Integrated Prospect Communication Plan Toolkit

Coordinating Outbound Communications to Boost Yield

Enrollment Management Forum

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User's Guide to This Toolkit

Purpose of the Integrated Prospect Communication Plan Toolkit

A student's enrollment experience is their perception of an institution, developed cumulatively through interactions with an institution as they move along the enrollment funnel. As students and families select a college, they receive multiple emails, phone calls, texts, and letters that are rarely coordinated by institutions for timing, importance, consistency, or comprehension. This uncoordinated communication stream creates a subpar enrollment experience for students and often deters them from progressing to the next step in the admissions process. This toolkit helps enrollment managers develop and implement an Integrated Prospect Communications Plan, organizing outbound communication with students from first point of contact through matriculation.

Toolkit Contents

The toolkit helps enhance the enrollment experience for every prospective student interacting with an institution across the enrollment funnel by ensuring that every outbound communication adds value for students. The enhancement happens through the following four-phase process:

Phase 1: Laying the Groundwork
- Integrated Communications Business Case Template
- Integrated Communications Committee Selection
- Funnel Stage Audit Diagnostic Tool
- Communication Channel Selection

Phase 2: Conducting the Audit Workshop
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- Communication Audit Workshop Outline
- Guidance for Determining Value of Communications
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- Guidance for Driving Plan Adoption

Who Should Use the Toolkit?

- Enrollment managers and their teams
- Marketing department
- All campus departments that communicate with prospective and admitted students

EAB

Laying the Groundwork

PHASE 1

- Integrated Communications Business Case Template
- Integrated Communications Committee Selection
- Funnel Stage Audit Diagnostic
- Communication Channel Selection

Phase 1 Summary—Three Steps

Goal

Secure buy-in from campus leadership for a comprehensive audit of all outbound student communications; assign ownership for the audit and define the scope of the communications to audit

Required Participants

VPEM and steering committee

1 Establish the Business Case for the Communication Audit

Challenges

- Communicating to senior leadership (president, board of trustees) the effect uncoordinated communications has on enrollment
- Garnering support for a communications audit

Integrated Communications Business Case Template (pp 7-8)

Use the Business Case to establish the need for the audit

2 Establish Committees for the Communication Audit

Challenges

- Building a coalition of stakeholders to lead and conduct a communications audit
- Establishing responsibility for improving selected communications after the audit

Integrated Communications Committee Selection (p 9)

Use this guidance to identify candidates for three committees:

- Steering Committee
- Cross-Functional Communication Planning Committee
- Content Enhancement Committee

3 Define Scope of Communications to Audit

Challenges

- Deciding which stages of the funnel and which types of communications to audit, based on institutional priorities and resources

Funnel Stage Audit Diagnostic Tool & Communication Channel Selection (pp 10-11)

Use the Funnel Stage and Communication Channel worksheets to determine the scope of the audit

Integrated Communications Business Case Template

Purpose of the Tool

Outline a business case that conveys the need for a Communication Audit and an Integrated Communication Plan

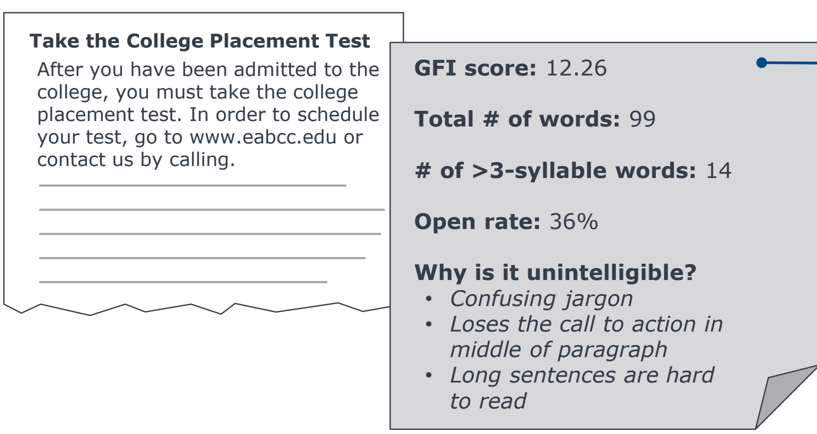
Directions

1. Identify examples of unreadable and off-brand communications that can help establish the need for an audit.
2. Articulate how the examples demonstrate the need for an Integrated Communications Plan managed by EM.
3. Explain the proposed investment from campus groups and the specific resources involved.
4. Define expected outcomes and ways to measure success.

1 Identify examples

Poor Readability

- ❑ Choose three communications that represent poor communication.
- ❑ Paste the text from each one into the online Gunning Fog Index tool (GFI at gunning-fog-index.com). The GFI is detailed in the appendices. Record the output:
  - Score
  - Total number of words
  - Number of >3-syllable words
- ❑ Use your CRM to identify the Open Rate and/or Click-Through Rate for the communication.
- ❑ Briefly describe what makes the communication unintelligible.



