data. It boosts your reputation for respecting consent and privacy while enabling you to provide more accurate, personalized communications.
3. Focus on creativity, even if it means hiring external partners. Establishing a centralized brand foundation allows you to innovate and scale your marketing efforts effectively.

It's easy to rely on the traditional marketing methods that worked in the past, but the best ideas often emerge when we step outside our box and seek inspiration from the broader world.



¹ Aitkenhead, Decca. "CMO Aude Gandon reveals the secret recipe for transforming Nestlé into a digital marketing powerhouse." *Think with Google*. <https://www.thinkwithgoogle.com/future-of-marketing/digital-transformation/nestles-digital-marketing-strategy-transformation/>. April 2024.



“When I Graduate, I Want to Be a Prompt Engineer.”

As Artificial Intelligence (AI) continues to evolve and grow, one of the fastest-growing careers today is that of a prompt engineer. This specialist designs and refines prompts for AI models, ensuring accurate and relevant outputs. These professionals typically hold degrees in Computer Science, Artificial Intelligence, or Data Science, often furthering their expertise with advanced degrees or certifications in these areas.

As the career potential in prompt engineering—and AI in general—continues to grow, prospective students are increasingly interested in programs and degrees that prepare them for these cutting-edge roles. Work with your colleagues across departments to ensure your institution offers relevant courses and stays updated on AI advancements. Be prepared to talk particulars with this year’s recruits about specific programs, internships, or other opportunities that set your school apart.

By preparing for the rising demand in AI-related careers, your institution can equip students with the skills needed for success as prompt engineers and in other emerging roles, reinforcing your commitment to innovative career preparation. This proactive approach positions your institution at the forefront of a rapidly expanding field in higher education, aligning with the dynamic job market and enhancing your institution’s long-term relevance and promoting growth.

Recruiting in the Outcomes Era

In today’s challenging enrollment landscape, developing a compelling, sustainable recruiting strategy is critical. Students aren’t just looking for a degree anymore—according to Deloitte, they’re seeking a degree with a compelling value proposition that sets them up for a reliable path in an uncertain world.¹

Successful recruiting in higher education today requires reframing the “story” of your institution’s value. Deloitte reports that outcome-oriented metrics (such as jobs, student debt levels, economic mobility, and ROI) speak more powerfully to current students. Your communications strategy should lean into these benefits, ensuring students see the connection between a degree and the futures they desire.



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Deloitte’s 2024
Higher Education
Trends.*

When students see how a degree pays off, they’re more enthusiastic about enrolling. Additionally, promoting opportunities like continuing education, professional certifications, and specialized programs that cater to the unique career needs and demands of students can significantly enhance your institution’s appeal and drive enrollment growth.

¹ Clark, Cole, et al. “2024 Higher Education Trends.” Deloitte. <https://www2.deloitte.com/us/en/insights/industry/public-sector/latest-trends-in-higher-education.html>. 19 April 2024.



OLD WAY

NEW WAY

Adapting to Change:

HOW OCU REVITALIZED ITS ENROLLMENT STRATEGY

Kevin Windholz, MLS

University enrollment growth: For nearly a quarter of a century, my life has centered on attempting to achieve it. When I recall all the prospect communication plans written and tweaked, high schools visited, recruitment events hosted, digital ads displayed, and discount strategies calculated, I could write volumes.

As a chief enrollment officer, the responsibility for achieving growth rests squarely on our shoulders. It's a role that is constantly under scrutiny, with success or failure often determining our professional fate. I've attended countless seminars and read many articles covering potential tactics used to raise the incoming class number. Rarely is any other position or topic at the university watched as closely, celebrated as much in good times, or judged as harshly in bad times.

I have been in enrollment management for 23 years and a chief enrollment officer for the past 12. My experience relates to a high school physics class I took three decades ago. In the class, I spent a lot of time agonizing over problems with a calculator and scratch paper, trying every method to figure problems out. One day, the right tutor came along and showed me a method that clicked. I moved forward from there and got an "A" in the class.

The same thing happened in my current position. Initially, I approached achieving enrollment growth as a complex problem where the sole burden of fixing it fell on me. And that "method" would never fix the problem. Then, I finally met the right tutor who showed me what I was missing—and that lesson lies in this reality: ***If a university charges enrollment management to make the market want what it offers, it will not grow.*** On the other hand, if a university listens to the market and adapts to market demand, it will grow.

To illustrate how I made this discovery, I should probably take you back to the beginning. As mentioned, for 12 years I have been the Vice President for Enrollment Management at Oklahoma City University (OCU). This is a smaller, private, urban, Methodist-affiliated institution located in the heart of Oklahoma City. While this experience has been the most transformative and positively impactful of my career, I have learned that it takes more stamina and courage to stay in a chief enrollment role than to leave it.

When I started at OCU in 2012, the university had around 3,200 students, but that number was already declining. There were several best practices I had learned along the way that I was able to bring to the role that made enrollment management better. The discount rate had been growing before my arrival, and I was able to stabilize it. We enhanced our financial aid education and improved our enrollment tracking reporting methods. Our communication plan became more multi-layered. I was able to slow the decline in total headcount, but I couldn't completely stop the slide. For the next nine years, I observed each fall census drop until it reached a low point of around 2,500 students in 2021.

Yes, the pandemic played a role, but not a pivotal one because the declines were in motion long before COVID was a common word in conversation. In the summer of 2021, I would have never guessed that in 2022, the slide would reverse, and our new student counts would have risen by 13%. I would not have imagined that by August 2023, OCU would be back up to 2,750 students and on a realistic track to enroll more than 3,000 students by 2025.

What changed? Our university mindset. We began to adapt ourselves to meet the market demand.

