



EAB

Creating Awareness for Your Transfer Program and Transfer Portal

Transfer Portal Intensive Limited Series, Session III

June 8, 2022

Today's Facilitators



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Update Your Name

The screenshot shows a Zoom meeting window with the title bar "Zoom Meeting ID: 841-573-482". The main content area displays a presentation slide with the EAB logo and the text "EAB Virtual Meetings". On the right side, the "Participants (2)" panel is open, showing "Test Participant (Me)" and "Meeting Host (Host)". The "Rename" button next to "Test Participant (Me)" is highlighted with a yellow box. An orange line points from this button to a "Rename" dialog box that is open. The dialog box contains the text "Enter a new screen name:" and a text input field with "Jane Doe - Institution" entered. Below the input field are "OK" and "Cancel" buttons. At the bottom of the Zoom window, the "Participants" icon in the toolbar is highlighted with a yellow box. An orange line points from this icon to a text box below the screenshot.

Update your name and add your institution

Open Participants menu

Mic, Chat, and Nonverbal Feedback

The screenshot shows a Zoom meeting window with a presentation slide titled "EAB Virtual Meetings". The interface includes a top bar with the meeting ID (841-573-482) and a status bar at the bottom with icons for Mute, Stop Video, Invite, Participants (2), Share, Chat, Record, and Leave Meeting. A callout box points to the "Chat" icon, stating "Unmute to verbalize a comment".

On the right side, the "Participants" panel is open, showing two participants: "Test Participant (Me)" and "Meeting Host (Host)". Below the list are icons for "Raise Hand", "yes", "no", "go slower", "go faster", and "more". A callout box points to these icons, stating "Use icons to communicate answers and signals to presenter".

Below the "Participants" panel is the "Zoom Group Chat" section, which includes a "To:" dropdown menu set to "Everyone" and a text input field for typing a message. A callout box points to the "To:" dropdown, stating "Select whether you want to chat with everyone or a specific person".

At the bottom center, a callout box points to the "Participants" and "Chat" icons, stating "Open Participants and Chat".

Audio Mute/Unmute and Video Stop/Start

We encourage you to turn your **videos on** during the session and take yourself off mute to share vocally with the group.

The screenshot shows a Zoom virtual session interface. At the top, the EAB logo is displayed. The main background features the text "EAB Virtual Session" in white and teal. A large black control bar is overlaid on the bottom half of the screen. This bar contains icons for audio and video controls, along with a secondary bar at the very bottom with more session controls. Two callout boxes with orange borders and lines pointing to specific icons provide instructions:

- Left Callout:** "Red slashes mean your microphone is muted and your camera is off". It points to the microphone icon with a red slash and the camera icon with a red slash.
- Right Callout:** "Access audio and video options by clicking the up arrow next to the Mic and Camera icon". It points to the small upward-pointing arrows next to the microphone and camera icons.

The main control bar includes the following elements from left to right:

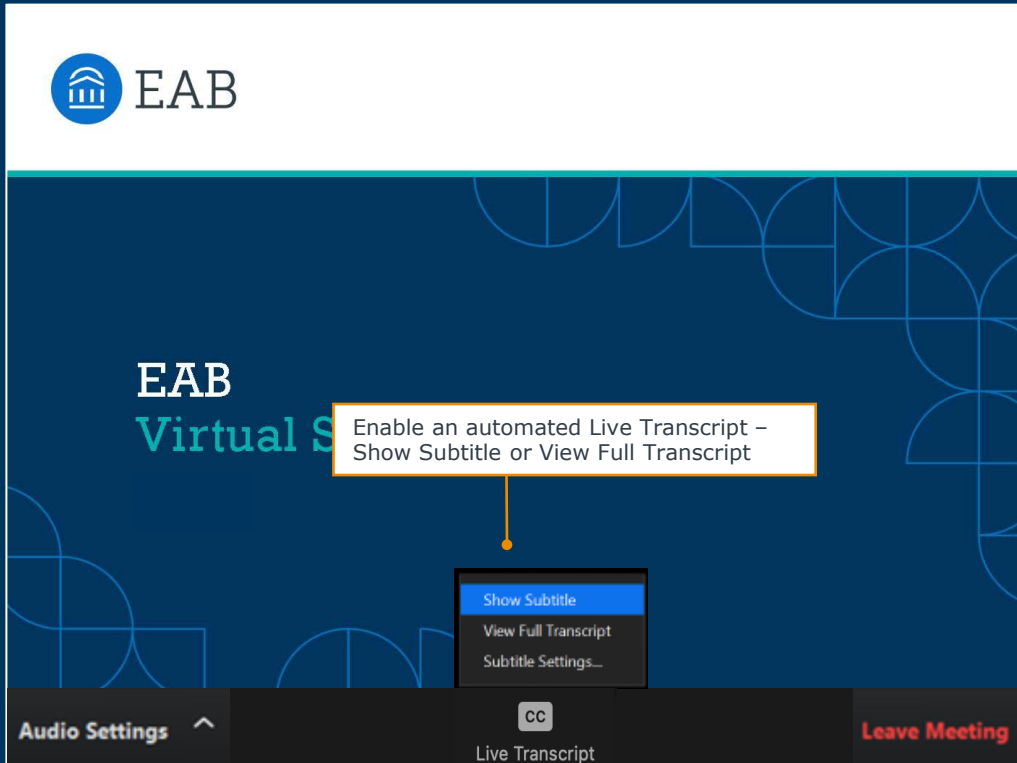
- Unmute:** A microphone icon with a red slash and the text "Unmute" below it.
- Start Video:** A camera icon with a red slash and the text "Start Video" below it.
- Upward arrows:** Small upward-pointing arrows next to the microphone and camera icons.

The secondary bar at the bottom includes the following elements from left to right:

- Mute:** A microphone icon with a red slash and the text "Mute" below it.
- Stop Video:** A camera icon with a red slash and the text "Stop Video" below it.
- Invite:** An icon of two people and the text "Invite" below it.
- Participants:** An icon of three people and the text "Participants" below it.
- Share:** A green screen icon and the text "Share" below it.
- Chat:** A speech bubble icon and the text "Chat" below it.
- Record:** A circular icon with a vertical line and the text "Record" below it.
- Leave Meeting:** A red button with the text "Leave Meeting" in white.

