



Search for the Holy Grail:

Customizing CRM in the Quest for Campus-wide Collaboration in Recruitment

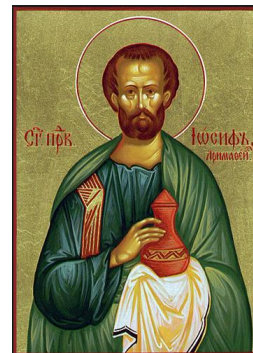
Noel Levitz National Conference on Student Recruitment, Marketing, and Retention

Kenton Pauls—Dean of Enrollment Management
Northwestern College, Iowa
July 8, 2014



The Oldest Search...

- Was sacred...
 - The Holy Grail defined:
 - The cup that is said to have been used by Jesus Christ and that was sought by knights during the Middle Ages



Less "Sacred" Recent Attempts



Historians Claim Holy Grail Sits In Spanish Museum



Enrollment Management Holy Grail

Holy Grail *noun*

: something that you want very much but that is very hard to get or achieve

- Just as finding a cure for cancer is the *holy grail* of medical researchers...
- So maximizing collaboration is the enrollment managers holy grail

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We Can't Succeed Alone



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My Quest

- 6,613 days in Admissions (roughly 19 years)
 - Canadian private
 - Midwest public
 - Iowa private
- Successes and failures
- Clarity has improved
- Lessons learned

Recently in Northwest Iowa

- Started as Dean in 2011
- Whispers & complaints
 - Staff: faculty aren't involved like they used to be or should be
 - If helping was important, they'd do it...we don't need to (or shouldn't need to) spoon feed faculty
 - Faculty: we are told we should help, but we don't know how...and we're not sure we really need to be anyway
 - Please make it easy...like it was 10 years ago

Faculty participation matters to student enrollment decisions

- At every school I've been at
- According to the research
 - 2012 TeensTalk (Stamats) indicated student perception of faculty as teachers and mentors
 - 6th most important factor impacting final college decision
- The perception of the academic experience
- How are students accruing this information?
- Individual encounters with faculty are the best way for this to be affirmed and internalized

Types of Faculty Recruiters

- Professor Nota Chance
 - At least you know...perhaps they can help with other things
- Dr. Do A Little
 - Occasional help some of the time for small events or programs
- Ms Armsa Twisted
 - Appointed to a work group which means she has to do it. Motivated mostly by the requirement
- Randy Raindancer
 - If it doesn't rain students Randy knows he won't have a job. The risk is Randy thinks everything and anything will work with students...
- Professor Aiwana Help
 - Wants to help, but she just doesn't know how. Give options.
- Dr. Phil Allgaps
 - He'll help in any way he can, for any department, on any weekend – and, he connects well with students

Common Characteristics of Faculty

- They want college recruitment efforts to be successful
- They want to be willing and know they should be
- More than we realize are truly willing though almost all...
 - Have limited time
 - Want to control the extent of their involvement
 - Don't want to be told, they want to be asked & enabled
 - Need the tools to participate on their own terms
 - Want their time to be well used
 - Don't want to look silly
 - Won't usually give a shameless plug
 - Often feel inadequate in connecting with HS students

more > less

JUST A FEW WILL DO.

Coalition of the Willing

- It has to be important
 - The highest administrator possible
 - Honor and reward faculty participation (release time, tenure credit, etc.)
- Basics for initial coalition membership
 - Who has done it well
 - What departments need to do it well
 - Who has credibility to speak persuasively to faculty colleagues

Tips for Encouraging Faculty

- Guide, don't direct
 - Provide ideas but don't expect lock-step compliance
- Assume and accept that there will be a full spectrum of willing/reluctant faculty
 - Assume the best
 - Recognize they're all different
- Provide a la carte options
- Give them an "out"
- Give them tools to make interactions most meaningful
- Respect their time
- Praise and recognize good work

Driving Principles Regarding Faculty

- Listen to them
- Honor their time, constraints and willingness
- Utilize your CRM to share information
- Capture the data necessary to share information well
- Automate...automate...automate

What We Accomplished

- Simple
 - Weekly database driven notification automatically sent to faculty chairs
 - System in place to easily enable participation
 - Honoring mechanism

Communication Plan

- Elevate importance
 - President supportive as was Provost and Dean of Faculty
 - Presidential newsletters regularly, etc.
 - Highlighted the importance for board
- Informed all faculty – especially those who are good with students
 - Private conversations with some
 - Faculty (senate) meeting agenda
 - Held “General Principles for Meaningful Faculty & Prospective Student Connections” workshops
- Guidelines and goals provided to faculty
- Introductory email from Dean of Faculty
- Launch



The Faculty Messages

The following was sent to philip@nwcjowa.edu

Philip,

The following list contains the names of students who have moved through the Admissions process since the last email was sent to you on Monday, January 27. The following list contains students who are interested in your academic area(s) who have also recently become accepted, deposited or enrolled (registered for courses) for fall 2014.