President Ken Evans took the helm at OCU in 2021. He was the 'tutor' I needed to solve the enrollment problem. Before the arrival of President Evans, I always assumed—and

"We were attempting to recruit students with outdated university programs and learning methods that had been effective 15 years ago but were no longer driving growth."

was often told—the enrollment declines resulted from a strategy that I needed to tweak. President Evans helped me recognize that I had indeed learned my trade, my strategies were sound, and my practices were up to date.

The problem was that OCU was trapped in a cycle of trying to force the market to desire what we offered. We were attempting to recruit students with outdated university programs and learning methods that had been effective 15 years ago but were no longer driving growth.

Under OCU's new leadership, we embraced change and recognized the need to diversify our recruitment strategies—put more eggs in more baskets, you could say—to stay relevant through the 2020s and beyond. We acknowledged that international, transfer, and graduate students were as crucial to our growth as incoming first-year students. Relevant academic programming became the cornerstone of our university strategy. By January 2024, OCU's total enrollment had increased by 8% compared to August 2021, with over 20% of that growth coming from new programs launched since 2020.

International student enrollment first illustrates the importance of academic programming. Even before 2020, international enrollment at OCU had been on a consistent decade decline, and the pandemic took it even further. In August 2021, a little more than 30 total international students were enrolled. By January 2024, that

enrollment shot up to a little more than 250 and shows continued signs of growth. The key: offering STEM-based graduate programming that came on board in 2022 and 2023. Without the investment in these new, revamped programs, OCU would not have seen any benefits in international enrollment once we reached the other side of the pandemic. Again, we listened to what the international market was telling us rather than forcing an unwanted product on uninterested non-U.S. students.

The MBA program also showed a multi-year steep decline. It had traditionally been an in-person general curriculum degree that attracted students well through the mid-2010s before numbers began to erode. We could no longer keep up with the more flexible and detailed competitors coming into play in our market. In 2022, we expanded our online presence, adjusted pricing to be competitive, and expanded the program to include six tracks. This caught the attention of both prospective students in the market as well as potential corporate partners in the Oklahoma City area. Consequently, total MBA enrollment grew by more than 100 students between 2022 and 2023.

While many institutions in recent years have seen a decline in their core colleges of Arts and Sciences, OCU saw a more than 200-student increase in this college between 2021 and 2023. For a school our size, that is significant. This was all about programming, from the onboarding of a health care doctorate degree to a revamped, STEM-based graduate program to Game Design and Animation studies attracting more traditional students.

When I started at OCU in 2012, our School of Nursing was a powerhouse. There was no greater academic revenue generator on campus, not even our law school. While the school continued to maintain an outstanding reputation in our region, enrollment began to fade shortly before the onset of the pandemic and most especially immediately after. The learning preferences of our potential market



began to change. We suddenly had a new generation of prospects not only comfortable with virtual learning but several who wanted to learn quickly.

OCU took action. First, programs designed for students who already held a Registered Nursing license were moved completely online, saving headcounts in these areas. Also, an accelerated and market-affordable version of the on-campus BSN program for students new to the nursing profession was implemented. This became so successful that in the second semester, August 2024 cohort, there was so much interest that a waitlist had to be implemented.

For many years, the Performing Arts programs have been the hallmark of traditional undergraduate study at OCU. During the decade of enrollment decline, these programs remained relatively stable until the pandemic. Then, numbers dropped to an unusual low in 2021. Instead of simply blaming the pandemic, our academic leaders took proactive steps to listen to the market and adapt accordingly. Options to audition virtually were permanently implemented. Timelines of auditions were moved up to catch the market earlier. Even a few long-standing but respected rules for current students were adjusted, reflecting methods that were successful in the past but no longer embraced in the current market. With all these adjustments, not only did the performing arts recover from the 2021 low, but the 2024 numbers are even stronger than immediately pre-pandemic.

Another lesson I learned on this journey is that headcount recovery does not equate to immediate budget recovery. A prolonged enrollment decline is accompanied by a long-term budget decline that won't fix itself overnight. As enrollment managers, we get the first taste of victory—one of the perks of the job—through initial headcount growth. However, the positive momentum from this growth is felt more universally two to three years later, when we begin to see the first signs of budget recovery.



Article author, Kevin Windholz, MLS, currently serves as Vice President for Enrollment Management at Oklahoma City University.

The last few years at my institution have been a gift I would never have expected to receive. I have been able to witness what happens when people work in their own lanes, maximizing their efforts in these individual areas and bringing the whole university forward piece by piece. I have seen plans on paper materialize and a ship turn to go in the right direction. I have had a role in modernizing a product designed for the 21st-century learner.

I wish this same opportunity for every enrollment manager reading this. You have earned it.

Kevin Windholz, MLS, has spent over 20 years working in the higher education sector and currently serves as the Vice President for Enrollment Management at Oklahoma City University, a role he has held since 2012. He has led domestic and international admissions, financial aid, student accounts, and university marketing and communications. Among his proudest achievements in this role have been discount rate management and developing a system to accurately predict net tuition revenue to be generated from future enrollment. Windholz has been a regular presenter at the American Association for Collegiate Registrars and Admissions Officers (AACRAO) SEM Conferences, as well as several other prestigious conferences. His work has also been published in the AACRAO Strategic Management Quarterly Journal.



THE 2024-2025 ENROLLMENT CYCLE

Trends,
Challenges, and
Predictions

Mike Wesner, MEd

In a recent *TED Talk*, Dr. Michelle Rozen shared the “secrets of the 6%”—the people who successfully stick with and achieve their goals. Among the traits of that 6% are clarity of purpose, consistency in habits, positivity, accountability, a strong support network, and resilience in times of stress or change.¹

Those same traits are critical for success in today’s enrollment landscape. If you want your team to be among the “six percenters” in higher education, it’s absolutely within reach! As the 2024-2025 enrollment cycle kicks into gear, it’s the perfect opportunity to take stock of recent trends, adapt to changes, and find the purpose, habits, and mindset that will drive your team to success in the year ahead.

