

Leveraging Your CRM to Improve the Student Experience

What's On The Docket...

- Trends in Higher Education
- Why Student Experience Matters Today
- Using AI to Amplify your Efforts

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PURPOSE-BUILT CRM FOR HIGHER EDUCATION

OVER 1700 COLLEGES AND UNIVERSITIES

OVER 350,000 TOTAL USERS

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7 Billion Emails Sent



68 Million Text Messages
Sent



During Decision Release,
typically shows up on the
top 100 visited websites

Current Landscape

LET'S LOOK AT SOME DATA

Figure 1a. Retention Rates by Starting Enrollment Intensity: All Institutions

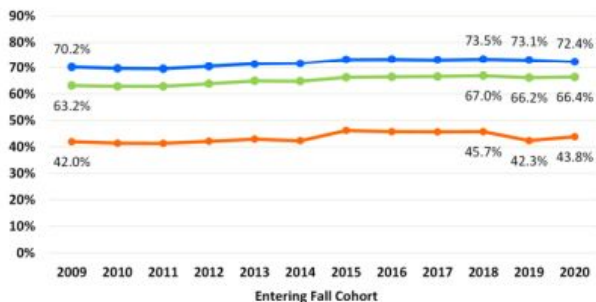
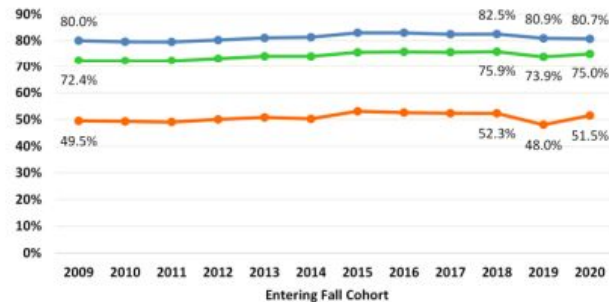


Figure 1b. Persistence Rates by Starting Enrollment Intensity: All Institutions



— Full-Time — Overall — Part-Time



		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Overall	Retention	63.2%	62.9%	62.9%	63.9%	65.0%	64.9%	66.3%	66.5%	66.7%	67.0%	66.2%	66.4%
	Persistence	72.4%	72.3%	72.3%	73.2%	74.1%	74.1%	75.6%	75.8%	75.6%	75.9%	73.9%	75.0%
Full-Time	Retention	70.2%	69.7%	69.6%	70.5%	71.5%	71.7%	73.3%	73.4%	73.2%	73.5%	73.1%	72.4%
	Persistence	80.0%	79.6%	79.5%	80.2%	81.0%	81.3%	83.0%	83.0%	82.4%	82.5%	80.9%	80.7%
Part-Time	Retention	42.0%	41.4%	41.3%	42.1%	42.9%	42.3%	46.2%	45.7%	45.7%	45.7%	42.3%	43.8%
	Persistence	49.5%	49.3%	49.1%	50.0%	50.8%	50.2%	53.1%	52.6%	52.3%	52.3%	48.0%	51.5%

For all figures in this report, data tables and methodological notes are available in the [Appendix](#). Data for the fall 2019 cohort can be found [here](#).

Figure 4a. Retention Rates by Starting Enrollment Intensity:
Public Four-Year Institutions

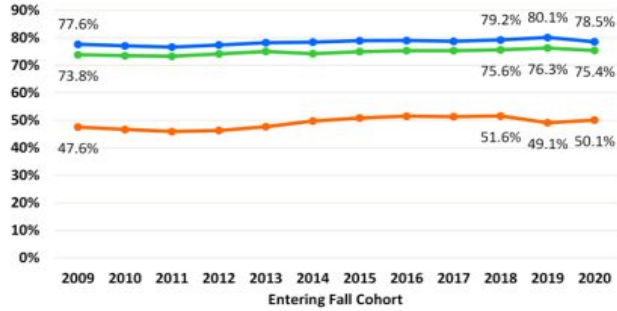
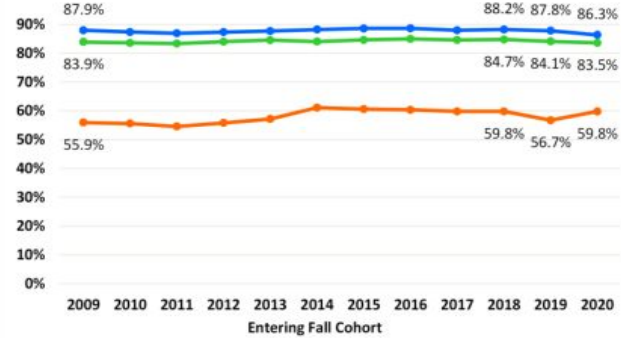


