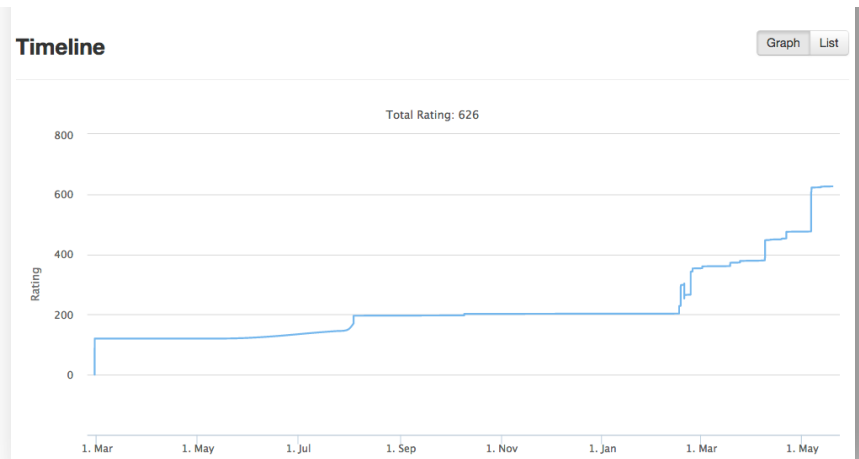


MOVE OVER PREDICTIVE MODELING: MAKE ROOM FOR BEHAVIORAL ANALYTICS

May 19, 2016



Liaison by the Numbers...

1,000,000+
applications/yr

5,000+
programs

700+
campuses

98%
retention

25+
associations

2
decades
experience

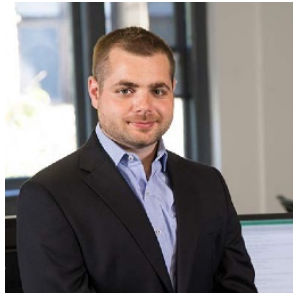


- Founded 1991
- 225+ employees
- \$50M+ annual revenues (and profitable)
- Admissions and enrollment specialists
- A Warburg Pincus portfolio company

Liaison's Reach (750+ Campuses)



Introductions



Andrew Mallen
Product Manager/
Director of Spectrum CRM Solutions
Liaison



Suzanne Sharp
Executive Director, Enrollment Management Consulting
Liaison



George Wolf
Vice President of Enrollment Management
Siena Heights University

Agenda

- Reaching students today
- Predictive Models
- Why is data important?
 - How do you gauge interest and allocate resources?
 - FAFSA Rankings are no longer available
- Behavior/Engagement Tracking
 - What do we mean and how does it work?
 - What does it look like?
 - How do schools use it?
 - What are the results?
- Review
- Questions & Answers

Engaging Students

- Immediate
- Relevant
- Automated
- Trackable



Predictive Models

- Predictive modeling is highly desired, but often elusive
 - Typically based on demographic data points, such as location and GPA
 - Assigns values based on past cohort performance
 - Doesn't consider the ever changing enrollment
- How do you enhance predictive modeling data?
 - What if there is no historical data?
 - What if you have a small sample size?

Why?



“While applications have increased by **108%** percent from 2001 to 2014, the number of high school graduates has increased by only **11.6%.**”

<https://www.academicimpressions.com/news/yield-rates-are-declining-why>

Why?

- Technology today allows us to have data
- Data helps us work smarter and allocate our resources wisely
- Some data is no longer available to us (FAFSA school rankings)



Why?

