Tool #3: Communications Plan Builder

A strong communication plan is instrumental for nurturing prospects through the funnel without making unrealistic demands upon enrollment counselors' (or their equivalents') time. However, the myriad x factors involved—like duration, frequency, content, and program type—make the process of building communication plans daunting.

The Communications Plan Builder simplifies and brings order to this process. First, it lays out the key considerations that should be taken into account while defining a communication plan. It then describes a model plan that applies the key considerations. Finally, it delivers several example communication plans graciously provided by research contacts.

Determining Communications Plans' Defining Features

Primary Consideration: Program Type

The table below explains how automated communication plans should differ according to program type, which is the most obvious "independent variable" according to which communications should be customized. Set up the scaffolding for your program-type-specific communication cascades with the following dependent variables in mind.

Recommended Features of Communication			
Program Type	**Max Frequency**	**Duration***	**Content**
Individual Enrichment Course	Once per week	2 months	• Convenience: o On-the-ground locations • Curriculum • Faculty background in niche (program) area

Individual Professional Development Course	Once per 2-3 days	1-2 months	• Convenience:
			  o Modalities
			  o Start dates
			  o Duration
			• Application to certifications/industry standards
			• Registration
			• Faculty's field experience

Certificate	Once per week	3 months	• Alumni outcomes
			• Faculty's field experience
			• Credit transfer to degree program
			• Curriculum alignment with industry standards
			• Convenience
			  o Modalities
			  o Start dates
			  o Duration
			• Financial aid

Undergraduate Degree Completion	Once per week	4-6 months	• Convenience
			  o Modalities
			  o Start dates
			  o Duration
			• Financial aid
			• Student profiles addressing key concerns:
			  o Work-life-school balance
			  o Academic rigor
			• Curriculum
			• Credit transfer
			• Experiential credit

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Recommended Features of Communication			
Program Type	**Max Frequency**	**Duration***	**Content**

Master's Degree	Once per week	6-8 months	• Convenience:
			  o Modalities
			  o Start dates
			  o Duration
			• Financial aid
			• Student profiles addressing key concerns:
			  o Work-life-school balance
			  o Academic rigor
			• Curriculum
			• Faculty profiles
			  o Practical experience in the field
			  o Academic experience in the field
			• Credit transfer
			• Experiential credit

*After the recommended durations elapse, the Forum recommends moving prospects to a cold prospect communication plan. See Tool #15, Cold Lead Email Preference Template, for assistance developing long decision cycle communications.

Secondary Considerations: Select Segments

Certain segments of prospective students may merit additional outreach customization due to content preferences that differ significantly from typical communication plan content. The COE Forum lists a few such segments and their preferences below. Marketing leaders should query their marketing and recruiting staff to ascertain whether any other segments special customization. The COE Forum advises that the most efficient way to customize outreach to these groups is in the first email and phone conversations.

Segment	Content for Initial Email and Downstream Phone Conversations

International	• Demand for content in home country
	• Convenience
	  o Visa
	  o Travel arrangements
	• Cost efficiency of not traveling to and living in the U.S.
	• Network of students like them, profiles of students like them
	• Outcomes of international students

Alumni	• Special promotions for return students

Military	• Convenience
	  o Working around deployment
	  o Continuing coursework while deployed
	• Special promotions for military personnel
	• Experiential credit

Community College	• Same as degree completion prospects (above)

An Optional Consideration: Intended Start Date

Many contacts rely on intended start date to both score leads and set the pace for future communications. If doing so is feasible (i.e., if a unit has the necessary staff and/or technological capacity), the Forum recommends using intended start date followed by accelerated versions of the program-type-specific communication plan. If resources are too limited to segment according to start date and create accelerated communication plans, the Forum advises using program type as the primary consideration for determining the optimal communications cascade for a prospect.

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Model Communications Plan for Master's Degree in Social Work Prospect

This plan suggests the order and variety of content that should be communicated to a prospective master's degree student. Similar plans should be made for all program+ program type combinations with modifications to content and delivery schedule made according to the needs outlined on the previous page. See Tool #2, Guidelines for When to Call a Prospect, for information about overlaying phone contact.

