

A blue-tinted photograph of the Seattle skyline. The Space Needle is prominent on the left. In the background, snow-capped mountains are visible under a cloudy sky. The text is overlaid in the center.

experience: LIAISON



SEATTLE | FEBRUARY 15-16, 2023

How Creative Coaching and Integrated EdTech Mitigate Melt Among Highest Risk Applicants

Carlton Stroud / Feb 15 / 3:45 – 4:30 PM

experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023

Agenda



- Introduction
- Campus Demographics
- Anti-Melt Committee
- Enrollment Coach Program
- Which technology and why?
- Enrollment Coach Stats
- Lessons Learned



Today's Speaker



Carlton Stroud

*Director, Enrollment
Management Systems*





- Public institution in Merced, CA
- 9104 total undergraduate and graduate enrollment
- 760 graduate students
- About 70% First Generation (Undergraduate)



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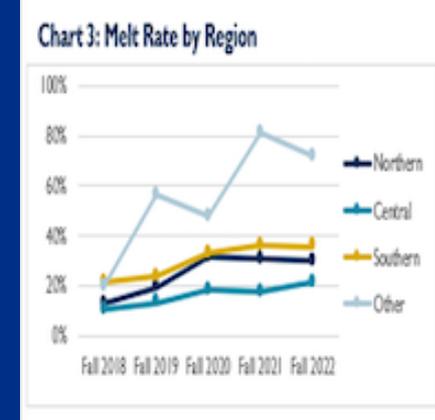
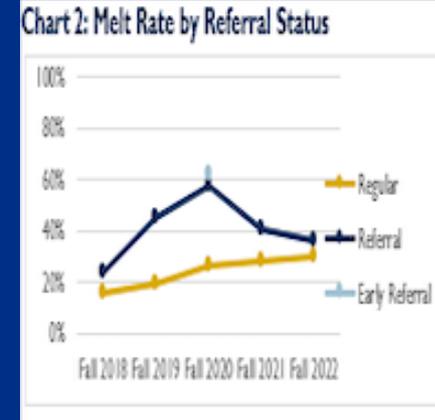
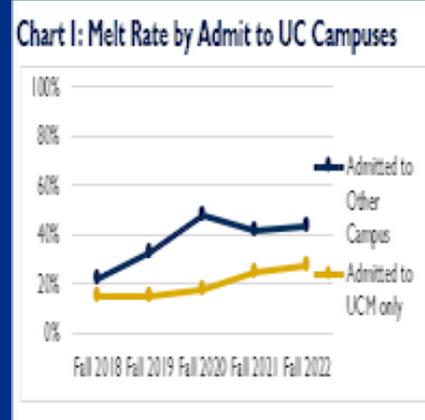
UC Merced Anti-Melt Program

The Campaign, History and Statistics



Anti-Melt

- Why an Anti-Melt Committee
- What's the Purpose
- Who's on the Committee
- How Often do we Meet



Anti-Melt Communication Plan



- Emails
 - 55 topical emails sent to both internal and external email addresses (9 for targeted for parents)
 - Welcome from Chancellor, dates and deadlines, advisor welcome
 - 8 Digital Newsletters (4 are targeted to just parents)
- SMS Communications
 - 8 messages reminders about important deadlines and events
- Webinars
- Social Media



Enrollment Coach Program

Selecting the students



Enrollment Coach Program

Selecting the population of students



- Analysis by the Institutional Research team helped identify the population
 - Research suggests that low-income, first-generation college students with less access to counseling and college advising support are more likely to benefit from proactive outreach and since 65% of UC Merced’s incoming class is low income the enrollment coach program could positively impact fall enrollment.
 - Student could be identified through one of two ways:
 - Admission Application information
 - Pell Eligibility or free/reduced lunch based on their FAFSA

Enrollment Coach Program



- Define a hierarchy of how you want to connect with the student
 - UC Merced Hierarchy of contact
 - Virtual Appointment
 - Phone Call
 - Email
 - Text Message