Deposited/ Enrolled	Withdrawn	Denied
125 points	65 points	52 points

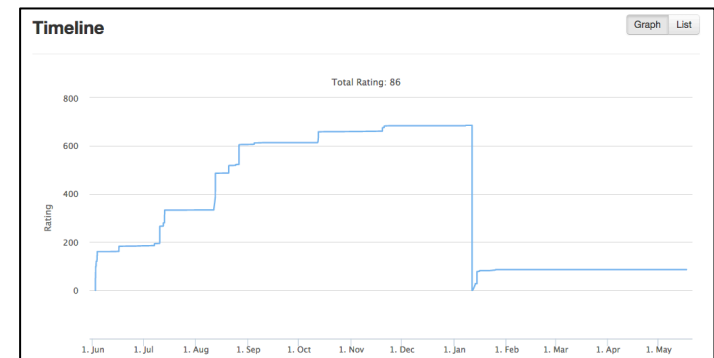
Behavioral/Engagement Tracking

- **Track Engagement Behavior**

- Combine engagement scores with predictive scores, and other data points.
- Manage workflow:
 - Re-targeted marketing campaigns
 - Identify leads at “in-between” stages
 - 1:1 follow follow up
 - Prioritize!

- **Benefits:**

- More intensive and relevant follow up
- Focused and meaningful personal outreach
- Prioritize follow up to student indicating higher interest
- Using an integrated system maximizes outreach
- Points versus drive down to specific clicks, opens, etc.
- Setting up points – custom to your institution