Poor readability occurs when:
- GFI Score is over 10
- Total words is greater than 200
- Total >3-syllable words is greater than 15

Learn more about the Gunning Fog Index in the Appendix

Off-Brand

- ❑ Choose three communications that misuse or fail to use the institution's branding.
- ❑ Note why each communication is off-brand.

Integrated Communications Business Case Template

2 Articulate need for an Integrated Communication Plan managed by EM

How can the issues demonstrated by the examples be solved by developing an Integrated Communication Plan?

3 Outline the proposed investment

Which institutional leaders should be involved (president, provost, etc.)? What type of support will each need to provide?

What short-term resources are necessary to execute the Communication Audit and create the Integrated Communication Plan (committee members for audit, marketing professionals to edit the communications, etc.)?

What long-term resources are necessary to sustain the Integrated Communication Plan (standing committee to evaluate the Plan on a regular basis, etc.)?

4 Define success

What metric(s) do you recommend to determine the success of the Communication Audit and the Integrated Communication Plan? How will you collect and report data on those metrics?

Integrated Communications Committee Selection

Purpose of the Guidance

To offer advice for developing committees responsible for implementing the Communication Audit and advice for writing and sustaining the resulting Integrated Communication Plan

Steering Committee

Purpose
To guide the creation of the other two committees (detailed below) and oversee the implementation of the Integrated Communication Plan

Composition: Three individuals total from admissions, financial aid, and other EM offices
The VPEM should form the committee, but a director of admissions or marketing should chair it

Time commitment: Six months to a year
The exact time will be a function of the funnel stage and portfolio of communications under audit

Cross-Functional Communication Planning Committee

Purpose
To conduct the Communication Audit and gather buy-in for the new Integrated Communication Plan

Composition: One individual from each department that communicates directly to students
Representatives should be at least assistant or associate director level and typically have a direct role in communications. The committee should include representatives from:

Enrollment Management	Academic Affairs	Student Affairs	Other Offices
• Admissions	• Academic colleges	• Housing	• Marketing
• Registrar	• Academic advising	• Orientation	• IT
• Financial aid	• Academic support	• Dean of students	• Advancement

Time commitment: Six months
The exact time will be a function of the funnel stage and portfolio of communications under audit

Content Enhancement Committee

Purpose
To revise and edit communications that come out of the audit workshop

Composition: Minimum two people from marketing/comms department, with copyediting skills
If marketing/comms professionals aren't available, invite admissions counselors who are skilled in copyediting or who administer admissions social media sites

Time commitment: Three months
The exact time will be a function of the funnel stage and portfolio of communications under audit

Funnel Stage Audit Diagnostic Tool

Purpose of the Tool

To gather consensus on which enrollment funnel stages to examine in the Communication Audit.

We recommend auditing every stage of the funnel. Each stage presents opportunities to improve and coordinate communications. In addition, all communications, at every phase, affect the student enrollment experience, and students and families don't make distinctions between offices.

If it isn't possible to audit the entire funnel, we recommend focusing on the Admissions and Enrollment stages. Use this tool, however, to identify which stages of the funnel are highest priority to other members of the steering committee.

Directions

1. Give the assessment to each member of the steering committee (including VPEM)
2. Collectively identify which stages have the most checks and include those stages in the Communication Audit

Funnel Stage Selection for Communication Audit

For each question, check the corresponding funnel stage. It is fine to check multiple stages for each question.

	Enrollment Funnel Stage				
	Prospect	Inquiry	Applicant	Admit	Enroll
At which stage is there the most outbound communication volume?	☐	☐	☐	☐	☐
At which stage do students and parents submit the most follow-up and clarification questions?	☐	☐	☐	☐	☐
At which stage do students especially struggle with intelligibility and relevance of communications?	☐	☐	☐	☐	☐
At which stage do non-EM departments send outbound communications?	☐	☐	☐	☐	☐
At which stage does our institution lose a relatively significant number of students?	☐	☐	☐	☐	☐
At which stage do we send segment-specific communications (transfer, international, etc.)?	☐	☐	☐	☐	☐

Communication Channel Selection

Purpose of the Tool

To determine which channels of outbound communication to audit within the selected funnel stages

We recommend auditing all of the channels pre-filled in the list below. Students and families don't differentiate forms of communication; rather, all communication from an institution help shape the student's enrollment experience.

We do not recommend auditing social media channels. Social media are crucial channels, but their variety and dynamic nature introduce too much complexity for an initial Communication Audit. Instead, choose channels that are easy to monitor.

Directions

Check the communication channels to be included in the Communication Audit. Fill in additional channels.