Enrollment Coach History



- Fall 2020
 - No analysis done of student population
 - Career staff members in SFC, Admission, Registrar, and Financial Aid made the calls
 - Contacted students that had missed enrollment steps, deadlines or documents
 - Calling campaigns changed based on deadlines and who was missing information
- Fall 2021
 - 35 Coaches
 - Career staff
 - Student staff (current student workers and new hires)
 - 1000 incoming first year students selected
 - Communication
 - 1211 emails
 - 411 phone conversations
 - 138 virtual appointments

Enrollment Coach History



- Fall 2022
 - 47 Coaches
 - 4 Lead Coaches – Student staff
 - 1178 emails
 - 650 phone conversations
 - 425 virtual appointments





Enrollment Coach Program

Hiring and training the coaches



Hiring your Enrollment Coaches



- Define your hiring process timeline
 - Early February post jobs
 - Mid to Late February interview and make decisions on who to hire
- Schedule training
 - Early to Mid March Training and Onboarding
 - Enrollment Coach (EC's) headshots (used in communications)
 - EC's write introduction paragraphs (where they are from, what's their major, what are they interested in outside of the classroom, advice to incoming student)
 - Set work schedules for the summer
 - At end of training brainstorm with students to make to go over any questions

Launching the EC Communication Plan



- Early May assign Enrollment Coaches to their student population
- Send EC introduction email after assigning the coach
 - Invite student to make an appointment with the coach
- One week after the introduction email, EC's reach out to their students that have not made an appointment
 - EC's will first call the student
 - If student doesn't answer or respond, EC will send another email
 - If student doesn't respond to email, EC will send a text

Enrollment Coach Calling Campaigns



- Calling campaigns are scheduled throughout summer around deadlines and enrollment steps
 - Late May calling focuses on missing Financial Aid documents
 - Early June is all about registration issues/questions
 - Mid to end of June focuses on Admission documents and deadlines
 - July calls focus on Health Insurance
 - Early August shifts to Housing and move-in questions
 - Mid to End of August focuses on the start of term needs – Immunizations, Violence Prevention (VIP), and transitioning the student from the EC program to where to get help on campus



Which Technology, and Why?



Technology for Enrollment Coaches



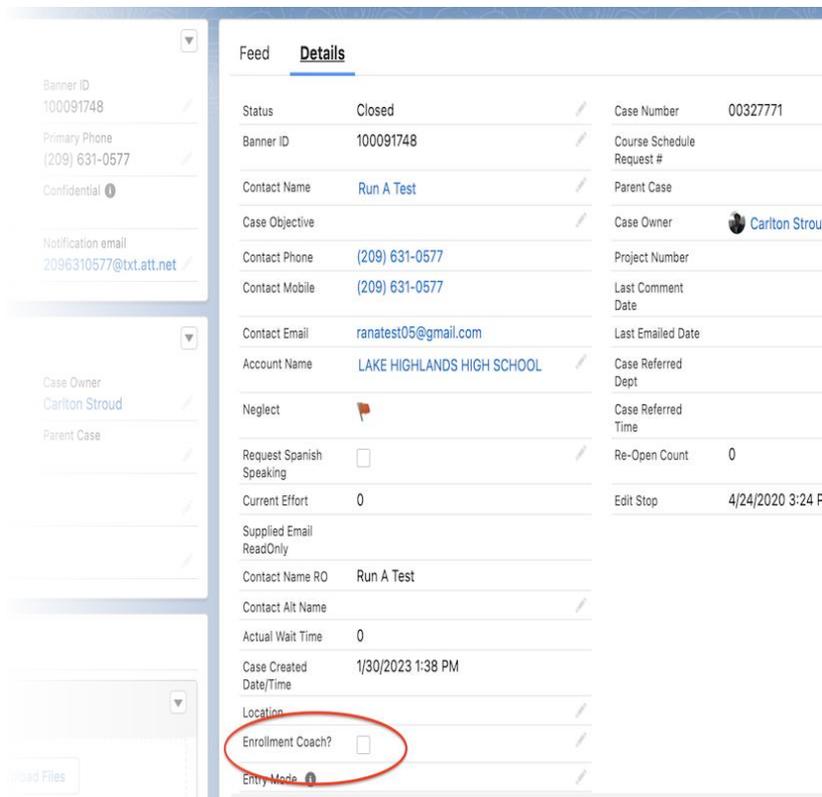
- Salesforce
- Marketing Cloud
- TargetX SMS
- Telemarketing
- Calendly
- Zoom