Ready to make it happen? Let’s start with seven key trends and how your team can transform challenges into opportunities.

1.

OVERHAUL TO EMAIL MARKETING

While email marketing remains a powerful tool in the recruitment toolbox, times and regulations around email use are changing. This year, most major email platforms—including Gmail and Yahoo!—instituted stricter anti-spam policies for bulk email senders, such as educational institutions. These guidelines require, among other things, more stringent use of technical verifications, one-click unsubscribe headers, and staying under a 0.3% spam rate.

Importantly, these restrictions apply to domains as a whole—which means that enrollment teams must coordinate with all other departments to ensure that everyone’s emails adhere to requirements and maintain the domain’s reputation. In addition to revising email content to minimize spam risks, enrollment teams may choose to rethink outreach strategies and embrace a more multi-channel approach. Direct mail, in particular, is making a notable comeback and presents a valuable opportunity for more personalized and tangible connections with prospective students. By integrating direct mail, social media, SMS messaging, and other options with email, institutions can mitigate potential hurdles and better connect with students through more personalized messaging.

1 “Secrets of the 6%: How to Achieve Your Goals in Business and Life | Dr. Michelle Rozen | TEDxUNLV”. https://www.youtube.com/watch?v=_loo9JkX_FY. 31 May 2024.

2.

RISING USE OF AI CHATBOTS

AI seems to be everywhere, and higher ed is no exception. Chatbots on university websites may be an opportunity to handle FAQs more effectively. These bots can streamline communications and help nudge students through the funnel toward application and enrollment by providing immediate, interactive responses to prospective students’ questions.

Customized, student-tailored chatbots can also be powerful tools for increasing enrollment and combatting melt. One study found that personalized, automated text messages reminding students of required tasks increased enrollment and reduced melt, particularly among students with less access to information from other sources.² Another study found that proactive outreach using AI chatbots reduced melt, improved enrollment, and increased financial aid successes and course registrations, with the biggest impact on first-generation students.³ It’s a crucial move in harnessing today’s hottest tech to have a real impact on students and institutions alike!

3.

VOLATILITY IN WORLD AFFAIRS

There’s no two ways about it: we live in a complicated global moment. It’s impossible to predict what geopolitics will be like in a few months—or even a few weeks. We do know, however, that it’s a volatile time, with elections, wars, and other events that people feel very strongly about. The big question is: will it change student enrollment decisions?

At this point, the frustrating answer is, “we don’t know.” With limited research and the rapid pace of change, answers could shift daily. Instead, enrollment teams can focus on addressing prospective students’ questions about campus culture, such as speech policies, DEI commitments, and mental health support.

- 2 Castleman, Benjamin L., and Lindsay C. Page. “Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates?” *Journal of Economic Behavior Organization* vol. 115 (2015): 144-160. doi: 10.1016/j.jebo.2014.12.008. <https://www.sciencedirect.com/science/article/abs/pii/S0167268114003217>.
- 3 Nurshatayeva, Aizat, et al. “Are Artificially Intelligent Conversational Chatbots Uniformly Effective in Reducing Summer Melt? Evidence from a Randomized Controlled Trial.” *Research in Higher Education* vol. 62 (2021): 392-402. doi: 10.1007/s11162-021-09633-z. <https://link.springer.com/article/10.1007/s11162-021-09633-z>.

4.

CONCERNS OVER LOWERED STATE FUNDING

It's an omnipresent concern in higher education: how much funding do we have, where is it coming from, and how much can we rely on it? 2022 was an unusual "peak" year, with state funding for public higher education rising nearly five percent⁴—but now, where are we? Education funding continues to fluctuate, even more so in states and regions where higher education has been turned into a political hot button.

Pair this with decreased enrollments and the costs of upgrading technology (and other repairs and adaptations necessary to maintain resources for internal teams), and financial concerns will probably be at the top of many minds this enrollment cycle. It may be necessary to get more innovative when determining where to allocate funding, what will provide the most ROI, and how to stretch funds further.

5.

A SHIFT TOWARD CAREER READINESS

Today's students are more focused than ever on career development and job readiness rather than education for its own sake. In one Lumina/Gallup study, 84% of current or prospective students cite at least one employment-related factor (landing a higher-paying or more fulfilling job, improving their standing in the job market, getting a salary increase or a promotion) among their reasons for considering or enrolling in a degree program.⁵ Students today see an uncertain world and want their education to give them some security.

That's supported by apparent rising interest in certifications and profession-oriented programs. The Lumina/Gallup survey found the single most significant increase in interest, rising nine points since 2021.⁶ Enrollment teams will need to pivot to highlight their programs' ability to get students the life outcomes they want—which also means hiring the right people who can go beyond quoting statistics and "tell the story" to connect with students during the pitch.

4 Knox, Liam. "State Funding Rose Last Year. Will it Last?" *Inside Higher Ed*. 25 May 2023. <https://www.insidehighered.com/news/government/state-policy/2023/05/25/state-funding-rose-last-year-will-it-last>.

5 "State of Higher Education 2024 Report." Lumina Foundation/Gallup. <https://www.gallup.com/analytics/644939/state-of-higher-education.aspx>. 2024.

6 Lumina Foundation/Gallup. 2024.

6.

FOCUS ON WELL-BEING

In addition to looking for career-oriented outcomes, today's students are seeking support for their *whole* well-being, including mental health. Research has found that 22% of all students have likely considered dropping out for mental health reasons, while one in six report feeling disrespected, discriminated against, or even unsafe in their programs.⁷ Anxiety and stress are omnipresent, and students want to know that their schools have their backs.

For prospective students and current students alike, a strong, clearly demonstrated commitment to mental health support can make or break enrollment decisions. Enrollment teams must be ready to address questions and guide students to comprehensive resources. Failing to provide this support could lead to losing students to institutions that offer assistance and can effectively communicate that value.

