

## Part 1: Executive Summary

Developing a comprehensive understanding of how Ohio University is perceived among students at various phases of the student life cycle (from prospective student to alum), by key audiences (including faculty and staff), and at key touchpoints will inform institutional marketing and communications strategy as well as policy and program development across departments and functional areas: admissions, student life, alumni relations, athletics, etc. Bringing you powerful new technologies and research approaches that immediately output actionable and powerful marketing tactics, we at Shmooze are confident that the technology and associated consulting services outlined in this proposal will stand out markedly from the solutions proposed by other vendors and make a compelling case for how partnering with us will enable Ohio University to accomplish myriad institutional goals in a manner that exceeds expectations and that is also innovative, affordable, and sustainable. **In fact, this document includes links to drafts of all interactive surveys that are described in this proposal. Therefore, if we are selected as your partner, you will find that a large portion of the upfront work has already been completed, and this project can commence immediately.**

Shmooze is a two-person partnership. Dr. James Vineburgh designs the market research and lead generation solutions described herein conceptually and executes all strategic consulting (market research design, survey distribution, analysis, and reporting). Dr. Vineburgh (Shmooze Co-Founder and Proposed Project Lead) works with dozens of institutions, utilizing market research, data science, digital technologies, and organizational planning tools to optimize enrollment strategy, recreate their brands, optimize the student experience, and enhance alumni engagement. Dr. Vineburgh is widely published in publications such as the Stanford Social Innovation Review and a frequent conference presenter for organizations that include the American Marketing Association Symposium for the Marketing of Higher Education. His research related to the college search and selection experience of nontraditional students was recently presented in Ruffalo Noel Levitz' E-Expectations series and was featured at the 2016 AMA Symposium for the Marketing of Higher Education. James holds a Ph.D. in Educational Policy and Leadership Studies from the University of Iowa as well as a Master's degree in Educational Studies from Tufts University.

Afaan Bilal develops all of the software used for market research and lead generation.

## Part 2: Partnership Value

**At Shmooze, we are experts in higher education marketing and (exclusively) how to transform perceptual data pertaining to the student experience into a powerful marketing asset that enhances enrollment, student life, and advancement initiatives:** Working with dozens of higher education institutions of all varieties (public, private, community colleges, denominational institutions, etc.), Dr. James Vineburgh (Shmooze Co-Founder and Proposed Project Lead) has helped institutions utilize market research, data science, digital technologies, and organizational planning tools to optimize enrollment strategy, recreate their brands, optimize the student experience, and enhance alumni engagement. Dr. Vineburgh is widely published in publications such as the Stanford Social Innovation Review and a frequent conference presenter

for organizations that include the American Marketing Association. His research related to the college search and selection experience of nontraditional students was recently presented in Ruffalo Noel Levitz' E-Expectations series and was featured at the 2016 AMA Symposium for the Marketing of Higher Education. James holds a Ph.D. in Educational Policy and Leadership Studies from the University of Iowa as well as a Master's degree in Educational Studies from Tufts University.

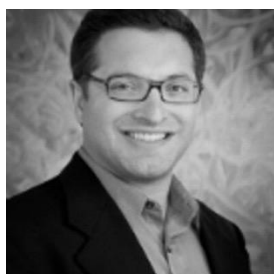
**At Shmooze, we are committed to innovation:** The proposed research methodology herein combines a powerful and proprietary combination of technologies and approaches. Not only will Ohio University obtain access to methods that make conducting quantitative research affordable and able to be executed persistently, but the institution will also be able to leverage some of the research findings to enhance its search engine visibility and enrollment activity.

**At Shmooze, we are committed to affordability and sustainability:** Many of the higher education marketing firms that conduct research charge their institutional clients so much that it becomes cost-prohibitive to gather pertinent information as often as it needs to be collected in order to keep up with rapid shifts in prospective student demographics, communication preferences, etc. In these cases, colleges and universities frequently base crucial marketing strategies and policy/program development upon outdated information. This is a huge problem. We aim to fix this problem by offering innovative and affordable solutions that empower your team to collect data in an ongoing manner and at all important touchpoints so that your decisions are based upon current perceptual information. We do this by offering a software solution on an annual subscription basis with a variety of higher education marketing study templates (brand awareness and perception studies, internal audience studies, alumni satisfaction and engagement studies, studies of students who were accepted but did not enroll, feedback on campus tours and open houses, feedback on financial aid award letters, etc.). Even though this proposal includes our assistance in terms of survey instrument design and distribution, data analysis, and reporting during year one (and, optionally in an ongoing manner), Ohio University will be in a position starting in year two to conduct various research studies as often as desired for several years after this proposed project for less than the cost of what many firms would charge for a one-time research engagement. Additionally, the subscription-based software also provides tremendous value to bolster institutional search engine visibility and enrollment activity.