EAB

Turn on Captions



What is one high point
or win from the past
academic year?



- 1 Transfer Maturity Curve
- 2 Best Practice 3: Create Transfer-Friendly Website and Self-Services Resources
- 3 Best Practice 4: Promote Transfer and Provide Detail on Cost, Credit, and Completion
- 4 Closing and Next Steps



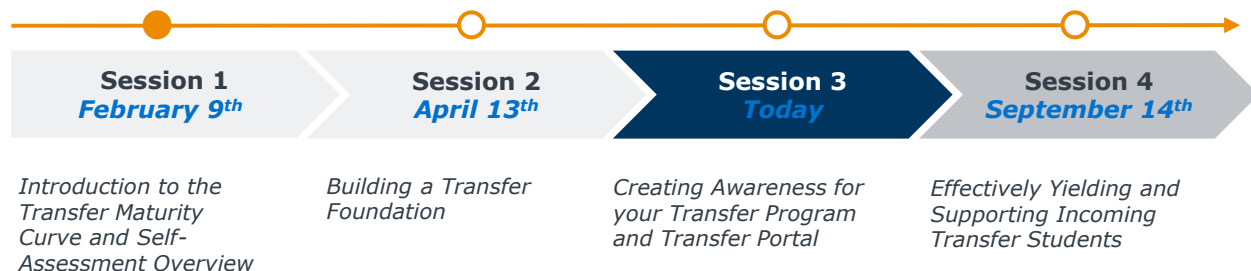
Transfer Maturity Curve

Brief Recap of Previous Intensive Sessions

Transfer Intensive Series

Register for the Final Session and Encourage Your Colleagues to Attend!

Four-Part Series

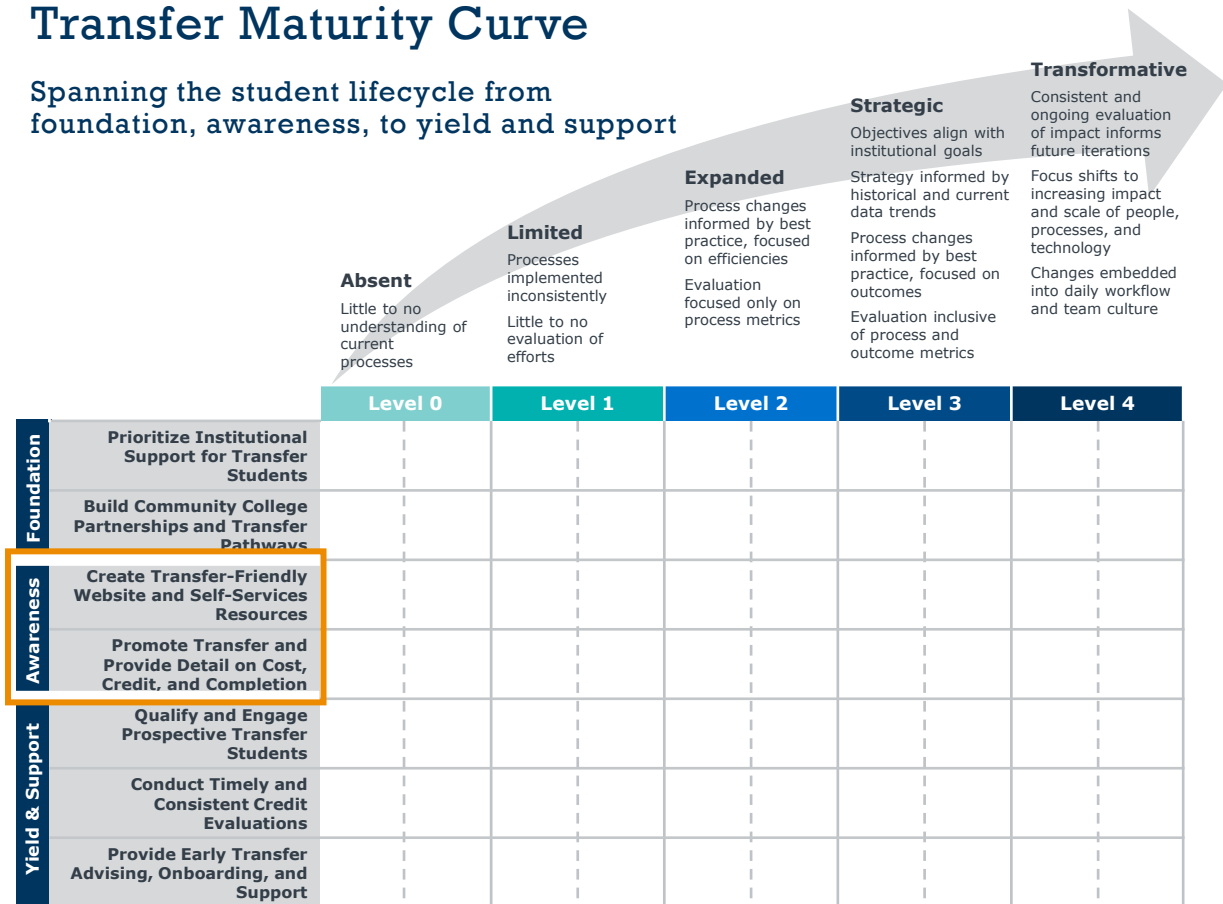


Register for the final session

[Click Here to Visit the Registration Page](#)

Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support





Create Transfer-Friendly Website and Self-Services Resources

Maturity Curve - Awareness

BEST PRACTICE

3

Maturity Curve – Awareness, Best Practice 3



Absent Level 0	Limited Level 1	Expanded Level 2	Strategic Level 3	Transformative Level 4
Website navigation is challenging; website is desktop first design and unresponsive to various screen sizes (e.g., mobile, tablet); analytics are not embedded. Maturity levels defined	Transfer content is fragmented across multiple pages and requires extensive navigation to locate (5+ clicks from institution home page); website is desktop first design and somewhat responsive to various screen sizes; analytics are embedded but not used.	Transfer content is available on a dedicated transfer section and can be found with relative ease (3 clicks from institution home page); website is desktop first design and responsive to various screen sizes; analytics are embedded and reviewed on an ad hoc basis.	Transfer content is prominently displayed on a dedicated transfer section of the admissions website and is easy to locate (2 clicks from institution home page); website is mobile first design; analytics are embedded and regularly reviewed by some but not all key stakeholders.	Transfer content is easy to locate (1 click or less from institution home page) with dynamic linking that reduces number of clicks and eases navigation of information; website is mobile first design; analytics are collected and regularly reviewed by Marketing to optimize the user experience.
Transfer guides do not exist. Strategies by level, specific to each track	Transfer guides at the institution-level exist but are not always updated and may not be publicly available.	Transfer guides at the institution-level and some programmatic-level exist, with efforts to ensure accuracy and availability online and on the community college website.	Transfer guides at both the institution-level and programmatic-level exist; all guides are up to date, centralized, and available online and on the community college website.	Program-specific transfer guides are made available to community college students within their first semester at the college; guides are routinely evaluated for effectiveness, incorporating student and advisor feedback.
Little to no self-service tools available during admissions process; staff are required to inform students of most information and complete almost all actions.	Institutions have multiple admission apps, websites, or tools for students to access information, but resources lack clarity and/or detail on transfer; students rely on staff for basic transactions.	Institutions have centralized repository of transfer resources with clear value propositions and comprehensive FAQ; students can resolve most common problems on their own.	Admissions alerts and messages include clear next steps and tools to allow students to take immediate action; self-service strategy is managed by key transfer cross-functional departments (e.g., Admissions, Registrar, Financial Aid).	Manual processes have been replaced by self-service tools in order to improve student utilization; staff time is assessed and reallocated regularly.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Suggestions for process and outcome metrics to track progress, specific to each track

3 Tracks to Create Transfer-Friendly Materials



3a

Transfer Admissions Website

Transfer content is easy to locate and navigate. Visitor data are used to inform user experience changes.

3b

Transfer Guides

Program-specific transfer guides are provided to community college students and guides are routinely maintained.

3c

Self-Service Resources

A centralized repository of transfer materials exists, and self-service tools improve student utilization.





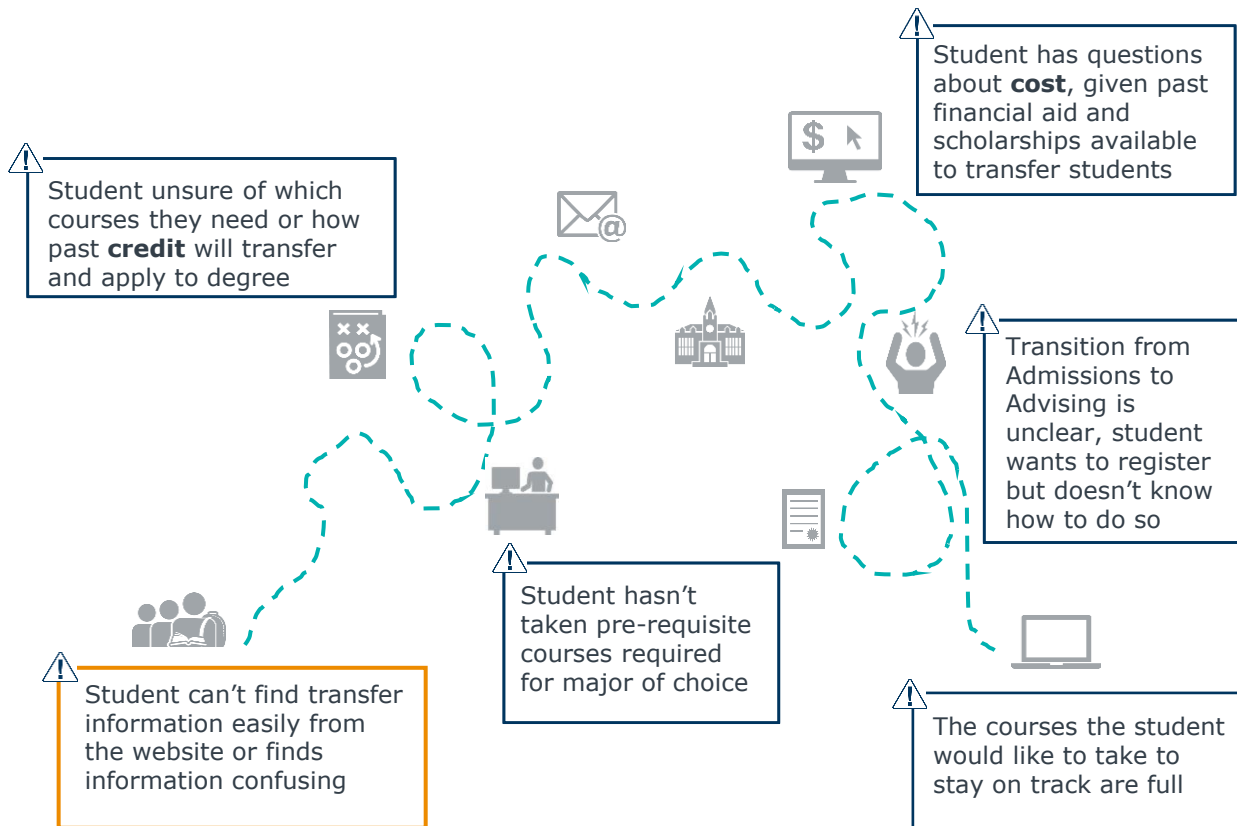
Pre-Work Reflection & Share Out

What is your institution's level of Transfer Maturity?

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Website navigation is challenging; website is desktop first design and unresponsive to various screen sizes (e.g., mobile, tablet); analytics are not embedded.	Transfer content is fragmented across multiple pages and requires extensive navigation to locate (5+ clicks from institution home page); website is desktop first design and somewhat responsive to various screen sizes; analytics are embedded but not used.	Transfer content is available on a dedicated transfer section and can be found with relative ease (3 clicks from institution home page); website is desktop first design and responsive to various screen sizes; analytics are embedded and reviewed on an ad hoc basis.	Transfer content is prominently displayed on a dedicated transfer section of the admissions website and is easy to locate (2 clicks from institution home page); website is mobile first design; analytics are embedded and regularly reviewed by some but not all key stakeholders.	Transfer content is easy to locate (1 click or less from institution home page) with dynamic linking that reduces number of clicks and eases navigation of information; website is mobile first design; analytics are collected and regularly reviewed by Marketing to optimize the user experience.