7 Lumina Foundation/Gallup. 2024.

**TODAY'S STUDENTS
ARE MORE FOCUSED
THAN EVER ON CAREER
DEVELOPMENT AND
JOB READINESS RATHER
THAN EDUCATION FOR
ITS OWN SAKE.**



THE FLEXIBILITY IMPERATIVE

With so many changes happening in such a short time, the most flexible institutions will be the most successful. Focus on developing change-proofed systems and processes, and hire people with an eye toward agility and adaptability.

We've seen many disruptions in the last few years, and there will likely be more. It's critical to focus on building durable yet responsive systems to continue meeting the changing needs of a wide range of students. More than anything else, that ability to adapt and respond is likely to determine which institutions thrive in the enrollment cycle(s) to come.

Understanding what lies ahead is vital to proactively meeting challenges and driving success, rather than merely reacting in the moment. If you're interested in learning more about current discussions in higher education, connect with the enrollmentFUEL team anytime!

Mike Wesner, MEd, is the CEO and Founder of enrollmentFUEL and a passionate student of recruiting strategies. In his role as CEO, he works with the team to develop new products to help enrollment leaders bring in their class and set enrollment records. Reach out to Mike at Mike.Wesner@enrollmentFUEL.com to share ideas on the future of strategic enrollment management in the year ahead.





FROM *Contact to Commitment:*



Tips for
Upgrading
Your CRM and
Communications
Strategy for the
Upcoming Cycle

Susanna Lehman, MBA

As they prepare to make college decisions, today's high school students will likely be inundated with an avalanche of communications from colleges and universities. Let's say a single student gets contacted by 20 institutions, and they ultimately decide to apply to 10. They're about to get hit with a tidal wave of emails. My eyes were widened hearing at the 2024 Slate conference that over 9 billion emails were sent using Slate this past year—and that's just one tool. One junior-year student, posting on the r/ApplyingToCollege subreddit, reported receiving a whopping 2,374 emails!¹

With so many messages vying for their attention—and students less engaged with email than ever—it's crucial for institutions to develop a standout strategy to rise above the crowd instead of being swallowed up by it. Crafting compelling, personalized, and timely communications is essential to ensure your institution remains top-of-mind for these students amidst the digital deluge and the chaos of senior year. Being well-prepared for the full cycle will position your team well for a successful cycle, especially as new initiatives are added and staff turnover may occur.

Drawn from conversations with enrollment leaders and our in-house experts, here are 10 tips for upgrading your CRM and communications strategy for a more successful cycle.

1. Schedule time with your team to gather feedback.

Creating a feedback loop for assessing outcomes is the best way to build a successful strategy. Gather your team to discuss what worked well and what needs improvement. Critical feedback provides an opportunity to uncover valuable insights. Filter out personal preferences and uninformed opinions, focusing on constructive elements. Use the remaining insights to drive continuous improvement and enhance your system's effectiveness. Take the opportunity to look for inefficiencies—like outdated or manual processes still being used—and find more effective solutions.

2. Document throughout the cycle.

Want to establish that you have the information necessary to determine success? Robust, transparent documentation is a must throughout the cycle. Move all your CRM

rules, queries, reports, deliver messages, and so on into organized folders so you can see which elements need updating for the next cycle. Project management tools may be handy for creating to-do lists for the upcoming cycle. If you start new initiatives during the year, add new tasks to your tools so nothing falls through the cracks!

3. Analyze your data to determine which initiatives did (and didn't) work.

To truly understand which parts of your strategy are effective, you need hard data to support your impressions. Build reports on your delivered messages, first sources, travel, and events. For delivered messages, analyze data based on the funnel stage to compare click rates for messages to the same population.

Evaluate data from your partners, along with ROI. For example, enrollmentFUEL's Student Search partners can measure conversion to inquiry, application generation can be measured by new applications, and yield can be measured by student matriculations. Similarly, when evaluating travel and events, assess the ROI by determining if event registrants converted to applicants and students.

4. Review your institution's goals to align your processes and reports.

Your CRM processes, reports, and tracking should align with your overall institutional goals. For example, if you are trying to enroll more student-athletes, do you have clear reports to show the progress of those records? Are you bringing relevant data from other departments into your CRM and working closely with the right people to move those students through the funnel? Additionally, think about how (and whether) you are giving access to and training team members from other departments who can help you reach your institutional goals.

5. Review the tools you have in place for your team.

One of the most critical steps is ensuring that your team has the tools they need, where and when they need them. Even the setup and organization of these tools can make a difference! For instance, I love using the dashboard to ensure the list of students a counselor needs to reach out to is the first thing they see when they log in. Territory reports and training on using reports are beneficial as you teach your

¹ Popopopper123. "A brief analysis of 2374 college emails." Reddit. https://www.reddit.com/r/ApplyingToCollege/comments/aibmii/a_brief_analysis_of_2374_college_emails/. 21 Jan 2019.

counselors how to be territory managers. You might want to create a report that displays top schools, majors, and other pertinent information for each territory manager. Their directors can then train them on how to use that information to make more informed decisions on travel and outreach.

6. Make sure you and your team are familiar with all current policies.

Your enrollment team should be experts on relevant federal, state, and institutional policies, and they should have easy access to reference materials. This past year has been particularly challenging with all of the FAFSA changes, and we've also seen changes in the Common App on how gender/sex has been collected. Keep an eye out for any other policy changes that may affect your institution and application process to verify your procedures follow those policies. It's also a good idea to connect with graduate-level recruiters to ensure there are no changes to required documents or questions based on their unique programs.