Channel Selection for Communication Audit

- ☐ Emails
- ☐ Text messages
- ☐ Phone calls
- ☐ Automated Calls
- ☐ Mailings
- ☐ ____________________
- ☐ ____________________
- ☐ ____________________
- ☐ ____________________
- ☐ ____________________

Conducting the Audit Workshop

PHASE 2

- Persona Development Guide
- Sample Persona
- Persona Template
- Communication Audit Workshop Outline
- Guidance for Determining Value of Communications
- Guidelines for Prototyping an Integrated Prospect Communications Plan

Phase 2 Summary—Four Steps

Goal

Prepare and execute a Communication Audit workshop

Required Participants

Cross-Functional Planning Committee

1 Create a Representative Student Persona

Challenges

- Preparing for a communications audit by understanding students' goals, motives, and needs

Persona Development Guide (pp 15-17)

Use the Guide and Persona Template to guide committee members' understanding of a student's expectations for communications

2 Audit the Communications

Challenges

- Conducting a communications audit that incorporates voices of various campus stakeholders
- Providing clear guidance for the audit

Communication Audit Workshop Outline (p 18)

Follow this Outline to implement a communication audit

3 Determine the Value of Selected Communications

Challenges

- Identifying communications that are duplicative and removing them from the communication stream

Guidance for Determining Value of Communications (p 19)

Use the Guidance to identify which communications to eliminate and retain

4 Prototype the Communication Plan

Challenges

- Collaboratively drafting a plan that can govern the timing, sequence, and volume of outbound communications

Guidelines for Prototyping an Integrated Prospect Communications Plan (p 20)

Follow these guidelines to create a draft of the Integrated Communication Plan

Persona Development Guide

Purpose of the Tool

To create a persona of your institution's core student segment to help ground the audit in the student's perspective

We recommend starting with a single persona of a representative full-time, first-time student.

What Is a Persona?

Personas are general representations of students that can help an institution understand students' college selection behaviors by diving deeper into their specific needs, goals, and challenges.

- A persona can represent a general group of students (Gen Z students) or a specific segment (African American males).
- Personas can guide institutions as they tailor interactions with specific student segments.

Creating a Persona

Effective personas are based on actual behaviors of students (e.g. where students go for information) rather than speculation or assumptions.

- Depending on your institution, you could have 1-2 personas, or as many as 10. Start small with one persona of the typical student at your institution or of the student that you wish to recruit.

Directions

1. Review the sample profile to understand the type of information that creates a persona.
2. Gather the information:
    - Conduct interviews with both prospective and current students. Ask them questions to determine their *enrollment experience*: their perception of an institution, developed cumulatively as they travel along the enrollment funnel and interact with each and every part of the institution.
    - Examine CRM data, admitted student surveys, and other research to find trends in how students find and consume communications.
3. Compile findings using the Persona Template (p 17).
4. Distribute the persona(s) to the participants of the Communication Audit. Refer to the persona(s) regularly during the workshop to prioritize student needs and behaviors.

Gen Z Student Persona Example

Name: Madison

Madison is part of the first wave of Gen Z students, born between 1998 and 2014, moving through the enrollment funnel. She is a digital native and her information gathering, communication preferences, and influencers reflect this.

Demographics

Age: 18

Gender: F

Race: White

Background

Location: Dallas, TX

Family income: $70k

High School: West Dallas High

Academic Profile

GPA: 3.4

SAT/ACT: 1,150

Determine the what: personal and professional goals

Getting into dream school and getting a scholarship

to graduate with little debt.

Determine the why: personal motivations

Madison is driven by the possibility of attending a good

law school after graduation and working as an attorney.

Key influencers: who drives college section decision

Parents play a significant role in guiding her

decisions. Madison's digitalized way of life makes her

highly aware of and interested in her peers' road to

College.

Barriers to achieving goals

- Perceived cost
- Lacks the proper tools to navigate admissions process
- Feels like the institution doesn't genuinely know her

Messages that help overcome barriers

- ROI of college
- Simplified checklists with clear action steps
- Personalized communications from admissions staff

Voice of the Student quotes

- "I hope I can afford college."
- "Will my degree be worth it?"
- "The application process can be so confusing."

Preferred Communication Channels

[X] Email

[X] Social media

[ ] Phone conversation

[X] Text messages

[X] Letters

Persona Template

Name:

1-2 sentence summary

Determine the what: personal and professional goals

Determine the why: personal motivations

Key influencers: who drives college section decision

Preferred Communication Channels

- [ ] Email
- [ ] Social media
- [ ] Phone conversation
- [ ] Text messages
- [ ]

Demographics

Age:

Gender:

Race:

Background

Location:

Family income:

High School:

Academic Profile

GPA:

SAT/ACT:

Barriers to achieving goals

Messages that help overcome barriers

Voice of the Student

Communication Audit Workshop Outline

Purpose of the Guidance

To provide directions for conducting a Communication Audit workshop that creates a visual depiction of the outbound communication flow as experienced by students; begin the collaborative process of eliminating unnecessary communications

Logistics

Set the stage:

- Secure a large room that has plenty of space for the committee to move around, and separate into groups.
- Mark off a section of the wall for each month in the enrollment cycle. Hang signs that indicate each month and the steps of the enrollment cycle occurring during the month.
- Place the student persona prominently to remind participants of the students' needs and preferences.

Make the time:

- Invite all members of the Cross-Functional Planning Committee.
- The workshop will take a minimum of half a day, perhaps longer, depending on the number of participants.

Gather supplies:

- Sticky notes or tags in different colors for each department participating in the workshop
- Use a camera to photograph the walls once the existing communications have been placed there. The photos depict for non-attendees what the unintentional enrollment experience created by siloed communications looks like.