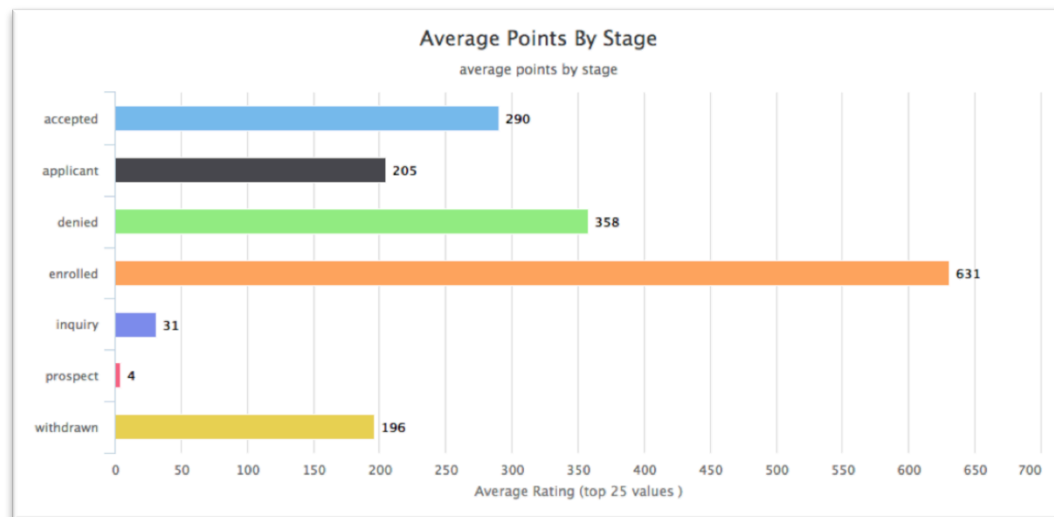


Audience Poll

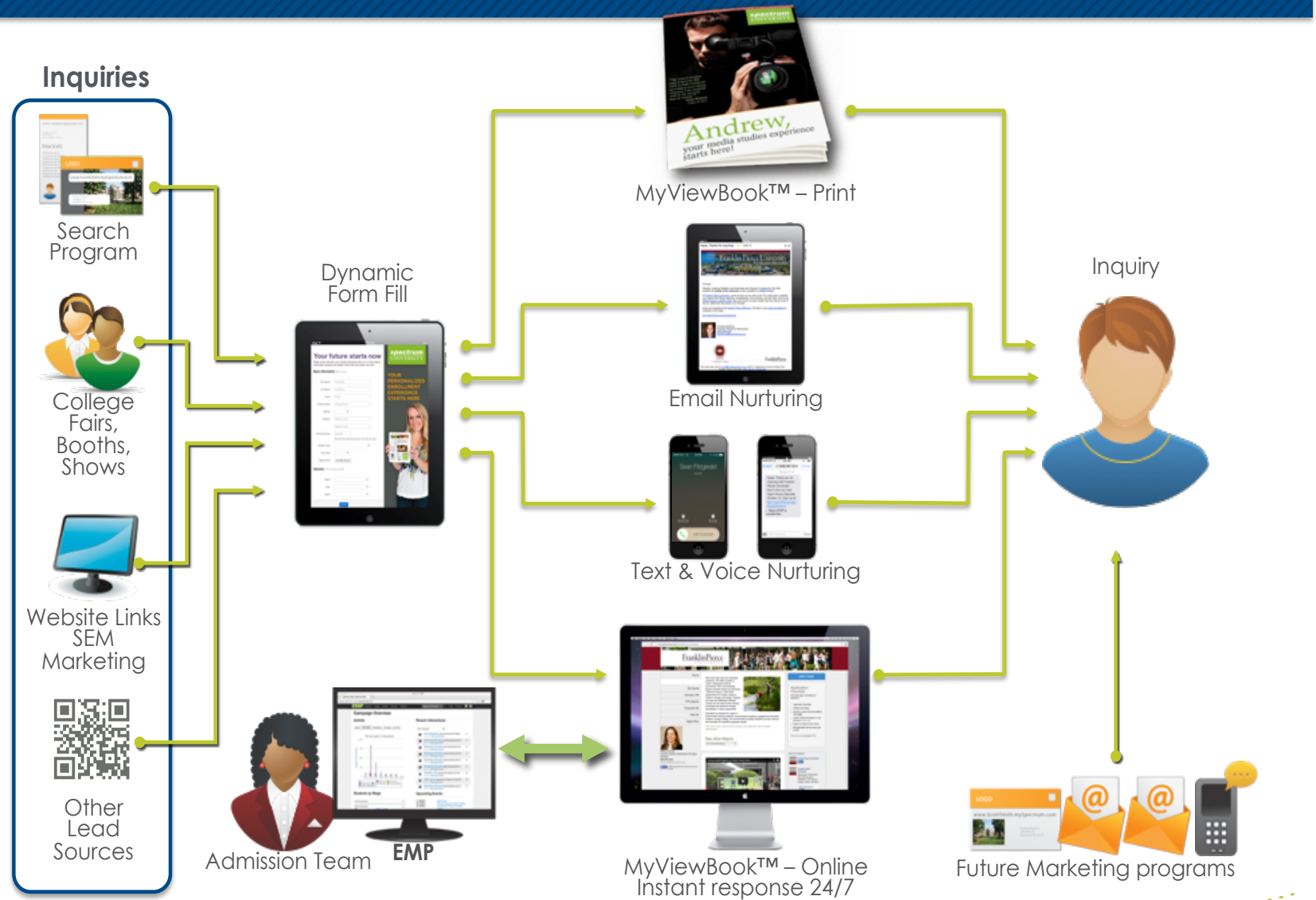
- How are you currently identifying best-fit students and guiding your outreach? (Select all that apply)
 - Predictive model for name purchasing (list buy)
 - Predictive model used to allocate resources to recruit inquiries and applicants
 - Behavioral tracking within your recruiting solution
 - No behavioral tracking
 - Would like more information on predictive models or behavioral tracking

About Engagement Tracking

- Student experience versus administrative experience
- How does it work?



Fulfilling an Inquiry



How Schools Use Engagement Tracking

Micro-Targeted Response



EMP



High Impact Response

- Personalized Microsite
- Personalized Brochure
- Targeted Nurture Email
- Personalized Text
- Rep Trigger for personal call response