- Poll:** Where is your institution on the maturity curve?
- When was your last Admissions website refresh? Are there any significant changes to the website coming soon?
- How easy is it to make changes to the website and who owns making these changes?
- How frequently are web analytics pulled and evaluated? Are they used to inform recruitment strategy and resource allocation?

What We Hear from Students



Criteria for Your Transfer Website

Areas to Provide Transfer Information

- Transfer preparation
- Degree options
- Navigating the transition
- Academic planning
- Costs and budgeting

Website Audit Checklist



Setup and Navigation: Site is accessible and optimized for different screen sizes.



Partnerships and Pathways: Co-branded materials exist.



Application: Requirements and deadlines are clear.



Credit Evaluation: A self-service portal exists for self-assessment.



Financial Aid: Distinct links for transfer students exist.



Admitted Student: Steps between admission and enrollment are clear.



Contact Information: There is an information request form.



SEO: Relevant information appears at the top of search engine pages.



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- 1 Poll:** Where is your institution on the maturity curve?
- Do you currently have community college transfer guides or similar equivalency tools? Are they up to date and on your website?
- How are these resources/tools used with prospective students?



Steps to Build Co-Branded Transfer Guides



Elements of a Transfer Guide



Clearly Stated Purpose That Benefits Both Institutions

Examples:

- A new pathway to a degree
- Prepare students for the workplace
- Provide a seamless transition



Consistent Format

- Develop templates
 - Multiple templates may be created depending on the type of agreement
- Examples:
 - General Education Agreement
 - Dual Admission Agreement
 - 45+ Agreement

Components

- Participating institutions
- Degree type
- Conditions of admissions
- Specific transfer policies
- Catalog term
- Course-to-course equivalencies
- Degree equivalency grid
- Clear expectation of expected credits
- Legal language
- Point of contact for each institution
- Signatures

[Institution Logo]

[Community College Logo]

**ASSOCIATES of (Community College Program) ^{Note 1}
at (Community College Name)
to BACHELOR OF (Program)
at (Institution School or College)
(Effective Term Year)**

(Community College Name) Recommended Course			(Institution) Equivalent	
First Semester			First Semester	
ENG 101	English Composition I	3	ENG 0802	Analytical Reading & Writing
Quantitative Reasoning	Recommended: MAT 131: Introduction to Statistics I ^{Note 2}	3	MATH 1013	Elements of Statistics
Technological Fluency	Recommended: CIS 110: Computer Information Systems for Management ^{Note 3}	3	CIS L**	Lower Level Elective- CIS
Oral Communication	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Social Science Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Semester Total:		15		
Second Semester			Second Semester	
ENG 102	English Composition II	3	ENG L**	English Lower Level Elective
HIS Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Scientific Reasoning	See CC's Requirements	4		Dependent upon course selection ^{Note 3}
Open Elective	See CC's Requirements	2-3		Dependent upon course selection ^{Note 3}
Aesthetic Sensibility	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Semester Total:		15-16		
Third Semester			Third Semester	
Open Elective	Recommended: BIO 131: Human Anatomy & Physiology I ^{Note 4}	4	KINS 1223	Human Anatomy & Physiology I
Cultural Awareness and Diversity	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Ethical Perspective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Open Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Open Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Semester Total:		16		
Fourth Semester			Fourth Semester	
Open Elective	Recommended: PBH 201: Public Health Administration ^{Note 6}	3	HPM 2214	Politics and Payments in U.S. Healthcare System
Open Elective	Recommended: HCP 224: Medical Terminology ^{Note 6}	3	HIM 1101	Medical Terminology
Open Elective	Recommended: BIO 132: Human Anatomy & Physiology II ^{Note 7}	4	KINS 1224	Human Anatomy & Physiology II
Open Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Open Elective	See CC's Requirements	3		Dependent upon course selection ^{Note 3}
Semester Total:		16		
Total:		62-63		

- Notes:**
- Students who transfer to [Institution] with the Associate of Arts in [Program Name] have satisfied the terms of the [Institution] – [Community College Name] transfer agreement.
 - It is strongly recommended students select [Community College Name] MAT 131: Introduction to Statistics I to satisfy their Quantitative Reasoning requirement. MAT 131: Introduction to Statistics I transfers to (Institution) as MATH 1013: Elements of Statistics and satisfies a major requirement. Students transferring without this course may require additional time to degree completion.
 - It is strongly recommended students select [Community College Name] CIS110: Computer Information Systems for Management to satisfy their Technology Fluency requirement.

If the suggested classes are successfully completed and an Associate in [Community College Program] is awarded from [Community College Name], the remaining four semesters in the Bachelor of [Institution Program] are as follows:

Remaining requirements at [Institution]			
Fifth Semester			
HIM 2215	Health Information IT Fundamentals		3
HIM 3101	Health Record Documentation		3
HIM 3106	Pathophysiology		3
HIM 3107	HIM Leadership and Strategic Management		3
HIM 3111	Statistics and Research in Health Care		3
HRPR 1001	Public Health: The Way We Live, Work and Play		3
Semester Total:			18
Sixth Semester			
HIM 3113	Healthcare Database Design and Development		3
HIM 3203	Electronic Health Record Systems		3
HIM 3208	International Classification of Diseases		3
HIM 3216	Clinical Procedures and Pharmacology		3
HIM 3271	Professional Development		1
HIM 3297	Health Information Management Human Resource Management [VI]		3
Semester Total:			16
Seventh Semester			
HIM 4101	Health Informatics: Infrastructure and Standards		3
HIM 4102	Legal Aspects of Health Information Management		3
HIM 4105	Current Procedural Terminology Coding		3
HIM 4113	Healthcare Reimbursement Systems		3
HIM 4121	Healthcare Data Analytics		3
HIM 4207	Healthcare Quality Improvement		3
Semester Total:			18
Eighth Semester			
HIM 4202	Health Information Management Project Management		3
HIM 4104	Health Information Management Operations Management		3
HIM 4206	Intermediate Coding		3
HIM 4286	Management Internship		4
HIM 4298	Health Information Management Senior Seminar (VI)		3
Semester Total:			16
<i>Credits transferred from the Associate in [Community College Program] at [Community College Name]</i> ^{Note 5}			62-63
<i>Remaining credits to complete the Bachelor of [Program Name] at [Institution Name]</i>			68
Total Credit Completed to Satisfy the Requirements for the Bachelor of [Program Name] ^{Note 5}			130-131