Figure 4b. Persistence Rates by Starting Enrollment Intensity:
Public Four-Year Institutions



● Full-Time ● Overall ● Part-Time



		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Overall	Retention	73.8%	73.5%	73.3%	74.1%	75.0%	74.2%	75.0%	75.3%	75.3%	75.6%	76.3%	75.4%
	Persistence	83.9%	83.6%	83.3%	84.0%	84.5%	84.0%	84.6%	84.9%	84.6%	84.7%	84.1%	83.5%
Full-Time	Retention	77.6%	77.1%	76.6%	77.4%	78.2%	78.4%	78.9%	79.0%	78.7%	79.2%	80.1%	78.5%
	Persistence	87.9%	87.3%	86.9%	87.3%	87.7%	88.2%	88.6%	88.6%	88.0%	88.2%	87.8%	86.3%
Part-Time	Retention	47.6%	46.7%	45.9%	46.3%	47.7%	49.8%	50.9%	51.5%	51.3%	51.6%	49.1%	50.1%
	Persistence	55.9%	55.6%	54.5%	55.8%	57.2%	61.1%	60.6%	60.3%	59.8%	59.8%	56.7%	59.8%

Figure 6a. Retention Rates
by Starting Enrollment Intensity:
Public Two-Year Institutions

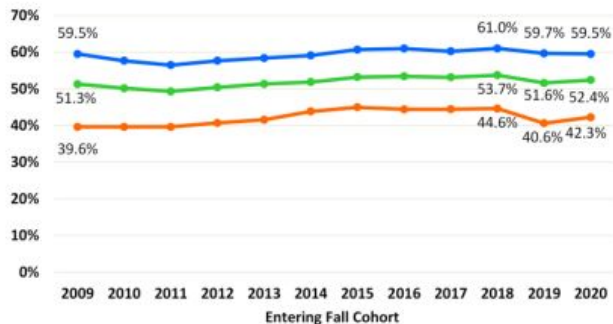
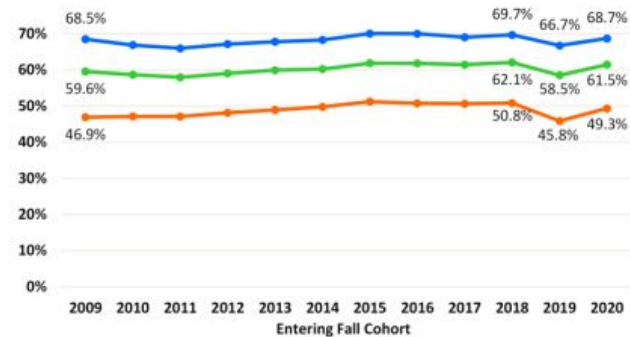


Figure 6b. Persistence Rates
by Starting Enrollment Intensity:
Public Two-Year Institutions



Full-Time Overall Part-Time



		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Overall	Retention	51.3%	50.2%	49.3%	50.4%	51.3%	51.9%	53.2%	53.4%	53.2%	53.7%	51.6%	52.4%
	Persistence	59.6%	58.7%	57.9%	59.0%	59.9%	60.2%	61.9%	61.8%	61.4%	62.1%	58.5%	61.5%
Full-Time	Retention	59.5%	57.7%	56.5%	57.7%	58.4%	59.1%	60.7%	61.0%	60.2%	61.0%	59.7%	59.5%
	Persistence	68.5%	66.9%	66.0%	67.2%	67.8%	68.3%	70.1%	70.0%	69.0%	69.7%	66.7%	68.7%
Part-Time	Retention	39.6%	39.6%	39.6%	40.7%	41.6%	43.8%	45.0%	44.4%	44.4%	44.6%	40.6%	42.3%
	Persistence	46.9%	47.1%	47.1%	48.1%	48.9%	49.8%	51.2%	50.7%	50.6%	50.8%	45.8%	49.3%