Salesforce



- Determine the license type needed
- Cases used to track all interactions
 - Fall 2021 utilized a Sub-Category – Enrollment Coach. Didn't allow us to track what we helped or discussed with the student
 - Fall 2022 switched to an Enrollment Coach checkbox. Allows us to track what the EC discussed with the student
- Reports and dashboards



The screenshot shows a Salesforce case record with the following details:

- Case Information:** Banner ID 100091748, Status Closed, Case Number 00327771, Contact Name Run A Test, Case Objective Run A Test, Contact Phone (209) 631-0577, Contact Mobile (209) 631-0577, Contact Email ranatest05@gmail.com, Account Name LAKE HIGHLANDS HIGH SCHOOL.
- Case Management:** Case Owner Carlton Stroud, Parent Case, Project Number, Last Comment Date, Last Emailed Date, Case Referred Dept, Case Referred Time, Re-Open Count 0, Edit Stop 4/24/2020 3:24 PM.
- Case Details:** Neglect (flagged), Request Spanish Speaking (checkbox), Current Effort 0, Supplied Email ReadOnly, Contact Name RO Run A Test, Contact Alt Name, Actual Wait Time 0, Case Created Date/Time 1/30/2023 1:38 PM, Location, Enrollment Coach? (checkbox, circled in red), Entry Mode.

Marketing Cloud



- Mass email
- Dynamic content
- Data Extensions to use non-Salesforce data
- Open and click rates



Hello Carlton,

My name is . I am your Enrollment Coach, and I am your main point of contact for all things UC Merced. I am here to help make your experience as personalized and convenient as possible. I'd love to have the opportunity to meet you and listen to all of your questions about your UC Merced journey. I have appointments on (insert options). Please click this link (insert link) to schedule a time.

When we chat, I can help you with questions related to admissions, financial aid, course registration, billing, campus events, clubs and organizations and many other aspects of UC Merced life.

A little more about me.....(insert paragraph about Coach)

I look forward to meeting you and helping you get started with our campus.

Congratulations on becoming a Bobcat!

STUDENTS FIRST CENTER
5200 N. Lake Road | Merced, CA 95343

TEL: 209-228-7178
EMAIL: studentsfirst@ucmerced.edu
WEB: studentsfirst.ucmerced.edu

TargetX SMS



- One to one texting
- Bulk messaging to a list of students
- Any EC could respond to the texts
- Templated messages to use



Telemarketing



- Easy campaign calling
- EC's would know who to call and then track information about the call
- Create reports and dashboards to track the interactions
- Supervisors can monitor completion of the campaigns

Calendly and Zoom



- Use Campus Calendly license
- Enrollment Coach creates Calendly schedules based on their schedule
- Calendly links are inserted into Marketing Cloud Data Extensions and used in the messages
- Campus is licensed with Zoom
- EC would create the Zoom meeting and send confirmation to student

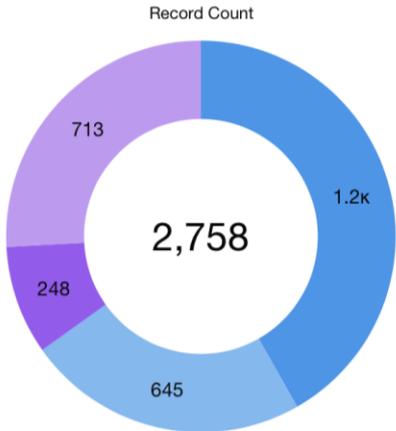


Enrollment Coach Statistics

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202230_EC_Calling_Campaigns



- Member Status
- Had Conversation
 - Left Message
 - No Answer
 - None

C1 - 1384, HC - 614, LM - 354, NA - 120, None - 296
[View Report \(202230_EC_Calling_Campaigns\)](#)

Enrollment Coach Weekly Report



Case Origin ↑	Record Count
Bobcat Caller Referral	2
Email	1170
Email - SFC Support	7
Email - Undergraduate Admission	1
In-Person	5
Phone	650
SMS/Text	10
Virtual Appt	425
Voiceemail	23