Day	
1	**Introduction** • Introduction of recruitment counselor Optional segment-specific paragraph (see table above) • Top three benefits of program • Upcoming deadlines
3	**Program Features** Learn more about the curriculum. Download curriculum map.*
7	**Role of Recruitment Counselor** Learn what questions a recruitment counselor can answer. Schedule an appointment.* → Emails for Appointment Schedulers
12	**Financial Aid, Transfer Credit, Application Info** Read our instructions for completing the FAFSA. Try our transfer credit calculator.*
15	**Invitation to Info Session** This [insert delivery mode (e.g., video conference)] will address [xyz] content on [date]. Register now!* → Emails for Info Session Registrants
25	**Meet Students, Alumni, Employers** Students and alumni explain the value of their degree at Example University. Visit our website to watch video testimonials. *
30	**Faculty are Experts** Learn about faculty; see why they value program. Watch faculty video testimonials.*
35	**Access Freemium Content** Have questions about what online learning is like? Participate in a free, two-week course on [topic name]. Reserve a seat.* → Emails for Freemium Registrants
50	**Designating Time to Complete Application** We'd love to develop a personalized strategy with you. Schedule appointment with your counselor.*

Emails for Appointment Schedulers

Day	
8	Appointment confirmation.
?	Manually send thank you after appointment with follow-up info.

Emails for Info Session Registrants

Day	
22	Thanks for registering.
26	Day-prior reminder to attend.
27	Thanks for attending! Contact counselor with further questions.

Emails for Freemium Registrants

Day	
36	Thanks for registering
37	What's different about online + success tips.
44	Reminder to participate (for synchronous).
46	Thanks for attending! Contact counselor with further questions. → Emails for Appointment Schedulers

*See Tool14: Quick Poll Questions Guide for tips on deriving value from links in embedded in e-mails.

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Implementation Tips for Creating a Communication Plan

- ✓ Each prompt to follow a link (e.g., to register for an event, schedule a conversation, use the credit transfer or cost estimate calculators, etc.) is an opportunity to collect additional information about the prospect through a quick survey. Single questions can be incorporated into pop-up forms, or can be incorporated into simple registration/scheduling forms. See Tool #14, Quick Poll Question Guide, for more guidance on using quick surveys.
- ✓ *Save Time by Recycling Material*: To the extent possible, the COE Forum aimed to create a communication plan that confines program-specific unique content to just a few steps in the communication plan (i.e., Program Features, Faculty are Experts). The emails at each of the remaining steps can reuse content from other communication plans and be reused themselves. As a result, new communication plans for other master's degree programs should be lighter builds.
- ✓ *Consistently Incorporate Calls to Action*: Contacts advise that each message should contain one or two calls to action. Popular ones include: Register Now, Talk to Your Recruitment Counselor Now, and Register to Attend an Admissions Event.

Overview: Communications Plans Samples

The sample communications plans that follow are adapted from a diverse group of COE units with different strategies for engaging prospects. While all of them involve some combination of email, phone, and some hard-copy mailing contact points, they are differentiated by the triggers and intervals for each type of outreach.

- **Plan 1: Front-Loaded Communications With Tapered Outreach**
  - If prospects get stuck in the funnel early on, this plan focuses on engagement of the prospect at the time of their inquiry, limiting resource investment in the prospect after initial interest has waned.
- **Plan 2: Outreach To Segments Based on Demographics and Inquiry Actions**
  - For marketing directors wondering how to determine contact triggers for outreach, this plan lets the prospect speak for themselves—data on *who* the prospect is and *what* the prospect does to indicate interest in the programs determine how and when outreach is conducted.
- **Plan 3: Maximized Automation Through Degree Program Segmentation**
  - If the inquiry form includes information on program interest, this plan assumes a heavy emphasis on program- specific information allowing limited staff time to be spent on phone or individualized outreach that is specific to the individual prospect, not the program.
- **Plan 4: Customized Base Template for Many Segmented Audiences**
  - If the baseline template is working but the unit requires additional more segmentation, this plan offers insight into how to maximize "tweaks" to provide prospects with a customized outreach experience without taxing staff too heavily with unique communications.
- **Plan 5: Highly Automated Custom Outreach For Non-Credit Prospects**
  - For programs concerned about filling up non-credit program seats, this plan places a heavy emphasis on information-session registration and payment-plan inquiries to identify prospects that are worth staff time.