Pre-Work

Prep the communications

- Each participant should compile all outbound communications from their department.
  - If the workshop will focus on specific channels or segments of the funnel, participants will need to sort out the appropriate communications.
  - Participants should print and bring one copy of each communication to the workshop.

Workshop

Compile the communications

- Ask each participant to pin up the printed copies of each communication (emails, calls, letters, texts, etc.) under the month/funnel segment when it was sent.
- Each department should color-code their communications via a sticky note to easily visualize the sources of each communication.

Eliminate unnecessary communications

- Once all the communications are on the wall (take a picture!), review them in order. Eliminate duplicative communications.
- Use the Guidance for Determining the Value of Communications (p 19) to further assess and eliminate unnecessary communications.

Prototype an Integrated Communication Plan (p 20)

Guidance for Determining Value of Communications

Purpose of the Guidance

To sort through the remaining communications to eliminate any that don't add value

1 Individual Review to Verify "Value-Adding" Communication

- Participants review each of their own communications to determine if it is valuable, via these criteria:
  - Value-adding: helps students make better decisions and/or progress through the pipeline (see below)
  - Policy/legally mandated: required by institutional policies and controls or state/federal law
- Eliminate any communications that don't add value and aren't mandatory.
- When there is disagreement about whether a communication adds value, run the communication through the following checklist. Eliminate any communication that does not meet *at least three of the criteria*:
  - ❑ **Timely:** Is the communication helping students at a moment of need?
  - ❑ **Intelligible:** Is the communication easy to understand?
  - ❑ **Motivating:** Does the communication establish the required action and prompt a response?
  - ❑ **Navigable:** Is the communication coherent and easy to navigate?
  - ❑ **Valuable:** Does the communication help students make better decisions and/or progress through the pipeline?
  - ❑ **Personalized:** Does the communication build affinity? Is it likable?

2 Group Vetting and Verification

After departmental owners self-eliminate communications, the entire Cross-Functional Communication Planning Committee must assess each remaining communication to ensure it objectively adds value.

As a group:

- Justify the value of each communication: Each participant must explain to the committee *the rationale for keeping any communication*. This prevents a siloed or subjective view of "value" retaining unnecessary communications.
- Eliminate any communication for which the departmental owner cannot provide a rationale.

Guidelines for Prototyping a Communications Plan

Purpose of the Guidelines

To draft of the Integrated Prospect Communications Plan

For the final step of the audit, participants should create a first draft of the Integrated Communication Plan by documenting the vetted communications and the timing of their distribution.

Directions

Use the following guidelines to ensure that the Integrated Prospect Communications Plan paths a student through the enrollment cycle.

	Current Communication Plans	Integrated Communication Plan
DISTRIBUTION **Spread evenly** Communications should be disbursed equally across days and times	✖ Students receive multiple communications in one day but none for a week	✔ Communications are evenly distributed across the enrollment calendar
SEQUENCE **Support the student's decision cycle** Communications path a student through key decision points	✖ Communications don't align with the student's actual decision cycle	✔ Data-driven approach pinpoints student decision moments
TIMING **Coordinate across campus** There is a right time to send communications	✖ Communication goes out sporadically based on administrative needs	✔ Data-driven approach identifies key moments to send communications
RELATIVE IMPORTANCE **All messages aren't equal** Prioritize critical communications	✖ Uncoordinated messages from different departments bury critical information	✔ Streamline the plan to ensure that key messages are read
CONFLICTING MESSAGES **Coherent communications** Make sure all communications are consistent	✖ Siloed communications conflict and lead to student confusion	✔ Cross-silo communication plan that is cross-checked for accuracy and branding

Enhancing Audit-Approved Communications

PHASE 3

- Editorial Checklist
- Clear Writing Exercises

Phase 3 Summary—Two Steps

Goal

Edit and enhance all communications that remain after the audit

Required Participants

Content Enhancement Committee

1 Optimize Communications

Challenges

- Revising all communications left over after the audit
- Ensuring that remaining communications maximize impact on the student enrollment experience

Editorial Checklist (p 23)

Run each communication through the checklist to ensure that it aligns with student needs

2 Remove Jargon from All Communications

Challenges

- Further honing communications by eliminating institutional/technical jargon

Clear Writing Exercises (pp 24-28)

Use these exercises to ensure that all communications are jargon-free and easy to read

Editorial Checklist

Purpose of the Tool

To ensure that all communications are intentionally designed for students, easy to understand, and aligned with institutional goals

Directions

1. Run every communication through the checklist, considering brand alignment.
2. Revise any communication that does not meet all criteria.

Grab Attention

- ❑ **Prioritize information:** Is content formatted for how people naturally read content on websites and mobile devices? Strategic use of bolding, headers, and colors?
- ❑ **Address questions just in time:** Is the information shared timely, relevant, and necessary for students?

Personalization

- ❑ **Tailor to your audience:** Does the message align with the audience? For students, parents, or particular majors?
- ❑ **Establish trust:** Does the communication appear authentic or build a personal relationship through the use of authentic tone?