### **Part 3: Qualifications & Capabilities**

## **ORGANIZATIONAL INFORMATION AND KEY PERSONNEL**

James Vineburgh, Ph.D.



### **Research Lead and Co-Founder of Shmooze**

I founded Shmooze, LLC (a privately held, fiscally healthy, and rapidly growing firm) in 2017 largely due to concerns related to how market

research has traditionally been conducted in higher education. After having worked for as well as created research and digital marketing departments within several well-known higher education marketing firms, I grew increasingly frustrated at how institutions were being charged exorbitant amounts of money to conduct survey research and implement digital solutions. Ultimately, many of the institutions that needed the most help weren't able to afford it while other institutions that could afford to conduct comprehensive research once weren't able to repeat the research as often as is required to track growth and perceptual change. Therefore, the vast majority of institutions have been basing critical marketing decisions upon outdated information while prospective student demographics shift rapidly, communication channel preferences change frequently, tuition levels continue to rise, and institutional marketers are asked to do more with less.

Having conducted scores of studies related to various higher education marketing initiatives, I can state confidently that 90% of the questions that end up on survey instruments come from templates, and many vendors pretend as if they're starting from scratch with every engagement. Our subscription-based software solution provides access to those templates (which are crafted from years of experience conducting higher education marketing research) so that your team can save large amounts of money and conduct research as often as you'd like.

I envision a workflow in which I work closely with your team during year one to customize various research instruments and then distribute, analyze, and report upon the surveys. But, beginning in year two, you will be able to run the same surveys that are now stored in your Shmooze account with or without my intervention. Either way, you will be able to collect data persistently and affordably, enabling the institution to track growth and perceptual change year-over-year while also enhancing institutional search engine visibility and qualified inquiry generation.

In terms of innovation, quantitative survey methodologies and practices hadn't evolved in ages, leading to increasingly lower survey response rates (which lead to important marketing decisions being based upon a non-representative sample of key audience groups). To address that problem, Shmooze transforms data collection into a conversational, branded (and, dare we say "fun") experience that is easily administered across preferred communication channels. Our case studies demonstrate statistically significantly higher response rates compared to the tools that are typically used to conduct quantitative surveys.

Another problem that Shmooze addresses is the tendency for market research to lead to generic, cookie-cutter recommendations that leave institutional marketers clamoring to figure out how to implement solutions that will truly move the needle. Shmooze provides a single technology platform that makes research findings actionable immediately and that also incorporates digital marketing tools that drive brand awareness and enrollment. We won't leave you with a 200-slide PowerPoint deck that leaves your team asking, "Now what?" at the end. Instead, we will empower Ohio University to leverage powerful, cutting-edge tools that address market research and digital marketing needs in a sustainable, affordable, and innovative manner.

## SELECTED PUBLICATIONS

The following links lead to articles and presentations that provide additional details related to my higher education marketing experience and expertise.

- [Adult E-Expectations](#)
- [The Value of Retargeting for Student Recruitment](#)
- [Optimizing Enrollment Management with Predictive Modeling](#)
- [The College Admissions Cookbook](#)
- [Saving Higher Education with Social Media?](#)
- [Findings from the Field: The Donor Motivation Study in Practice](#)

### c. Relevant Projects

Pertaining to all of the references below:

I am currently working with Christian Brothers University on the following projects:

- Brand Awareness and Perception Studies of prospective undergraduate and graduate students
- Study of admitted students who did not enroll
- Study of matriculated students
- Study of Alumni (includes publishing of ratings and reviews to enhance SEO and enrollment activity)
- Implementation of Website Widgets to enhance enrollment activity from the website

I am currently working with MSSU on the following projects:

- Brand Awareness and Perception Studies of alumni and current students that will be published as ratings and reviews on the institutional website to enhance SEO, online reputation, and inquiry generation capabilities
- Predictive modeling of enrollment propensity

I am currently working with York College of Pennsylvania on the following projects:

- Study of admitted students who did not enroll
- Study of matriculated students

I am currently working with The Evergreen State College on the following projects:

