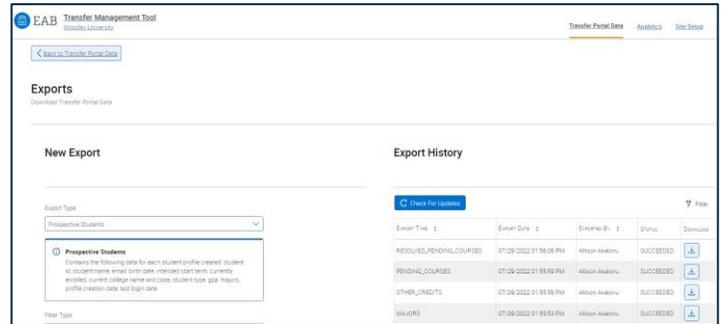


Transfer Enrollment and Revenue

Option 1: Partner managed CRM report and tracking

- 1 Transfer Portal data must be regularly exported (automatically or manual) and imported into CRM
- 2 Portal data should be de-duplicated
- 3 Portal data should include indicators in the CRM for (1) new lead source and (2) activity for existing lead
- 4 There is risk with accuracy based on how leads are imported and managed



Option 2: Semi-manual analysis, using Transfer Portal exports, partner's entering class file, and EAB Transfer Data Analysis workbook

- 1 Partner-generated enrollment entering class (EC) file must match EAB's data spec
- 2 EC data and latest Portal data loaded into an Excel workbook
- 3 Match all portal leads to EC file
- 4 Workbook pivot and some data fields need to be updated for accuracy

Summary of Portal Users		Total	
Portal Accounts Created		#	
# of Matched Portal Users*		#	
# of Non-matched Portal Users		#	
% of Matched Portal Users who applied		#%	

*Matched users = Email, LN/DOB or FN/LN Match

Term	Submitted	Complete	Admit	Deposit	Enroll	App Complete %	Admit %	Yield %
Transfer EC	Total All Time							
Non-Portal	Total All Time							
Portal	Total All Time							
% of EC (Portal)	Total All Time	#%	#%	#%	#%	#%		

Term	Submitted	Complete	Admit	Deposit	Enroll	App Complete %	Admit %	Yield %
Transfer EC	Spring 2019							
Non-Portal	Spring 2019							
Portal	Spring 2019							
% of EC (Portal)	Spring 2019	100%	100%	100%	100%	100%		

Term	Submitted	Complete	Admit	Deposit	Enroll	App Complete %	Admit %	Yield %
Transfer EC	Summer 2019							
Non-Portal	Summer 2019							
Portal	Summer 2019							
% of EC (Portal)	Summer 2019	#%	#%	#%	#%	#%		

Excel linked on [Transfer Maturity Curve and Strategic Resources](#)

Sample Output

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
Transfer EC	Total	8000	6500	4000	3200	81%	49%
Non-Portal	Total	3000	1700	1350	900	57%	53%
Portal	Total	2250	1800	1500	1250	80%	69%
% of EC (Portal)	Total	28%	28%	38%	39%		

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
Transfer EC	Fall 2021	5000	4000	3000	2500	80%	63%
Non-Portal	Fall 2021	2000	1000	800	500	50%	50%
Portal	Fall 2021	1500	1100	900	750	73%	68%
% of EC (Portal)	Fall 2021	30%	28%	30%	30%		

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
Transfer EC	Spring 2022	3000	2500	1000	700	83%	28%
Non-Portal	Spring 2022	1000	700	550	400	70%	57%
Portal	Spring 2022	750	700	600	500	93%	71%
% of EC (Portal)	Spring 2022	25%	28%	60%	71%		

* Dummy data used in this example

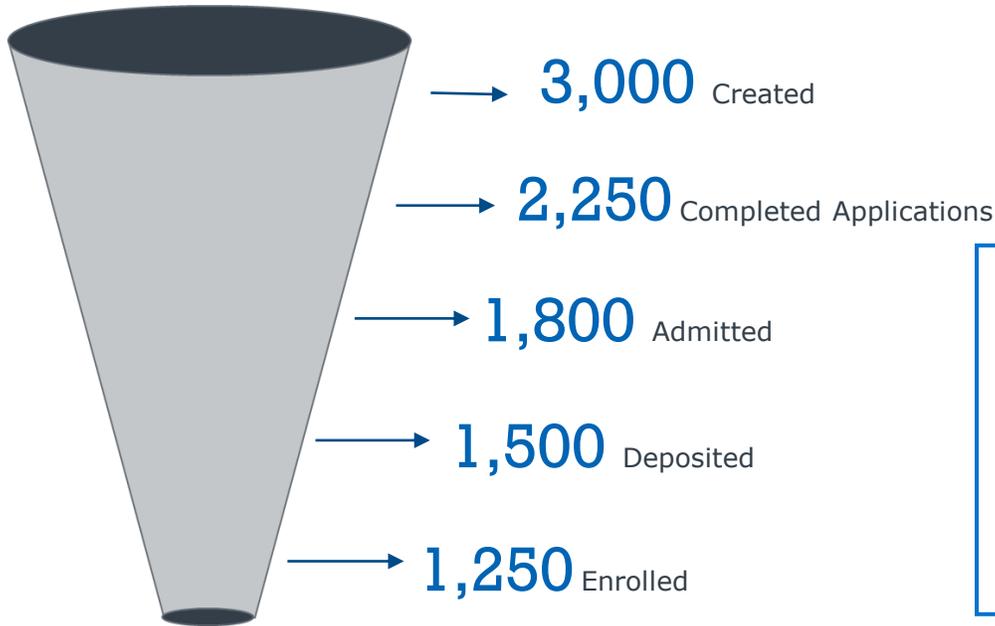
Summary of Portal Users		Total
Portal Accounts Created		3,000
# of Matched Portal Users*		1,500
# of Non-matched Portal Users		1,500
% of Matched Portal Users who applied		66%

*Matched users = Email, LN/DOB or FN/LN Match

Transfer Enrollment and Revenue

Enrollment cycle: Fall 2021, Spring 2022

Account Activity



Portal User Yield:

69%

Transfer EC = 49% yield
 Non-Portal = 53% yield
 Transfer Portal = 69% yield

Yield = Enrolled / Admitted

* Dummy data used in this example
 Matched users = Email, LN/DOB or FN/LN Match

Inquiry Generation

The accounts generated in the Transfer Portal serve as transfer inquiries, which are then exported into your CRM, resulting in cost savings by eliminating the need to purchase inquiries from transfer students.

3,000 Accounts Created	×	\$50 Estimated price per inquiry	=	\$150,000 Saved in one year
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Estimated Cost and Revenue

2022-2023	In-State Per Year	Out-of-State Per Year
Tuition/Fees	\$14,500	\$32,000
Housing & Meals	\$16,200	\$16,200
Books	\$1,850	\$1,850
Transportation	\$2,900	\$2,900
Other	\$2,050	\$2,050
Direct Loan Fee	\$100	\$100
PLUS Loan Fee	\$820	\$820
Total:	\$38,420	\$55,920

In-State:
 \$14,500 tuition/fees
 x 1,250 Transfer Portal users enrolled
 = \$18,125,000.00

Transfer Portal Revenue:
\$18,125,000.00*

*Considerations: Some transfer students are out-of-state; transfer discount rate