Strong Profile/
Highly Engaged



Secondary Response

- Postcard
- Targeted Nurture Email
- Personalized Text
- Personalized Microsite



Medium Profile/
Medium
Engagement



Automated Response

- Personalized Microsite
- Targeted Nurture Email



Lower
Engagement



Response

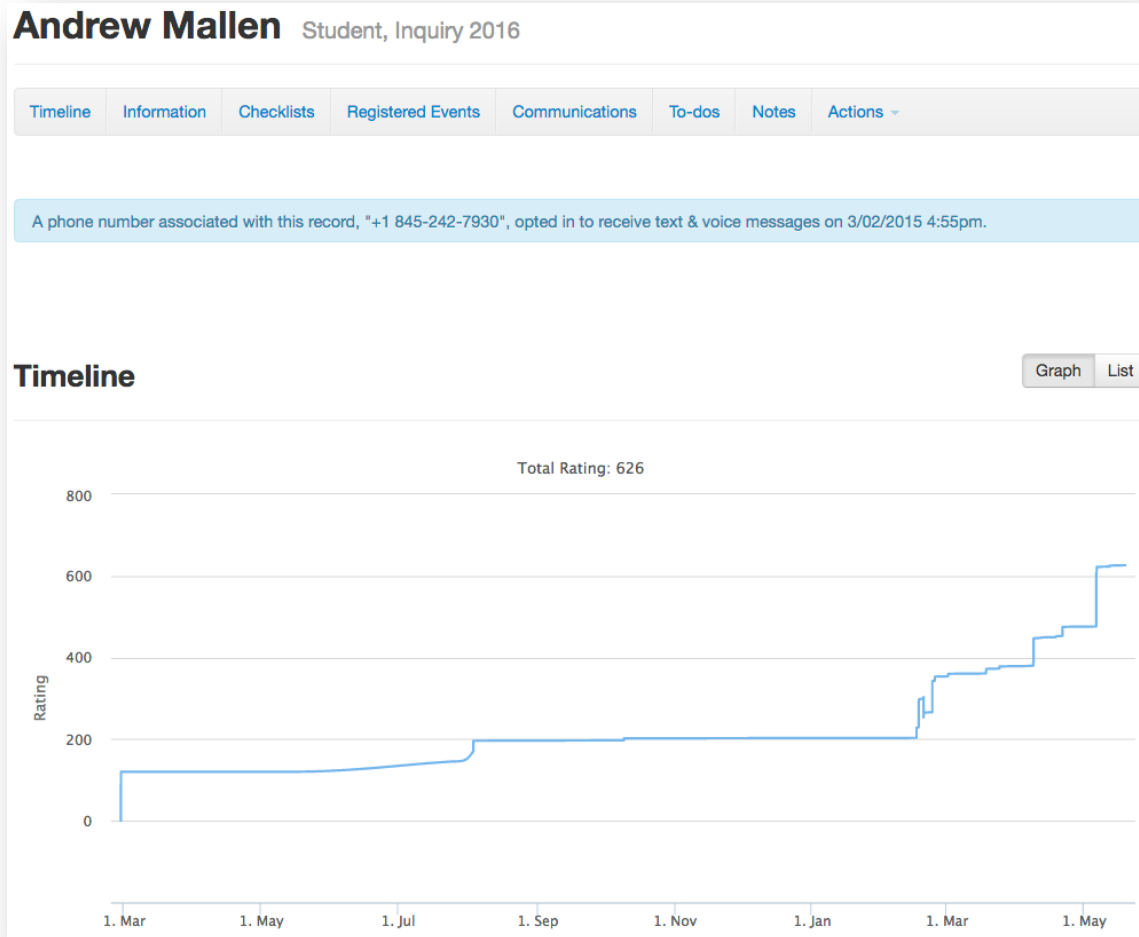
- Personalized Microsite



Less Desirable Profile

How Schools Use Engagement Tracking

Team View – Timeline graph view



Individual Tracking Timeline

Team View – Empowered with information

The screenshot displays the EMP (Educational Management Platform) interface for a student inquiry. The top navigation bar includes links for Students, Outreach, Content, Calendar, Analytics, a search bar, Help, Account, and a notification badge with the number 6. The main header identifies the student as **Faith Weimer** with the status 'Student, Inquiry'. Below this is a tabbed interface with options: Timeline, Information, Checklists, Registered Events, Communications, To-dos, Notes, and Actions. The 'Timeline' tab is selected, showing a list of activities. To the right of the timeline list are 'Graph' and 'List' buttons. Above the timeline list is a toolbar with icons for information, folders, refresh, chat, email, calendar, and a plus sign. The timeline itself lists eight activities, each with a globe icon, a description, a timestamp, a link to view other students' activity, and a '+1' indicator.

