“We are continually faced by great opportunities brilliantly disguised as insoluble problems”.

Lee Iacocca

An American businessman known for his revival of the Chrysler Corporation in the 1980s.
Consider the following statements:

Enrollments shape budgets that shape programs that shape enrollments.

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Budgets shape enrollments that shape programs that shape budgets.

Programs shape enrollments that shape budgets that shape programs.

Programs shape budgets that shape enrollments that shape programs.
EM's Roots and Purpose

- Enrollment management (EM) was born on the East Coast sometime in the early to mid-1970s.
- Enrollment management was a logical response for higher education when suddenly the marketplace changed from seller to buyer and admissions directors transitioned from gatekeepers to salesmen.
- The unprecedented growth that higher education had realized since World War II was coming to a predictable end.
- Demographic forecasts were dire.
EM's Roots and Purpose

- The emergence of the for-profit sector as legitimate and worthy competitors forced many senior officers to rethink how well they were positioned to handle a dynamic environment with unpredictable changes.
- Enrollment management became a common response to these mega-changes.
- Today, enrollment management has further mutated and evolved.
Guiding principles for EM

Ethos:

- Shared responsibility
- Integrated institutional planning
- Focus on service
- Key Performance Indicators (KPI)
- Research & Evaluation
- Long haul mentality
  - Enrollment management is long-term and never finished
Enrollment Management is not

- A quick fix to achieve higher enrollment
- Solely an organizational structure (though this is important)
- An enhanced admissions and marketing operation
- An administrative function which operates separately from the academic mission of the institution
  - Must maintain the core
21ST CENTURY CHALLENGES TO HIGHER EDUCATION

- Educating citizens for a global, technology-centric economy
- Meeting the needs of an expanded population of learners
- Education reform
- Heightened competition from a new wave of learning opportunities
- Economic pressures to lower costs and manage with less government funding
Knowledge and Content

- Collaboration
- Technology Literacy
- Information Literacy
- Invention
- Critical Thinking and Reasoning
- Self Direction
Addressing Trends

- Having an anticipatory mindset
  - Ex: new: AP Capstone Program Model / Capstone Diploma & AP Seminar and Research Certificate

- Being able to link data and measure what matters
- Technology… technology… technology

- Being aware of conditions of economic, political, and cultural globalization

- Having key campus collaborations/ Campus Partners
Addressing Trends—Critical Steps

- Conducting:
  - Situational Analysis (SWOT)
  - Recruiting audit
  - Non-matriculant studies
  - Communication sequence mapping
  - Campus visit assessments
  - Financial aid audit
  - Tuition pricing elasticity studies
  - Assessing the marketability of your academic programs
What 2030 might look like?

- "There’s going to be a different way that we learn and teach. Online will be great for the type of content that is delivered, memorized and learned in that fashion, but we’ll have much more collaborative space where people come together and discuss; where people come together and work on projects together."

- "Long-distance learning is probably going to be the norm. There will always be certain things that students have to physically attend, like the arts and the Conservatory. But I think the main reasons students will come together will be for social reasons. We’re going to have a lot of online learning that the University is going to have to prepare for."
What 2030 might look like?

- "Information is going to be overly abundant, so the best functional people in 2030 are going to be the ones who can filter through that information and determine what's important, and then act on it. The world of 2030 is going to be very global, because information will be very available globally, and how our students play in the global world and how they filter information is going to be very important."

- "I think in 2030, students will be able to sample all kinds of potential careers before they finally decide what their niche is."

- "The business world is going to change, too, jump-started by this recession that we’re in. We’re going to see more people develop their talent at something they love to do, and they’ll shop it out to many organizations as opposed to looking for any one organization. We’ll see more corporations hiring contract workers as opposed to hiring lots of full-time people."
KBW’s central tenets & themes of Enrollment Management:

- Establishing clear goals for the number and types of students needed to fulfill the institutional mission
- Promoting academic success by improving student access, transition, persistence and graduation
- Determining, achieving, and maintaining optimum enrollment

- Key Research Tools:
  - Reporting and analytical tools
  - Inferential statistics
  - Data mining
  - Data warehousing

- Generating added revenue for the institution
  - Financial Aid leveraging
Central tenets & themes of Enrollment Management:

- Increasing process and organizational efficiency
  - Lean manufacturing principles
- Improving service levels to all stakeholders
- Creating data-rich environment to inform decisions and evaluate strategies
  - Prospect tracking
  - Early alert systems
  - Custom automated communications/ CRM
- Creating and continuously strengthening linkages w/ functions and activities across the campus
“Management involves motivating other people”.

