Enrollment Strategy Handbook

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ENROLLMENT MANAGEMENT HISTORY + TERMS

Enrollment Strategy History

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- History of Enrollment Management - Enrollment Strategy - Chicago Offsite 2024 (Slides 1-36)

Carnegie Search Definitions (WIP)

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- Carnegie's Glossary of Search Terms:
    - INT | Glossary of Search Terms

ROLES + RESPONSIBILITIES

Role Definitions and Background

- What is an Enrollment Strategist?
    - A strategic partner for our clients who specialize in enrollment decision-making: developing strategies, analyzing performance, and optimizing Student Search efforts year-after-year.
- What does success look like for an Enrollment Strategist?
    - External: Building a strong relationship with the client, where the Enrollment Strategist is a trusted partner in their enrollment management journey. The client recognizes the value the Enrollment Strategist brings to the table and the impact they make on the client reaching their goals.
    - Internal: Building trusting relationships with team leads including Account Managers, Client Success Leaders (CSLs), Divisional Subject Matter Experts (SMEs); having a strong grasp of Carnegie's offerings; and leading the charge for the collective team in helping clients achieve their goals.
- What is the vision for the Enrollment Strategist role?
    - External: To be a search expert and to actively advance Carnegie's Search offering to become THE go-to source for deeply strategic, highly-customized student search in the higher education enrollment market. Ultimately, the Enrollment Strategist should become the client's accountability partner as we work to reach our clients' enrollment goals.
    - Internal: To be the client before the client; reviewing clients' strategies across Carnegie's offerings, making suggestions based on client data and results, and shifting priorities to ensure client goals are achieved. You should accomplish all of

these things while working in collaboration with the CSL, AM, and SMEs to ensure client success.

- What is an Enrollment Data Specialist?
  - A supporting partner of both the Enrollment Strategist and the client, who is an expert in tactical activities such as building and managing client name lists, acting as a bridge between strategy and client campaign implementation, and monitoring and assessing client campaign progress and success.
- What is the Enrollment Strategist Team?
  - A group of highly-skilled Enrollment Strategists and Data Specialists assigned to our student search clients who are tasked with advancing the offering by adding a consultative partner to Search and beyond - including a client's recruitment and admissions strategies and goals. Thus, providing revolutionary and best-in-class Search strategies to the higher education market.
- Why was an Enrollment Strategy Team needed and created at Carnegie?
  - Enrollment Strategy was born out of the need for Carnegie's student search offering to provide a highly strategic approach for its clients that includes a consultative element. The team was initially built around key employees from the acquisition of Fire Engine RED. It has since grown to include multiple team members who focus on the success of our student search clients.

Responsibilities and Expectations

- What are the responsibilities of the Enrollment Strategist compared to the members of Client Success and Client Management?
  - DRAFT | Roles 2024 - Notes
- What are the responsibilities of the Enrollment Strategist compared to the Enrollment Data Specialist and Slate Communications Strategist/SSA?
  - INT | Slate Comms Strategist vs EDS vs ES
- What are external communication expectations?
  - Respond to clients within 24 hours (or 1 business day).
    - Coordinate with AM on client response content and who delivers said response
    - We don't need to have an answer for their issue; at the very least, acknowledge the request and give an estimated timeline for response.
- How should an Enrollment Strategist show up on a client call?
  - Enrollment Strategists are expected to:
    - Instill confidence
      - Show your clients that you have a mastery of their data and trends, what's happening on their campus, how their campaign is performing, market conditions, and weave together how they can integrate all of their Carnegie products to help achieve their goals.
    - Maintain trust

        - Do what you say you are going to do. Keep your client top of mind, constantly working to make their lives easier.
    - Be personable, find common ground with clients, build relationships, etc.
        - Try to not JUST talk about the weather!
    - Manage the unknown
        - Always remember, it is 100% okay to say, 'I don't know'. While we are certainly Enrollment experts, this does not mean that YOU need to know everything about everything. In fact, our ability to humble ourselves and dig into the unknown shows our authenticity and sets us apart.
        - Some good phrases to use if you don't know something a partner asks you are:
            - "That's a great question! I'm not sure off the top of my head but let me research that offline and get back to you."
            - "Oh wow, awesome question. That's an area I haven't spent much time in but we have experts that work in (said topic). Let me run this question by them and I'll get back to you!"
            - "I'm not entirely sure but why don't we dig into that together?"
    - Lead calls or portions of calls pertinent to Enrollment Management (strategy calls, reporting/results calls, vision calls, integration calls, etc.) as the resident expert for our clients
        - Including but not limited to performance on all Enrollment Strategy and Carnegie delivered products and services - ALWAYS tying back to client goals. For more detailed information refer to the "Interpreting XYZ Product" sections (Digital, Slate, FAO/Modeling, Clarity, Web)
        - Note: The long-term goal is for Enrollment Strategists to be able to lead these calls and topics without the regular call support of the divisional strategist. This divisional strategy support will be needed on calls in the interim, as guided by the Enrollment Strategist on the account and specific call.
        - For reference, this document INT | Search - Client Calls Outline, outlines the different Search calls content, timing, participants and call leader.
    - Show up, be present, and speak up on calls
        - This applies to all calls on which an Enrollment Strategist is present, as opportunities to chime in on the call may present themselves at any time
    - Be on time.
    - Communicate as early as possible if there are going to be changes to meetings.

                - Ensure homework and tasks are completed beforehand.
        - Expectations for call attendance:
                - If you are added to a meeting by a Project Manager, Account Manager, or CSL, be sure to attend and ready to play the role of the client's Enrollment Strategist
                - If you are added as OPTIONAL to a meeting, determine if you should attend and be sure to RSVP as a Yes or No in the meeting request at least 24 hours in advance of the meeting. You should not start your day with any meetings on your calendar that you have not RSVPd to, Yes or NO.
- What are internal communication expectations?
        - The Carnegie expectation is that all direct internal communications are responded to within 24 hours (or 1 business day). This applies to Asana, Slack, and Email.
        - As a key player in client relationships, it's expected that the Enrollment Strategy team will proactively share information through any communication channel (likely in monthly internal meeting (see below), client Slack channel (for timely news or information sharing in real time), or Asana (if appropriate)) and advise the client project team on:
                - How to best serve clients
                - How projects are performing
                - What might be happening on campuses that can affect outcomes
                - How to best reach clients' goals.
        - Short-term Internal Communication plan (to begin in October through spring 2025):
                - ES and AM to host monthly internal strategy calls for all Carnegie project team members
                        - Prior to Call:
                                - Recurring tasks are assigned to the divisional strategists with prompts to which they can respond, providing the Enrollment Strategist with the appropriate data points to review before the call ([Example for College of Idaho]())
                                - Recurring tasks are assigned to the Enrollment Strategists with outline of client-specific information they're expected to pull prior to the internal call
                        - Call Details:
                                - To occur 3-4 business days prior to monthly external strategy call
                                - Led by the Enrollment strategist, reviewing all information provided by the divisional strategists and sharing relevant enrollment metrics and goal tracking updates
                                - Intended to ensure Enrollment Strategist is prepared for monthly external strategy call with client and that all divisional strategists are aware of how the client is doing in terms of enrollment and other stated goals

Carnegie Products to Know (WIP)

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- What are the top things an Enrollment Strategist needs to know about Carnegie offerings?
  - Be a Search (industry, not just Carnegie) expert.
  - Have a functional understanding of Carnegie's offerings, knowing:
    - How each offering is used by clients to advance toward their goals
    - How each offering can be weaved together to create a powerful solution for our clients
    - How each offering can / has impact(ed) enrollment
    - How to interpret each offerings KPI's and tell the performance narrative in response to the data in the KPIs
    - How to make strategic recommendations for clients based on performance
  - Priority products for which to apply these expectations to*:
    - Market Opportunity Index (MOI) and Market Scan (MS)
    - Slate Communications
    - CollegeXpress
    - Psychographics (Darts and Motivators)
    - Digital
    - FAO/Modeling (Specifically Lead Scoring and EnGauge Scoring)
    - Clarity
    - Web

**Details on individual products can be found below.*

Client Info to Know

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- What are the top things an Enrollment Strategist needs to know about each of their clients?
  - What are the clients goals for this recruitment cycle?
    - What are their immediate enrollment goals (first-year, transfer, fall/spring cohorts, etc.)
      - Growth
        - Headcount
        - Headcount but with target populations
      - Shaping
        - NTR
        - Academic Profile
        - Geodemographics
        - Gender
        - Ethnicity
        - In-state vs out-of-state