Remove Barriers

- ❑ **Accessible:** From a student's perspective, does the communication feel burdensome? If students have problems, how can they resolve them via the communication?
- ❑ **Remove jargon:** Does the communication make sense to someone who is unfamiliar with higher education terminology?

Clear Next Steps

- ❑ **Provide visuals:** Are the next steps summarized easily? Are the steps easy to find? Are there checklists to keep track of steps?
- ❑ **Establish deadlines with next steps:** Is there a clear deadline for each of the next steps? Is each task prioritized?

Clear Writing Exercises

Purpose of the Exercises

To identify and remove terminology that inhibits students' abilities to comprehend and act on emails, letters, handouts, and other written materials

1 **Prioritize communications to edit:** by identifying communications that:

- Contain high levels of jargon (e.g., financial aid award letters)
- Students are most likely to read (e.g., admissions notification)

Starting with those priorities, complete the steps below for each individual communication.

2 **Group related information:** Condense all text that pertains to the same topic in a specific area, and use white space to separate it from information pertaining to another topic.

3 **Revise each sentence for clarity:** Use this revision process to make all sentences clear and active.

Scan Each Sentence

- ❑ Highlight any words that unnecessarily contain more than two syllables.
- ❑ Highlight any prepositions (at, in, on, to, of, for, etc.).
- ❑ Highlight the "actor" of the sentence, if there is one.
- ❑ Highlight any instances of "to be" (is, am, are), especially if followed by an -ing verb.

Revise the Sentence

- ❑ Replace as many multisyllabic words as possible with simpler synonyms or phrases.
- ❑ Rearrange words to eliminate as many prepositions as possible.
- ❑ Make sure the "actor" appears as close as possible to the beginning of the sentence.
- ❑ Rearrange words to eliminate passive "to be" verbs, particularly those followed by an –ing verb.

Take the College Placement Test

After you ~~have been admitted~~ **to** the college, **you** must take the college placement test. **In** order **to** schedule your test, go **to** www.eabcc.edu or contact us **by** calling. If you have successfully completed a college-level English or math course **from** another college or have taken EABCC placement testing **at** an earlier date, **you** may qualify **for** an ***exemption*** **from** all or part **of** the test. **Students** who ~~are planning~~ **to** participate **in** specific academic programs and/or enroll **in** credit classes must achieve a minimum score **of** 33 **out of** 120 **on** the reading portion **of** the test.

GFI Score: 12.65

Key:

Multi-syllabic words

Prepositions

Sentence's "actor"

~~**"to be" verbs**~~

Take the College Placement Test

Jumpstart your year by taking your Placement Test! This test measures which regular-credit classes you're ready to take. You will need to score at least 33/120 on the reading section of the test to take classes that count toward your degree.

You may not need to take the test if:

1) You completed and passed an English or math course for college credit at another school
2) You took the test at EABCC in the past

Otherwise, you will need to schedule a time to take the Placement Test. Call XXX-XXXX or go to www.eabcc.edu to schedule your appointment.

GFI Score: 7.697

Phrase requirements in terms of students' goals rather than policies

Sources: Lanham, Richard, *Revising Prose*, 5th ed.; EAB interviews and analysis.

Clear Writing Exercises (cont.)

4 **Translate Jargon:** Use the charts below to “translate” university and academic jargon into plain language.

- Write a 7 to 10-word translation for each term.
- Use Gunning Fog Index online tool to assess the readability of the translation: www.gunning-fog-index.com. (Learn more about the Gunning Fog Index in the Appendices.)
- Share translations with other members of the Content Enhancement Committee and determine most suitable, concise, and lowest GFI score translation.
- Optional: consider how these translations may vary for a student or parent audience.
- Replace uses of these terms, or find places to insert your translated definitions, in outgoing communications.

Admissions		
Representative Terms	**Translation**	**GFI Score**
Example: Bursar	*The office that deposits financial aid into your account and the office where you can pay your tuition bill*	
High School Transcript		
GED		
ESL		
Credit for Prior Learning		
Certificate		
Degree		
Transfer		
Residency		
Early College Enrollment		
Prospective Student		
Course Load Status		
Class Status		
Certificate		
Tuition and Fees		
Tuition		
Payment Plan		
Tuition Schedule		
Subsidy		
Fee Schedule		
Tuition and Fee Refund		
Withdrawal		
Registration Fee		
Program Eligibility		

Sources: “Glossary: Financial Student Aid,” https://studentaid.ed.gov/glossary (accessed April 2015); EAB interviews and analysis.

Clear Writing Exercises (cont.)

Financial Aid		
Representative Terms	**Translation**	**GFI Score**
Academic Year		
Accreditation		
Additional Eligibility		
Adjusted Gross Income		
Associate Degree		
Attending School		
Award Amount		
Award Letter		
Award Year		
Cancellation		
Collection Agency		
Collection Charges		
Cost of Attendance (COA)		
Data Release Number (DRN)		
Default		
Default Rate		
Deferment		
Delinquent		
Dependency Status		
Direct Loan		
Disbursed Amount		
Disbursement		
Discharge		
Eligible Noncitizen		
Eligible Program		
Enrollment Status		
Entrance Counseling		
Exit Counseling		
Expected Family Contribution (EFC)		
FAFSA		
Federal Pell Grant		

Sources: "Glossary: Financial Student Aid," https://studentaid.ed.gov/glossary (accessed April 2015); EAB interviews and analysis.