7. Choose a communication strategy that aligns with your population's preferences.

Enrollment success isn't just about reaching students at the right time—it's also about reaching them in the right way. Recent reports show that the current generation of

high school students is overwhelmed by emails, so if your strategy is email-centric, you're likely getting lost in the noise! Rather than being another voice in a clamorous crowd, standing out requires a multichannel approach. If you're not integrating texts and digital marketing into your communication flow, you're missing the boat!

8. Look for opportunities to simplify.

Simplification and streamlining are essential for the student experience and your own. If you're annually updating your CRM to display tuition rates, consider linking to your website to share that information. Wherever you can remove friction from the process without compromising the quality of processes or information, it can lead to better student engagement and outcomes for your team.

9. Work with teams outside of Admissions more often.

Admissions is easily siloed off, but isolation can rob your team of the opportunity to better understand how other teams use your data—and opportunities to update what you already have.

I often see a disconnect between Admissions and Marketing, for instance. Many CRM managers are not familiar with



the benefits of UTM codes and how the Marketing and Web teams use them. Fun fact: Marketing will use this information to map how people are coming to your website. They can then prioritize which pages to update based on web traffic. Adding UTM codes to your emails will help them see that admissions drive web traffic. If you're unfamiliar with the benefits and how-tos of UTM codes, schedule a time with your webmaster to walk through how they use UTM codes and how you can support them.

Additionally, marketing teams often hold the budget for digital marketing. Since we're seeing fewer and fewer students actually reading emails, it's important to have a conversation with Marketing to ensure they are taking advantage of the existing services. You can even create specific CRM forms to help track which sources convert most for you!

10. Teach!

Teaching is an essential but potentially overlooked part of the job for enrollment leaders. As you start the next cycle, use this as an opportunity to update training documents and determine where there are gaps in your team. It's so important to confirm all team members understand each assigned task and can use the tools you create.

In addition to teaching end users, secure a backup as the CRM administrator. I know too many people who "go on vacation" but take their computer because no one else can do what they do. Don't let your team fall into that trap!

Effectively using your CRM can have a big impact on meeting your enrollment goals. With these tips in mind, your team will be well-positioned for success, even in today's challenging and fast-changing landscape.

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Aligning Enrollment Strategy *with* Institutional Vision:

THE IMPORTANCE OF A STRATEGIC ENROLLMENT PLAN

Mark Campbell, MAT, and Rachel Schreiber, PhD

Most academic leaders would describe their institutions as “enrollment-driven,” meaning that everything from the annual operating budget to the very mission of the institution depends on meeting enrollment targets. However, we find that few institutions operate using the guidance of a well-crafted Strategic Enrollment Plan. In the absence of such a plan, a more appropriate descriptor would be that institutions are “enrollment-reactive,” meaning that, annually, colleges and universities follow the enrollment opportunities that come their way. One program grows, another shrinks—as the semester deposit deadline approaches, seats are filled in accordance with actual enrollment numbers in ways that are often reactive rather than intentional. Sound familiar? If so, your institution would likely benefit from developing and implementing a Strategic Enrollment Plan (SEP).

It’s tempting to think that an Institutional Strategic Plan (ISP) obviates the need for a separate SEP. But these plans differ in significant ways, and both are necessary. ISPs are foundational documents that most institutions regularly develop—indeed, accreditors typically require them and may also be required by institutional charters or Boards of Trustees. ISPs set the stage for the mission and values of the institution for the next phase of time (typically five to eight years), articulating the broad vision and then sometimes drilling down into the ways this will be fulfilled. By contrast, a SEP—though also strategic—focuses on the tactical details of how the institution will maintain (or more often grow, even if incrementally) enrollment over the next five to eight years. In many ways, the SEP fuels significant portions of the effort to operationalize the ISP.

ISPs set the stage for the mission and values of the institution for the next five to eight years.

SEPs focus on the tactics necessary to maintain or grow enrollment.

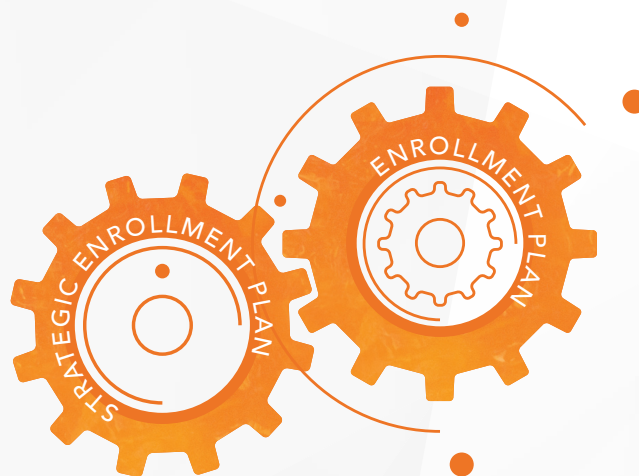
The ISP is a grand statement expressing the vision for the future. But how will this be carried out? Given that most initiatives detailed in the ISP require fiscal resources in one way or another, they can only be accomplished if your enrollment goals are met (or exceeded). Time and again, we’ve seen institutions expend significant energy (and

dollars) to develop a bold and ambitious ISP that sits on a shelf collecting dust because enrollment targets have not been met. As Lee Gardner writes in the *Chronicle of Higher Education*, all too often, “strategic plans ... make promises the institution can’t deliver on.”

Why is this? We believe the main reason is that, without an accompanying SEP, there is no roadmap for achieving the financial stability—via realized enrollment goals—needed for the initiatives described in the ISP.

Enrollment slumps in one area or another and ambitious initiatives are put on hold so that all energy can be diverted to addressing that problem.

A well-conceived, practical SEP can go a long way to ensuring your institution can pursue its broader strategic goals. In this way, the SEP must operate alongside the ISP. Think of these two as cogs with interlocking teeth. One wheel can only move smoothly when the other moves in tandem.