- Brand Awareness and Perception Studies of prospective students to inform persona development
- Brand Awareness and Perception Studies of current students to inform persona development
- Study of Alumni (includes publishing of ratings and reviews to enhance SEO and enrollment activity)
- Study of admitted students who did not enroll (multiple years)

I have been working with Kalamazoo College on the following projects:

- Brand Awareness and Perception Study of prospective students
- Surveys of financial aid award process, campus tours, and open houses

d. References

## References

Company Name	Christian Brothers University		
Address	650 E Pkwy S, Memphis, TN 38104		
Contact Name	Dr. Anne Kenworthy, Vice President for Enrollment		
Phone	(901) 321-4213	Email address	akenwort@cbu.edu

Company Name	Missouri Southern State University		
Address	3950 E Newman Rd, Joplin, MO 64801		
Contact Name	Cassie Mathes, Director of Marketing and Public Relations		
Phone	(417) 483-1455	Email address	cassie.mathes@uni.edu

Company Name	York College of Pennsylvania		
Address	441 Country Club Rd, York, PA 17403		
Contact Name	Danny Green, Dean of Enrollment		
Phone	717.815.1924	Email address	greend@ycp.edu

Company Name	The Evergreen State College		
Address	2700 Evergreen Pkwy NW, Olympia, WA 98505		
Contact Name	Eric Pedersen, Chief Enrollment Officer		
Phone	(360) 867-6310	Email address	pedersee@evergreen.edu

Company Name	Kalamazoo College		
Address	1200 Academy St, Kalamazoo, MI 49006		
Contact Name	David L. Anderson		
Phone	269-532-9902	Email address	david@riskclimate.com

e. Unique consulting methodology or approach to be employed for this engagement.

Part 5 addresses the unique methodology and approach that will be used for this project.

#### **Part 4: Primary Contact Information**

Dr. James Vineburgh  
Co-Founder of Shmooze  
[james@shmooze.io](mailto:james@shmooze.io)  
319-448-0757

#### **Part 5: Proposed Work Breakdown Option(s) to fulfill the Scope of Work outlined in SECTION 3 above**

## QUANTITATIVE RESEARCH APPROACH

We propose to conduct a comprehensive set of studies of Ohio University in which the following audience segments will participate:

- Prospective Students (at various touchpoints and phases of the enrollment funnel)
- Current Students
- Alumni
- Faculty and Staff

Although all study participants will be asked to rate Ohio University along many of the same topics, there will be many questions that pertain solely to specific audience segments.

In terms of prospective students' feedback, the survey will inquire about:

- How prospective students/parents first learned about Ohio University
- Prospects' levels of awareness and perceptions of Ohio University vis-à-vis competing and aspirant institutions
- What attributes are most important in the college selection process and how Ohio University is perceived along those same attributes as well as compared to competing institutions
- Where Ohio University ranks in prospects' consideration sets and why
- Prospects' and parents' perceptions of Ohio University's website, campus tours, social media, and recruitment communications
- How prospective students prefer to communicate with institutions during the enrollment decision process
- Values, Beliefs, Goals, and Habits of prospective students that can be used to develop personas for recruitment marketing purposes



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Tufts



**When evaluating which college/university to attend, how important is the quality of your program/major of interest (using the following 5-point scale where 1 = Not at all important and 5 = Very important)?**

**5 = Very important**



**When evaluating which college/university to attend, how important is it that graduates get good jobs or get accepted into good graduate programs (using the following 5-point scale where 1 = Not at all important and 5 = Very important)?**

1 = Not at all important

2

3

4

5 = Very important

Please select one of the options above



Among admitted students who did not enroll, we will develop a better understanding of:

- Where the students enrolled and why
- What attributes are most important in the college selection process and how is Ohio University perceived along those attributes versus the school where they chose to enroll
- Perceptions of the institution's website, campus tours, social media and recruitment communications as well as how those items factored into their decision-making process
- How prospective students and prefer to communicate with institutions during the enrollment decision process
- Values, Beliefs, Goals, and Habits that can be used to develop personas for recruitment marketing purposes





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Which college or university will you be attending:

**Tufts**

What is your overall perception of Ohio University?

**Good**

Why did you choose not to attend Ohio University? Please select all that apply.

☐ Social reputation and other things I heard

☐ Personal circumstances

☐ Could not find or get into programs/courses of interest

☐ Ohio University was not the right fit for me

☐ A degree from Ohio University would not be helpful for me getting a job or for getting into grad school


Please select one or more of the options above

## Campus Visit/Tour Surveys

Revisiting the benefit of being able to conduct research in an affordable and persistent manner at key touchpoints, we will work with Ohio University's admissions team to develop surveys that can be distributed to all prospective students who tour Ohio University and/or attend open houses.