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Plan 1: Front-Loaded Communications with Tapered Outreach

Source: University of Chicago Graham School of Continuing, Liberal, and Professional Studies

Day of Inquiry
1. Inquirer completes landing page, including name, email, phone, and program area. 2. System records the URL so inquiry can be tagged by general and program area. 3. Web system generates automated "Thank you for your inquiry" email; information saved in IT file.
8 am - 9 am next business day:
Enrollment Manager: 1. Download inquiries from last 24 hours from web inquiry; 2. Upload inquiries into PW database "Web Inquiry." (Database not available to staff during this time.) Database will record the following: ▪ Name ▪ Email ▪ Phone (if provided) ▪ General program area ▪ Specific program area(s)
10 am - 5 pm next business day
Enrollment Manager: 1. Download lists of inquirers by program area from PW "Web Inquiry" 2. Send program specific email to inquirers, including: ▪ Thank you for inquiry ▪ Introduce self as program manager with contact information ▪ Critical information about program, upcoming deadlines ▪ Invitation to program or general "information session," with link (if scheduled) 3. Record email contact in database "Web Inquiry" notes field 4. Capture emails of inquirers 5. Add to email lists, coded by program areas 6. Send emails used in general announcements, email blasts, and invitations 7. Alert staff of new inquiries in the database
Within one week
Program Staff: 1. Make phone contact (if number available) with inquirer; record contact in "Web Inquiry" database 2. Use database to invite inquirers to relevant events, including lectures, information sessions, alumni events, webinars
Ongoing
Enrollment Manager 1. Troubleshoot issues in master database 2. Schedule space and manage technology for program recruitment events; develop and manage master schedule of events for school 3. Research, benchmark peer institutions' processes and systems for enrollment 4. Participate in discussions of enrollment goals, strategies and development of tactics for increasing enrollment 5. Participate in evaluation and measurement of marketing/enrollment efforts Inquiry Management: Change of Inquirer Status 1. Inquirer should be added to the permanent database when: ▪ Inquirer attends lecture, information session, or free event ▪ Inquirer enrolls in a single course ▪ Inquirer applies for certificate program or degree

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Plan 2: Outreach to Segments Based on Demographics and Inquiry Actions

Source: Southern New Hampshire University

Within 24 hours of inquiry
1. Email Viewbook, First Application, Financial Aid Brochure
Within 7 Days
1. Segment By: • Major/Department • Undecided o Send: General academic brochure o Academic reply card • Multiple program interests
Within 14 Days
1. Conduct Qualifying Call
Within 30-45 Days from inquiry
1. Check If They Completed a Campus Visit 2. If Yes: • Send faculty brochure 3. If No: • Send campus visit brochure and appointment card • Wait 14 days • Conduct pre-visit call If still no visit scheduled • Try to schedule visit over next 14 days • After 60 days since inquiry, send faculty brochure whether or not campus visit has been scheduled
Within 2 months (90 days from inquiry)
1. Send "Success After" Brochure and Second Copy of Application
Within 3 months (90 days from inquiry)
1. Send "Financing Your ______ Education" Booklet
Within 4 months (145 days from inquiry)
1. Conduct Phone Call
Within 5 months (160 days from inquiry)
1. Send "Last Chance" Reply Card and Third Copy of Application
Within 6 months (175+ days from inquiry)
1. If No Action/Contact: • Send "lost inquiry survey" at point of cancel

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Maximized Automation Through Degree Program Segmentation

Source: Oregon State University

Immediately After Inquiry

1. Inquirer completes request for information at: http://ecampus.oregonstate.edu/contact
2. The CRM System immediately does the following:
   - Sends a Form Submission Message (Pop-up) on Inquirer's screen saying "Notice: Your inquiry has been submitted successfully" with a button that says "Ok"
     - When the inquirer clicks "Ok" it sends him/her to a new Return URL (http://ecampus.oregonstate.edu/contact/thank-you.htm)
   - Creates a closed Case in the CRM
   - Creates a Contact in the CRM (which is sent to the Enrollment Services Team); contact has this info:
     - Lifecycle Record Assignment
       1. Lifecycle Role: Automatically set to Prospect
       2. Lifecycle Stage: Automatically set to Active
     - Assigned Degree Type Based on Inquiry Form
       1. Degree Type 1 (Bachelor's): Enter Target as Bachelor's Prospect
       2. Degree Type 2 (Graduate): Enter Target as Graduate Prospect
       3. Degree Type 3 (Courses Only): Enter Target as Courses Only Prospect