Please distribute these names among your colleagues and ask them to invite further conversation with these students. Students at this stage are likely to think more highly of Northwestern College if they hear from faculty members like you, or others in your department. I encourage you to contact them in the most personal way possible (phone, personal card, email).

You are receiving this list because the students have indicated, among possibly multiple interests, a desire to know more about an academic area for which you have responsibility. Full details about these students can be found in the [Prospective Student Center](#). I encourage you to use this tool. Call if you would like a tutorial.



Ease Will Determined Use

Students accepted since last email						
Student	Classification	Visited campus	Phone numbers	Email	Counselor	
Lindsay (57) West Des Moines, IA 50266	First-time freshman	N	515-4-1515 4-1515 (cell)	lindsay.p@gmail.com	Tyler Zeutenhorst	
Lindsey's interests: Extracurricular Theatre, Theatre Major, Art/Graphic Design						
Alexis (56) Andover, MN 55304	First-time freshman	N	763-766-0076 763-6666 (cell)	lex@hotmail.com	Cassandra De Bruin	
Alexis's interests: Art/Graphic Design , Undecided, Women's Cross Country, Women's Track						
Students deposited since last email						
Student	Classification	Visited campus	Phone numbers	Email	Counselor	
<i>There were no new deposits this week in your academic area(s)</i>						

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The Message Itself

- Sent to each department chair
- They're invited to distribute, share and follow up somehow
- Qualities of what they received:
 - Click on name directly to CRM record
 - Easily see mailing address to mail a card or note
 - Identify the type of student (freshmen, transfer, etc.)
 - Whether a visit has already happened or not
 - Phone number if they would be willing to call
 - Clickable email to make emailing easy
 - Knowledge about who the admissions counselor is so they can pass of any questions, etc.
 - Indication of other interests

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Faculty Results Measurable & Felt

- Faculty participation has increased
 - Measurable interaction with CRM more than doubled in two years
 - +54% (+555 more comments made by faculty 2012-2013)
 - +41% (+648 more comments for 2014 than for 2013)
- Faculty buy-in for recruitment is higher
- Faculty feel more “in the loop” and “helpful”

Enrollment Management Holy Grail is Campus-Wide Collaboration

- It can always be better
 - Even among already “bought in” partners
- What can technology add to improve the ability for best intentions to be acted upon...every day by all partners?

Coalition of the Willing

- Admissions Counselors
- Coaches
- Alumni
- Advancement
- Administrators
- Staff

Common Core Principles

- Relevant information
- Timely information
- Easy interaction and integration with CRM
- Assume willingness
 - Build engagement and participation into job expectations where possible
- Honor and reward participation
- Drive to CRM for the benefit of shared communication

Daily Admissions Counselor Email

- Automated - every day @ 6 AM
- Focuses every day
- Example



The following is your daily prospective student enrollment/runner activity summary. Please provide the necessary follow-up with these students and record your activity in the PSC.

Thanks,
Kenton

BIRTHDAYS

Student	Classification	Visited	Phone	Email
Rebecca Peterson (513-222-1122) (cell) Maple Grove, MN 55369	First-time freshman FA 2014	N	612-222-3991 (cell)	rebecca.peterson@comcast.net

Rebecca birthday is on February 26

Rebecca's ref source: Application , High School coach referr, Campus visit (drop-ins) , ACT Purchased , Parent Referral

Rebecca's interests: Women's Cross Country, Women's Track, Biology Hlth Professions, Nursing, Pre-Medicine

Counselor: Cassandra De Bruin

NEW PRIME

Student	Classification	Visited	Phone	Email
Petra Peterson (576-222-1122) (cell) North Hollywood, CA 91606	First-time freshman FA 2015	N	818-222-7173	petra.peterson@mail.com

Petra's ref source: SAT scores

Petra's interests: Not provided

Counselor: Jordan Kruse

RECENTLY ACTIVE PRIME

Student	Classification	Visited	Phone	Email
Dasha Peterson (541-334-1122) (cell) Paramount, CA 90723	First-time freshman FA 2014	N	562-338-7387 562-338-7383 (cel)	dasha.peterson@ioo.com