            - Rural vs urban
            - Athlete vs. non
    - What are the client's goals for 3-5 years?
        - Same questions/categories as above
    - Admissions Operations
        - CRM & SIS (nice to know)
        - Hand raiser sources
        - Travel territories
            - Regional reps
    - Student Body
        - Athletic conference
        - Religious affiliation
            - And level of influence it plays
        - Campus housing
            - Commuter/resident goals
    - Academics
        - Are there academic majors that are over-enrolled or those that are focused on enrollment?
            - Are there programs with an enrollment cap?
        - Any new programs or programs that will be phased out?
    - Other need-to-knows
        - Past relationship and work with Carnegie
        - Core team structure and relationships/dynamic
            - For the history and dynamic outside of the core team, connect with CSL
        - Recent history/events at university/area that may impact enrollment
        - Directives from president/BOT
        - State, Regional or local dynamics that impact recruitment
            - State based scholarship initiatives
            - Dual credit programs and AP policies
    - What are internal outreach campaigns that are part of the SEM plan for app gen + yield
        - Individual counselor outreach
        - Internal Comms
        - Faculty/staff/alumni outreach
        - Current student outreach efforts

ACCOUNT PROCESSES

Onboarding a New Client

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- Resources
  - Name Buy/ELSS Asana Template - https://app.asana.com/0/1203562208828734/1206970893152681
  - Meeting Template - INT | Carnegie Search - Client Call Outline

- Timelines & Deliverables
  - TASK - Read over the client brief, particularly for renewing clients. The sales history, general scope of work and goals will be helpful prior to the first call with the client
    - You can find the client brief in Tinman, sometimes a link to the document will be pinned in the internal client Slack channel, as well as the central google doc folder for all client brief
  - MTG - Kickoff Call
    - ES/CSL/AM
    - Ask about Slate Captain (SC) / primary data contact
    - Introduce the Search Discovery Form
  - TASK - Send the Search Discovery Form to the client SC
  - TASK - for CHI clients the AM will send the consolidated data request
  - MTG - Integrated Search + SlateComms Discovery Call
    - Generally, we want to answer as many of the topics covered by What does an Enrollment Strategist need to know about each of their clients?
    - See the shorter version here - IN PROGRESS *TEMPLATE* INT | [CLIENT] - Search Strategy…
    - After the Search Discovery Call the ES and AM will coordinate on whether an MOI or MS makes the most sense for the client.
  - TASK/MTG - Review MOI with RMS Researcher and integrate MOI into Market Analysis & Search Recommendations document (see Development of Search Strategy section)
  - DLV - Develop the Market Analysis & Search Recommendations document
    - Template - TEMPLATE | Carnegie - Name Buy Market Analysis & Recom…
  - MTG - Search Strategy & MOI Meeting
    - DLV - RMS (normally Jared) will present MOI pdf for standalone MOI clients
      - For Search/Name Buy MOI the ES will introduce the MOI and

    then transition into the Market Analysis & Search Recommendations
    - DLV - ES will present Market Analysis (with some level of MOI integration)
  - MTG - Recurring Search meetings
    - Search team will meet with clients every two weeks
    - ES will join every other call for enrollment strategy and list acquisition discussion and approval; tracking toward enrollment goals and all campaign results will be discussed here as well
    - AM and Search PM will use every other call to discuss Search campaign / project logistics
  - MTG - Mid-Campaign Assessment (MCA)
  - MTG - Renewal
  - MTG - Annual Campaign Assessment (ACA)

Search Discovery Form

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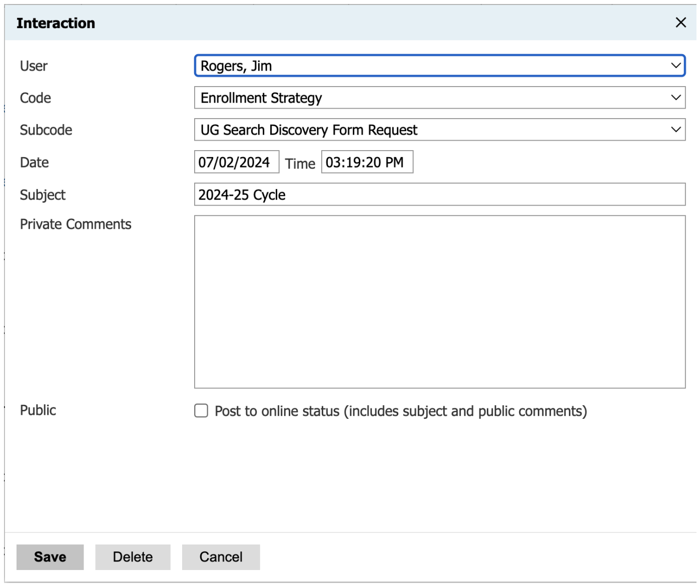
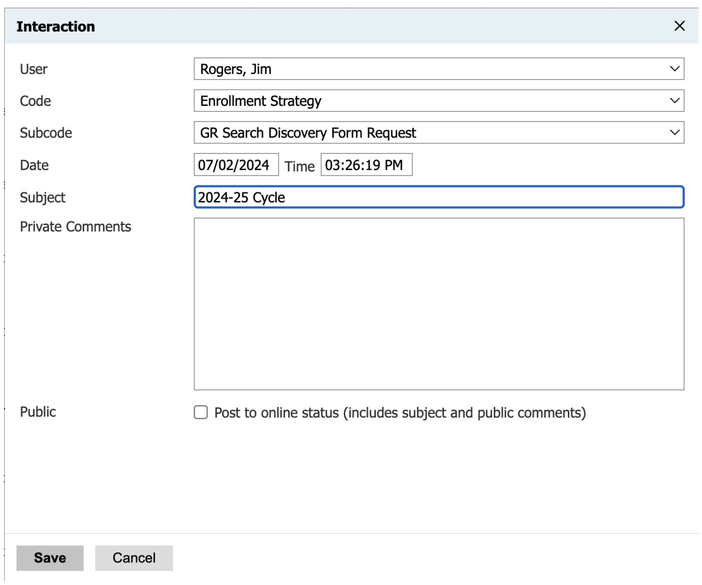
- Do not send the raw link to the search discovery form directly to the client! The form needs to be triggered in our Carnegie internal instance (https://partner.carnegiehighered.com/manage/).
- The Search Discovery Form is a preset questionnaire that is sent to the client to gather foundational information on the client's goals, student search history, search operational details and to start the process to access the client's College Board and Encoura accounts.
- There are two versions of this form
  - Undergraduate
  - Graduate
- Assure your name is input in the Search Consultant 1 field assignment in the Enrollment Strategy tab of the client's record in the Carnegie instance (Search Consultant 2 can be left blank unless 2 ES staff are assigned)
- Collect the contact name and email for the person responsible for search name approvals and input in Slate
  - First and last name and email must be entered in the Carnegie Slate instance in the Enrollment Strategy tab on the institution record
  - Collect undergraduate and graduate contacts if scoped for each search population
- Triggered directly from the Carnegie Slate instance
  - Input the interaction in the Timeline (undergraduate or graduate or both, see screenshot below) and add the cycle in the Subject line of the interaction
  - Form gets linked to the institution to get stored in Slate correctly
  - Form gets sent through Slate to be completed by campus contact
  - Email can be forwarded to others on campus to complete if necessary

- Enrollment strategist gets cc'd on the email to know it triggered





- Completed forms are found in the Carnegie Slate instance
  - Undergraduate
  - Graduate

SEARCH STRATEGY PROCESSES

Development of Search Strategy (WIP)