So, how does an institution produce an SEP? The first step is to achieve consensus among senior leadership about building a plan and communicating the timeline and process to the entire campus. Once that has happened, the next step is assessment, evaluating the current state of enrollment and retention. For each existing curricular program, ask: do you expect the program to maintain its enrollment, expand, or contract (and by how much)? This is also the time to explore opportunities for new programs or substantial revisions to existing ones. This critical decision demands comprehensive market research on projected workforce development needs, potential applicant pools, and relevant industries. Additionally, a thorough analysis of accreditation and licensure requirements is essential, along with a detailed checklist of current resources versus those needed to implement and sustain these programs effectively.

Next, the institutional vision should be articulated in relation to that assessment. Where do you want to be in five to



SMART Goals are:

Specific
Measurable
Achievable
Rellevant
Time-Bound

eight years compared to where you are now? More diverse? More residential? Show improved retention and graduation rates? More strengths in STEM fields? Have more of a focus on regional versus national or international recruitment? These are but a few examples. SMART goals can then be developed in relation to this vision.¹

Once these are established, an implementation plan is written. List the resources needed to achieve each goal (fiscal and otherwise). Examples of fiscal resources include additional marketing, more dedicated recruiters, faculty hiring, necessary technology and equipment, and increased financial aid, to name a few. Staff and faculty will need to be assigned to address additional considerations such as accreditation proposals, approvals for federal financial aid and visas for international students (if applicable), revised curricular plans for changed programs, etcetera. Be clear about which goals depend on anticipated revenue (i.e., if revenue is not realized, the goal might need to shift). Plan for accountability, noting who/which office will be accountable for the plan's elements. Ensure that everyone is clear on the timeframe for future check-ins.

The process for developing the elements outlined above *must* include all key stakeholders. We cannot emphasize this enough. Much like the ISP, the SEP will only succeed when everyone—staff, faculty, leadership, the Board—has participated in its development and is entirely in agreement with the final plan. Collaboration between the admissions office, academic affairs, marketing—really everyone—is key.

As for the timeline, you might ask: when is the right time to produce an SEP? **The answer is that the time is always right.** Ideally, the ISP and SEP should be developed together. But the reality is that when you join a new institution as an administrative leader, you will most likely inherit an ISP that

is partially underway. Or your institution will realize the need for an SEP part way through a period covered by an extant ISP. No matter—the SEP can still be developed in relation to the current ISP. When it's time to write the next ISP, take that opportunity to develop an SEP at the same time.

Once the plan has been developed and is underway, it's important to note the cyclical nature of this work and the fact that enrollment planning is *never* done or complete. Evaluation will continue to occur, and alterations must be made iteratively. To understand the landscape of enrollment planning is to know that change is a given; to be resilient, an institution should be ready to adapt to ever-shifting realities.

Finally, the SEP needs to be completely honest. It must begin with a clear-eyed assessment of historical data and the current state of the institution, and then continue with realistic future plans. For example, creating expectations for doubling a program's size without informed research about whether the market exists to fulfill this aspiration or without planning for additional faculty, space, and staffing benefits no one. While discussions about downsizing or closing programs are difficult subjects that must always be handled delicately and sensitively, avoiding these conversations altogether or holding them behind closed doors will only lead to mistrust and anger.

Though related, SEPs and ISPs differ in essential ways. While both are necessary to move an institution forward, most institutions devote significant energy to the ISP while disregarding the need for an SEP. Once one considers the high dependence of most institutions on enrollment, it becomes evident just how important it is to be intentional with enrollment planning. If the enrollment piece is not in place, full achievement of the ISP is unlikely. An SEP can be a highly effective tool to ensure that a college or a university can fulfill its vision and educate a thriving student body.

¹ First coined by George T. Doran in *Management Review*, SMART goals are those that are: specific, measurable, achievable, relevant, and time-bound. See: Doran, G. T. (1981). "There's a S.M.A.R.T. way to write management's goals and objectives." *Management Review*. 70 (11): 35–36.



EVALUATE

5. IMPLEMENT

1. ANNOUNCE THE PROCESS AND TIMELINE

4. GOALS

2. ASSESSMENT



3. VISION

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At the national level, Rachel has worked with the Association of Independent Colleges of Art and Design, founding a teaching fellowship program and the Academic Leadership Institute for graduate students and faculty of color. She is currently a university professor at The New School in New York City.

Dr. Mark Campbell has held senior enrollment positions at leading institutions across the United States for over 25 years. He has overseen all elements of the admission cycle, from marketing to yield, financial aid strategy, student success, advising, registration, and retention. Mark has extensive experience in building consensus around enrollment strategies and implementing campus-wide strategic plans, leading to significant growth in enrollment, revenue, application numbers, applicant quality, yield, retention, graduation rates, and diversity.



Mark is currently Vice President for Enrollment at The Cooper Union in New York City, overseeing admissions, financial services, the registrar's office, and international student services. He holds a bachelor's degree in economics and geography from Mount Allison University and a graduate degree in education from the University of Windsor, both in his native Canada.

But, We Don't Have Enough Staff *(in an AI World)*

Jacquelyn D. Elliott, EdD



SCAN HERE

Scan the QR code
to read the original
article, "But, We Don't
Have Enough Staff,"
published in 2018.



In the fall of 2018, I had just returned from a tour of college campuses across the country. Despite their many differences and distinct demands, one thing stood out as a common thread: frustration with staffing shortages. Often caused by tight budgets, these shortfalls created a ripple effect, and I heard story after story of enrollment teams struggling to manage increased applications with decreased resources.

Today, enrollment teams grapple with these familiar pressures, but the operational landscape has changed significantly. These shifts are driven by various factors, including the COVID-19 crisis, the demographic cliff, FAFSA impacts, staff burnout, the “Great Resignation,” and the emergence of Artificial Intelligence (AI). Or, to put it another way, as we progress through another enrollment cycle, there are more challenges and fewer resources than ever for many institutions. And the question is: how do we adapt and succeed?