Activity	Timestamp	View Others	Count
Faith Weimer was browsing the Home page	6/25/2015 8:50am	Who else did this?	+1
Faith Weimer clicked a link on their Viewbook to landing_inquiry_0	6/25/2015 8:50am	Who else did this?	+1
Faith Weimer clicked a link on their Viewbook to http://www.csc.edu/admissions/apply.csc	6/25/2015 8:50am	Who else did this?	+1
Faith Weimer was browsing the Visit Us page	6/25/2015 8:49am	Who else did this?	+1
Faith Weimer clicked a link on their Viewbook to events	6/25/2015 8:49am	Who else did this?	+1
Faith Weimer was browsing the Why Other Students Choose Chadron page	6/25/2015 8:49am	Who else did this?	+1
Faith Weimer clicked a link on their Viewbook to why_other_students_choose_chadron	6/25/2015 8:49am	Who else did this?	+1
Faith Weimer was browsing the Sports page	6/25/2015 8:49am	Who else did this?	+1
Faith Weimer clicked a link on their Viewbook to sports	6/25/2015 8:49am	Who else did this?	+1

Individual Follow Up

- No more cold calls! *Personal* calls to hot leads

Faith Weimer Student, Inquiry

Timeline Information Checklists Registered Events Communications To-dos Notes Actions -

Timeline

- Faith Weimer was browsing the Majors page
4/07/2015 4:13pm Who else did this?
- Faith Weimer clicked a link on their Viewbook to majors
4/07/2015 4:13pm Who else did this?
- Faith Weimer clicked a link on their Viewbook to clubs_and_activites
4/07/2015 4:13pm Who else did this?
- Faith Weimer was browsing the Clubs and Activites page
4/07/2015 4:13pm Who else did this?
- Faith Weimer clicked a link on their Viewbook to clubs_and_activites
4/07/2015 4:13pm Who else did this?
- Faith Weimer was browsing the Majors page
4/07/2015 4:13pm Who else did this?
- Faith Weimer clicked a link on their Viewbook to majors
4/07/2015 4:13pm Who else did this?
- Faith Weimer was browsing the Clubs and Activites page
4/07/2015 4:12pm Who else did this?
- Faith Weimer clicked a link on their Viewbook to clubs_and_activites
4/07/2015 4:12pm Who else did this?

Hope Weimer Student, Inquiry

Timeline Information Checklists Registered Events Communications To-dos Notes Actions -

A phone number associated with this record, "+1 573-268-6777", opted in to receive text & voice messages on 4/07/2015 3:21pm.

Timeline

- Hope Weimer was browsing the Sport page
4/07/2015 3:57pm Who else did this?
- Hope Weimer clicked a link on their Viewbook to sport
4/07/2015 3:57pm Who else did this?
- Hope Weimer was browsing the Orientation/Registration page
4/07/2015 3:57pm Who else did this?
- Hope Weimer clicked a link on their Viewbook to orientationregistration
4/07/2015 3:57pm Who else did this?
- Hope Weimer was browsing the Sport page
4/07/2015 3:56pm Who else did this?
- Hope Weimer clicked a link on their Viewbook to sport
4/07/2015 3:56pm Who else did this?
- Hope Weimer was browsing the Home page
4/07/2015 3:56pm Who else did this?
- Hope Weimer clicked a link on their Viewbook to landing_inquiry_0
4/07/2015 3:56pm Who else did this?
- Hope Weimer was browsing the Visit Us page
4/07/2015 3:55pm Who else did this?