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IN DEVELOPMENT - PENDING NEW STRATEGY DEVELOPMENT DATABASE

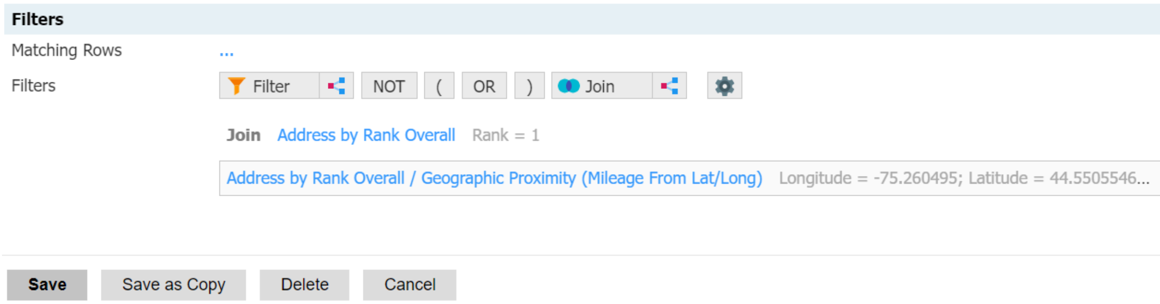
- Goals - where does the client want to be?
  - See the detailed list of questions included in the Integrated Client Discovery Meeting template - IN PROGRESS *TEMPLATE* INT | [CLIENT] - Search Strategy Discovery Call O...
  - Growth - just overall headcount or targeted growth?
  - Shaping - net neutral headcount, but moving the incoming class profile
- Geography
  - Geography can be very predictive for traditional undergraduate students
  - Proximity to campus can often be the most predictive data point, particularly for non-selective, regional institutions
  - Generally, high school students are a product of their environment. This is a core tenet of the Carnegie MOI as well as the College Board's SAS. Students attending a similar type of high school and living in a similar part of the country and similar type of neighborhood will exhibit similar college search behaviors. We can leverage these predictive geographic analytics by proxying the dominant historical enrollment profile to identify "lookalike" markets across the country.
- Market Designation
  - This will vary by client but in general we want to be sure we are addressing four markets:
    - Core/Backyard/Primary - This is the region closest in proximity to campus where the client typically has a very high yield rate and high populations of current students and alumni. Within the backyard, there is usually a general awareness of the university and its story
    - Historical/Feeder/Secondary - Areas where the client experiences consistent enrollment, deposits, admits, apps, inquiries. The exact balance of status values will depend on the client and the MOI may have useful data points to help reinforce particular zips such as Inquiry_Percent (useful to determine market saturation), or Feeder_Potential)
    - Expansion/Reach/Tertiary - These are markets that have yet to be developed as feeders but they align with the "lookalike" profile. The MOI can easily provide us these ZIP codes and/or DMAs via the Opportunity_Score field. These markets may be further customized to fit the client's goals. For example, if one of the client's goals is to increase the NTR you may select ZIP codes outside of Core and Historic with a high Opportunity_Score AND a in one of the higher income bracket percentages.

        - Travel - We always recommend supporting the client's boots-on-the-ground efforts with Search, and Digital when possible. Ideally, we would love a student to have been served a handful of digital impression and at least one email before they walk past the client's booth or table at a high school visit or college fair.
        - For new clients it may be helpful to map out their purchase history. You can view selection criteria within the name purchase platform. Zip code download functionality appears to be missing, but would recommend discussing the geography parameters during the discovery call or soon thereafter. Check to see if the client can provide a excel file, or even pdf report from past search efforts.
    - Slate Process
        - **Core** - Utilize the historical geographic funnel report in Slate to review the core market. This report is typically built by an EDS once a task has been created and the Search Discovery Form is received. The EDS will initially build the report based on the markets the client identifies in the Search Discovery Form.

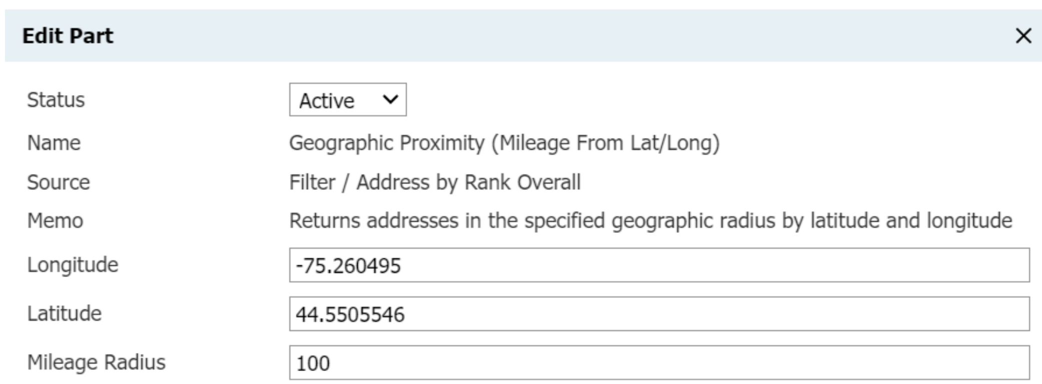
            - Generally it's best to use the lat/long for the campus in lieu of the zip code center choice as zip code physical size can vary wildly depending on the part of the country the campus is located. You can identify the lat/long by using google to search for the school. In the url for the google map result you can identify the lat/long after the @ symbol.
              For example, the google map result for "Azusa Pacific University" delivers this url - https://www.google.com/maps/place/Azusa+Pacific+University/@34.1300755,-117.8909342,17z/data=!3m1!4b1!4m6!3m5!1s0x80c327c652bf9325:0xdb69be4de88a0731!8m2!3d34.1300755!4d-117.8883593!16zL20vMDJmZ3E3?entry=ttu
              The latitude for campus is 34.1300755 and the longitude is -117.8909342.

            - Navigate to the Historical Geographic Application Funnel Report in the client's slate instance to review and edit distance from campus information.
            - Select "Edit Report" in the top right section to access the Edit Report Details Layer.
            - Click into the "Application Funnel" by double clicking on the report part. Scroll down to "Distance from Campus" and double click the data table.

- Scroll down and click on the “Address by Rank Overall/Geographic Proximity” filter to open it.



- Latitude and Longitude should be preloaded into this filter. Adjust the “Geographic Proximity (Mileage radius from Lat/Long)” as needed to determine the Core geo by the highest yield marker. For universities in highly urban areas it may be as little as 25 miles. For universities in more rural areas it may be as much as 250 miles.



○

- Save the changes you’ve made on the filter.
- Hit save again to ensure all changes are saved to the distance from the campus data table.
- You should now be back at the “Edit Report Details Layer.”
- Scroll to the top of the report and select the “First-Year Application Funnel - Geographic Segmentation” breadcrumb to allow the report to render in the view layer.

■ **Historic** - The same funnel report can be used to identify areas outside of the Core that are generating high numbers of students in the funnel. Often times it may be as simple as identifying those ZIP codes that produce consistent enrollment over the last few enrollment cycles. For universities with less defined pipelines you may need to expand this to include applicants and even inquiries. Just because an inquiry from a previous cycle didn't enroll doesn't mean they did build brand awareness amongst other students in the area.

        - **Expansion** - For areas outside of the Core and Historic you'll be using the MOI to help identify strong reach markets. It's not uncommon to allocate fewer resources to reach markets for Senior efforts and more for Underclassman efforts, so don't feel you need to keep a static strategy geography. Your Senior geo may be more conservative than your Underclassman geo. For many students as the recruitment cycle gets closer to the start of term (sometimes even before the beginning of their Senior year) their perceived mobility decreases.
        - **Travel** - You'll rely on the client to provide any data they can that reflects the previous cycle's high school visits, college fairs and other travel related recruitment. Using maptitude you can load the list of cities/zips, add in some appropriate drive time rings (varies by urban/rural but 30 minutes is reasonable) and then export the ZIP codes in those drive time rings.
        - **Recommending List Parameters**
            - Scores/GPA - Utilize the Application Funnel - Academic Segmentation Slate report to identify the academic profile that persists through matriculation. You may expand that GPA or score range for Underclassman search. Also consider scholarship requirements and possible a High Achieving (HA) vs General tag. As the testing platforms (College Board + Encoura) do NOT provide
            - Academic Major
            - Demographics
            - Platform specific parameters - i.e. SAS, Mindsets, EnrollmentPredictor.

- Market Analysis & Search Strategy Recommendations deliverable
    - Include an up-to-date industry trends section.
        - [Industry Trends_FINAL_June2024]
        - [2024 Digital & Higher Ed Industry Trends_2.12-24]
        - [Jim's slide for Columbia University's deck]
        - [Watermarks for Maptitude maps]
            - Copy/paste preferred watermark onto map in Slides
            - If creating a doc, save watermarks and map jpg first. Then open both in Paint and layer together.
- Next Steps & Integrations
    - Print -
    - Digital -

Development of Print & Digital Strategies (WIP)

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- Print
  - The default print process/schedule for Search projects has been a single drop early in the campaign. Moving forward, Strategists should review the contract and also check in with the CSL and AM to see if a print budget was discussed with the client. If yes, work with the Slate Strategist and/or EDS to find a multi-drop schedule that is within the client's budget
    - Jason is working on a tool to help estimate cost implications of adjusting volume and/or the number of drops
  - Carnegie is testing a new approach in 2024-2025 that uses Slate Print (Mittera) like a standard printshop and contracts are including a print and postage budget that the client would prepay. This allows us to build in some margin.
    - When preparing to send print there is an existing process to work with Slate Comms Strategist to purchase Slate Credits for the Slate Print jobs here - INT | Slate Communications Handbook
    - This same process will also apply to using Slate Credits for Text Messaging in CHIs, or for PHIs where the cost for Text Messaging was built into the contract
- Digital
  - Although the Enrollment Strategist is not expected to be a SME in Digital strategies, they need to be familiar with the different platforms available as well as what Search efforts they pair well with.
    - This DRAFT Timeline shows some recommendations of platform/service to pair with recruitment and Search efforts - INT | Digital & Search - Timeline_Draft
      - The DRAFT Timeline also will include examples of high and low-spend budgets