Notes: Students following this plan are under the GenEd-to-GenEd General Education Program

- The Bachelor [Program Name] is Fall Start Only. While the intent of this agreement is that students who complete the A.A. in [Community College Program] at [Community College Name] will be able to start the Bachelor of [Program Name] professional courses in their first semester, students must have all prerequisites completed before beginning these courses. Students who transfer to [Institution Name] in a fall semester and who have not completed all prerequisite courses at [Community College Name] will not be able to start the HIM professional courses until the next Fall term, which will delay time to degree completion. Additionally, students who transfer to [Institution Name] in a spring semester will not be able to start professional courses until the Fall which will delay time to degree completion.
- To earn a Bachelor of [Program Name], a student must complete a minimum of 123 credits.
- All inquiries about the undergraduate program and application are handled through the Office of Undergraduate Admissions. If you have specific questions about your application or the admission process, please call XXX-XXXX.
- [Institution Name] requires that all undergraduate degree candidates complete 45 hours of the last 60 hours of the degree or program as matriculated students at [Institution Name]. If a matriculated student previously took [Institution Name] courses on a non-matriculated basis, those courses are counted towards this requirement.



Pre-Work Reflection & Share Out

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Little to no self-service tools available during admissions process; staff are required to inform students of most information and complete almost all actions.	Institutions have multiple admission apps, websites, or tools for students to access information, but resources lack clarity and/or detail on transfer; students rely on staff for basic transactions.	Institutions have centralized repository of transfer resources with clear value propositions and comprehensive FAQ; students can resolve most common problems on their own.	Admissions alerts and messages include clear next steps and tools to allow students to take immediate action; self-service strategy is managed by key transfer cross-functional departments (e.g., Admissions, Registrar, Financial Aid).	Manual processes have been replaced by self-service tools in order to improve student utilization; staff time is assessed and reallocated regularly.

- Poll:** Where is your institution on the maturity curve?
- What transfer-specific preparation materials or resources are in place for prospective transfer students?
- Who owns creating/updating these resources?

Self-Service Resource Tips



1 **Prioritize Content Needs**

Provide content that clearly answers the 3 C's: cost, credit, completion. Instead of trying to offer every possible choice, focus on the probable actions that are most likely to help students.

2 **Keep It Simple**

Focus on design simplicity. Each additional option adds complexity to the decision-making process.

3 **Consider the User Experience**

Offer interactive tools and make resources easily accessible, mobile-friendly, downloadable, and printable.

4 **Don't Make Students Dig for Answers**

Provide FAQs or automatically link to a useful resources section.

5 **Include Visuals**

Use images or icons for easy recognition.

Self-Service Examples

Financial Aid Franklin Fits Your Budget Loans & Repayments Additional Resources Blog



Free Guide: Where to Find Free Money to go Back to School

Learn how to get grants to cut college costs.

DOWNLOAD NOW >



Search Transfer Maps

Northern Virginia Community College

or

Keyword search

eg. community college degree name or VCU degree name

View archives

Search

Sources: Franklin University. College Financial Aid Resources | Franklin.edu. Retrieved from <https://www.franklin.edu/tuition-financial-aid/financial-aid-resources>; Virginia Commonwealth University. Major maps. Transfer Maps. Retrieved from <https://majormaps.vcu.edu/transfer?college=Northern%2BVirginia%2BCommunity%2BCollege&query=>.



Promote Transfer and Provide Detail on Cost, Credit, and Completion

Maturity Curve - Awareness

BEST PRACTICE

4

Maturity Curve – Awareness, Best Practice 4



26

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer marketing materials (print and online) are not available.	Some transfer marketing materials are in place, but key components of transfer program are not well known.	Transfer marketing materials are in place and opportunities for co-branding with community colleges have been identified but not executed.	Wide variety of transfer marketing materials are in place, transfer program is well known, and community college partners are recognized online with active referral links to-and-from websites; materials are consistently co-branded.	Transfer marketing materials are optimized for audience, university and community college partners collaborate on joint marketing materials promoting transfer program and resources.
Digital advertising (ads) are not used.	Digital ads are used to promote the university but do not include transfer content.	Digital ads are used to promote the transfer program but pay-per-click and retargeting are not used; integration with other communication channels is not a priority.	Digital advertising, pay-per-click, and retargeting advertising are used to promote the transfer program; integration with other communication channels is in place.	All digital advertising are updated to reflect latest market trends in transfer; SEO is in place and optimized for transfer pages.
Transfer admissions information (print and online) is available but does not accurately address cost, credit, or completion.	Transfer admissions information about cost, credit, and completion are limited or outdated, often leading to follow up questions.	Transfer admissions information is available and partially addresses key decision factors around cost, credit, completion; opportunity to enhance descriptions or clarity in language.	Transfer admissions information is robust and as comprehensive as first-time, full-time student materials; effectively addressing key questions about cost, credit, completion; deploys best practices to avoid jargon and increase student engagement.	Transfer content is journey based, organized by transfer milestones like past/current colleges, target enrollment term, number of credits; copy crafted with student in center, using relevant terminology and providing easy to understand definitions, as appropriate.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

3 Tracks to Promote Transfer and Provide Detail on Cost, Credit, and Completion



4a

Transfer Marketing

A variety of transfer marketing materials exist, and community college partners collaborate on joint materials.

4b

Digital Advertising

Digital advertising, pay-per-click, SEO, and retargeting are in place.

4c

Transfer Admission Information

Information is robust and addresses key decision factors around cost, credit, and completion.



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- 1 Poll:** Where is your institution on the maturity curve?
- Do you currently have a recruitment marketing plan that includes transfer-specific strategies? Elaborate on any transfer-specific promotional materials currently in place and who owns making updates.