Clear Writing Exercises (cont.)

Financial Aid (cont.)		
Representative Terms	**Translation**	**GFI Score**
Federal Perkins Loan		
Federal School Code		
Federal Student Aid		
Federal Student Aid PIN		
Federal Student Loan		
Federal Work-Study		
Financial Aid Offer		
Financial Aid Package		
GED		
Grace Period		
Grant		
Guaranteed Student Loans		
Income Tax		
Independent Student		
Interest		
Legal Guardianship		
Lender		
Loan Forgiveness		
Loan Holder		
Loan Services		
Master Promissory Note		
Merit-based		
Need-based		
Net Price		
Net Price Calculator		
Overpayment		
PLUS Loan		
Private Loan		
Promissory Note		
Regular Student		
Repayment Date		

Sources: "Glossary: Financial Student Aid," https://studentaid.ed.gov/glossary (accessed April 2015); EAB interviews and analysis.

Clear Writing Exercises (cont.)

Financial Aid (cont.)		
Representative Terms	**Translation**	**GFI Score**
Satisfactory Academic Progress		
Scheduled Award		
Scholarship		
Standardized Test		
Student Aid Report		
Subsidized Loan		
TRIO		
Unsubsidized Loan		
Verification		
Work-Study		
Placement Tests		
Evaluation of Prior Coursework		
COMPASS/ACCUPLACER		
ACT		
Remedial		
Developmental		
Cut-off Score		
Accelerated		
Placement		
Registration		
Registrar		
Elective		
Prerequisite		
Course Load		
Credit Hour		
General Degree Requirement		

Sources: "Glossary: Financial Student Aid," https://studentaid.ed.gov/glossary (accessed April 2015); EAB interviews and analysis.

Implementing the New Communication Plan

PHASE 4

- Guidelines for Finalizing the Integrated Prospect Communications Plan
- Guidance for Driving Plan Adoption

Phase 4 Summary—Two Steps

Goal

Finalize the Integrated Communication Plan; drive adoption of the plan by campus stakeholders

Required Participants

Cross-Functional Communication Planning Committee; Steering Committee

1 Finalize the Integrated Communication Plan

Challenges

- Converting the draft Integrated Communication Plan into a finalized form
- Creating an inventory of all communications and their timing in a form accessible to all stakeholders

Guidelines for Finalizing the Integrated Prospect Communications Plan (p 31)

Use the guidelines and the Communication Inventory to map out communications and keep all stakeholders aware of the plan

2 Drive Adoption of Integrated Communication Plan

Challenge

- Creating awareness and buy-in of Integrated Communication Plan across all campus departments

Guidance for Driving Plan Adoption

(p 32)

Draw on the guidance summary to promote the plan across campus silos

Guidelines: Finalizing Integrated Communication Plan

Purpose of the Guidelines

To finalize the Integrated Communication Plan, secure buy-in, and establish guidelines for future revisions

Create an Integrated Communication Plan

- The Cross-Functional Communication Planning Committee should gather for a final meeting (two hours) to revise the prototype plan from Phase 3 (p 21) created during the Communication Audit.
- The Integrated Communication Plan identifies the timing of each outbound communication and the originating offices.
- Keep the plan in an easy-to-update spreadsheet, shared between all of the participating departments.

Department	May	June	July	Aug	Sept
Admissions					
Office of Financial Aid					
Office for Student Affairs and Services					
Office of the Registrar					
Office for Inclusion and Intercultural Affairs					
Residence Education & Housing Services					
Pre-Major Advising					
Office of Undergraduate Education					

Download the Communication Inventory Template to Finalize the Plan:
a spreadsheet to keep track of every outbound communication by office and date

Sustain the Integrated Communication Plan with regular updates

- The Communication Plan will inevitably need to change in line with enrollment needs.
- Establish a standing team of three people within EM to own all future revisions to the Plan (e.g., changing the date of an email, revising content, etc.).
- Create a Google form or another easy-to-use tool with clear instructions on how to request a change to the Plan.
- Share the process widely so all relevant campus stakeholders know how to submit changes.
- Host a meeting every semester with the members of the Cross-Functional Communication Planning Committee to evaluate the success of the Communication Plan.

Guidance for Driving Plan Adoption

Purpose of the Guidance

To provide advice for driving adoption of the Integrated Communication Plan across campus.

1 Top-Down Advocacy

VPEM, with the rest of the Steering Committee, presents the Plan to all the requisite stakeholders on campus (President, Provost, and other VPs) who need to either support the Plan or be made aware of it.

2 Bottom-Up Advocacy

Once there is a finalized Plan, audit workshop participants secure buy-in from the head of their departments or other relevant leaders.