Leveraging a Market Opportunity Index (MOI) or Market Scan (WIP)

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- Deciding on an MOI vs MS
    - Market Opportunity Index (MOI) provides
- Service Levels for MOI/MS:
    - Search/Name Buy MOI or Market Scan - Both:
      - $6k to RMS
      - Only a Researcher resourced

            - Researcher isn't client-facing, doesn't attend kick-off call or other things like that
            - No PDF deliverable or strategy component.
            - MOI: Data and maps passed from researcher to ES team.
            - Market Scan: We would create the data sheets (ZIP Code, School, and Funnel), the interactive mapping tool, and 4-5 key/interesting time comparison charts in a Slides deck.
            - Summary - Client receives ZIP code list, mini pdf, ES presents
        - ELSS MOI or Market Scan - Both:
            - $10k to RMS
            - Researcher and Brand Strategist resourced
            - Researcher is the only one client facing, brand strategist stays behind the scenes (unless other work included that has Brand Strategist involved, i.e. Darts, Motivators, etc.)
            - PDF deliverable. Researcher and Brand Strategist work on opportunities section in tandem. Researcher passes to ES team.
            - Summary - Client receives ZIP code list, pared down pdf, ES presents
        - Full/Stand-alone MOI or Market Scan - Both:
            - $12.8K to RMS
            - Researcher and Brand Strategist resourced
            - Full pdf deliverable. Researcher and Brand Strategist deliver to client.
            - Summary - Client receives ZIP code list, pdf, and into/training from Researcher
- Incorporating an MOI Into Enrollment/Search Strategy
    - MS Access is still our best tool for manipulating MOI ZIP codes
    - Your knowledge of the client's strengths, weaknesses and goals should frame how the MOI Opportunity Score is incorporated into your strategy. For example, the client may desperately need to diversify geographically even though their historical funnel has been primarily in-state. An OS of .4+ in key OutState markets with an OS or .5+ in InState markets may be the best strategy to continue to nurture key in-state markets while strategically expanding out-of-state efforts.
    -

- RMS Data Requests -
    - These data requests are in Enrollment Data Requests the process of being streamlined as the MOI and MS requests are nearly identical. The primary differentiator is Alumni Data needed for the MOI

MOI/MS Data Management & Tasks

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Market Opportunity Index

- General information
  - Can work just as well for grad as it does undergrad
  - In order to run the MOI, the file layout should match the Historical Pipeline Data Request Example. For data coming out of Slate, fields that are housed separately for inquiries and applicants will need to be consolidated.
  - Specify the type of file in the document name: historical vs alumni.
  - Definitions:
    - Fields:
      - Student ID: required; a unique ID for each record
      - First Name: suggested
      - Last Name: suggested
      - Status: required
        - Inquiry: use inquiry and created applicants
        - Applicants: submitted applicants and above
        - Admits: all admitted students
        - Matriculants: deposited and enrolled
      - Address 1: required
      - Address 2: required
      - City: required
      - State: required
      - Zip: required
      - Athlete: suggested; can be yes/no
      - Type: suggested; use all first year, readmit, and transfer types (undergraduate only)
    - Other data points:
      - Include all terms (fall, spring, summer)
- Carnegie Hosted Instance
  - If we have the full, clean historical file from the client, we can use that data to create the file for the RMSC team. If not, we can use what is in the core client database.
- Partner Hosted Instance
  - There is a suitcase in the Carnegie instance that you can bring into the PHI. While the specific query will vary from instance to instance, the basic outline should be as follows:
    - Student ID: use Person Reference ID
    - First Name:
    - Last Name:
    - Status:

            - Inquiry: use inquiry and created applicants
            - Applicants: submitted applicants and above
            - Admits: all admitted students
            - Matriculants: rank 1 deposit OR rank 1 enrolled
        - Address 1: required; use a filter to only include records that have data in the address 1 field
        - Address 2
        - City: required; use a filter to only include records that have data in the city field
        - State: required; use a filter to only include records that have data in the state field AND the states are domestic
        - Zip: required; use a filter to only include records that have data in the zip code/postal code field
        - Athlete: this will vary from instance to instance on how this is pulled in
        - Type: use all first year, readmit, and transfer types (undergraduate only)
            - What is included here will vary from instance to instance.
        - Other considerations:
            - Include all terms (fall, spring, summer)
            - Be sure filters are included to suppress prospects

Market Scan

- General information
    - Up to 45 zip codes, but more effective closer to 20
    - Provides a deep dive into a specific market
    - For best results, think of a radius around a particular location
    - Not as simple as selecting a DMA, usually geographically more focused
    - You could use a prior year MOI to help inform market selection for a MS
    - Notes from Jared for context for Market Scans:

A Market Scan is done with a cluster of ZIP Codes within a market. The ZIP Code cluster could span across a few different markets, depending on what the geography of the area looks like, but it is not scoped as whole markets. The maximum ZIP Codes allowed in a Market Scan is 45, with the best results coming from about 20. The client could tell you which areas they are interested in, but ultimately it's your call as the enrollment strategist to pick ZIP Codes that need the information.
If they picked Houston, you would need to select X number of ZIP Codes in Houston. I would not do a second market really far away. A Market Scan is a Single Place but it's not bound by markets. So if they were near the border of two markets, they might have ZIP Codes from both, but you should think of a Market Scan as a "radius around an area" for the best results.

I would not worry about the actual market a ZIP Code is in when selecting, but rather that they are geographically clustered together. Such as "ZIP Codes within a X mile radius of Y important location" (like their campus).

As a note, most markets have hundreds of ZIP Codes. So it won't be as simple as saying "Houston" or "LA," it's a focused look at a specific area of interest in a given market. If they had an MOI first, you could pick the top scoring ZIP Codes in an area, but it sounds like they have skipped the MOI to go straight to Market Scan, which means it should be based on something tangible. For example, you could look for the ZIP Codes in Houston around a certain point, or the ZIP Codes in Houston with their highest amount of deposits.

Search products can be swapped for MOI or Market Scan 1:1. So if they actually need MOI, I'd go that route based on what you know about the client's needs.

I believe all levels can be swapped in the bundles on purpose like that, so unless it's a standalone, you should be okay to swap to the other as their lead strategist. Grad schools are typically pretty national. I don't know what their enrollment looks like, though. That's why the Enrollment Strategist is supposed to work with the client to pick which option works best for them in year 1.
But we have a grad-specific HEI and competitive index and the rest of the measures work just fine for grad. MOI is designed to work for grad schools no problem. The only limitation is if the school doesn't do anything outside a very small area. If their enrollment is limited to one or two markets, then a Market Scan to start digging there does make more sense.

Interpreting Digital (WIP)

(Table of Contents)

- Digital

Interpreting Slate (WIP)

(Table of Contents)

- Slate Reports?
-
-

FAO/Modeling (WIP)

(Table of Contents)

- Financial Aid Optimization (FAO)
- Lead Scoring
- EnGauge Scoring

Clarity (WIP)

(Table of Contents)

- Clarity - BlueConic
- Clarity Powered by Slate -
- Integration opportunities -

Web (WIP)

(Table of Contents)

- SEO -
- Web Refresh -
- Web Rebuild -
- Signature Creative -

-

Building and Understanding Slate Reports (WIP)

(Table of Contents)

    - Reports

Thinking about Psychographics

(Table of Contents)

- Internal Dart Training & Examples - Internal Dart Training for Carnegie Divisions
- Video Walkthrough of Personality, Motivators and Darts - Darts + Motivators Walkthrough.mp4
- Use Cases -
  - Kettering (Darts)
  - TCOI (Darts)
  - Drake (Motivators)
  - Curry (Darts)
  - Bridgewater (Darts)
  - Cleveland State (Darts)

Recommending and Using CX Data (WIP)

(Table of Contents)

- Reports
- State-specific student data privacy legislation is important to keep top of mind when recommending list sources. For instance, California and New York are two highly populated states that will be/are affected by data privacy laws. The volume that will be available from College Board and similar testing agencies will continue to shrink, so CX can be a great opportunity to fill in the gaps.
  - New York currently has legislation in place that prohibits contractors (i.e., College Board) from disclosing student data received from an educational agency (i.e., high schools) to any other party (i.e., us via Search). College Board is prohibited from using student data it collects or receives in connection with a contract with a NY educational agency for any marketing or commercial purposes. This includes data obtained from administering PSAT, SAT, or AP exams during the school day. In addition, College Board cannot solicit students to participate in Search or similar programs during these exams.
  - California is currently following suit. Although the law has yet to be passed, it is important to prepare for what is ahead.