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**How was the length of the campus tour?**

The right length



**On a scale of 1-5 (where 5 is very knowledgeable), how knowledgeable was your tour guide?**

Very knowledgeable



**On a scale of 1-5 (where 5 is very friendly), how friendly was your tour guide?**

Not at all friendly

2

3

4

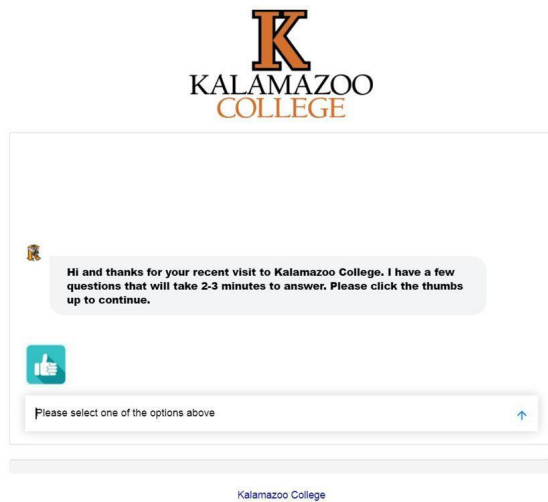
Very friendly

Please select one of the options above

28% complete

Your institution's brand is something that people experience at every touch point, at various locations, and every day. Although the other studies that we have proposed for this project should be conducted annually, prospects are visiting and considering Ohio University throughout the year. Therefore, we will ensure that the perceptions of those who tour Ohio University and/or attend open house events are captured soon after their visits so that tours and events can be optimized and so that additional perceptions of the institution, its tour guides, admissions personnel, and others who interact with prospective students are captured daily.

## Case Study: How Kalamazoo College used the Listen module to increase survey participation rate by 22%



*"At Kalamazoo College, we are gathering feedback from our prospective and admitted students at various points in the college selection process. Shmooze provides a powerful and flexible platform with which we can invite people to participate in "conversational" surveys via email, text message, and other channels. Now, we are able to reach students on their preferred channels with a text message-like user experience that incorporates our branding and that ultimately enables us to collect important data to inform our admissions and financial aid functions."*

**David Anderson, Director of Admission at Kalamazoo College**


### Financial Aid Award Letter Survey

Among admitted students, we will send a survey after receipt of financial aid award letters to determine the extent to which:


- The award letter was clear and comprehensible
- The offered amount was sufficient
- The letter was received before, around the same time as, or after financial aid award letters were sent by competing institutions




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 **Have you received your financial aid award letter from Ohio University?**

**Yes**

 **Was the financial aid award letter easy to understand?**

**Yes**

 **How do you feel about the amount of financial aid that you were offered?**

Please select one of the options above 


## Current Students

Among current students, we will develop a better understanding related to perceptions of:


- Current students
  - Academic quality
  - Rank and reputation
  - Quality of major
  - Quality of faculty
  - Quality of academic support and advising
  - Value for the investment required
  - Quality of student life
  - Quality of social opportunities both on and off campus
  - Internship/employment opportunities
  - Perceptions of whether the institution is headed in the right direction
  - Communication channel preferences
  - Values, Beliefs, Goals, and Habits that can be used to develop personas for recruitment marketing purposes




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 How did you first learn about Ohio University?

**Parent(s)**

 Where did Ohio University initially rank among the schools you were considering?

**1st choice**

 As you learned more about Ohio University prior to enrolling, please rate your perceptions of your Visit to/Tour of campus/center on a scale of 1-5 (1 = Very poor and 5 = Very good).

Please select one of the options above 

## Alumni Survey and Transformation of Data into a Powerful Marketing Asset

Among alumni, we will develop a better understanding related to perceptions of:


- The alignment of academic preparation and employment readiness/success in the workplace
- Alumni perceptions of connectedness
- Current and desired levels of alumni engagement as well as via what channels




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a scale of 1-5 (where 1 = Very poor and 5 = Very good).

4

 Please rate the quality of the academic advising that you received in your major/program on a scale of 1-5 (where 1 = Very poor and 5 = Very good).

4

 Please rate the extent to which you feel that your degree program prepared you for employment on a scale of 1-5 (where 1 = Not to any extent and 5 = To a great extent).

