

2023

SOUTHEAST ACT CONFERENCE

BRYANT CONFERENCE CENTER

December 5-6, 2023

ACT® State
Organizations

Session Title: G5: You Can Do It On Your Own: Bringing Search In House

Presenter Information:

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Bringing Search in House



Bethany Moran

*Vice President
Higher Education Consultant Group
Encoura*

A Mission-Driven Organization Committed to Fighting for Equity in Education



Where Informed Decisions Begin



How to Get Started



Get Inspired

Top Concerns We Hear from Clients

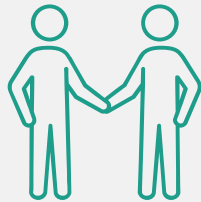
1. "Stealth" applicant rates are so strong.
2. Difficulty tracking source performance.
3. A complex geographic search strategy that isn't flexible.
4. Investing time in re-writing and editing copy that never fit the University voice.

Getting Started: Goals for Success



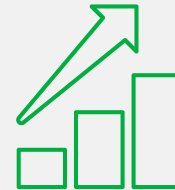
Goal 1

Save the institution money by eliminating vendor contracts that were overly complex and inflexible.



Goal 2

Hire and retain skillsets needed for institutions/office's future.



Goal 3

Create operational efficiencies and own full enrollment funnel.



Goal 4

Individualize brand and maintain a clear voice.

Goals 1 & 2: Save the Institution Money & Retain Skilled Staff

2020-2021 Estimated Search Budget

\$XXX,XXX	Search Vendor Contract
\$XXX,XXX	Cost of Search Names
\$XXX,XXX	Cost of Search/App Gen
\$XX,XXX	Search Vendor 2
\$X,XXX,XXX	

2021-2022 Proposed In-House Search Budget

\$XXX,XXXX	Salary Request (3.5 Position Additions 7 \$ Increases)
\$XXX,XXX	Cost of Search Names
\$XXX,XXX	Search Vendor Contract + Names
\$X,XXX	Name Vendor 2
\$XX,XXX	Name Vendor 3
\$XX,XXX	Name Vendor 4
\$XXX,XXX	Cost of Search/App Gen Postage
\$XXX,XXX	
\$200,000	cost savings

Goal 3: Own the Search Funnel



Goal 4: Recruit Students In Your Own Voice

- Everything is now App-Gen
- Include “non-responders” from email comm flows—because it’s free to email!
- Flexible messaging based on what admissions cares about like our “Choose a Major” quiz and scholarship estimator

How to Operationalize



Preparing Your System: It's Not as Scary as You Think

Search Purchased Files

[College Board](#)
[Encoura](#)
[NRCCUA](#)
[NRCCUA Declared](#)

Source Field =sample value	Destinations
Data Source =eMatch	
DataSource =DSC	
Encoura ID =	Fields Other - Search Encoura ID
ResponseType	
ResponseDate	
Student PIN =	

- Be thoughtful with organizing and naming source formats.
 - Track licensed and purchased files when you begin.
- Continue to use delivered source formats as much as possible.
 - Revisit the field map during this transition—now may be a good time to expand!
- Don't be afraid to create new fields within your CRM.
 - Adding unique IDs can reduce duplicate volume.

Redefining Inquiries

- Prior to bringing search in house, inquiries were known as “hand raisers”. These students completed big steps like completing/submitting an entire form or visiting campus.
- By redefining inquiry parameters, you can see students move more broadly throughout your funnel, including:
 - Has a form or event registrations
 - Has a verified test score
 - Have clicked into specific mailers
 - Started an application
- As a result, you’re able to dedicate specific budget dollars and remove the guesswork—saving time and resources!

Collaborating with External Vendors

Best Practices & Lessons Learned

Be familiar with your fields and how and where you store your data.

We all make mistakes—**don't get caught up in the granular details.**

Cleansed files are the best files! Encoura cleans our partners files which in turn reduces duplicate clean up.

Looking to the Future

- **Create more fields within your CRM** for the unique values provided from outside vendors (e.g., Model Scores and Personas).
- **Create additional reports** to track the efficacy of partnerships and vendor name buys to track and evaluate on our own time.
- **Create new and exciting communications** and mailers that are unique to each student using the new fields and values brought into the system
- **Reduce the length of inquiry forms.**

The screenshot shows a dark-themed website background with a white modal form overlay. The form has a title 'Your journey begins with one step.' and a sub-header 'We'll send you information about programs, the admissions process and connect you with an admissions specialist to guide you.' Below this are four input fields: 'First Name', 'Last Name', 'Student Email Address', and 'Student Phone Number'. A blue 'SUBMIT' button is at the bottom of the form. In the background, there is a list of majors: 'Communication', 'Corporate', 'English', 'Languages', 'History', 'Human Resources', 'International', 'Marketing', 'Political Science', and 'Psychology'. A 'CHOOSE YOUR MAJOR QUIZ' banner is visible in the top left corner of the background.