Figure 8a. Retention Rates by Starting Enrollment Intensity:
Private Non-Profit Four-Year Institutions

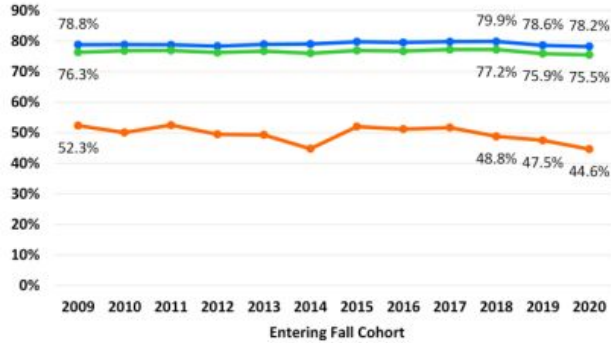
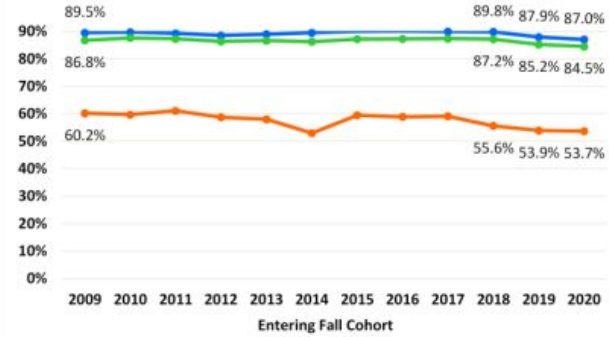


Figure 8b. Persistence Rates by Starting Enrollment Intensity:
Private Non-Profit Four-Year Institutions



Full-Time Overall Part-Time



		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Overall	Retention	76.3%	76.8%	76.9%	76.2%	76.7%	76.0%	76.9%	76.7%	77.2%	77.2%	75.9%	75.5%
	Persistence	86.8%	87.6%	87.3%	86.3%	86.7%	86.2%	87.2%	87.3%	87.4%	87.2%	85.2%	84.5%
Full-Time	Retention	78.8%	78.8%	78.8%	78.3%	78.9%	79.0%	79.8%	79.5%	79.8%	79.9%	78.6%	78.2%
	Persistence	89.5%	89.7%	89.3%	88.5%	89.0%	89.5%	90.0%	90.1%	89.9%	89.8%	87.9%	87.0%
Part-Time	Retention	52.3%	50.1%	52.5%	49.5%	49.3%	44.8%	52.0%	51.2%	51.7%	48.8%	47.5%	44.6%
	Persistence	60.2%	59.7%	61.0%	58.7%	58.0%	52.9%	59.4%	58.9%	59.1%	55.6%	53.9%	53.7%

In the News...

Understanding the College
Enrollment Drop
Inside Higher Ed 9/22

Strategies Changing to Recruit
High-School Students
University Business 11/22

Adjusting Tuition to Attract More
Students
Forbes 12/22

Schools See Largest Enrollment
Decline Since 1943
EdWeek 6/22

Study Looks at Why Students Don't
Go to College
Inside Higher Ed 9/22

How College Closures are Derailing
Student Success
Forbes 11/22

Enrollment Remains Top Risk Cited by
Colleges
Inside Higher Ed 1/23

College Endowments Post Biggest
Losses Since Financial Crisis
Bloomberg 8/22

Spring Enrollment Plunges 4.7%
Higher Ed Dive 5/22

Enrollment has been the biggest risk for
the past 4 years in a row cited by
colleges and universities