1 = Not to any extent   2   3   4   5 = To a great extent

Please select one of the options above

We will also ask alumni and current students to provide testimonials (if they are willing) related to their experiences (past or present).

Although the research findings will lead to various recommendations to inform marketing and communications strategies across departments and programs using multiple channels and messages, we plan to leverage some of the data in a way that will have immediate and powerful impact upon the institution's search engine visibility and enrollment activity.


With the perceptual data from alumni and current students in hand, we will transform approved institutional and program-level feedback into star-based ratings and reviews and then implement them on key marketing and academic program pages on your website. This enables the people who can truly articulate the value of an Ohio University experience and degree to promote the institution in an authentic and differentiated manner. At the same time, the inclusion of these ratings and reviews is looked upon favorably by Google's search algorithm so that the institution's and its programs' search engine visibility is improved while enrollment activity from the website will increase.

## Case Study: How Concordia used the Publish module to increase traffic to academic program pages by 81%

About 273,000 results (0.81 seconds)

**Elementary Education - Concordia University-Nebraska**  
www.cune.edu/academics/undergraduate/elementary-education/   
★★★★★ Rating: 4.4 - 387 votes  
Elementary school teachers are compassionate, understanding and kind. They are passionate about learning and teaching. Though the job can be challenging, ...

**Education Department - Concordia University, Nebraska | #GoHigher**  
www.cune.edu/directory/departments/education-department/   
College of Graduate Studies & Adult Education, Education Department, Intercultural Studies ...



Elementary Education	
Student and Alumni Reviews	
Concordia University is focused on providing an exceptional experience and we ask our students to provide feedback on all aspects of their student experience. The ratings and comments below are from our annual survey of all graduates regarding their experience in the Elementary Education program, the academic department and the university.	
Quality of teaching ★★★★★ 4.7	Accessibility of faculty ★★★★★ 4.64
Writing skills developed ★★★★☆ 4.12	Speaking skills developed ★★★★☆ 4.36
Critical thinking skills developed ★★★★☆ 4.39	Quality of academic advising ★★★★☆ 4.33
Adequacy of classroom resources ★★★★☆ 4.36	Quality of technology integration ★★★★☆ 4.15
Usefulness of your internship or field experience ★★★★★ 4.67	Overall experience ★★★★★ 4.56

### The issue

- Improve search engine optimization strategies
- Research identified the need to explore new opportunities for differentiation of undergraduate and graduate programs.

### How we helped

- Published reviews from over 1,300 graduating students for over 30 academic programs
- Over 800 comments published
- Expanding to include 10 additional graduate programs

Among faculty and staff, we will develop a better understanding related to perceptions of:

- Interactions among faculty/staff and students
- Opportunities to enhance levels of engagement among faculty/staff and students
- What faculty/staff believe makes Ohio University students unique as well as what they perceive to be strengths and weaknesses of students in terms of academic capabilities, social opportunities, internship opportunities, etc.



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**Please rate Ohio University on its academic reputation (using the following 5-point scale, where 1 = Very poor and 5 = Very good).**

4



**Please rate Ohio University on its graduates' success in terms of obtaining high-quality employment opportunities (using the following 5-point scale, where 1 = Very poor and 5 = Very good).**