Lifecycle Record	Communications Plans		
	Degree Type 1 (Undrgrd)	Degree Type 2 (Grad.)	Degree Type 3 (Courses)
○ *In OSU's CRM, they've created rules in the CRM to withdraw the prospect from the communications plans on the basis of their degree types and lifecycle assignments.* ○ *If a student changes to inactive, for example, he/she will be removed; if they change from Degree 1 to Degree 2, the communications plan will also change.*	Day 0: ○ Initial mailings Day 1: ○ Email 1: Initial email (All) Day 2: ○ Initial phone call Day 8: ○ Email 2: University prestige (All) Day 13 ○ Email 3: Tuition, etc. (undergrad and grad) Day 17 ○ Email 4: Course demo, etc. (All) Day 19 ○ Follow-up phone call 1 Day 24 ○ Email 5: Admissions overview (All) Day 33 ○ Email 6: Jobs and career counseling (undergrad and grad) Day 40 ○ Follow up phone call 2	Day 0: ○ Initial mailings Day 1: ○ Email 1: Initial email (All) Day 8: ○ Email 2: University prestige (All) Day 13 ○ Email 3: Tuition, etc. (undergrad and grad) Day 17 ○ Email 4: Course demo, etc. (All) Day 24 ○ Email 5: Admissions overview (All) Day 33 ○ Email 6: Jobs and career counseling (undergrad and grad)	Day 0: ○ Initial mailings Day 1: ○ Email 1: Initial email (All) Day 3: ○ Email 5: Admissions overview (All) Day 10 ○ Email 2: University prestige (All) Day 15 ○ Email 4: Course demo, etc. (All)

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Customized Base Template for Many Segmented Audiences

Source: Excelsior College

<table>
<tr><th colspan="6">Inquiry from Prospect : Immediate response depends on type:</th></tr>
<tr><th colspan="1">Call</th><th colspan="2">Chat</th><th colspan="3">Inquiry Form</th></tr>
<tr><td colspan="1">1. Call Center answers</td><td colspan="2">1. Admissions Counselor</td><td colspan="3">1. Reply message generated and sent automatically
2. Contact is put in queue for contact <u>within 30 minutes</u></td></tr>
<tr><th colspan="6">Immediate Triage</th></tr>
<tr><td colspan="6">1. Assign “role” (is the prospect “shopping” or “intending to apply”?
a. Shoppers—noted by conversation that is typified by “browsing” questions, no mention of application
b. Applicants—noted by a clear indication from student that they intend to apply</td></tr>
<tr><th colspan="6">Communications Plans</th></tr>
<tr><td colspan="6">Unique Communications Plans with about 6 communications over 90 days, all customized based on:
• Roles (i.e., Shopper or Applicant)
• Stages (defined by prospect behavior/time from inquiry)
• Program Type (In which the lead is interested)
• Level of Degree Completed (Prior to starting at Exelsior)</td></tr>
<tr><th colspan="2">Shopper Role</th><th colspan="4">Applicant Role</th></tr>
<tr><td colspan="2">Stage 1: New Lead
• <u>Description:</u> Has not received outbound call from admissions counselor yet
• <u>Action:</u> Put contact in queue for phone call</td><td colspan="4">Stage 1: Applicant Open
• <u>Description:</u> Applicant is completing application and will be sending in licenses and transcripts
• <u>Actions:</u>
o System assigns each applicant a counselor based on alphabetical order
o System generates automatic introductory email from counselor to make sure applicant is aware that personal time is available with a staff member when needed</td></tr>
<tr><td colspan="2">Stage 2: Interviewed
• <u>Description:</u> Admissions counselor spoke with him/her; they are shopping around
• <u>Action:</u> Commence 90 day/6 touch point communication plan
o 7 Days: Email 1
o 15 Days: Email 2
o 30 Days: Email 3
o 45 Days: Email 4
o 60 Days: Email 5
o 90 Days: Email 6</td><td colspan="4">Stage 2: Intermediate Steps
• <u>Description</u>: Communications while student is completing application
• <u>Actions</u>
o Commence 90 Day/6 touch point communication plan
▪ 7 Days: Email 1
▪ 15 Days: Email 2
▪ 30 Days: Email 3 (conversion likely if they’ve applied)
▪ 45 Days: Email 4 (conversion likely if they’ve applied)
▪ 60 Days: Email 5
▪ 90 Days: Email 6
▪ >6 months: 3 Dormant Emails
o Automatic emails generated based on application material submission (e.g., “Thank you for submitting your transcript.”
o Counselor sends prospect an unofficial evaluation of credits from counselor to applicant to offer a rough idea of how many credits they can bring from past education</td></tr>
</table>