Dasha's recent activity: SAT scores

Dasha's ref source: High School visit , SAT scores

Dasha's interests: Nursing, Music Choir, Pre-Physical Therapy

Counselor: Jordan Kruse

NEW APPLICATIONS					
Student	Classification	Visited	Phone	Email	
Ke (579935) 4 Beatrice, NE 68310	Transfer Sophomore FA 2014	N	402- 178 402- 134 (cell)	kknig - nail.com	
<p>Kelsey applied on: Tuesday, February 25 Kelsey's ref source: Online ad , Application , In Progress Online App , Web Site Kelsey's interests: Campus Ministries, Intramurals, Cheerleading, Softball, Athletic Training Counselor: Jeffrey Guthmiller</p>					
NEW ACCEPTANCES					
Student	Classification	Visited	Phone	Email	
Linds (34) 66 Sioux Center, IA 51250	Transfer Sophomore FA 2014	N	712 105 712 180 (cell)	lindsa - ill.com	
<p>Lindsay was accepted on: Wednesday, February 19 Lindsay's ref source: Application , Friend , Pastor Referral Lindsay's interests: Biology, Student Activites Council, Dance Team, Biology Teaching Counselor: Jeffrey Guthmiller</p>					
NEW DEPOSITS					
Student	Classification	Visited	Phone	Email	
Merid (43) 1 Omaha, NE 68135	First-time freshman FA 2014	N	402 1339 (cel.,	meridy - hoo.com	
<p>Meridyth deposited on: Tuesday, February 25 Meridyth's ref source: Alumni referral , Application , College Fair Scanned , Campus visit (drop-ins) , College Fair Program , Friend Meridyth's interests: Campus Ministries, Intramurals, Student Activites Council, Psychology, Undecided Counselor: Elizabeth Huseman</p>					
NEW REGISTRATIONS					
Student	Classification	Visited	Phone	Email	
Elijah (252) 11 Lebanon, VA 24266	First-time freshman FA 2014	N	717- (cell)	0	chr - tel.net
<p>Elijah enrolled on: Friday, May 23 Elijah's ref source: Application , FAFSA Inquiry , Parent Referral Elijah's interests: Campus Ministries, Intramurals, Men's Soccer, Men's Track, Psychology, Spanish, Music Strings Viola & Guitar Counselor: Cassandra De Bruin</p>					

Admissions Counselor Praise

"The daily email notifications allow me to best serve students. I am responsive to new leads and can recognize when existing leads show new/different interests. It takes the guessing game out of who I should be contacting." Ross Fernstrum Admissions Counselor

"I think the daily emails are great. They especially help us with staying on top of new leads, nursing deposits and other things that give us reasons to connect intentionally with students." Elizabeth Huseman, Admissions Counselor

"The daily emails are a great way to ensure we keep up-to-date on all of our students and the needs they may have. It creates a level of personalization that I've found my students really appreciate." Cassandra Sterk, Admissions Counselor

Other Partners - Coaches

- Coaches
 - Weekly summary of athletes
 - Same information as what counselors get, just smaller & focused group for athletes
 - Result
 - Coaches involvement has increased even more than faculty
 - 1,600 comments for Fall 2012 and 4,400 for Fall 2014 (up ~ 173% in two years)

Other Partners - Alumni

- Weekly notification of all who are known to be a child of an alumnus
- Basic recruitment info about alum relationship
- Direct follow-up from Alumni Office

Student	Classification	Visited	Phone	Email
Graham, Robbie (10004) 602-220-1000 Phoenix, AZ 85083	First-time freshman FA 2016	N	602-220-1000 602-220-3668 (cell)	
Parent(s):				
Mary, Robbie (1044) 602-220-1000, Phoenix, AZ 602-220-1000			Kurtis, Robbie (10010) 602-220-1000, AZ 602-220-1000	
Class yr: 1988 Grad yr: 1988			Class yr: 1989 Grad yr: 1989	

Legacy Alumni Email...

Quotes from Director of Alumni

“It informs me (us) of those students who are considering Northwestern who have a legacy with us. This information reminds us of the importance of the primary purpose we exist, to educate current and future students...”

“...creates an easy touch point for me to connect with alumni without asking them for something.”



Other Partners – Advancement & Administrators

- “It would be great to know who is coming to visit each day...”
 - Resulted in twice weekly email notification of upcoming campus visitors
 - Includes reference to alumnus parents if known

“I really appreciate getting the campus visit notifications. I scan the list each time to see where they are from in case I know the student or the parents. If I have a connection with the family, I usually ask for more details from admissions so I can also connect with them while they’re on campus as another touch point/ personal attention feature of NWC.”
 Jackie Davis, Director of Advancement



Summary of Results

- Total participation in recruitment
(measured by comments in our CRM)
 - Fall 2013 → Fall 2014: 31% increase
 - Fall 2012 → Fall 2014: 68% increase

Conclusion

- Collaboration is necessary to realize maximum enrollment potential
- Collaboration with faculty is most challenging
- Further, broader campus-wide collaboration is also crucial
- It's a worthy pursuit
- Maximize technology & maximize people
- Don't despair or be encumbered by what hasn't worked
- A good outcome is possible

“ THERE ARE
NO RULES HERE
- WE'RE TRYING
TO ACCOMPLISH
SOMETHING ”
Thomas A. Edison

Questions & Discussion

Resources

http://www.iowaacac.org/assets/documents/MIDWest/2012_stamats_teenstalk_final_comprehensive.pdf

<http://www4.aacrao.org/semsource/sem/index236b.html?fa=view&id=3799>

<http://www.academicimpressions.com/news/practical-strategies-partnering-faculty-student-recruitment>