1 = Very poor

2

3

4

5 = Very good

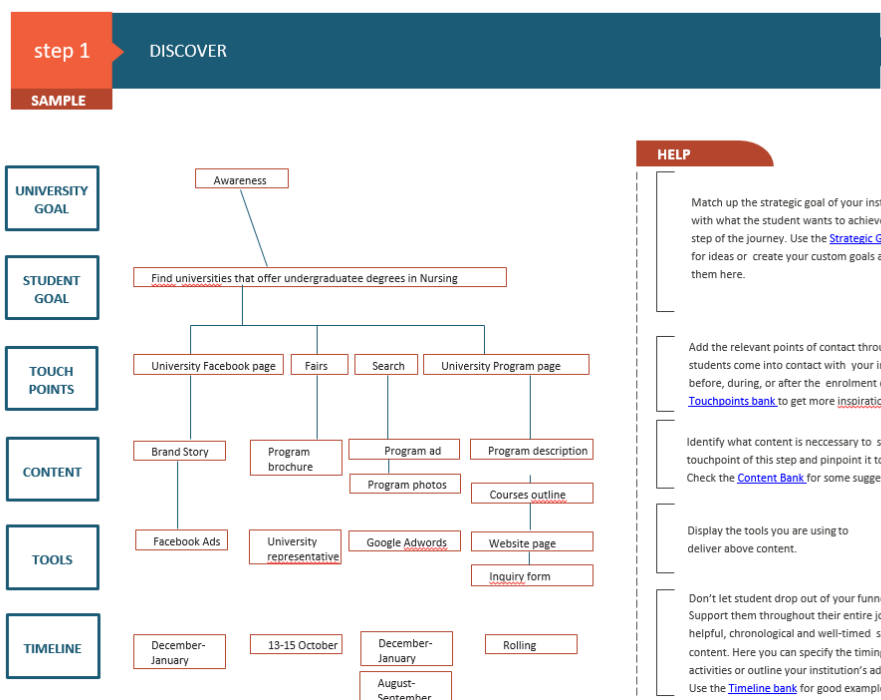
Please select one of the options above



## Deliverables

During the proposed engagement, all surveys will be analyzed and reported upon using PowerPoint/PDF. Each study will have an individual report associated with it. However, an aggregate report that synthesizes findings across audiences (prospective students, current students, faculty/staff, and alumni) will also be prepared during each year of the project that examines, compares, and contrasts pain points, positive sentiments, etc. For example, it might be found that prospective students experience difficulty registering for classes online while current students report feeling the same way. Using this example, key findings impacting the full life cycle of the student experience will be examined and presented in the form of journey maps that plot experiences and associated perceptions of those experiences graphically.





All study reports and associated artifacts (including journey maps and interactive dashboards) will always provide key findings and recommendations sections that will be referenced when conducting stakeholder workshops designed to translate study findings into action. Recommendations will always be prioritized and presented in ways that clarify steps for implementation (technology implications, human resource implications, etc.) as well as associated budget and timing.