Most institutions will need to balance top-down and bottom-up advocacy to effectively drive adoption

3 Announce the Plan

VPEM emails key campus stakeholders (deans, department heads, etc.) to announce the Plan and highlight:

- The institution's need for the Communication Audit
- Findings from the Communication Audit workshop (e.g., students receive 200 emails in March)
- Benefits of the Integrated Communication Plan and how it will differ from current practice
- Logistics of sustaining the Plan
- Timeline for reporting on impact of the Plan

4 Build Plan Awareness

- VPEM and steering committee should arrange at least three presentations of the Plan to campus stakeholders.
- At the presentations, underscore the Plan's potential for enhancing student enrollment experience, improving yield, and benefiting the colleges and institution as a whole.

Toolkit Appendices

A. The Gunning Fog Index
B. Student Advice on Occasions to Text
C. 20 Tips for Texting Students
D. Text Message Examples for Key Decision Moments

The Gunning Fog Index

Developed in the 1950s by Robert Gunning, the Gunning Fog Index is a measure of readability that estimates the reading level required to understand a passage. The index uses an algorithm based on the number of words in the passage, the number of words in each sentence, and the number of “complex words”—words that have three or more syllables, not including proper nouns.

The index scores map to reading grade levels. It’s best practice to write regulatory and policy documents at an eighth-grade reading level—or a GFI score of 8. **We recommend that all communications to prospective students score no higher than a 10.**

Calculate the GFI

A free tool for calculating GFI can be found at http://gunning-fog-index.com/

GFI	Reading Level
6	Sixth grade
7	Seventh grade
8	Eighth grade
9	High school freshman
10	High school sophomore
11	High school junior
12	High school senior
13	College freshman
14	College sophomore
15	College junior
16	College senior
17	College graduate

Limitations of the Gunning Fog Index

- The GFI uses word and sentence length to calculate complexity. Its efficacy lies in the assumption that most multisyllabic words are more difficult to read and most short sentences are easier to read—which is not always true.
- The purpose of the GFI is to provide a general indicator of a passage’s difficulty, which can help prioritize more qualitative editing efforts.

Student Advice on Occasions to Text

Most students ignore most emails. As a result, universities are looking to mobile-based communication channels to reach the next generation of students. Text messages present opportunities to engage students but also pose risks: if text messages are not executed properly, students will ignore them.

Appropriate Occasions to Text Students

EAB's Enrollment Services division surveyed 8,515 college-bound high school students in the summer of 2015 to find out how they gathered college information and how they preferred to receive communication. The chart below shows the percentage of surveyed students who felt that each occasion was an appropriate reason for an institution to send them a text message.

Occasions for texting	% students who felt texting was appropriate		
	Full sample	Rising seniors	Rising juniors
To announce a deadline related to students' applications	86.0	89.4	82.0
To respond to specific questions from students	81.5	80.9	82.3
To confirm receipt of a student's test scores or other application materials	79.6	79.9	79.1
To remind students about an event for which they registered	74.6	74.4	74.8
To provide students with information about financial aid award from the school	73.6	75.5	71.2
To send students information about the college	65.3	62.9	68.1
To invite students to campus	55.4	52.1	59.1
To let students know about events on campus	49.9	48.1	52.0

Why Some Students Don't Like Receiving Texts from Universities

- Excessive/not necessary/annoying (40.4%)
- Texting is personal/too informal (36.2%)
- Prefer other contact methods (27.6%)
- Additional charges/can't receive texts/don't use phone (14.6%)
- Not efficient (8.3%)
- Not reliable (3.4%)

EAB Enrollment Services, Student Communications Preference Study, 2017.

20 Tips for Texting Students

Purpose: The following list of tips for texting students was compiled by experts at Signal Vine, a text-messaging provider that works with many colleges, school districts, and community-based organizations nationwide. These tips are intended to provide additional context for practitioners when devising text-messaging calendars, schedules, and content.

1 **Frequency:**

The recommended number of prescheduled or programmed messages is 2-5 per month. We discourage more than that but strongly encourage back and forth conversation if a student replies to the message.

2 **Personalization:**

Make sure that the messages are personalized and include relevant student information (e.g., student's first name, grade, school, etc.) and the counselor/advisor's name, especially in the first message. The more personalized the message, the higher the response rate.

3 **Relevancy:**

The content of the messages should be relevant to that particular recipient's needs. Colleges often filter messages to only those students who meet certain criteria that would make the message relevant. We strongly discourage mass texting where everyone receives the same message.

4 **Action:**

Include "calls to action" in the text messages that will nudge students and/or parents to complete their necessary tasks or to take an action that moves forward in the process. For example, you might include a short link (e.g., bit.ly or goo.gl) to a resource or have a student respond back to answer a question about their progress.

5 **Urgency:**

When possible, create urgency by using dates and sending messages about three days prior to deadlines. Make sure that you send the message on a date that is not too close to the deadline (so recipients aren't overwhelmed) but that also is not too far away from the deadline (so they don't forget about the deadline).

6 **Timing:**

Timing can impact the rate of student responses to text messages. During the school year, K-12 students reply most frequently before school (7am) or after school (4-7pm). College student messaging should begin between 10am to 11am, the lunch hour is popular and we have found no need for class-day limitations.