Revisiting Areas of Change

When I first looked at this issue a few years ago, I shared four key actions that teams could take to revise processes and meet goals:

- Change your mental mindset
- Examine your processes
- Do what you do best
- Invest in your people

In many ways, these four areas remain relevant in today’s enrollment landscape; the challenges are simply evolving. The enrollment cliff poses new questions for institutions for whom “doing what they do best” may not necessarily be enough anymore. By the same token, re-evaluating processes and investing in the people who can make or break your program are always smart moves.

In my recent conversations with enrollment leaders, I’ve noticed that, like students on campus, many staff are also experiencing emotions such as depression, exhaustion, and personal financial concerns. I also hear that people feel overworked, underpaid, and underappreciated—and those feelings are happening at every level, not limited just to specific groups or roles. When we think about how to invest in our people, providing counseling services for our employees and students is a wise investment. Making



people feel heard and appreciated for their long hours (often doing the job of two) matters in retaining the right people. And, when possible, even when budgets are tight, finding meaningful ways to thank employees with extra time off, extra time at lunch to work out, or student work-study help can all matter.

Additionally, the work does not go away when staff openings, reductions, and layoffs occur. That means that the remaining people suffer from the “loyalty tax.” Those who are loyal get extra work, often without recognition or pay. So, how can processes be streamlined to reduce workloads? This is where AI comes in—and its timing couldn’t have been better. In my world, writing tasks that would have taken me 20 to 30 minutes can be cut down to about 10, as the research portion is summarized in seconds, leaving me to focus on the human elements of communication—the most critical and valuable part of my job.

AI and Productivity

If you know anyone on the enrollmentFUEL team, you know that part of our mission is to be a teaching-learning organization. To support our client-partners and community, we strive to understand AI, translate that knowledge into practical applications for Strategic Enrollment Management (SEM), and use actionable insight to help institutions achieve their goals. We believe AI will revolutionize admission processes and Student Search marketing efforts by enabling data-driven perception and personalized outreach, allowing the admission team to focus on building relationships and **personal selling**. The mainstreaming of AI tools has brought conversations about productivity to the forefront during many of my campus visits as higher education leaders work to assess the scope of the opportunity and their next steps.

Currently, predictions about the impact of AI on productivity tend to be conservative.

Goldman Sachs estimates that (in wealthy countries), generative AI could increase productivity by about 1.5 percentage points over the next decade, while McKinsey predicts that generative AI could increase productivity by 0.1 to 0.6 percentage points between 2023 and 2040.¹ Research from Microsoft, meanwhile, has found that generative AI can help people work faster and more efficiently while retaining a consistent level of quality.²

In higher education—and, specifically, enrollment—AI-powered solutions have already made a difference. A 2021 study used an AI chatbot for summer outreach to first-year and first-generation students and found significant potential for boosting positive outcomes. The study found that outreach using the chatbot was able to improve enrollment and course registrations, reduce melt, and increase successful use of financial aid, with the benefits most visible among first-generation students. The AI-driven outreach program was able to increase loan acceptances by eight percentage points and increase success with course registration and fall semester enrollment by three points each.³

These productivity gains are a crucial part of the staffing puzzle. Fewer team members mean that each individual has more to do, and even the most skilled teams may eventually let something fall through the cracks or miss an opportunity. Adding AI to the workflow could help boost productivity while remaining at the same staffing (and budget) levels.

Could AI help relieve some of the pressures of lean staffing and slimmed-down budgets among enrollment teams? It's possible, but a careful, thoughtful approach is required to ensure that technology enhances goals rather than creates new problems.

Enhancing Processes, Avoiding Pitfalls

In the context of higher education, incorporating AI is most likely to be helpful in two key areas: **streamlining** and **personalization**.

Its benefits for **streamlining** are fairly obvious: AI-powered tools and related technologies can be handy for automating basic, repetitive tasks that nonetheless take up workforce time and energy. When the members of your enrollment

team don't have to spend chunks of their day on tasks like sending emails and scheduling, they can focus on the more important actions that require human connection—that is to say, the investment of time that is most likely to tip the scales in favor of their institution because they've built a bond with prospective students.

AI can also help with **personalization** at scale, which has been shown (both in higher education and other fields) to improve response rates and positive outcomes. It might be as simple as ensuring the correct name is used in every communication; it might be more complex, like using powerful data analytics to better segment your pool of prospects and target them with communications tailored to their unique needs and interests.

Despite the excitement over AI, however, it is also important to avoid pitfalls, including copyright concerns, a lack of “soul,” and a slide in general perception. For instance, 82% of job seekers say they're frustrated with an overly automated process, and 87% say that tech has made the job search process more impersonal.⁴ While this is about job seekers, not college applicants, we can extrapolate that people generally don't like a process that is too automated—the human touch still matters. Similarly, generative AI itself has something of an image problem, with perceptions rising that it is a means of cutting costs, jobs, and human creativity while “learning” from human work without permission.⁵

Instead of getting swept up in the hype, focus on ways to incorporate AI into communication flows for the two areas described above, streamlining basic tasks (and taking them off of your team's overloaded plates) and personalizing more targeted communications. When you focus on how technology can enhance (rather than replace) your team, your productivity will rise, and your goals will feel even more achievable.

1 Keynes, Soumaya. “How to get big numbers when predicting AI's effect on growth.” *Financial Times*. <https://www.ft.com/content/8ee7fe88-e15a-405a-9cac-914612fd4c89>. 9 May 2024.

2 Eastwood, Brian. “Want to make the most of generative AI? Use your imagination.” MIT Sloan. <https://mitsloan.mit.edu/ideas-made-to-matter/want-to-make-most-generative-ai-use-your-imagination>. 15 May 2024.