How Schools Use it: Real Time

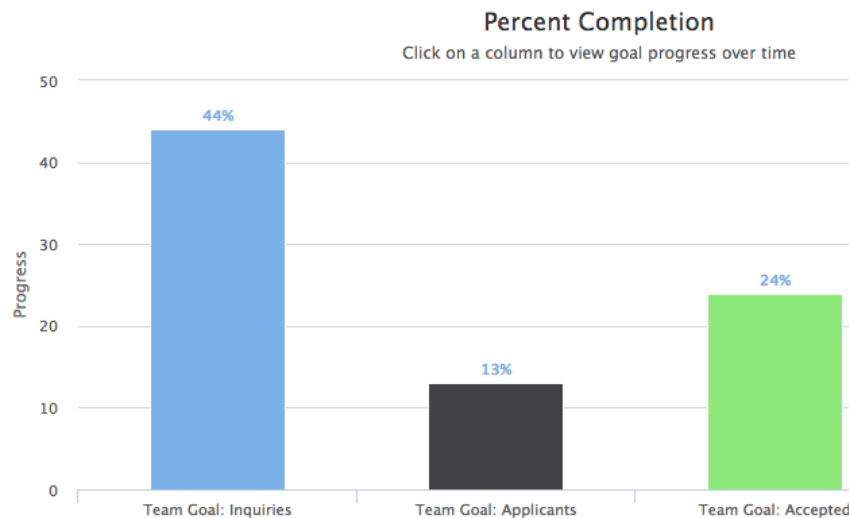
Dashboard

1 To-do due today

2 Overdue to-dos








Goals in Progress

Show goals



Recent Interactions

Show activity for students assigned to

-  **Matthew Cerniglia** attended Summer Open House +25
6/24/2015 2:44pm [Who else did this?](#)
-  **Luke Bartholomew** attended Summer Open House +25
6/24/2015 2:44pm [Who else did this?](#)
-  **Joseph Adams** attended Summer Open House +25
6/24/2015 2:44pm [Who else did this?](#)
-  **Brian Keane** was browsing the Study Abroad Countries page +1
6/24/2015 1:50pm [Who else did this?](#)
-  **Brian Keane** clicked a link on their Viewbook to study_abroad_countries +1
6/24/2015 1:50pm [Who else did this?](#)
-  **Brian Keane** submitted the Study Abroad +25
6/24/2015 1:50pm [Who else did this?](#)
-  **Brian Keane** was browsing the Home page +1
6/24/2015 1:50pm [Who else did this?](#)

Behavioral/Engagement Tracking

- **Uses**

- Phone call lists
- Travel planning
- Prioritizing
- New campaigns

Interactions Match of the following fields: ⓘ

Did or Didn't	Type	Interaction	Timeframe	Date
Did	Form submissions	Inquiry Formfill		
Did	Email link clicks	prospect.spectrumdem os.com/{{Unique PURL}}	Days ago	2

Filter by interactions. These are the things we track about records.

Events Match of the following fields: ⓘ

Did or Didn't	Action	Event	Date	Time
Did	Register	August 8 Open House	08/08/2015	

Filter by Event Registrations and Attendances

Form Payments Match of the following fields: ⓘ

Filter by form payments.

Outreach Status ☐ Filter to prospects who have received emails to their primary email address.
☐ Exclude students who have opted out of receiving emails with their primary email address.
☐ Filter to students who have opted in to receive text and voice messages sent to their primary or secondary phone number.

Student Status

Include active and/or inactive students in my results. Not selecting active or inactive will result in no students.

Dashboard Students Outreach Content Calendar Analytics Search for Students 🔍 Help Account 48

Filtering Options

Name

Rep

Rating Min - Max
Select a minimum and maximum range of ratings to include.

Sources

Time Zone

The selected time zone will be used for any date filters used in this group.

From to

Students are filtered based on when they were created, inclusive of the dates or relative times entered.

Match students ⓘ

Stage Timeframe Date

Stage, timeframe and date are required in this section. If you want to filter to students in a stage, use the field filters below.

Fields Match of the following fields: ⓘ



Field	Measure	Value
Distance	Less than	100
ACT score	Greater than	20
Total GPA	Greater than	3.5

How Schools Use it: Reporting

Build Funnel Chart

[Funnel Chart List](#)[New Funnel Chart](#)