7 **Interactive:**

Ensure that the conversations are two-way and interactive, and that counselors are responding to students' messages by answering questions in a timely manner. Prepare staff to monitor/reply to messages the hour after a programmed message is sent. Most student replies will be sent back within the first 15 minutes.

8 **Programmed:**

Productivity increases when time is spent up front to design a program of messages around key dates, which reduces the pressure on staff to remember when to engage specific students. We have seen a 4x-10x increase in counselor capacity when they are able to readily respond to student replies from programmed messages.

20 Tips for Texting Students (cont.)

9 **Opt-Out:**

Recipients need to be able to opt out of receiving text messages. In the first message, let students know that they always have the option to text back STOP or CANCEL to stop receiving messages. They can always opt back in at a later time and start receiving text messages again.

10 **Introduction:**

It's best to begin the engagement with an introduction message that introduces the counselor and solidifies the connection. We also recommend that you suggest students save the number and text anytime they need help.

11 **Prepared Responses:**

To further productivity, prepare responses to common or anticipated questions in advance to avoid duplicative or inconsistent work on behalf of staff.

12 **Prepared Links:**

Often students would be best suited to utilize an online resource, rather than including all of the content in a text. Make these links readily available for counselors to send students to improve productivity and responsiveness.

13 **Link Shortening:**

When including web links, we find use of a link shortener such as bit.ly or goo.gl to be useful in conserving characters in programmed messages.

14 **Less is More:**

The 160 character limit can be challenging for some organizations who want to send two- and three-part messages. Do not exceed the 160 character limit: the process of honing the content of a text message down to its main point ensures students are able to digest the content quickly.

15 **10-Digit Personal Touch:**

Although short codes (3 to 6-digit numbers) are popular for marketing companies and some may consider sending texts via email (from an email address), students are most likely to trust a 10–digit phone number.

16 **Ad-hoc Messages:**

Programmed messages can only cover the expected communications, so counselors should text students with one-off, ad-hoc messages as necessary. This keeps the texting informal and relevancy high.

17 **Ask Questions:**

The best interactions happen when you ask students a question that invites a response. Messages that contain questions have 30-40% higher response rates, and they are a great way to get information from students.

20 Tips for Texting Students (cont.)

18 **Limited Automation:**

There is value in automating some student messages, but students are perceptive and therefore quickly recognize when a “computer” has taken over the conversation. We generally advise no more than 2-3 automated messages in a row if you’re looking to keep the relationship personal.

19 **Group Messaging:**

Messaging students in large groups may save time initially, but it’s important that each message is still sent one-on-one to avoid unintended connections being made between text-message recipients.

20 **Multi-Language for Parents:**

When messaging parents, determining the parents’ language of choice is important when engaging them, or you can give them an option to select their native language.

Text Message Examples for Key Decision Moments

Content Theme	Text Message Content
Introduction	Hey [name]! Thanks for starting an application with EABU. If you ever have any questions, please feel free to reply to this text and we will quickly get in touch
Incomplete Application	We're excited you are considering EABU! Remember to complete your application in time for our priority deadline. Check out our website at www.eabcc.edu
Campus Tour	Come experience what it's like to be a student at EABU. Schedule a tour around your availability; go to the link to register http://EABU.edu/campustour
Application Support	Have questions about the admissions process at EABU? Or just want to make sure you're on the right track? Reply to this message and one of our student application specialists will be in touch with you
Admissions	Be on the lookout for an admissions decision coming to your mailbox in the next two weeks.
Acceptance and Follow-Up	Don't forget to fill out and return the forms in your admissions packet
Deposit Reminder	Don't forget to submit your deposit today. The final deadline is 3/3
Incomplete Financial Aid	Hi [student name]! It looks like you might be missing some financial aid paperwork… give us a call ASAP at 202-555-5555
High School Graduation	Only a few more days until your graduation! EABU is gearing up for commencement too. This will be you in two years! Watch graduation here today: eabu.edu (commencement link)
Portal	Check your MyEABU account and EABU email regularly for updates. Go to http://myeabu.edu Click here to find your user information: http://goo.gl//bsoeri2
Housing Deadline	Want to make sure you have the best roommate? Submit your housing preferences form today. Deadline is 5/22. Access the form through http://myeabu.edu
High School Transcripts	Make sure to request and send all final official transcripts, including those for dual enrollment to EABU Admissions
Orientation	Hi [name] make sure to register for orientation, here are upcoming dates 7/15, 7/25, 8/13. Go to [insert link]
Financial Aid	How are you paying for college? A payment plan may be available (request) at 202-555-5552 or acctsrec@eabcc.edu
Loan Borrowers	First-time loan borrowers must complete their Entrance Counseling and Master Promissory note. Visit www.studentloans.gov. Questions: 202-555-5553
First Day Checklist	First days at EABU. What to do: campus map (http://goo.gl/werns93k), buy books (http://eabcc.bkstr.com)
Advising	Get off to a great start. Introduce yourself to your Advisor. Request a tutor (202-555-5556)

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