Fire Engine RED Playbook

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- Alumni and Sibling Matching (will need updates)
- Application Matching (will need updates)
- Best Practices for International Recruitment
- Carnegie List Build/Purchase Notes (will need updates)
- Client Data - Review and Analysis (will need updates)
- Data Dictionary (will need updates)
- Data Warehousing (will need updates)
- Database Management (will need updates)
- Encoura Build Instructions
- IP Warm Up and Correction Plans
- List Building - Purchasing (will need updates)
- List Count Refresh - Purchasing (will need updates)
- List Downloading - Purchasing (will need updates)
- List Ordering - Purchasing (will need updates)
- List Processing: Data Manipulation, Cleaning, & Customization (will need updates)
- List Processing: Database Set Up (will need updates)
- List QA - Purchasing (will need updates)
- List Revisions - Purchasing (will need updates)
- Maptitude - Incomes
- Maptitude - Maps
- Maptitude - Psychodemo
- NTR Calculations
- Opt-Out Requests & Email Removal (will need updates)
- Phone Appending
- Print and Digital: Modeling and List Preparation (will need updates)
- Reports Message (Teamwork) (will need updates)
- Segment Analysis Service
- Source Parameters
- Source Release Schedule
- Third Party Access Management

Connections, CX Connect and Slate Comms (WIP)

(Table of Contents)

- IN PROGRESS - Carnegie can help clients start with CB Connections and/or CX Connect

Record Consolidation / Deduplication (WIP)

(Table of Contents)

- CHI
  - Context for Record Consolidation Process:
    - When records are brought into a Slate instance, Slate will try to match incoming records to existing records. It first looks for IDs. If records don't match on those, it looks to match on four things: First Name, Last Name, Email Address, Date of Birth. If all four of those data points match, Slate will automatically merge and update these records.
    - Between 2 and 4 am eastern, Slate runs all data points on all data records to look for duplicates. Any potential matching records are added to the Consolidate Records module. This includes list uploads–this would not actually look for duplicates until this time period the next morning. These records are active and will continue to get campaigns based on the rules for their population. It is essential that these are resolved on a frequent basis.
  - Documentation for resolving records in the Consolidate Records module
- PHI - Carnegie will not be providing record consolidation (deduplication) for partner-hosted instances of Slate. Record consolidation
- DataOnly - There are a handful of FER-originated clients who have Carnegie provide ELSS services AND list processing. These are clients not using Slate AND not having Carnegie provide comms via a CHI. The ES team will provide the data standardization and deduplication via processing in MS Access. Examples include (as of June24): Dayton, Lipscomb.

Travel Analysis (WIP - New product in development - ETA Sept 2024)

Using modeling to help determine travel areas allows schools to be more strategic in their planning. By being more strategic, schools can:

- Save time.
- Save money.
- Better align travel with recruitment goals.

- Allocate resources more effectively.

How Does Travel Analysis Work?

1. We look at data sources, including:
    - Three years' worth of historical enrollment data.
    - Three years' worth of high school and college fair visit data.
    - Underlying high school data (from MOI/MS, company data, SAS).
2. We consider institutional knowledge from:
    - Friends of institution (college counselors).
    - Recent outreach (campus fly-ins).
    - Quality of opportunity (lunchtime and/or hallway visits).

Phone Matching

Fire Engine RED can take receipt of a list and match it with phone numbers based off of mobile phone registries and landline directories. Phone matching is most commonly offered to clients to provide additional support for their in-house recruitment efforts. The data lead will work with the client to identify a population that may benefit from additional outreach.

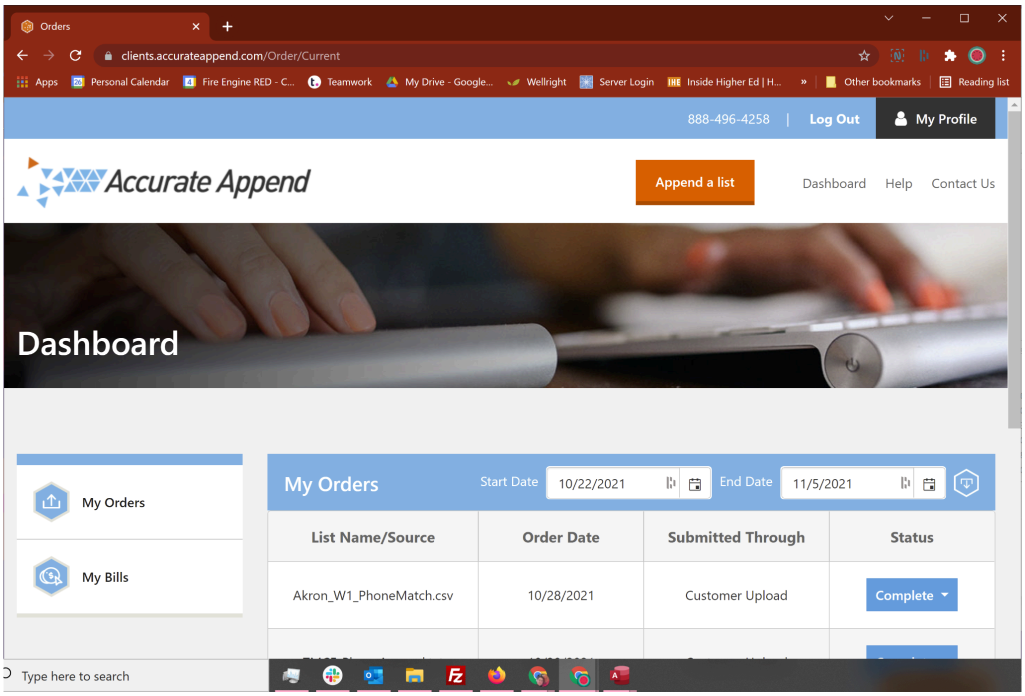
Prep file:
Before loading to the Accurate Append FTP, you should verify that the list includes the following fields:

- ID Number (from list processing database, use tmpFERID)
- First Name
- Last Name
- Street 1
- City
- State
- ZIP Code

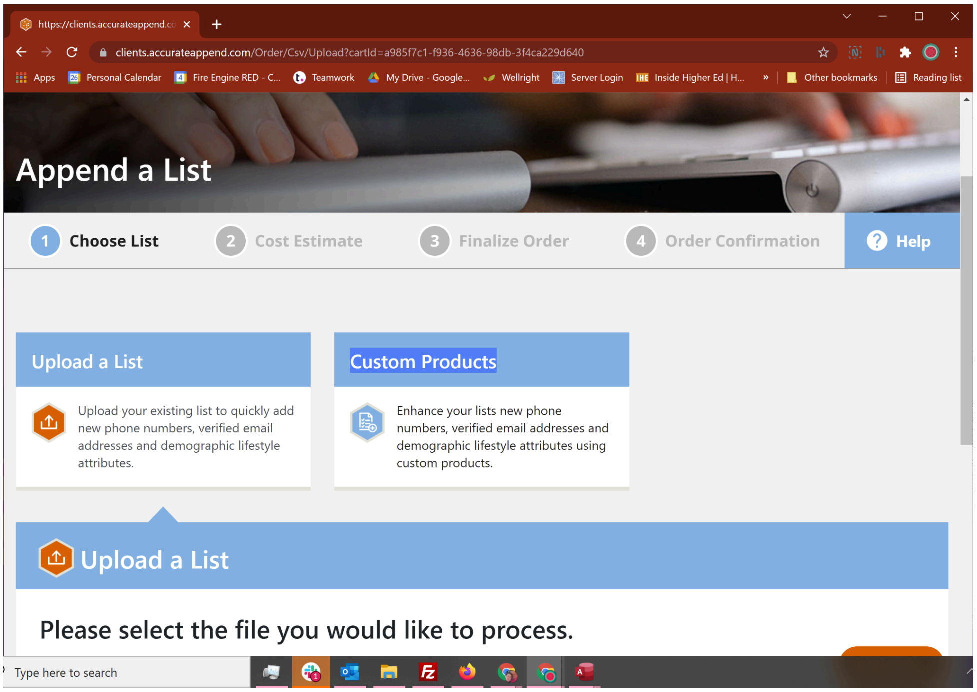
Your file name needs to include the client name.

Web-Based Platform
URL: https://clients.accurateappend.com/Authentication use Jason's log in (This is located on the 3rd party access google doc).