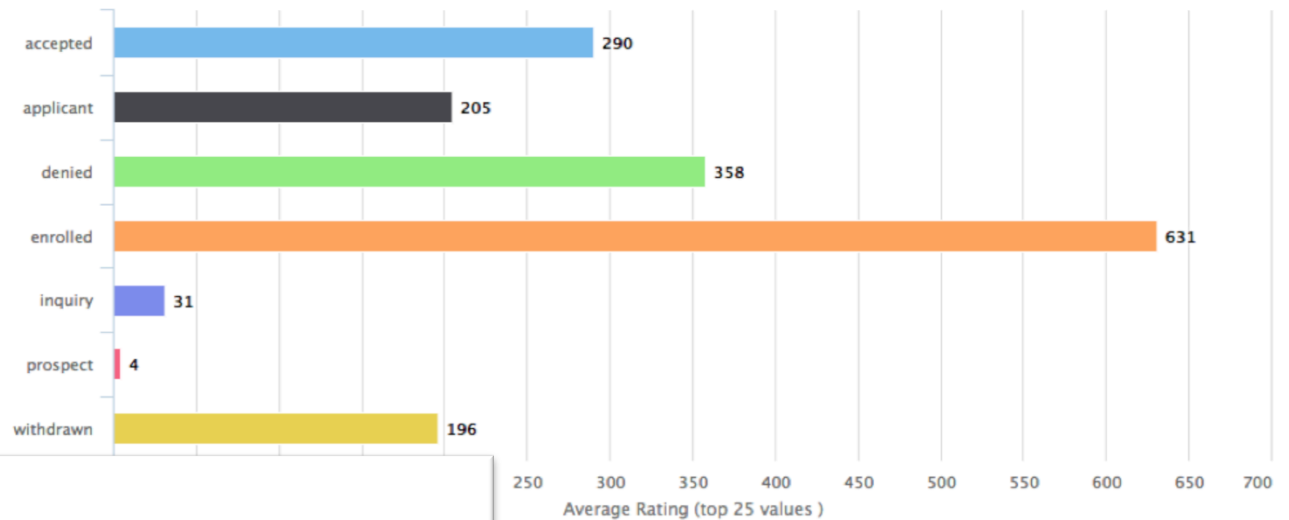
Funnel (pivot) charts, are used to show the most critical metrics for admissions offices. This reporting tool can be used to generate both **current**, and **point in time results**. Point in time reporting will show a historical view that compares numbers for the current entry year versus points in previous years.

 		Major ▼ County ▼								
Count ▼		Stage ▼								
Entry Year ▼ Gender ▼										
		Stage	prospect	inquiry	applicant	accepted	withdrawn	denied	enrolled	Totals
Entry Year	Gender									
Fall 2016	Female		17,281	8,932	7,766	5,070	917	755	218	40,939
	Male		12,019	7,015	6,293	3,719	578	826	159	30,609
Fall 2017	Female		10,646	1,562	21	6			2	12,237
	Male		7,743	919	16	5			3	8,686
Fall 2018	Female		388	383	28					799
	Male		242	238	25					505
Fall 2019	Female		137	136	2					275
	Male		114	112						226
Fall 2020	Female		44	42						86
	Male		47	47						94
Fall 2021	Female		64	63						127
	Male		60	58						118
Totals			48,785	19,507	14,151	8,800	1,495	1,581	382	94,701