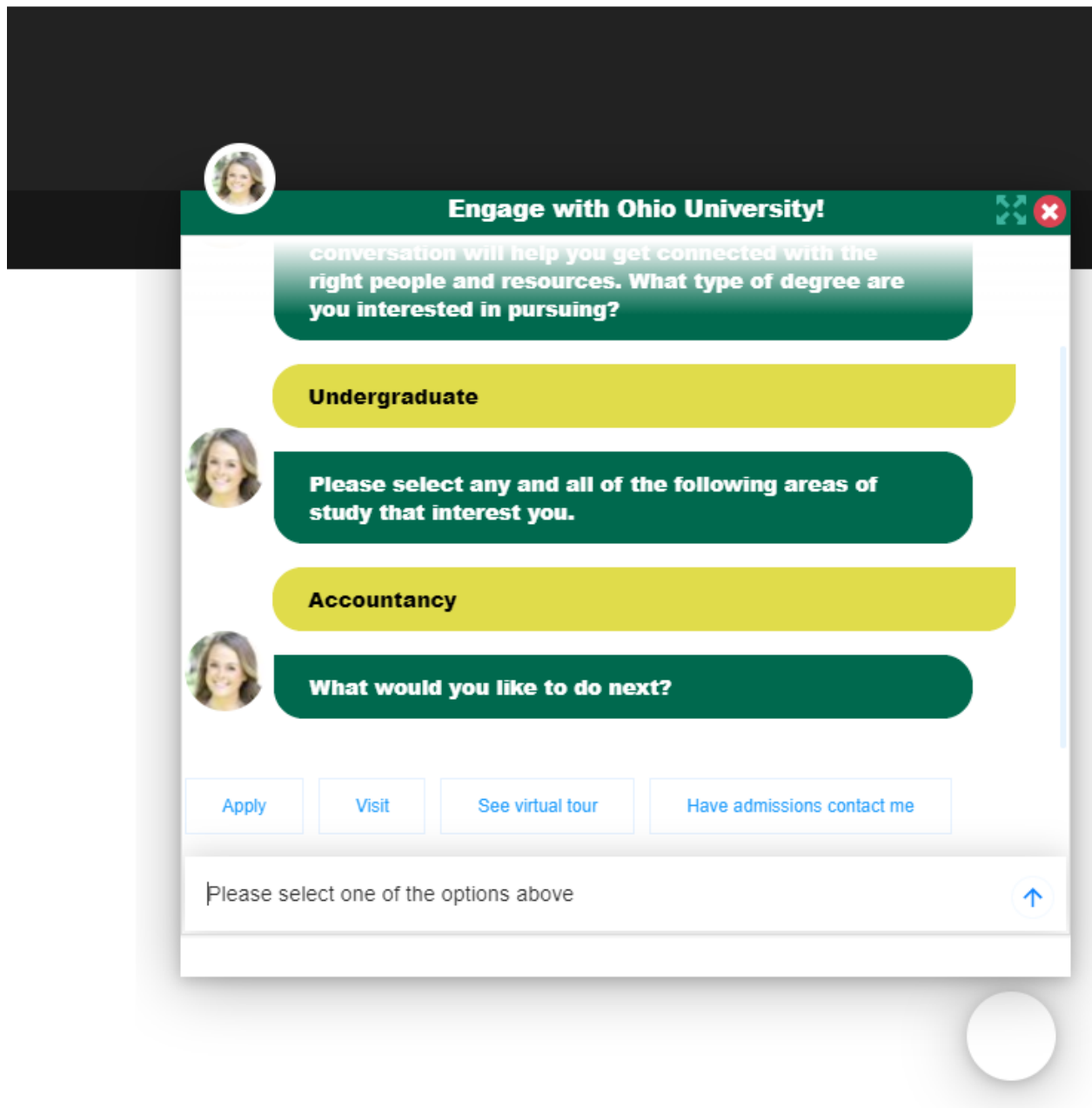
## Timing and Current Study Drafts

All studies described in this proposal are included here in draft form. The studies are typically in the field for three weeks, and analysis and reporting can be done within two weeks per study.

- Prospective Student (Brand Awareness and Perception) Study Draft: <https://app.shmooze.io/converse/c/584>
- Admitted-Non-Enrolled Study Draft: <https://app.shmooze.io/converse/c/585>
- Campus Tour Study Draft: <https://app.shmooze.io/converse/c/586>
- Financial Aid Award Letter Study Draft: <https://app.shmooze.io/converse/c/587>
- Current Student Study Draft: <https://app.shmooze.io/converse/c/588>
- Alumni Study Draft: <https://app.shmooze.io/converse/c/589>

- Faculty and Staff Study Draft: <https://app.shmooze.io/converse/c/590>

A website widget(s) for automated lead capture is also included in draft form:  
<https://www.shmooze.io/ohiouiversitydemo/>



**Engage with Ohio University!**

conversation will help you get connected with the right people and resources. What type of degree are you interested in pursuing?

**Undergraduate**

Please select any and all of the following areas of study that interest you.

**Accountancy**

What would you like to do next?

[Apply](#) [Visit](#) [See virtual tour](#) [Have admissions contact me](#)

Please select one of the options above

Once the campus tour and open house studies are approved, we will coordinate with Ohio University to get the names, email addresses and/or mobile phone numbers of prospective students who tour Ohio University's campuses and/or attend open houses and then invite them to

participate in the surveys within 24 hours after their tour experience. Although Ohio University will be able to access the data in real time, we will provide monthly reports of campus tour and open house study findings and provide recommendations based upon the data. A similar workflow pertains to the financial aid award letter study.

I will personally execute all deliverables described in this proposal. I am currently working on a handful of engagements that are very similar in scope to this proposed project. Those current clients (all of whom are provided as references) would be happy to speak to their experiences in working with me in terms of quality of deliverables, work atmosphere/environment, timeliness, and overall value.

In years two and three, it is important to note that Ohio University has the option to utilize me for dissemination and analyses of the surveys or to execute those deliverables using its own team (which would result in considerable cost savings).

## Investment Requirements for Year One

<b>Project Component</b>	<b>Timing</b>	<b>Investment</b>
<b>Prospective Student Study</b>	Expected Completion in Q1 of 2020	\$7,000
<b>Admitted-Non-Enrolled Study</b>	Expected Completion in Q1 of 2020	\$5,000
<b>Campus Tour Study</b>	Ongoing	\$7,000
<b>Financial Aid Award Letter Study</b>	Expected Completion within a month after financial aid award letters have been sent to admitted students	\$5,000
<b>Current Student Study</b>	Expected Completion in Q1 of 2020	\$7,000
<b>Alumni Study</b>	Expected Completion in Q1 of 2020	\$7,000
<b>Ratings and Reviews on Website to Enhance SEO and Enrollment Activity</b>	Expected Completion in Q1 of 2020	\$5,000
<b>Study of Faculty and Staff</b>	Expected Completion in Q1 of 2020	\$7,000
<b>Website Widget to Automate Lead Capture</b>	Q4 of 2019	Value Add
<b>Campus-Based Workshop and Presentation</b>	Beginning of Q2 of 2020	\$2,500**
<b>Total Investment</b>		\$52,500*

\* List purchase costs are not included.