Competition Forcing Shift in Marketing Approach

The Attention Economy Requires a New Marketing Paradigm

Consumer Attention in Short Supply

Marketing costs have risen, as has consumer avoidance (e.g., ad blocking).

Digitally Accessible, but Distracted

There are more opportunities to engage with digitally-connected consumers, but they are much more distracted.

Consumer Skepticism of Marketing

Although marketers heavily invest in advertising, consumers are more likely to trust recommendations and referrals.

"ROI" Shopping Behavior

Public concern over student debt and uncertain higher ed outcomes intensifies prospective student skepticism.

Outcomes Marketing

Campaigns and messages that demonstrates a program's tangible career benefits

- Labor market demand that demonstrates opportunities in a field of study, such as:
 - Available job openings
 - Expected job growth
 - Average earnings by position
- Success and validation of graduates, such as:
 - Student testimonials
 - Quantitative placement data
 - Ratings and reviews
 - Program rankings

Example

- ✗ Prospect Filters Out Transactional Ads
"Become a Cybersecurity Specialist"



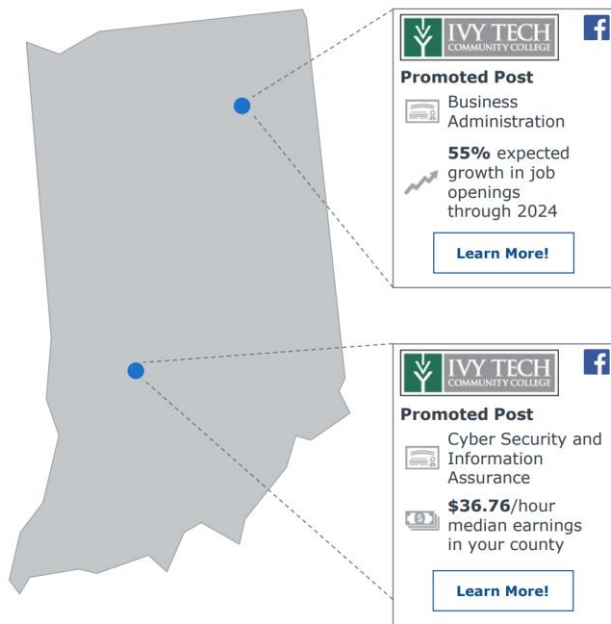
- ✓ Active and Inactive Prospects Engaged by Outcomes Data
"Make more money in a better job"



- ✗ Fails to communicate compelling value proposition
- ✗ Only appeals to prospects actively evaluating programs

- ✓ Leverages local demand data
- ✓ Attracts attention of prospect not actively searching for programs

Example



Triggering Interest from Underemployed



Geotargeted advertisements highlight relevant local labor market data



Educational ads highlight career, not program, opportunities



Social media promoted posts allow for further segmentation based on desired demographic parameters



Labor market data infused in print collateral, website, and program pages to create fully integrated, multichannel marketing campaign

POSITION

IMPACT

- = Transfer Prospects (Low to medium commitment)
- = Transfer Leads (Medium to high commitment)
- = Internal / External Influencers

BUDGET

- = Cost neutral/low cost
- \$ = <\$500
- \$\$ = \$500-\$2500
- \$\$\$ = >\$2500

CHANNEL

- O = Owned
- E = Earned
- S = Shared
- P = Paid

AWARENESS

CONSIDERATION

INFLUENCE

Go-to-Market Essentials

-- | O

Portal Identity

Enfranchise staff in selecting a name and logo/icon to visually identify portal

-- | E

Partner Portal Placement

Locate portal icon in key transfer areas of 2-yr partner websites to guide referral traffic

-- | O

Website Portal Placement

Locate portal prominently throughout institution on transfer-centric webpages

-- | O

Recruitment Marketing

Incorporate portal into transfer admissions materials and highlight benefits and URL

-- | O

Campus Communication

Build communication plan to create broad awareness, excitement, and portal support

-- | O

Faculty/Staff Messaging

Create portal messaging for use by faculty and staff in support of prospect, student, and constituent interactions

Jump-Start Early Impact

-- | O

On-Hold Messaging

Include reference to portal in student and prospect facing on-hold messaging

-- | S

YouTube/Facebook

Build profiles and provide portal use and benefit focused content for social sharing

\$\$\$ | P

Branded Swag

Support recruitment events with portal branded free stuff that transfers love (e.g. pens, highlighters, thumb drives; stress balls)

\$\$\$ | O

Co-Branded Material

Develop marketing piece that highlights portal benefits; co-brand with 2-yr partners

\$\$\$ | P

Print Advertising

Co-brand print ads in 2-yr partner publications to promote portal & transfer program

\$\$\$ | O

Partner Recruitment Events

Use transfer events hosted at 2-yr partners as "demo days" to highlight portal and transfer program

\$\$\$ | O

Direct Mail Campaign

Collect graduation lists from 2-year partners and send targeted messages to encourage portal use

\$\$\$ | P

Digital Ads

Position portal in on-line ads to promote portal in channels that best reach targeted prospects

\$\$\$ | O

SEO Strategy

Create portal content around keywords that matter most to transfers (e.g. transfer, credit, time to degree, cost, career, academic programs)

-- | O

Outreach Materials

Target non-portal inquiries with timely testimonials to reinforce use and nurture relationships.

-- | O

Campus Tour

Include references to and resources around portal throughout transfer campus visit

\$\$\$ | O

Infographic

Create a portal-centric illustration featuring transfer, time, and cost benefits of portal for transfer prospects in graphic format and place on website

-- | O

2-Yr Advisor Training

Provide portal training to 2-yr partner advisors; support with portal reference material and a central contact for questions

-- | O

Portal Training

Provide portal training to faculty and staff and reinforce with self-paced portal webinars

-- | E

Public Relations Plan

Implement PR plan to position and bring attention to the portal among the institutions external constituents

-- | O

Portal Champions

Create ambassador program that recognizes 2-year partners that encourage high portal use

Enduring Strategies for Sustained Growth

-- | O

Club Presentations

Visit 2-yr partner student clubs to promote portal

\$\$\$ | E

Referral Program

Target portal users that apply and enroll and solicit referrals for outreach

\$\$\$ | P

Sponsorships

Include Portal Identity as a sponsor at 2-yr partner (extra)curricular events

\$\$\$ | P

Outdoor Boards

Leverage compelling portal calls-to-action via billboards co-branded with 2-yr partners and placed near college entrances