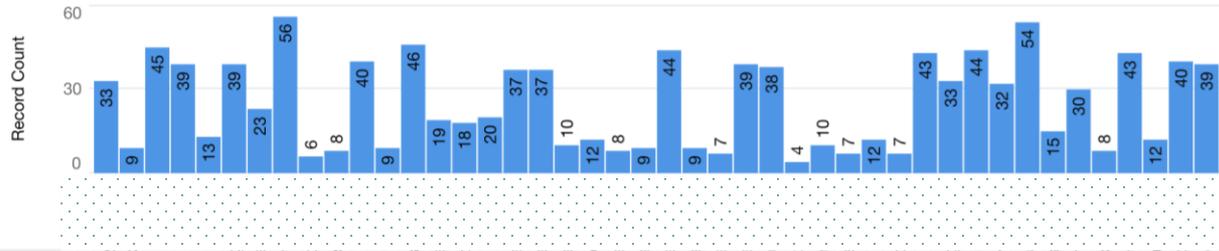
[View Report \(Enrollment Coach Weekly Report\)](#)

Number of Students in Program



1,106

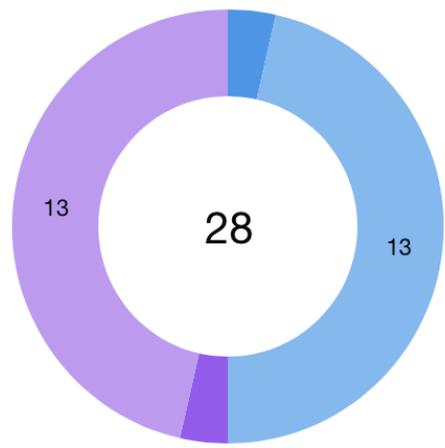
202230_All_EC_Contacts



Member Status

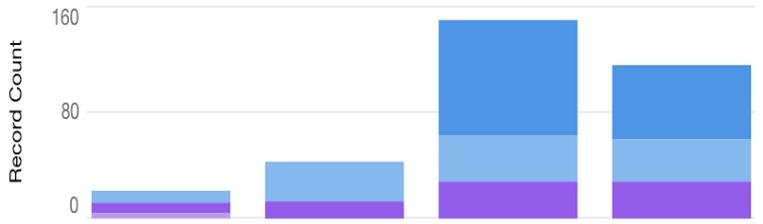
- Had Conversation ●
- Left Message ●
- No Answer ●
- None ●

Record Count



Case Origin

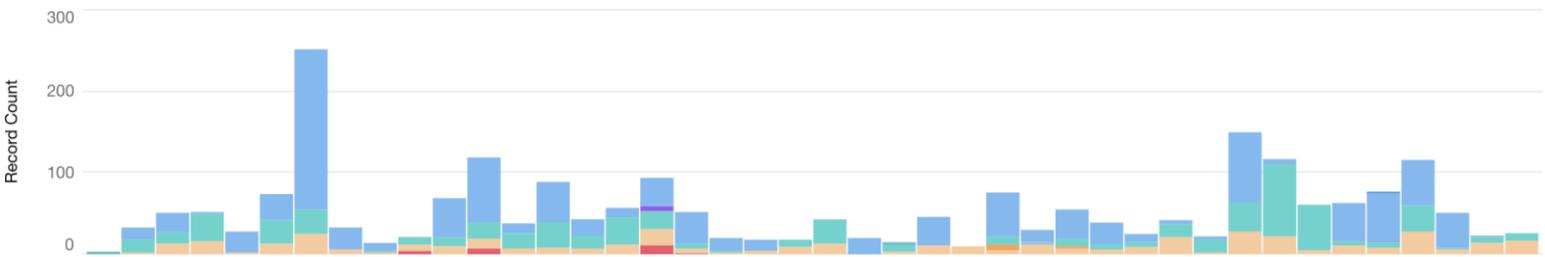
- Email ●
- Phone ●
- Virtual Appt ●
- Voicemail ●



Contact Enrollment Coach Name

[View Report \(EC Supervisor Juan Lopez\)](#)

Enrollment Coach Cases Created



Contact Enrollment Coach Name

[View Report \(EC Supervisor Case View\)](#)

Predicted Melt vs Actual Melt



- Fall 2021
 - Total population 2411 entering first-year students at fall Census
 - 955 students enrolled in intervention
 - 663 at fall Census
 - *Predicted 48% melt with this population*
 - *Achieved 30%*