\*\* Travel and expenses will be billed separately.

## Investment Requirements for Years Two and Three

<b>Project Component</b>	<b>Timing</b>	<b>Investment</b>
Annual Subscription for Shmooze Software, which includes: <ul style="list-style-type: none"> <li>• All research studies from year one</li> <li>• Widget for Automated Lead Capture</li> </ul>	Ongoing	\$20,000 (two years of subscription pricing included)
(Optional) Dissemination and Comparative/Longitudinal Analyses of all seven studies from Year One: <ul style="list-style-type: none"> <li>• Prospective Student Study</li> <li>• Admitted-Non-Enrolled Study</li> <li>• Campus Tour Study</li> <li>• Financial Aid Award Letter Study</li> <li>• Current Student Study</li> <li>• Alumni Study</li> <li>• Study of Faculty and Staff</li> </ul>	All completed one year after initial studies' completion dates listed in year one table (above)	\$56,000 (two years of subscription pricing included)
Study of Recent Graduates to Add to Ratings and Reviews on Website	Completed within one month of graduation in 2021 and 2022	\$10,000 (two years of subscription pricing included)
<b>Campus-Based Workshop and Presentation</b>	Beginning of Q2 of 2021 and 2022	\$5,000**
<b>Total Investment</b>		\$35,000 - 91,000 (depending upon optional dissemination and analyses)*

\* List purchase costs are not included.

\*\* Travel and expenses will be billed separately.

## Part 6: Additional Information

b. Value Added Services. This is an opportunity to propose any value-added services that the vendor has the capacity to offer that will strengthen the partnership and value to OHIO.

As a value add, we will implement a widget on institutional website pages that will enhance enrollment activity among the prospective students who are looking at those pages. If you navigate to <https://www.shmooze.io/ohiouiversitydemo/>, you will notice what looks like a chat widget in the lower right of the footer. However, this is not a live chat. Instead, it is a predefined form that can reside anywhere and everywhere on your website to engage prospective students and to get them in the enrollment funnel. The idea is quite simple: maximize your website's organic site traffic and increase inquiries, scheduled visits, and applications. Most websites have a limited number of pages and/or calls to action upon which prospective students can take meaningful, admissions-related action. Therefore, a site visitor is required to find those pages first and then convert. Our software enables your website to capture more inquiries, collect relevant information, point prospective students in the right direction (you'll notice that, at the end of the conversation, the site visitor is presented with links/takeaway resources), and do all of that in a way that leverages the institution's brand.

### Case Study: How Ponce Health Sciences used the Convert module to assist in a year of record enrollment.



**Ponce Health Sciences University's website was not capturing inquiries as effectively as desired.**

**Since implementing the Convert module widget across its website, the institution has generated more than 1,000 qualified inquiries in less than 6 months. Dozens of enrollments have been attributed to the widget as the first source of inquiry, leading to several hundred thousand dollars in tuition revenue in a short period of time.**

In addition to collecting the data in Excel-based format that can be uploaded into your CRM as well as viewed via interactive charts, we can also add options including the admissions team receiving an email with all of the form data immediately upon form submission, etc.

Currently, we are observing colleges and universities get exponentially higher numbers of inquiries (as well as associated visits scheduled, applications, and enrollments) than they used to by putting this website widget across relevant site pages: homepage, about us pages, contact pages, admissions pages, program pages, financial aid pages, etc. Not only is this form of communication keeping with current trends in terms of communication preferences, but it is a lot more efficient than redesigning your website in a way that is more marketing-oriented.

This same technology can also be used to create landing pages and as an email and/or text message marketing platform (the system can send trackable emails and text messages to people). All of these potential use cases are included in the annual subscription cost.

I truly look forward to your feedback on this proposal and hope to be your chosen partner.

I understand that the OHIO University Procurement Services will take care to protect the confidentiality of my proposal prior to the bid opening date and time. I also understand and acknowledge that as a result of my choice, to attach the proposal to this email, confidentiality cannot be assured in the traditional manner (e.g., unbroken seals). I assume full responsibility for my choice to submit this proposal and for the lack of assured confidentiality inherent in that choice.

Sincerely,

A handwritten signature in blue ink, appearing to read "Dr. James Vineburgh".

Dr. James Vineburgh