3 Nurshatayeva, Aizat, et al. “Are Artificially Intelligent Conversational Chatbots Uniformly Effective in Reducing Summer Melt? Evidence from a Randomized Controlled Trial.” *Research in Higher Education* vol. 62 (2021): 392-402. doi: 10.1007/s11162-021-09633-z. <https://link.springer.com/article/10.1007/s11162-021-09633-z>.

4 “The State of HR Tech in 2024.” Near. <https://www.hirewithnear.com/blog/the-state-of-hr-tech-in-2023>. 9 May 2024.

5 Di Placido, Dani. “AI Is Generating Online Backlash And Mockery.” *Forbes*. <https://www.forbes.com/sites/danidiplacido/2024/03/28/how-the-generative-ai-backlash-took-over-the-internet/?sh=642b7b826576>. 30 May 2024.

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BIG GOALS to Achieve?

Start with the Small Wins

Laralee F. Harkleroad, EdD

Picture this: a Rider perched atop a powerful Elephant, struggling to maintain control. This metaphor, used by Jonathan Haidt in *The Happiness Hypothesis*, describes the dynamic between our rational and emotional selves. The Rider, our logical side, tries to steer, but Haidt warns, “Changes often fail because the Rider simply can’t keep the Elephant on the road long enough to reach the destination.”¹

In other words, trying to do too much can set us up for disappointment. However, the Rider could choose to steer the Elephant in shorter segments, take breaks in between, and successfully reach the destination. This thinking explains why small goals may not seem as powerful as big plans, but they might be the strategy your team needs to stay on track and achieve even more than you think you can.

¹ Haidt, Jonathan. *The Happiness Hypothesis* (Basic Books, 2006), 7.

Setting Small Goals

Small goals along the way can help to clarify overall objectives and boost morale. Research from PwC found that when employees set small goals regularly, they are more likely to actively think about what they want to achieve, hit performance targets, and have higher morale. In fact, people who set at least four small daily goals each week were 34% more likely to hit their KPI targets. Goal setting also had a positive impact on “feeling good” about work, especially when they achieved at least half their stated small goals.²

When it comes to small goal setting, specificity is key. Otherwise, they can actually cause stress instead of relieving it. In an interview with *CIO*, strategy consultant

² Van Buggehout, Nele, and Jamie Ellis. “The Big Power of Small Goals.” PwC. <https://www.pwc.com/gx/en/issues/workforce/big-power-small-goals.html>. 14 May 2024.



and former Harvard psychology professor Shawn Achor explained how goals that are too big “literally shut off your brain” from a neurological perspective. When faced with something overwhelming, the amygdala—the “threat response center” of the brain—takes resources away from the “creative thinker” part of the brain (the prefrontal cortex).³ Instead, smaller goals allow the prefrontal cortex to evaluate decisions and see the possibilities rather than losing out to a stress response.

Perhaps that’s why, according to PwC, highly specific and actionable small goals garner the best results. In their research, which was conducted in a sales environment, when small goals mentioned clear, measurable terms like “sales” or “leads,” teams generated 12% more leads overall.⁴

Incorporating small, actionable goals into admissions processes is not always simple. It can take time and will likely look different for every team. Enrollment leaders may want to consider steps such as:

- Providing and encouraging support systems (i.e., group goal-sharing and brainstorming)
- Actively setting goals with clear, measurable outcomes
- Coaching teams on goal setting
- Creating a sense of psychological safety so that people feel comfortable setting goals, sharing obstacles, and working through them
- Focusing on specific goals to set and equally specific language to identify aims and wins
- Celebrating the wins, even and especially the small ones

That last point in particular may just be the key to achieving your small and big goals.

Celebrating Small Wins



Just as it’s crucial to set smaller goals to avoid overwhelming individuals and teams, celebrating those small wins is equally important. It’s simple logic: when people feel better about their work and enjoy a positive environment, they become more creative and productive. Additionally, they’re more likely to see the impact of their efforts and feel good about collaborating with their colleagues.

Research in the *Harvard Business Review* bears this out. In a study focusing on inner work life and job performance, they found that the most common event that would trigger a “best day” of work was progress (any progress) by the individual or by their team; those “steps forward” happened on 76% of the days those employees evaluated as “best-mood” days. In contrast, the most common event that would trigger a “worst day” was a setback, and setbacks only happened on 13% of “best days.”⁵

More importantly, the researchers found that many of these “steps forward” were relatively minor in the grand scheme of things, yet they managed to evoke strong positive reactions. 28% of occurrences that had a minor impact on a project nonetheless significantly impacted people’s feelings.⁶ Small, consistent wins shared among a supportive team can have a positive avalanche effect, accumulating into major achievements that are critical to the success of the institution as a whole.

The key is that work should be *meaningful*, whether its impact is small or big. Indeed, a small win with a meaningful impact can be more motivating than a “bigger” goal that feels more detached or remote from the person or people doing the work. When we focus on those moments rather than getting lost in the weeds of big ideas, we feel better and do better, too.

In many ways, enrollment is all about those small things. The “small” interactions our teams have with individual students and families may actually be “big” moments that sway decisions, especially when seen from the students’ perspectives. Our teams may be under strain, but focusing on small goals can help maintain a positive culture while breaking down challenges into more manageable tasks. That, more than anything, is how we’ll achieve the wins we (and our students) need!

5 Amabile, Teresa M., and Steven J. Kramer. “The Power of Small Wins.” *Harvard Business Review*. <https://hbr.org/2011/05/the-power-of-small-wins>. May 2011.

6 Amabile & Kramer, 2011.

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3 Levinson, Meredith. “Why Your Negative Outlook Is Killing Your Career.” *CIO*. <https://www.cio.com/article/282325/careers-staffing-why-your-negative-outlook-is-killing-your-career.html>. 19 Apr 2011.

4 Buggenhout & Ellis, 2024.



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