*-United Educators
2022 Top Risks
Report*

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Industry Reality

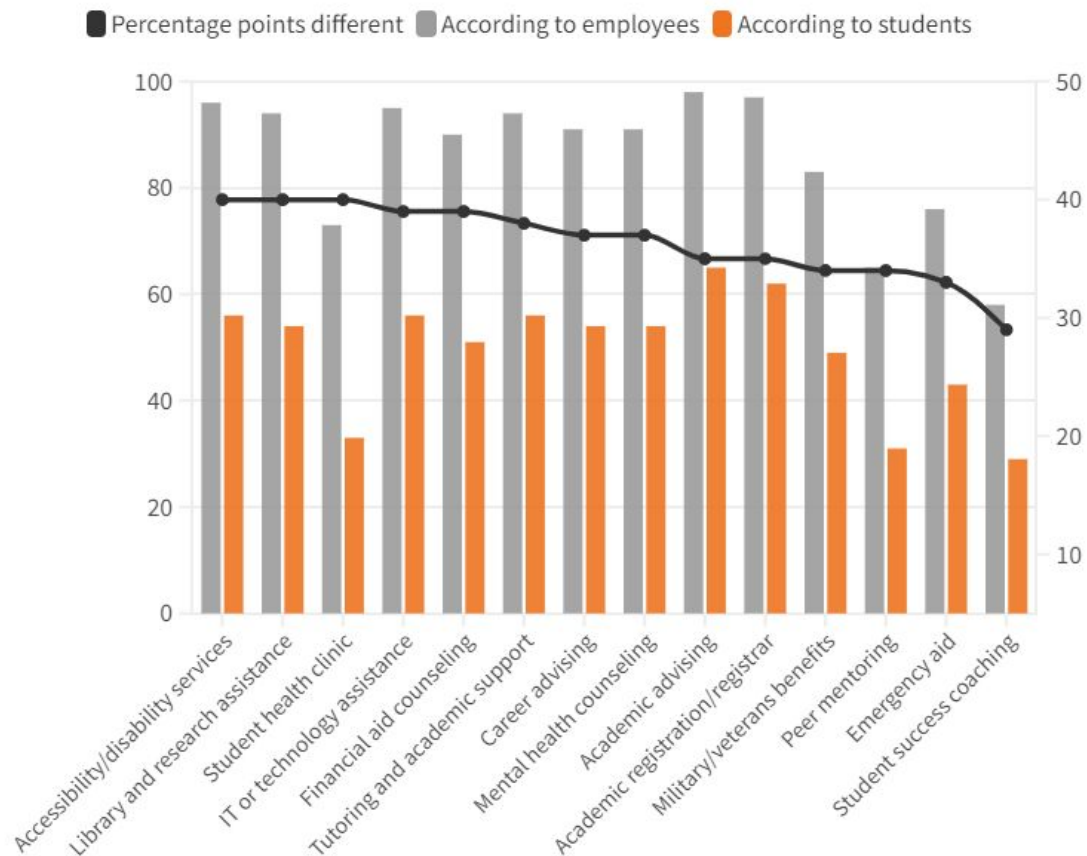
- Still primarily focused and reliant on maintaining size/strength of incoming class
- Changing opinion on the value of degree attainment
- Limited resources for retention
- Disparate systems
- Siloed departments

The average financial loss attributed to attrition for an undergraduate institution is more than **\$9.8 MILLION** per school, based upon tuition of \$18,297.

*-Education Policy
Institute*

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Awareness of available support services at institutions



Source: Tyton Partners Driving Toward a Degree 2023: Awareness, Belonging, and Coordination • Administrator/advisor/faculty n=1,756; student n=2,056

Awareness = Belonging

"Crucially, the report found a direct correlation between awareness of support services and feelings of belonging—students who had higher levels of resource awareness also felt higher levels of belonging in their community."

Remarketing Time!

- Continue to treat their experience *as if* the propensity to leave is high (because it might be!)
- Continue the “high touch” marketing experience that they received throughout the recruitment process
- “Date your spouse”
- Tell them what you're going to tell them, tell them, then tell them what you told them

Action Items

WHAT CAN YOU DO TODAY?