How to Manage and Maintain



Marquette University and Encoura: A Close Partnership in the Search Process

Marquette had been a long-time user of the Smart+® Predictive Model and had worked with Encoura once a year to:

Review the model rebuild

Talk through model performance with search

When Marquette decided to pull all searches in-house, the University also started to work with Encoura monthly to help with:

Data Analysis, Prospect Performance, and Enrollment Strategy

First Things First: Data is Essential

As we began working together, it was essential that there is a steady stream of data going back and forth between Marquette and Encoura:

- Past enrollment data needed in the building of the Smart+ Predictive Model and rebuilding of the Model every year.
- Current and future enrollment years (inquiry through enrolled funnel data points) sent monthly to update the views in Enrollment Lens for analysis.

This gives us the ability to be able to accurately assess opportunities and challenges in the data, as well as strategize on potential “tweaks” to how we are tracking our students through the funnel.

Smart+ Model Performance

SMART+ Score Distribution by Funnel Point											
Display 2021 as of 11/13/2021 2022 as of 11/13/2022 2023 as of 11/13/2023											
Score Range	Inquiries	Δ	Applicants	Δ	App Completed	Δ	Accepts/Admits	Δ	Deposits/Confirms	Δ	Enrolled
0.90-1.00	10,200	48.04%	4,900	98.53%	4,828	92.00%	4,442	19.05%	846	95.98%	812
0.80-0.89	12,820	27.02%	3,464	98.04%	3,396	88.63%	3,010	10.90%	328	93.90%	308
0.70-0.79	6,525	12.58%	821	96.10%	789	89.61%	707	11.17%	79	93.67%	74
0.60-0.69	3,713	10.77%	400	95.25%	381	85.56%	326	8.59%	28	92.86%	26
0.50-0.59	2,021	10.04%	203	97.04%	197	84.26%	166	6.63%	11	90.91%	10
0.40-0.49	1,158	8.55%	99	91.92%	91	82.42%	75	8.00%	6	100.00%	6
0.30-0.39	679	6.63%	45	86.67%	39	79.49%	31	6.45%	2	100.00%	2
0.20-0.29	302	8.94%	27	96.30%	26	61.54%	16	6.25%	1	100.00%	1
0.10-0.19	111	1.80%	2	100.00%	2	100.00%	2	0.00%	0	0.00%	0
0.00-0.09	15	6.67%	1	100.00%	1	100.00%	1	0.00%	0	0.00%	0

Search Performance

Search Order Performance														
Search / Order Name	Order Date	Student Volume	Inquiries	Δ	Applicants	Δ	App Completed	Δ	Admit	Δ	Deposits	Δ	Enrolled	
Ian/Noel '23 Nat'l/GPA/.8+ w/ ['23 Add On's Oct BK]	10/06/2022	2,171	233	36%	85	98%	83	93%	77	14%	11	91%	10	⋮
Ian/Noel '23 Nat'l/GPA/.8+ w/ ['23 Senior SMART+ Sept BK]	09/16/2022	18,112	1,594	41%	654	99%	645	93%	597	14%	86	93%	80	⋮

Source Analysis

Year over Year Focus Point

Display

2022 as of 11/13/2021

2023 as of 11/13/2022

2024 as of 11/13/2023

Completed App Volume

Inquiry Source

Name	Focus	Inquiries	Δ	Applicants	Δ	Completed Applicants	Δ	Accepts/Admits	Δ	Deposits/Confirms	Δ	Enrolled
Daily Visit	↑ 1,393	3,778	56.99%	2,153	90.99%	1,959	0.00%	0	0.00%	0	0.00%	0
All Tests	↑ 2,021	3,909	53.77%	2,102	96.15%	2,021	0.00%	0	0.00%	0	0.00%	0
College Fair	↑ 704	16,263	7.32%	1,191	87.07%	1,037	0.00%	0	0.00%	0	0.00%	0
Encoura	↓ -739	8,929	9.25%	826	73.12%	604	0.00%	0	0.00%	0	0.00%	0
Common App Suspects	↓ -439	2,035	39.21%	798	70.43%	562	0.00%	0	0.00%	0	0.00%	0
RNL	-61	3,727	17.63%	657	73.06%	480	0.00%	0	0.00%	0	0.00%	0
Open House	↑ 279	766	60.57%	464	88.36%	410	0.00%	0	0.00%	0	0.00%	0
HSV	↑ 370	1,139	40.21%	458	90.17%	413	0.00%	0	0.00%	0	0.00%	0
Search	↓ -1,285	3,393	12.67%	430	74.88%	322	0.00%	0	0.00%	0	0.00%	0