Predicted Melt vs Actual Melt



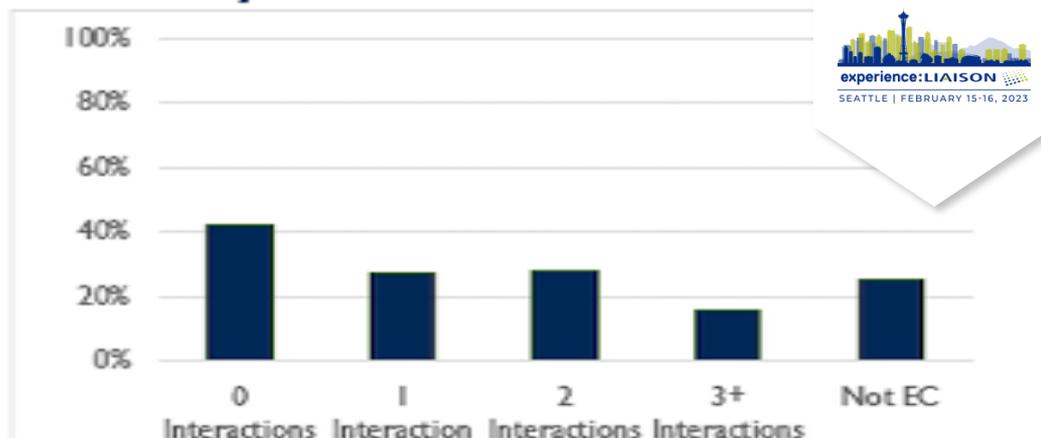
- Fall 2022
 - Total population 2387 entering first-year students at fall Census
 - 1456 students enrolled in intervention
 - 1048 at fall Census
 - *Predicted 30% melt with this population*
 - *achieved 28% melt*
 - *Predicted 14% melt for other students, but saw 25% melt*

Melt Statistics

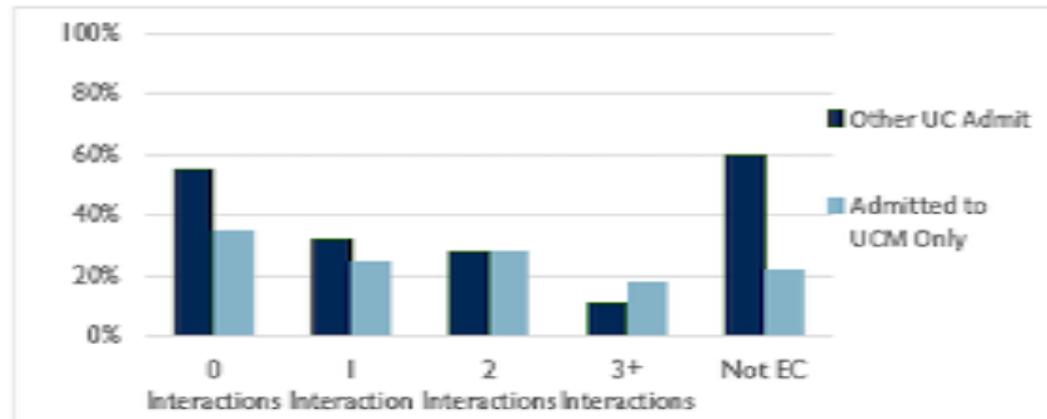


- Initial email not tracked as interaction
 - Appt, phone call, text are interactions tracked in Salesforce
- With no intervention and same melt rate as other students we would have lost an estimated 204 more students

Melt Rate by Interactions



Melt Rate by Interactions and Other UC Admissions



Lessons Learned





Lessons Learned



- Hire your Enrollment Coaches as early as possible
- Define success for your program
- Segment your calling campaigns with pre-determined start and end dates
 - Useful in monitoring Enrollment Coach progress and where help is needed
- Have a schedule, but be flexible to change as challenges arise
- Have a plan for if/when an Enrollment Coach quits early
 - How to re-assign the students to the new coach
 - What communication do you send and from whom
- Start with a smaller population and build your program



Questions?

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Thank You



Carlton Stroud

UC Merced

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