\$\$\$ | P

Vehicle Graphics

Promote portal by wrapping admissions counselor vehicles on and around 2-yr campuses

\$\$\$ | P

Cinema Advertising

Leverage precision targeting of cinema advertising to promote the portal and transfer at theatres in 2-yr partner markets

\$\$\$ | P

TV/Radio Ad Sponsorship

Include Portal Identity as a sponsor in news, sports, traffic or weather in media outlets with coverage in 2-yr partner markets

-- | E

Social PR

Encourage accepted students to share portal testimonials and distribute across channels to reinforce portal impact

\$\$\$ | O

Transfer Prospect Blog

Develop a series of transfer portal posts that highlight the portal as a helpful resource for transfer planning and admissions process

-- | O

Best Practice Sharing

Share best practices around leveraging portal with prospects and influencers

\$\$\$ | O

Influencer Content

Create flyers with 2-yr partner portal data for partner faculty and staff that highlight portal efficacy and build confidence in advocating for transfer

\$\$\$ | O

2-Yr Faculty/Staff Dev

Identify opportunities to sponsor and present the transfer program and portal at summer faculty and staff development session

\$\$\$ | O

Conference Presentations

Bring visibility to the portal's role in support of your transfer program by collaborating with 2-yr partners to present at higher education conferences

Pre-Work Reflection & Share Out

What is your institution's level of Transfer Maturity?

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Digital advertising (ads) are not used.	Digital ads are used to promote the university but do not include transfer content.	Digital ads are used to promote the transfer program but pay-per-click and retargeting are not used; integration with other communication channels is not a priority.	Digital advertising, pay-per-click, and retargeting advertising are used to promote the transfer program; integration with other communication channels is in place	All digital advertising are updated to reflect latest market trends in transfer; SEO is in place and optimized for transfer pages.

- 1 Poll:** Where is your institution on the maturity curve?
- 2** Are digital ads used to promote transfer program?
- 3** Is Search Engine Optimization (SEO) used to improve search results for stealth transfer prospects?

Digital Marketing Channels

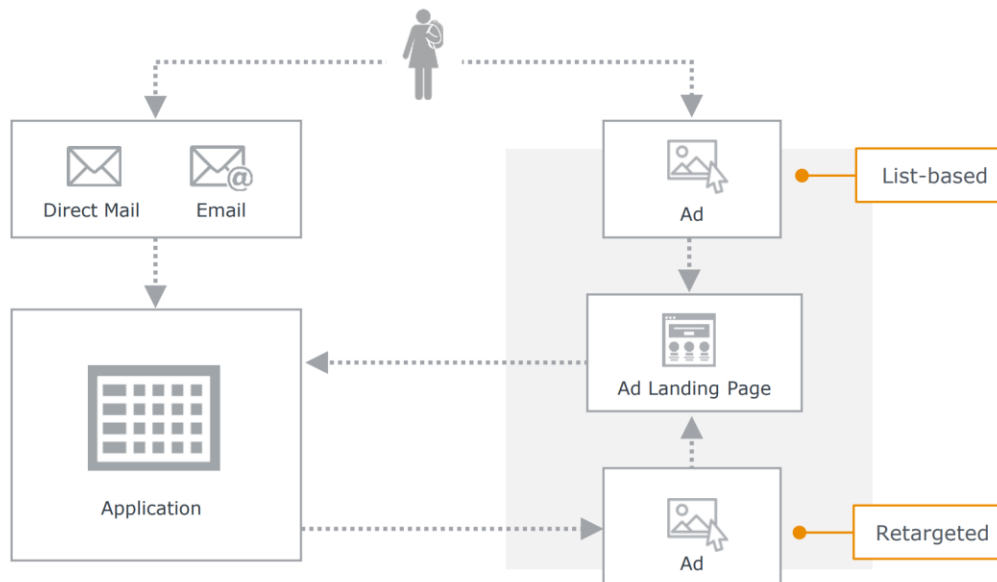
An Overview of Key Digital Channels

With Associated Marketing Approaches

		Unpaid	Digital Channels	Paid		
		Social Media				
Content marketing	•	✓	Facebook	✓	Ads and sponsored content	•
		✓	Instagram	✓		
		✓	Twitter	✓		
		✓	Snapchat	✓		
		Content Platforms				
Content marketing	•	✓	YouTube	✓	Ads and sponsored content	•
			Pandora	✓		
			Spotify	✓	Ads	•
		Search Engines				
SEO ¹	•	✓	Google	✓	SEM ²	•
		Websites				
Content marketing	•	✓	School Website		Ads	•
			Google Display Network	✓		

Use Ads to Drive Students to Action

Integrate Ads Into Larger Communication Flows to Ensure Impact



Guidelines for High Impact Ads

Design Guidelines

For Facebook Ads

Do



- ✓ Strong campus visuals
- ✓ Clear "main character"
- ✓ Strong copy-image link
- ✓ Candid experience visuals

Don't



- X Hard-to-understand image
- X Multiple focal points
- X Weak copy-image linkage
- X Staged visuals

For Display Ads

Put Your Audience First

Ads are most effective when they focus on one specific concern or aspiration of your audience (one message per ad)

Have a Clear Call to Action

Be transparent on the intended action and what is to be achieved if a student clicks your ad – avoid click bait

Be Brief

Keep body copy short – long copy feels very long on mobile – and have one clear takeaway

Getting Started: Display and Social Ad To-Do's



Impact of Ad Campaigns Depends on Effort and Expertise Invested

A Display and Social Ad Campaign To-Do List

- ☐ Set goals for ad performance
- ☐ Set and allocate ad budget
- ☐ Choose type of ad to run
- ☐ Choose ad network(s)
- ☐ Determine and specify audience
- ☐ Develop required creative
- ☐ Design and build tracking system (cookies + pixels)
- ☐ Build out landing page(s)
- ☐ Design larger communication flow in which ad operates
- ☐ Evaluate special targeting options (e.g., geolocation)
- ☐ Choose ad parameters to split test
- ☐ Execute ad buys with relevant network(s)
- ☐ Continuously manage ad parameters
- ☐ Gather data on ad performance and student response
- ☐ Analyze relative performance of variants tested
- ☐ Adjust ad parameters based on findings from testing
- ☐ Reallocate spend to most impactful networks, formats, etc.