How Schools Use it: Reporting

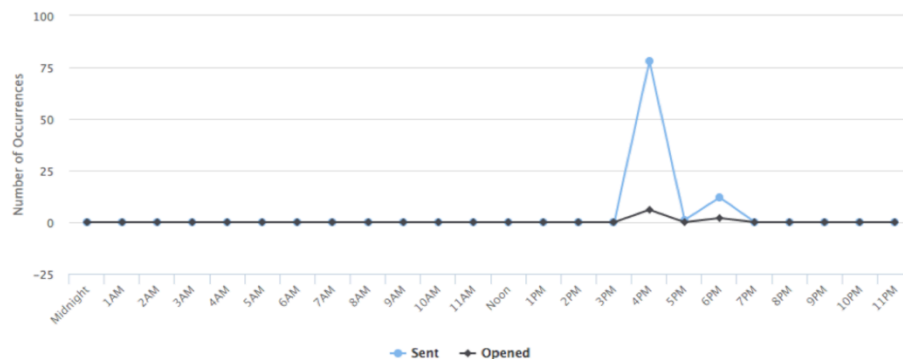
Average Points By Stage

average points by stage



Emails

Emails Sent and Opened



How Schools Use it: Reporting

Email Statistics

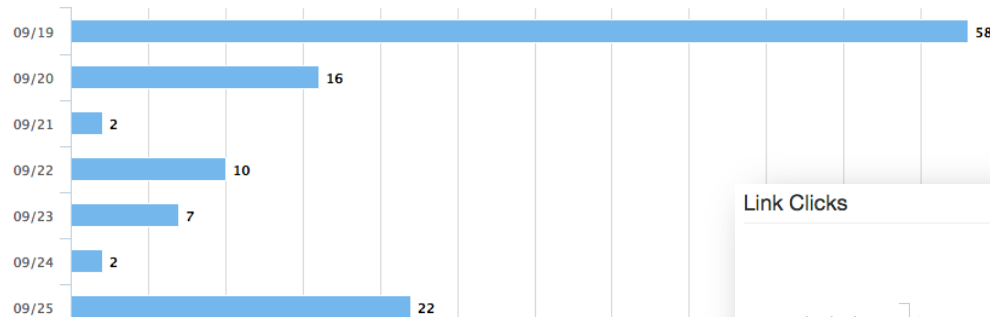
[View Sent List](#)[View Track](#)

Email	General Acceptance Letter	view email
Subject	{{First Name}} - You have been ACCEPTED!	
Track	Acceptance Email	view stats
Campaign	Acceptance	view stats
Emails Sent	737	view

Unique Emails Opened	547
Emails Unopened	190
Link Clicks	818
Click Through Rate	52.65 %
Open Rate	74.22 %

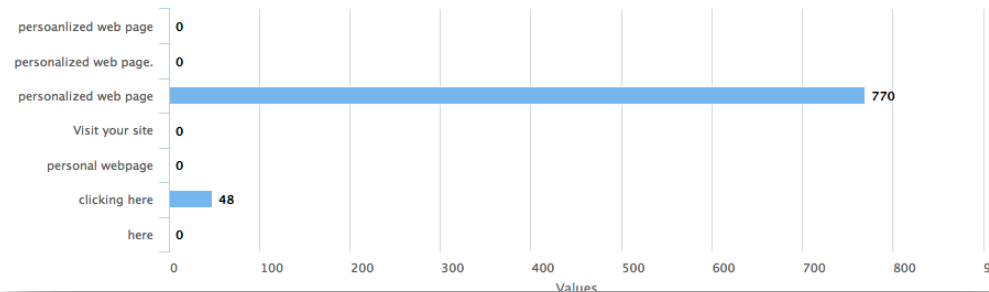
Email Opens

Opens by Date



Link Clicks

Clicks by Link



Engaging Students and Collecting More Information

- Collect more information from secondary forms
- Additional engagement interactions = more points
- Leverage new data and interactions for further communications and touch-points

Are you flying or planning a hotel stay?

If you're thinking about flying or staying the night in an area hotel, we have information that's perfect for you! Just click "I'd like flight and hotel information" below and refresh this page—you'll see a new page called "Getting to Campus" in the sidebar menu.

I'd like flight and hotel information *

☐ Yes, please

Go >

What pages would you like us to add to your site?

Additional Information: *

- ☒ Campus Housing
- ☒ Homeschooled Students
- ☒ International Students
- ☒ Online Studies
- ☒ Veteran and Military Students

Go >

Thanks for telling us more about you, Matt!

UVF has so much to offer and we appreciate you sharing what matters most to you. Feel free to update your selections here at any time!

Which of the following is most interesting to you?

Interest

What is most important to you in choosing a college?

I care most about...

- ☐ Financing my education
- ☐ Preparing for my career
- ☐ Opportunities for service and leadership
- ☒ A high-quality Christian education at a private university

Best time(s) for us to text or call? *

- ☐ Afternoons (after 4pm)
- ☒ Evenings (after 6pm)
- ☐ Mornings

Are you a first generation student?

Did either of your parents graduate from college?

Parent/Guardian - Email

Go >

Using an Integrated System



Review

- Data help us work smarter and allocate resources wisely
- Behavioral/Engagement Analytics works with other resources and can help fill in gaps
- Bring it all together in an integrated system works best
- Technology should work FOR you and your team



EMP

Questions & Next Steps...

Experience it for yourself:

www.myviewbookdemo.com