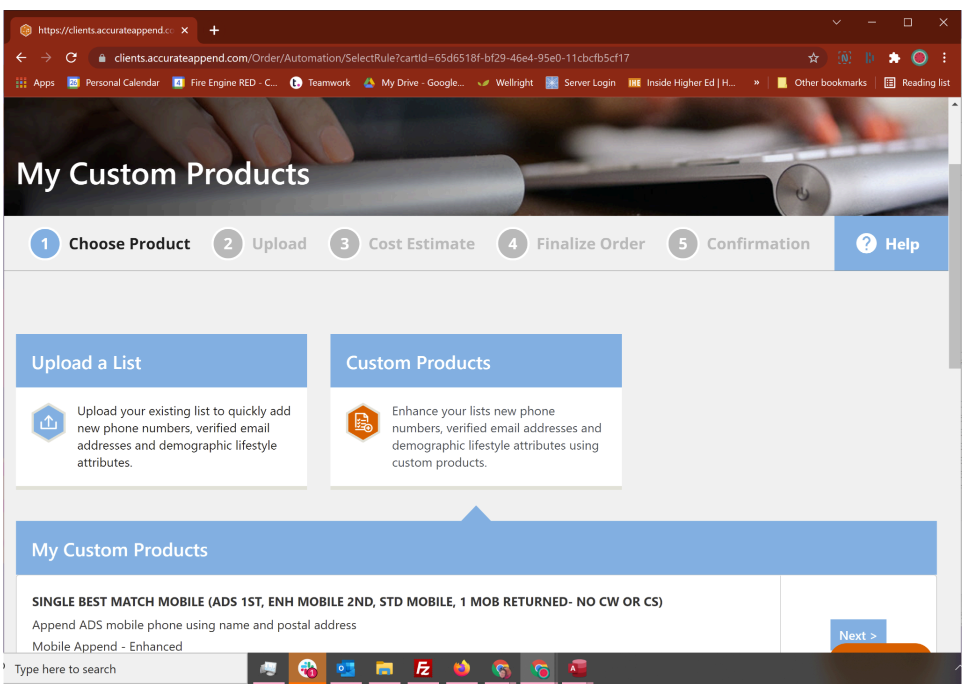
Click on Append a list



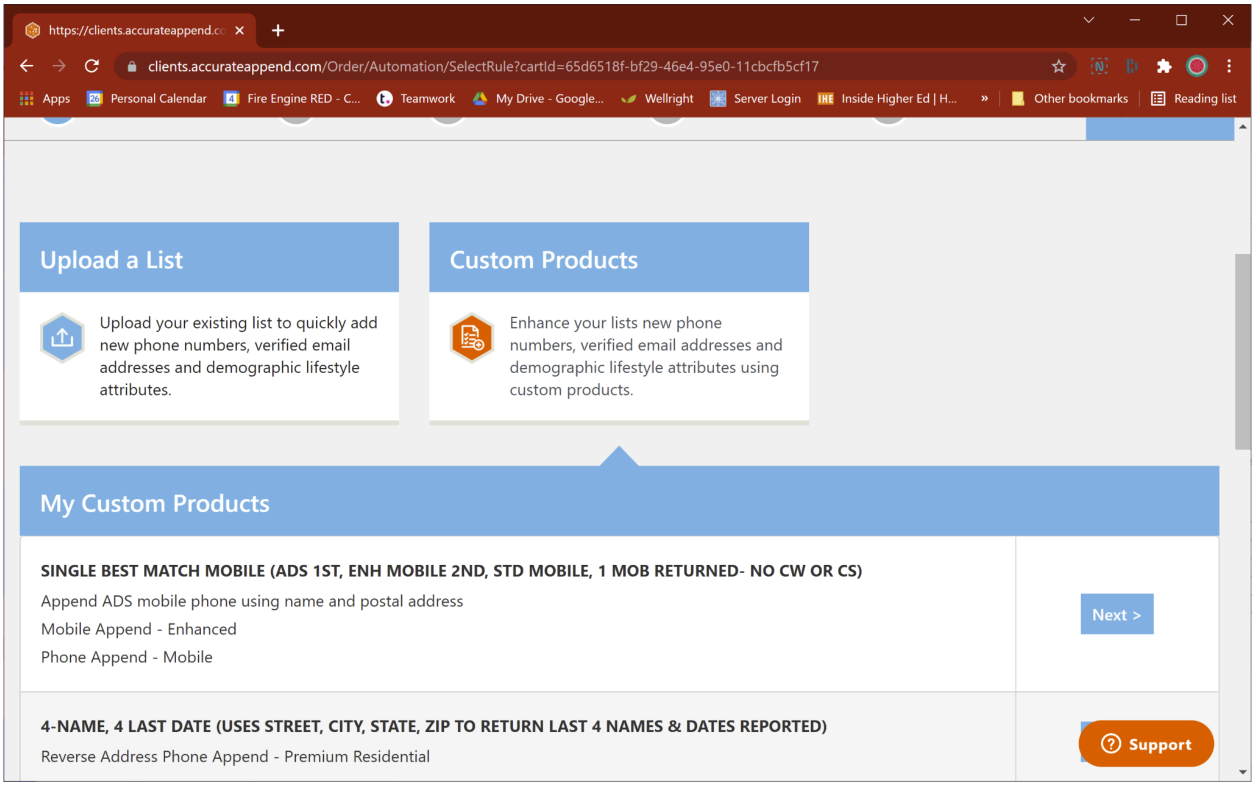
Click on Custom Products



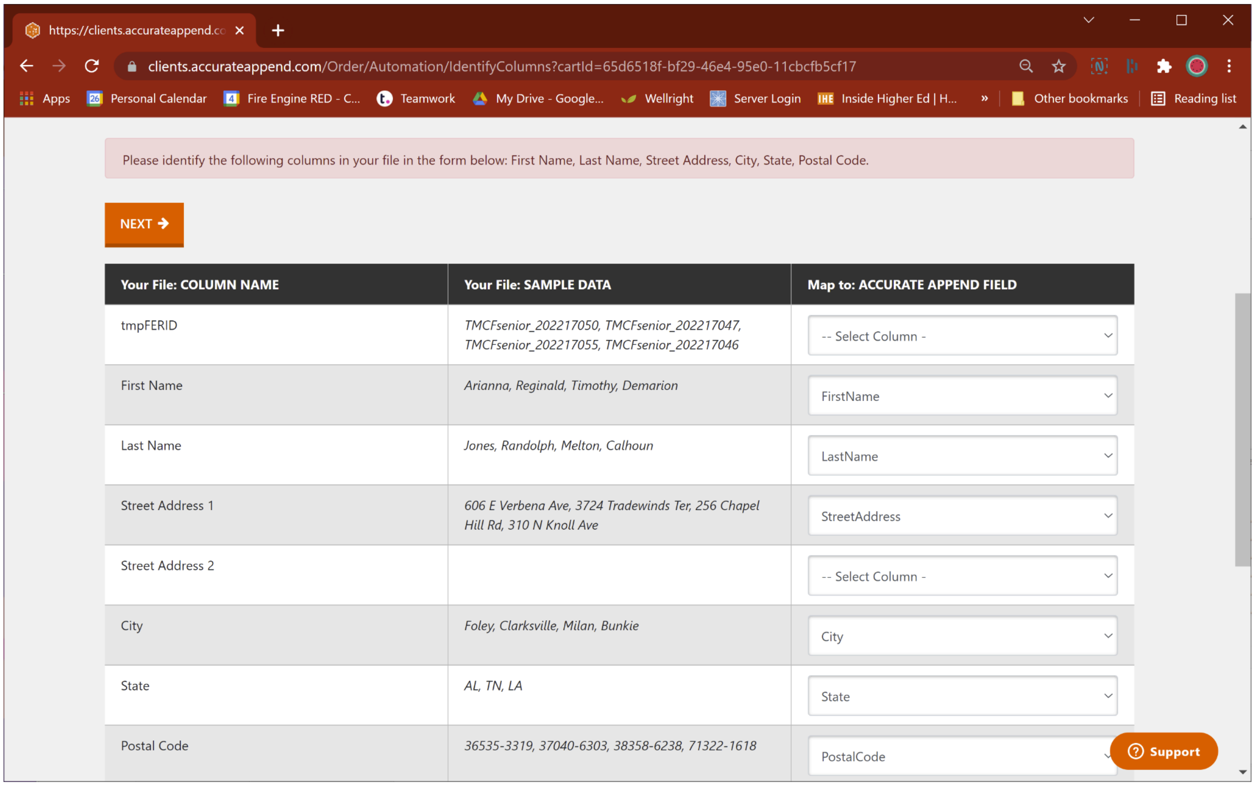
It will shift the arrow over and you'll see the My Custom Products below:



Choose Single Best Match Mobile and click Next.