Location Analysis

Conversion

County

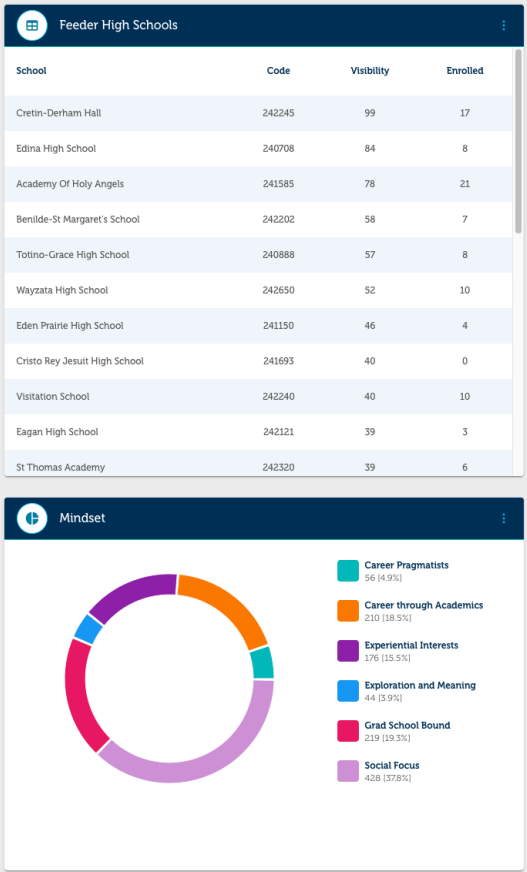
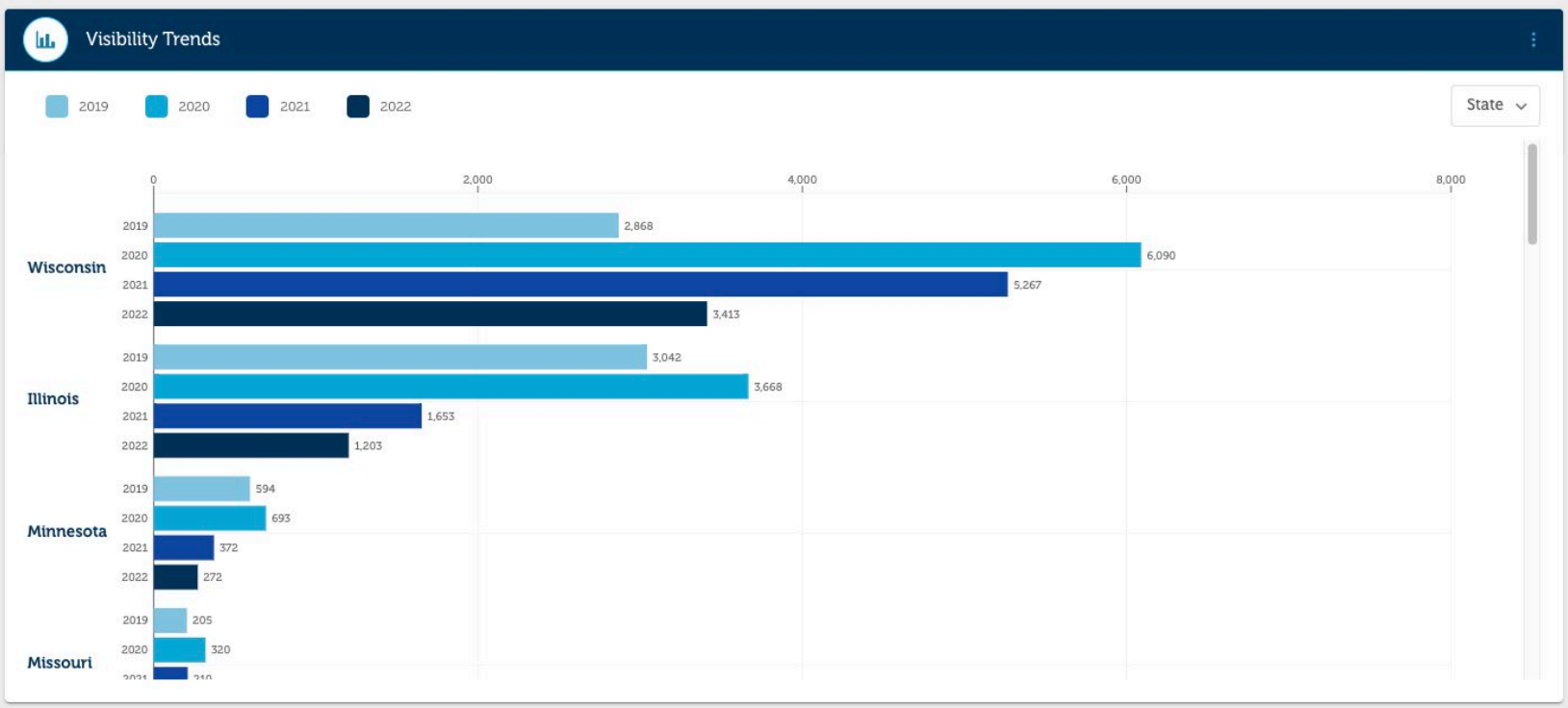
2022 Students as of 11/13/2021