Effort Versus Impact

Most steps are fairly easily executed at a basic level.

Innovation and/or expert performance within any given task can pose significant challenges for typical colleges and university enrollment teams.



Pre-Work Reflection & Share Out

What is your institution's level of Transfer Maturity?

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer admissions information (print and online) is available but does not accurately address cost, credit, or completion.	Transfer admissions information about cost, credit, and completion are limited or outdated, often leading to follow up questions.	Transfer admissions information is available and partially addresses key decision factors around cost, credit, completion; opportunity to enhance descriptions or clarity in language.	Transfer admissions information is robust and as comprehensive as first-time, full-time student materials; effectively addressing key questions about cost, credit, completion; deploys best practices to avoid jargon and increase student engagement.	Transfer content is journey based, organized by transfer milestones like past/current colleges, target enrollment term, number of credits; copy crafted with student in center, using relevant terminology and providing easy to understand definitions, as appropriate.

- 1 Poll:** Where is your institution on the maturity curve?
- Do your online and print transfer admissions content comprehensively address cost, credit, and completion student questions?
- What are common questions you hear from prospective transfer students?

Translate Online Content to Student Friendly Language



Simplifying Content Reduces Call Volume

1



In 2001, measured spike in call and email volume for FAQs answered online

2



Gunning-Fog Index calculates reading level required to read online content

3



Removed jargon, used active voice, and simplified language used on website

BEFORE

Your airline may require either your e-ticket number or confirmation number when checking in. Both of these numbers are available in the Passenger and Ticket Information section of your itinerary.

Gunning Fog Index Score: 15.33



AFTER

Be sure to bring your Travelocity itinerary when you check in. This includes your e-ticket and confirmation number which you may need to show when you check in.

Gunning Fog Index Score: 9.88

5%

Drop in call volume to Travelocity customer service call center after website content simplification

Does Your Website Pass the Readability Test?

40

Poll: Which translation has the lower Gunning Fog Index (GFI) score?

- a) The applicability of credits to specific degree programs are evaluated on a course-by-course basis.
- b) Transfer credits apply to a degree based on course evaluation.



- a) Gunning Fog Index Score: 17
- b) Gunning Fog Index Score: 8

Worksheet: Website Jargon Reduction Audit

([Transfer Portal Resource Hub](#) > Strategic Resources > Promote transfer...)

Higher Ed Terminology Translation Exercise

Website Jargon Reduction Audit

Purpose of the Tool

This worksheet identifies language commonly used by administrators and in new-student onboarding materials (e.g., handouts, webpages, etc.). This worksheet is designed as a group or individual activity to create student-friendly translations of technical jargon.

Directions

- Complete worksheet in a group or alone
- Fill in the translation section with a brief and simple definition of a term (recommended length: 7-10 words)
- Use Gunning Fog Index (GFI) online tool to assess the readability of your translation (www.gunning-fog-index.com)
- Share group or individual translations with colleagues and determine most suitable, concise, and lowest GFI score translation
- Optional: Formalize into handout for all staff, new hires, and even students
- Optional: Consider with staff how these translations may vary based on a student or parent audience

Admissions		
Term	Translation	Gunning Fog Index Score (GFI)
Articulation Agreement		
High School Transcript		
GED		
ESL		
Credit for Prior Learning		
Certificate		
Course Equivalency		
Degree		
Transfer		
Residency		
Early College Enrollment		
Prospective Student		
Course Load Status		
Class Status		
Certificate		
Tuition and Fees		
Tuition		
Residency Fees		



Closing and Next Steps

Transfer Portal Resource Center

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Download Resources [Online](#)! You Must Be Logged Into eab.com

The screenshot shows the 'Transfer Portal Resource Hub' website. On the left is a 'Table of Contents' dropdown menu with five items: 1. Getting Started, 2. Events, 3. Transfer Maturity Curve, 4. Strategic Resources (highlighted with an orange box), and 5. Quick Reads. An orange arrow points from this menu item to the 'Strategic Resources' section on the right. The 'Strategic Resources' section has a title, a sub-header 'Click on each topic below to explore toolkits, templates, and more.', and a list of five topics, each with a plus icon and a list of links. The topics are: 'Prioritize institutional support for transfer students', 'Build community college partnerships and transfer pathways', 'Create transfer-friendly website and provide self-services resources', 'Promote transfer and provide detail on cost, credit, and completion', and '35 Top Transfer Portal Marketing Promotion Ideas'.

Transfer Portal
Transfer Portal Resource Hub

Table of Contents ▾

1. Getting Started
2. Events
3. Transfer Maturity Curve
4. Strategic Resources
5. Quick Reads

Getting Started

EAB provides strategic resources and events for Transfer Portal partners to help them succeed.

Ways to get the most out of your EAB partnership:

Register for an event to get the latest
Take EAB's Transfer Maturity

Strategic Resources

Click on each topic below to explore toolkits, templates, and more.

- + Prioritize institutional support for transfer students
 - NISTs - How to Create and Sustain a Transfer-Student Centered Web Presence
 - EAB Transfer Website Audit Overview
 - EAB Transfer Website Audit Excel Template
 - Toolkit for Building Transfer Guides
- + Build community college partnerships and transfer pathways
- Create transfer-friendly website and provide self-services resources
- Promote transfer and provide detail on cost, credit, and completion
 - 35 Top Transfer Portal Marketing Promotion Ideas
 - Transfer Portal Communication Repository
 - Jargon Reduction Audit

- 1 On the [Transfer Portal Resource Hub](#), click on "Strategic Resources" in the Table of Contents.
- 2 In the Strategic Resources section, click on each topic to view relevant resources.
- 3 Click on a resource to download it.



Poll: Would you like to be registered for the final Transfer Intensive session (September 14)?

- a) Yes
- b) No / already registered

Poll: For what topics would you like additional resources and desire to learn more about? (open text response)

We Value Your Feedback!

Please take a few minutes to answer the final poll question to provide your feedback on today's experience.

We will also share a link to a short online evaluation in the Chat.



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