Segmentation

- Bifurcate your student populations into manageable “buckets”
- Create targeted, intentional, and *meaningful* communication plans

Mailings		
+2 Mon, Tue, Wed, Thu, Fri, Sat, Sun, Midday	New International Students Welcome to Slate University! Population Restriction	In Progress Preview
+7 Mon, Tue, Wed, Thu, Fri, Sat, Sun, Midday	Secure Source of Funds Secure Source of Funds! Population Restriction	Completed Preview
+10 Mon, Tue, Wed, Thu, Fri, Morning	Academic Advising Appointment Population Restriction Code NOT IN Interaction - Ad Hoc Meeting, Interaction - Formal Meeting	Completed Preview
+14 Mon, Tue, Wed, Thu, Fri, Morning	Submit your Visa! Submit your Visa Application ASAP! Population Restriction Visa Submission IN No	In Progress Preview
+21 Mon, Tue, Wed, Thu, Fri, Sat, Sun, Morning	Join us for the Holidays! Join us for the Holidays! Annual Festival Invite! Population Restriction	In Progress Preview

Tags & Populations

Tags

Absenteeism

Academic Probation

Athlete

Hold - Academic

Hold - Administrative

Hold - Financial

Homesick

Legacy

Opt Out

Re-Recruit

Study Abroad

Test Record

FERPA Waiver

Populations

Name	Folder
Insert	
Disciplinary	Student Success
Enrolled	Student Success
Faculty	Faculty
Fin Aid	Student Success
Freshman	Student Success
GPA Concern	Student Success
Housing	Residence Life
International	Student Success
Masters	Student Success
Pre-Med	Student Success
Seniors	Student Success
Undeclared Sophomore	Student Success

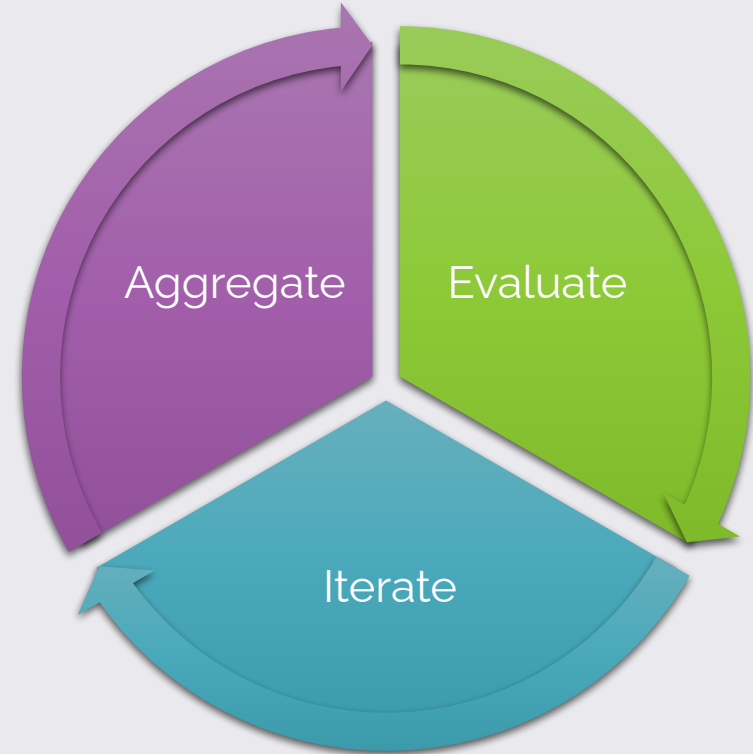
Rules Really Do Rule

- GPA
- Message Engagement
- Campaigns
- Webpage Traffic
- Class Attendance (LMS)
- Fin Aid Buckets
- Advising Appointments
- Conduct
- Housing
- Card Swipes
- Registration Info

If the data exists, use it....

Monitor, Evaluate, Intervene

- Aggregate engagement data
- Adjust messaging and outreach based on data-informed decisions
- Decide on intervention actions



Utilize All The Tools In Your Toolbox

What's This "A.I." Thing I Keep Hearing About?

(INSERT FUNNY LINE HERE ABOUT HOW THIS WHOLE PRESENTATION WAS
CREATED BY CHATGPT OR BARD)

It's Here To Stay

- As of March 2023, there are 14,700 AI start ups in the US alone
- Close to 80% of businesses use or are planning on using AI
- It's not going to take your job, it's going to help you do your job more efficiently
- Education is predicted to be a beneficiary of AI

-Forbes,

In Closing

- Understand the needs of your current students, and provide them a similar "recruitment" experience that your prospective students received
- Embrace AI, understand the tools that you have, and use them
- Disrupt the historical narrative surrounding retention and persistence
- Break down the silos and disparate systems

Thank You So Much For Listening