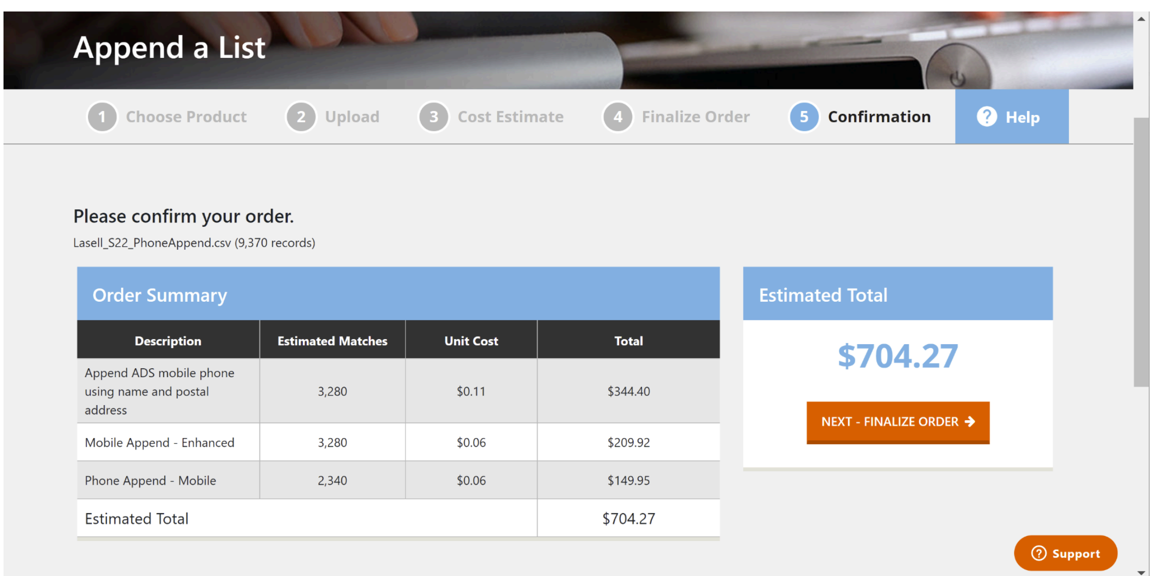


Click on Select File and navigate to the file you want to use. Map your fields (we need to include ID but they won't map with it)



Click the orange next button.

Estimated cost: very optimistic matching rate. **We have seen this match rate get as high as 78%, so if you need to stay below a certain number, start with a smaller list.**

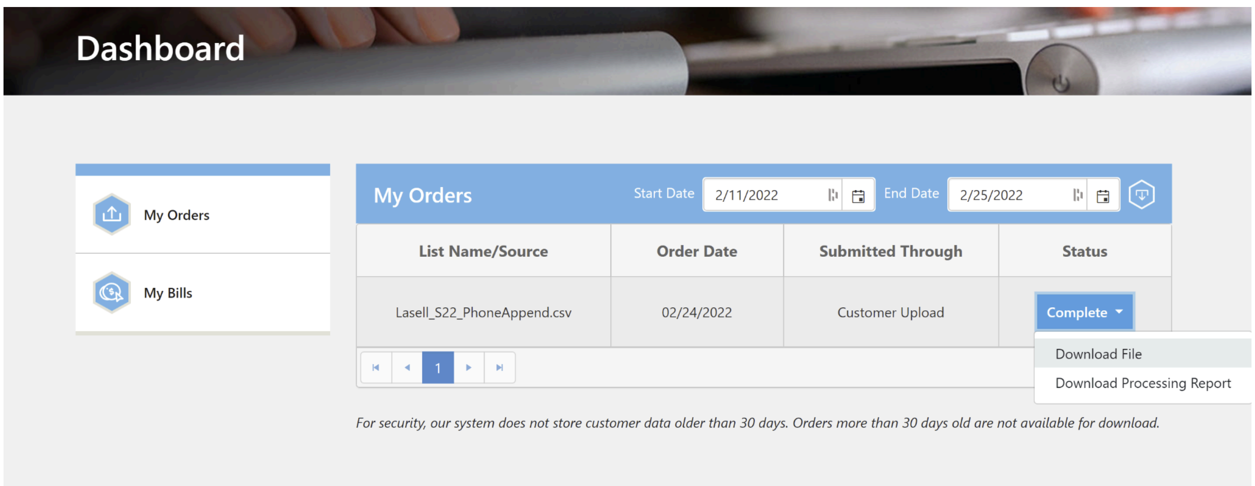


Click “next - finalize order”.

Finalize order. Jason and Elizabeth are automatically sent an email when it's finished. You can click "View your orders" to take you to the dashboard to view the status of the job.
Below are rough records per hour as we get a feel for how long it takes to complete a file.

- 15000/hour (10/27/21)
- 46500/hour (10/28/21)
- 69500/hour (10/28/21)

When it is complete, click the "Complete" button and choose "Download File"



On the file, Match Type has two codes. The translation is below:

Match Code	Description
IND	First and last name match with full or partial address match
HH	Last name only with full or partial address

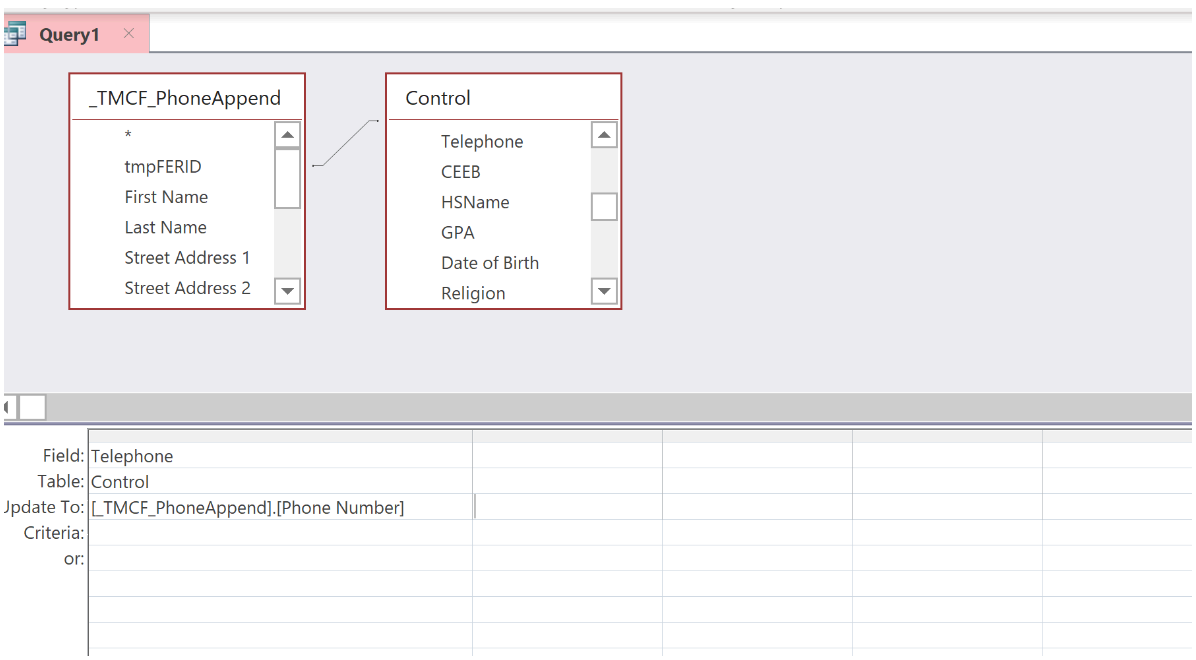
The Match Level refers to….
E1
E2
N1
N2
B1

B2

Operation refers to the type of phone number it is.
Phone Append - Mobile
Mobile Append - Enhanced
Append ADS mobile phone using name and postal address

Returning Phone Numbers back to List Processing Database or Client Core Database

Once you have your file, link it back to your database. Create a query linking IDs and updating the telephone field.



Check the format of the phone numbers, because once the numbers reach the control table, they are not re-formatted. Use the following query to change the format of the numbers once they are in the control table to ###-###-####:

UPDATE Control SET Control.Telephone = Left([Telephone],3) & '-' & Mid([Telephone],4,3) & '-' & Right([Telephone],4)
WHERE (((Control.Telephone) Is Not Null));

Source Format, Origin Source, and New Field Approval in PHIs

The EDS team will be working on auditing origin sources and source formats in Partner-Hosted Instances (PHIs). They will make recommendations to the client and will work with the client to get anything new built, as well as make initial mappings in the source formats. As you are presenting the first estimates, including the following language helps set the timeline for when names can actually enter the PHI.

> As a part of importing name buy files into your Slate instance, we want to ensure that the associated source formats are mapped completely and consistently with your instance. This will ensure that person records are populating the appropriate information and that all name buy purchases are tagged for reporting purposes.
>
> Once your initial purchase is complete, your Enrollment Data Specialist will map all fields in the inactive source format and alert you via Asana that it is ready for review. When you have reviewed and approved all of the mappings (field mappings, prompt value mappings, and any static mappings), they can then activate the source format and import the names.
>
> In conjunction, they may be recommending additional fields, prompts, interaction codes, and/or origin sources to make your data as robust and consistent as possible. This will be done in collaboration with you and will also require your approval.