Lee Iacocca

President and CEO of Chrysler from 1978 and additionally as chairman from 1979, until his retirement at the end of 1992.
In conclusion: Enrollment Management Is...

- A process that brings together often disparate functions having to do with recruiting, funding, tracking, retaining, and replacing students as they move toward, within, and away from institutions.

  - Goals often accompany enrollment management initiatives to detail the focus and intended outcomes or deliverables.
EM...Different things at different schools

- There is no one-size-fits-all, cookie-cutter approach.
- However there are foundational attributes:
  - Ex: the need for an analytical, empirical, data-driven approach to problem solving and decision-making.
- Intuition, enrollment managers will tell you, is important but not sufficient. The "culture of evidence" is a cornerstone of enrollment management.
Determining factors in approaches

- Public v/s Private Colleges
- Open Admission vs. Selective vs. Highly Selective
- Rolling Admission vs. Precipice Admission
- Local vs. Regional vs. National
- Traditional Students vs. Non-traditional
- Residential vs. non-Residential

All of these factors determine the activities of the admissions office and the timing of when we conduct the activities.
Other factors impacting institutions

- Demographic trends
  - increased/decreased population
  - Increased number of minority students
  - Increased adult learners

- Technology
  - web-based recruitment services
  - distance learning

- Enrollment history of the institution

- Economic circumstances
“Start with good people, lay out the guidelines, communicate with your employees, motivate them and reward them. If you do all those things effectively, you can't miss.”

Lee Iacocca

Iacocca was a passionate advocate of U.S. business exports during the 1980s.
Traditional Recruitment Funnel

- **Early Funnel**: Inquire
- **Mid Funnel**: Visit & Apply
- **Late Funnel**: Enroll
- **Entering Class**

**PRE-FUNNEL**

Introduce, Market Benefits, Confirm choice
Recruitment Funnel

Addition of Retention and Alumni to the funnel in order to be certain we were recruiting students who are likely to graduate (Enrollment Management).

Early Funnel
- Inquire

Mid Funnel
- Visit & Apply

Late Funnel
- Enroll

Entering Class
Multiple Recruitment Funnels

Out-of-State

Multicultural

High Achieving

Pre-Funnel

Early Funnel  Mid Funnel  Late Funnel

Early Funnel  Mid Funnel  Late Funnel

Early Funnel  Mid Funnel  Late Funnel

Entering Class

Retention

Alumni

Introduce, Market Benefits, Confirm choice
Multiple Funnels for each Student Population

Academic Preparedness
- High
- Average
- Low

Geographic
- Local
- Non-local
- Out-of-State

Minority
- Visit
- apply
- enroll

Likelihood of enrollment
- Very
- Somewhat
- Not at all
Recruitment funnel
(21st Century)

Academic Preparedness

Geographic

General Visit Apply Enroll

Minority

Ability to Pay

Managing multiple funnels simultaneously in a systemic fashion
Recruitment Activities

- Off-campus programs (Travel): high school visits, college nights, off-campus interviews, geographic receptions.
- On-campus programs: visitation days, individual family visits, overnight visits, scholarship programs, early outreach programs, etc.
- Telecounseling: Inquiries, applicants, admits.
- Direct Mail: Inquiries, applicants, admits.
- Electronic Communication: web site & email
- Guidance Counselor Programs: on-campus and off-campus.
Non-recruitment activities

- Processing applications
- Reading applications
- Evaluating scholarship applicants
- Travel planning
- Assessing programs and services
- Program planning
- Staff training and development
- Managing student employees
- Orientation and registration
- Developing publications
- Completing Surveys
- Producing enrollment reports
- Managing web content
RECRUITMENT FUNNEL ACTIVITIES

PRE-FUNNEL
EARLY INTERVENTION, COMMUNITY SERVICE PROGRAMS
SUMMER CAMPS, WEB REPLIES

EARLY FUNNEL
PSAT/ACT PLAN/CARD DECK SEARCHES
SAT/ACT SCORES
DIRECT MAIL
TRAVEL
PUBLICATIONS
ON-CAMPUS PROGRAMS
ADVERTISING

MID FUNNEL
ON- AND OFF-CAMPUS PROGRAMS
DIRECT MAIL
TRAVEL
TELECOUNSELING
PUBLICATIONS

LATE FUNNEL
ON- AND OFF-CAMPUS PROGRAMS
DIRECT MAIL
TELECOUNSELING
PUBLICATIONS
SCHOLARSHIPS
FINANCIAL AID

FEB - AUG

AUG - JAN

JAN - MAY

Inquire

Apply

Enroll
The goal during the EARLY FUNNEL is to identify students who have the propensity to apply for admission. Students who indicate an interest in NIU are sent information about the variety of recruitment programs and opportunities available.