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<table>
<tr>
<td>Stage 3: Apply
• Description: The prospect indicated that they will be applying or already began the application
• Action: System sends automatic email within 48 hours if prospect has not commenced application; email asks if they have any more questions before they apply.</td>
<td>Stage 3: Applicant Closed
• Description: Applicant is fully admitted
• Action:
o Commence automatic communication (5 messages over 30 days) includes messing about how to enroll and how to take a “test drive course”
▪ 3 Days: Email 1
▪ 5 Days: Email 2
▪ 14 Days: Email 3
▪ 20 Days: Email 4
▪ 30 Days: Email 5
o Phone call triggered in system if applicant has not enrolled within two weeks after reaching the “Close” stage</td>
</tr>
<tr>
<td>Stage 4: Attempted Call
• Description: Admissions counselor tried to contact student over phone
• Action: Put in queue for further follow up outreach</td>
<td rowspan="5">Stage 4: Dormant
• Description: Applicant admitted but not enrolled in 60 days
• Action: Commence 3 message plan starting from date of admission, messages focused on “re-engaging”
o 60 Days: Email 1
o 90 Days: Email 2
o 120 Days: Email 3</td>
</tr>
<tr>
<td>Stage 5: Non-viable
• Description: The prospect is not going to convert
• Action: Either remove from database or maintain if viability is time dependent and dormant communications would be helpful</td>
</tr>
<tr>
<td>Stage 6: Do not call
• Description: The prospect indicates they do not want phone contact
• Action: Maintain email communications plan</td>
</tr>
<tr>
<td>Stage 7: Dormant
• Description: No action from prospect after 6 months
• Action: Commence 3 message communications plan focused on reengagement</td>
</tr>
<tr>
<td>Stage 8: File Closed
• Description: Admissions counselors tried 5 times to contact student and were unsuccessful
• Action: Remove from email campaigns/queues for contact</td>
</tr>
</table>

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Highly Automated Custom Outreach for Non-Credit Prospects

Source: University of Delaware Professional and Continuing Studies

<table>
<tr><th colspan="2">Within 24 hours of inquiry</th></tr>
<tr><td colspan="2">1. Send first email with:
• Links to the website
• Dates/times of the program
• Invitation to register for free Information Session (held twice a year in January and July)</td></tr>
<tr><td colspan="2">General Email Schedule
Prior to Information Session, all prospects receive same email campaign (minimum of three emails before next session) encouraging them to register and attend the Information Session</td></tr>
<tr><td colspan="2">1. Email 1
2. Email 2
3. Email 3</td></tr>
<tr><td>Do Not Register for Information Session
(Dormant Prospects)</td><td>Do Register for Information Session
(Hot Prospects)</td></tr>
<tr><td rowspan="7">1. Added to mass email list for outreach prior to course start date</td><td>1. Email 1: 10 days before Information Session
2. Email 2: 2 days before Information Session</td></tr>
<tr><td>After Information Session:
Each registrant is assigned a new email campaign with content based on program type and timing based on program start date.</td></tr>
<tr><td>1. Email 1:
a. If attended: “Thanks for attending”
b. If didn’t attend: “Sorry we missed you”
2. Email 2:
a. Program dates and registration info
3. Email 3:
a. Financial aid information, program dates, registration information</td></tr>
<tr><td>One Week After Information Session</td></tr>
<tr><td>1. Program coordinators make phone calls to assess prospect interest for programs with available seats</td></tr>
<tr><td>If they request payment plans</td></tr>
<tr><td>a. They are referred to the Financial Aid advisor who follows up with a phone call/email
b. Program coordinators request that prospect completes a payment plan form and a registration form</td></tr>
</table>