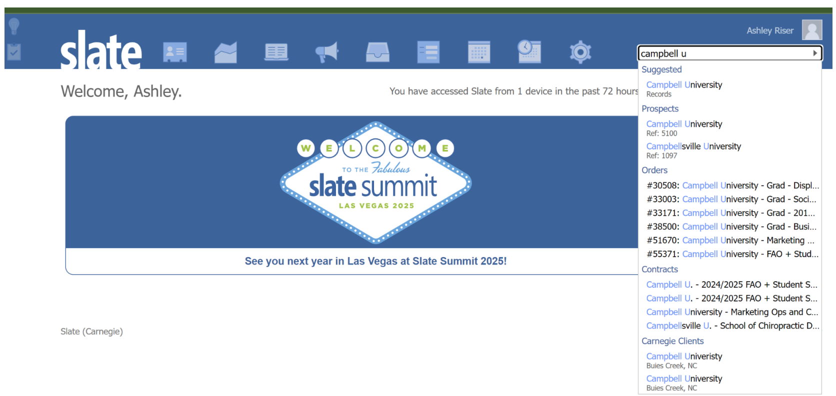
Ongoing Slate Namebuy Tracking

Search client order history is tracked in the [Carnegie Slate instance](). It allows staff to quickly see the order history and other client information related to search name buys. Each order has the date of the order, vendor, class year, quantity, and remaining quantity after processed. It also has a status field that can be updated as the order progresses. The final status should be *Uploaded* and the *Remaining Volume* should be added to the most recent order for the dates of each buy.

A [Slate report]() can be run to see all data and statuses of name buys for all clients. There are sections for those orders that are created or pending client approvals, approved orders that need to be processed or are tasked to EDS, and orders that are processed and awaiting import. The bottom section lists all clients and their Encoura and College Board subscription amounts. It includes and is sorted by subscription renewal dates to track remaining volumes and when they expire. This gives the staff an easy way to know when renewal deadlines are near and how many names need to be used before they expire. If there is no volume listed, it means either the client does not have a subscription or more likely that the last upload does not have the remaining volume posted or it is not entered in the last name buy date in that order history. Enrollment Strategists should monitor this report each week to assure all orders are moving through the process and get updated in Slate as well as monitor remaining volumes and approaching expiration/renewal dates.

Instructions on recording purchase and upload in Carnegie's Slate instance

Log into the Carnegie Slate instance. Navigate to the client (search in the search bar on the far right).



Click Enrollment Strategy tab. Scroll down to the "Search Order History" section:

GRE Login

Search Order History

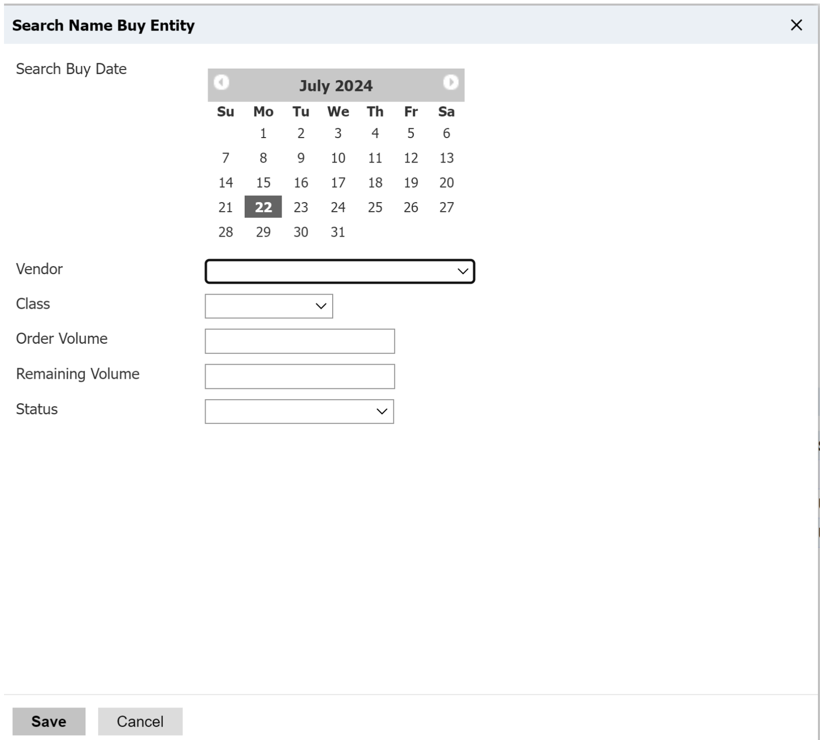
Date	Vendor	Class	Order Volume	Remaining Volume	Status
Add New					
07/22/2024	College Board	2025	9,456	20,061	Uploaded
07/22/2024	College Board	2026	222		Uploaded

Edit

Set Default Tab

Slate (Carnegie) maia1 / luna / usr

Add new– fill in the vendor, class, order volume, status, and remaining volume:



Notes:

- Status
  - Created = The estimate has been created. (rarely used)
  - Awaiting approval = Estimates have been presented to the client but not yet approved. (rarely used)
  - Approval = The client has approved the estimate but nothing has been purchased/requested yet. (rarely used)
  - Requested from vendor = the file has been requested from a vendor like Christian Connector, Encoura, Scholarships.com, etc.
  - Tasked to EDS = The file has been received and is posted to Files.com. This would likely be the status following “Requested from vendor”
  - Downloaded = The files have been purchased and downloaded/posted to Files.com.
  - Uploaded = The records are in Slate.
- Order Volume:
  - For statuses Created, Awaiting approval, and requested from vendor, if the volume has changed between each step, update that as we see that new volume.
- Remaining Volume:

- This field feeds into a report (Search Name Consultation - All Consultants). This allows an at-a-glance look at what volumes are remaining for clients. In order for this to work, Slate looks for the most recent Search Order History entry for each source.
- For sources with one file and one class year, this can be entered in the one entry for the source/date.
- **For sources with multiple files and/or multiple class years, this needs to be entered in the most recent/top entry for that source/date.**

Date	Vendor	Class	Order Volume	Remaining Volume	Status
Add New					
07/23/2024	Encoura	2027	403	51,339	Requested from Vendor
07/23/2024	Encoura	2025	4,408		Requested from Vendor
07/23/2024	Encoura	2026	788		Requested from Vendor
06/28/2024	College Board	2026	451	20,517	Uploaded

Digital Slush Management (WIP)

Outline

Outside of Scope / Value Add Components (WIP)

Collateral Analysis

Address Validation/Cleaning

If a client is having issues with clean mailing addresses we can provide CASS™ address cleaning and validation. We white-label a service available from AccurateAppend. Similar to other services with AccurateAppend, we upload a list, wait for the data to be appended/edited, and then download the corrected list.

Client Cost - $0.05 per uploaded record (even if the record is unmatched and/or doesn't require any edits), with a **minimum charge per list of $500**.

Carnegie Cost - The cost incurred by Carnegie is $0.01 per uploaded record (even if the record is unmatched and/or doesn't require any edits).

If a client is interested in doing this on a regular basis, maybe for reach round of namebuy it is worth chatting with Jason Frost to see if we can establish a better rate for the client.

Don't share the fact that we white-label this service and don't share our actual cost

Templates

Template: [Tinman Order #] _ [Client Code] _Name Buy Calendar & Purchase Estimates

C/E-Level and Board Presentations (WIP)

- Occasionally we are asked to present to
    - Industry Trends_FINAL_June2024
    - UC Presentation Final - June 2024

EDS PROCESSES

CHI Set Up

- Documentation
- Upcoming training for EDS on CHI:
    - System overview
    - Historical Data loads
    - Process task review
    - Consolidate records
    - Integrations

Origin Source Audit

- Documentation

Reports and PHI Info

- Documentation

Slate Communications Dashboard Set Up/Customization

- Documentation

Print Lists

- CHI using Slate Print
- CHI not using Slate Print
- PHI using Slate Print
- PHI not using Slate Print

Phone Matching Full EDS Process

- Documentation
- Includes documentation for Slate export and import

CARNEGIE BEST PRACTICES

Best Practices - Circle of Strategy

(Table of Contents)

  - The Circle of Strategy group manages this summary of best practices INT | Strategic Best Practices Doc
  - It contains high level recommendations, not anything tactical

RESOURCES

- Enrollment Strategists Trainings (recordings)
- **Search Resources (Within Client Management Drive)**
- **Client Facing List Summary Template**

Sources, Vendors, CRMs

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- We keep an ongoing list of different search list sources, vendors in the higher ed space, and CRMs. It is important to have a basic understanding of the sources, vendors, and software solutions available to clients in order to speak from an informed viewpoint of efficacy, differentiators, and costs.
  - Higher Ed Vendors & Search List Sources
  - Christian Connector media kit
- Data Manipulation
  - Forcing a leading