**Search**
- PSAT Search
- ACT Plan Search

**Person-to-Person Contact**
- High School Visits
- College Fairs
- Telephone Inquiries

**Electronic Contact**
- Online Inquiry Form
- E-mail Requests for Information

**Campus Visits**
- Individual Visits
- Group Visits
- Special Recruitment Programs
- Summer Camps

**Other**
- ACT/SAT/TOEFL Scores
- Peterson’s List
- Individual Referrals
**Marketing**
“We’re Coming to your school” Poster in High Schools
Visit NIU Telecounseling Phone Calls
Apply to NIU Telecounseling Phone Calls

**Recruitment Programs**
High School Visits
College Fairs
Fall Visit Days

**General Mailings**
Letter from Geographic Counselor
Letter from Director of Admissions
High School Visit Letter
Viewbook/Application Mailing
Value Brochure (Parents)
Reminder to Apply Letter/E-mail

**Targeted Mailings**
Multicultural Visit Day Postcard
Various Scholarship Letters
Current Student Letter (S.T.A.R.)
CONVERTING APPLICANTS TO ENROLLED STUDENTS

Recruitment Programs
- Geographic Area Receptions
- Spring Visit Days for Admitted Students

Person-to-Person Communication
- Admissions Counselor Phone Calls
- Telecounseling Phone Calls (Student Callers)
- Faculty/Administrator/Alumni Phone Calls

Electronic/Written Communication
- Financial Aid Award Letter
- Scholarship Award Letter
- President’s Letter
- Alumni Letter
- Admitted Student Facebook page E-mail
- Hand-signed Card

Late Funnel
Seasons of the profession

The timing of admissions and enrollment management activities varies depending upon on the type of institution, the type of student it serves and the institution’s position in the marketplace.
Late summer and fall

Goal: Generate interest and applications

- Travel Planning
  - Geographic territory
  - Key H.S.’s to visit
  - College Fairs
- Travel to high schools and college fairs
- Direct mail activities (viewbook, application, FA, academic programs, HS visit announcement, etc.)
- Campus visitation programs
- Individual campus visitors (interviews, tours, etc.)
Winter

Goals: Generate, Read & Process Applications, encourage campus visits, select scholarship winners.

- On-campus programs
  - Individual family visits
  - Visitation Days
  - Scholarship Competitions
- Email communications
- Telephone communications
- Direct mail activity
- Read and Process Applications
Spring

Goals: Generate enrollment deposits
Generate inquiries for following year

- Read and process applications
- Determine scholarship winners
- On-campus programs
- Off-campus “Yield” programs
- Telephone communications
- Direct mail to students and parents
- Generate enrollment commitment
- Generate interest from juniors (searches, visit days, direct mail, etc.)
## Summer

### Goals:
Confirm “paid” students, generate additional “paids”, generate inquiries for following year, assess the previous year, prepare for upcoming year.

### Activities
- Search responses
- Web responses
- Rising senior visit programs
- Student interviews
- Application and yield studies.
Communications Plan: Direct Mail

Sophomore

- PSAT Search
- Search Reply
- Travel Reply

Junior

- Summer Visit Day Invitation
- Visit Day Invitations
- “Quality” Mailing
- PSAT Search
- Search Reply
- ACT Letter
- Minority Search
- Travel Reply

Senior

- Geographic Recpt. Invitation
- Viewbook
- CDrom
- ACT Letter
- Travel P.C.
- Travel Reply

Does not Include Admitted Student Activities
Communications Plan: Programs and Travel

- Special Tours
  - Fall Travel
  - Spring Travel
  - Summer Visit Day

- Daily Campus Tours and Admission Interviews
  - Career Beginnings
  - Geographic Receptions

- Sophomore
  - Fall Travel
  - Spring Visit Day

- Junior
  - Spring Travel
  - Summer Visit Day

- Senior
  - Fall Travel
  - NEOEA Day
  - Fall ADD
  - Fall ADD
  - Fall ADD
  - Multicultural Visit Day

Does not Include Admitted Student Activities
Communications Plan: Electronic

Sophomore:
- Search Response Option

Junior:
- Search Response Option
- Invitation to Visit

Senior:
- On-line Scholarship Application
- On-line tour scheduler
- On-line Applications
- CDrom
- Parent Email Sequence
- Does not Include Admitted Student Activities
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