2023 Students as of 11/13/2022

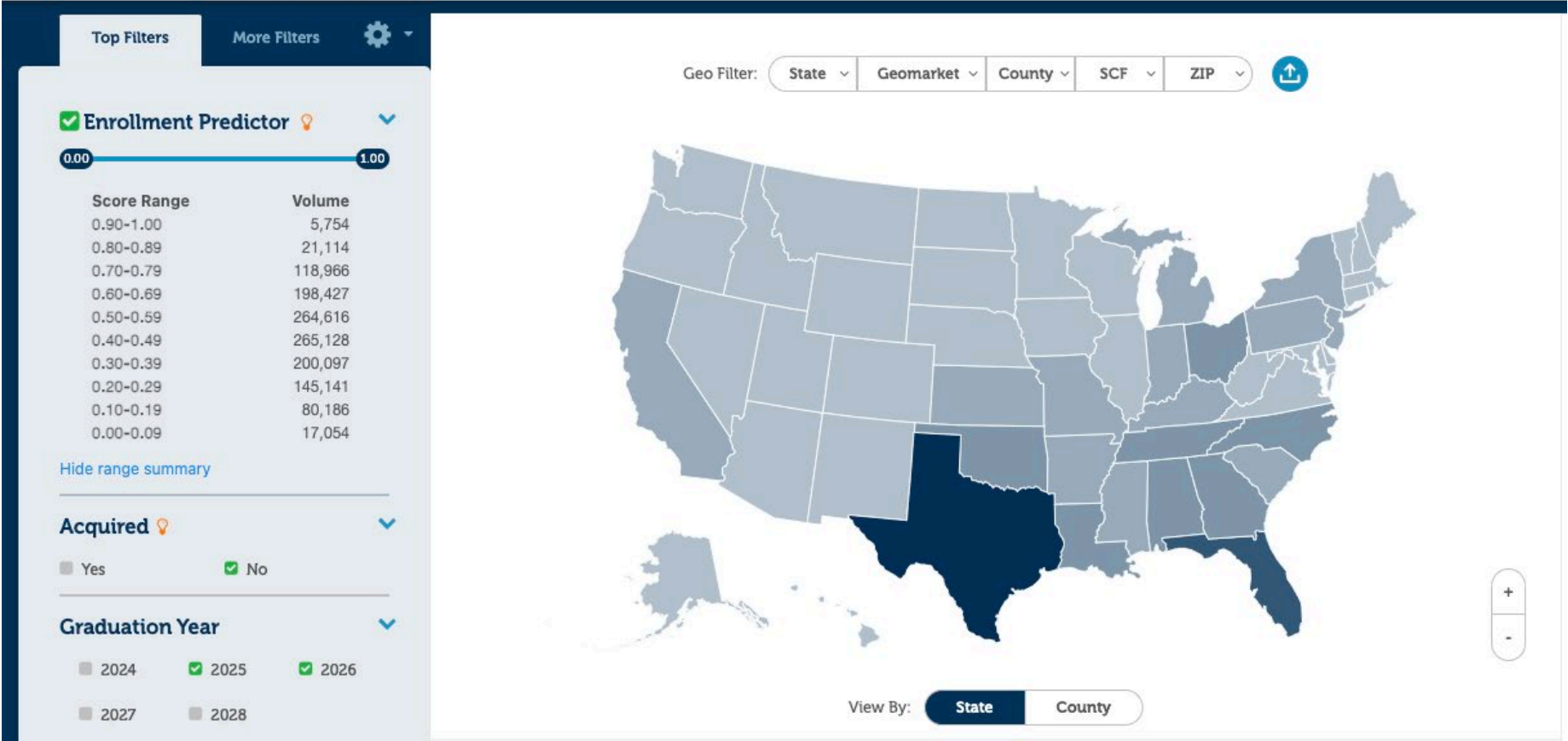
2024 Students as of 11/13/2023

Name	State	Code	Inquiries	Applicants	Δ	Inquiries	Applicants	Δ	Inquiries	Applicants	Δ
Cook	IL	17031	5,939	2,288	38.53%	7,320	2,680	36.61% (▼1.92)	8,045	3,167	39.37% (▲2.76)
Milwaukee	WI	55079	1,915	696	36.34%	2,633	881	33.46% (▼2.88)	3,142	1,083	34.47% (▲1.01)
Dupage	IL	17043	1,591	686	43.12%	1,750	738	42.17% (▼0.95)	2,025	815	40.25% (▼1.92)
Lake	IL	17097	1,380	500	36.23%	1,511	589	38.98% (▲2.75)	1,723	722	41.90% (▲2.92)
Allegheny	PA	42003	65	12	18.46%	1,187	14	1.18% (▼17.28)	1,711	22	1.29% (▲0.11)
Waukesha	WI	55133	1,017	372	36.58%	1,210	423	34.96% (▼1.62)	1,667	592	35.51% (▲0.55)
Los Angeles	CA	06037	311	40	12.86%	487	56	11.50% (▼1.36)	1,434	47	3.28% (▼8.22)

Institutional Visibility



Strategy in Prospect Selection



Continuing to Measure Return on Investment

SMART+ Score Distribution by Funnel Point											
Display 2022 as of 11/13/2021 2023 as of 11/13/2022 2024 as of 11/13/2023											
Score Range	Inquiries	Δ	Applicants	Δ	App Completed	Δ	Accepts/Admits	Δ	Deposits/Confirms	Δ	Enrolled
0.90-1.00	10,851	37.07%	4,023	89.01%	3,581	0.00%	0	0.00%	0	0.00%	0
0.80-0.89	13,591	19.55%	2,657	85.66%	2,276	0.00%	0	0.00%	0	0.00%	0
0.70-0.79	6,423	8.73%	561	81.28%	456	0.00%	0	0.00%	0	0.00%	0
0.60-0.69	3,505	6.96%	244	83.20%	203	0.00%	0	0.00%	0	0.00%	0
0.50-0.59	1,845	5.64%	104	74.04%	77	0.00%	0	0.00%	0	0.00%	0
0.40-0.49	960	4.90%	47	68.09%	32	0.00%	0	0.00%	0	0.00%	0
0.30-0.39	439	2.96%	13	46.15%	6	0.00%	0	0.00%	0	0.00%	0
0.20-0.29	191	5.24%	10	40.00%	4	0.00%	0	0.00%	0	0.00%	0
0.10-0.19	52	1.92%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Key Takeaways



Bringing In House is Possible

It Can Be Done With Planning

1

Understand implications of additional resources needed to achieve results

2

Understand if your CRM is capable of meeting your expectations and handling the data components needed to be successful

3

Have buy in from your Administration, Marketing and other teams on campus

4

Constantly monitor progress of each stage of the funnel and key characteristics



Looking to Engage Families over the Holidays?



Encoura Digital Solutions Winter Packages

Our winter packages were developed to reach students and their parents/guardians on their favorite devices while they're at home and on the go this season.

Act now—these packages are only available for purchase until January 5, 2024!



Application Generation: Jump Start

Encoura will match your list of prospective students to their respective Snapchat accounts and devices. Includes residential targeting to reach the whole family

Application Generation: Build and Nurture

Reach your custom list of prospective students, plus find new prospective students with similar characteristics. Invite students to visit or apply.

Inquiry Generation: Geofencing

Connect to students on high school campuses with Mobile Display or Instagram and Snapchat video ads.

Brand Builder: Family Focus

Reach the entire family with your brand's value propositions through residential targeting.



Contact

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