

Tailored Outreach

Personalizing Communications

January | 2024



PRESENTERS

Allison Steinberg

- + Assistant Director, Slate Communications
- + 10+ years in higher education enrollment & marketing and 5+ years of Slate experience
- + The Sophisticated and Curious Ambassador



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- + Director, Slate Trainings
- + 10 years in higher education & 5+ years of Slate experience
- + The Considerate and Adventurous Explorer





Agenda

- 1 Reviewing Deliver Campaign Essentials
- 2 Creating Slate Data Points
- 3 Elevating your Communications

1 Reviewing Deliver Campaign Essentials

IN THIS SECTION...

- + Ideal Campaigns
- + Do Your Research
- + Communication Plans

Standard Admissions Campaigns (undergraduate & graduate)

- Senior Search
- Underclassmen Search
- Application Generation
- Application Completion
- Yield
- Anti-Melt

Specialized Campaigns

- Admissions
 - Parent + Family
 - Guidance Counselors
- Student Success
 - Registration & Advising
 - Melt Prevention
 - New Student Welcome
- Advancement
 - Day of Giving
 - Capital Campaigns
 - Alumni Association Updates

Do your research

What to consider...

- Behavior (*campaign data*)
- Type of institution
- Brand + voice
- Available content

Basic Communication Plan

Application Generation Communication Plan

Application Generation Communication Plan							
Campaign Begins:							
Deliverable	Method	Send Date	Drip Day	Topic	Call-to-Action	Audience	Email Format
#01 App Gen	Email			Intro/Overview	Apply	Traditional UG Inquiries	Template ▼
#02 App Gen	Email			Greetings from Admission Counselor	Apply	Traditional UG Inquiries	Plain Text ▼
#03 App Gen	Email			Brief on Academics	Apply	Traditional UG Inquiries	Template ▼
#04 App Gen	Email			Info on Honors College	Apply	Traditional UG Inquiries	Template ▼
#05 App Gen	Email			Affordability & Scholarships	Apply	Traditional UG Inquiries	Template ▼
#06 App Gen	Email			Student Story	Apply	Traditional UG Inquiries	Plain Text ▼
#07 App Gen	Email			Campus Community	Apply	Traditional UG Inquiries	Template ▼
#08 App Gen	Email			Student Resources	Apply	Traditional UG Inquiries	Template ▼
#09 App Gen	Email			Details on how to apply	Apply	Traditional UG Inquiries	Plain Text ▼
#10 App Gen	Email			Student Life	Apply	Traditional UG Inquiries	Template ▼
#11 App Gen	Email			ROI	Apply	Traditional UG Inquiries	Template ▼
#12 App Gen	Email			Alumni spotlight	Apply	Traditional UG Inquiries	Plain Text ▼
#13 App Gen	Email			Student Perspective	Apply	Traditional UG Inquiries	Newsletter ▼
#14 App Gen	Email			Learning outside of the classroom	Apply	Traditional UG Inquiries	Template ▼
#15 App Gen	Email			What's your interest level?	Apply	Traditional UG Inquiries	Template ▼

Enhanced Communication Plan

Application Generation Communication Plan								
Campaign Begins:								
Deliverable	Method	Send Date	Drip Day	Topic	Call-to-Action	Audience	Segmentation/ Mark-Up	Email Format
#01 App Gen	Email			Intro/Overview	Learn More/Apply/Visit	Traditional UG Inquiries	freshman/transfer/international	Template
#02 App Gen	Email			Greetings from Admission Counselor	Learn More/Apply/Visit	Traditional UG Inquiries	freshman/transfer/international	Plain Text
#01 App Gen Parents	Email			Intro & Greetings from Admissions Counselor	Learn More/Connect	Parents of Traditional UG Inquiries		Template
#03 App Gen	Email			Brief on Academics	Learn More/Apply/Visit	Traditional UG Inquiries	academic colleges	Template
#04 App Gen Opener	Email			Info on Honors College	Learn More/Apply	Traditional UG Inquiries	High Academic Ability Name Buys	Template
#05 App Gen	SMS			Applying is Free	Apply	Traditional UG Inquiries		
#06 App Gen	Email			Affordability & Scholarships	Learn More/Apply	Traditional UG Inquiries	freshman/transfer/international	Template
#02 App Gen Parents	Email			Affordability & ROI	Learn More	Parents of Traditional UG Inquiries		Plain Text
#07 App Gen	Email			Student Story	Learn More/ Apply/Connect on Social Media	Traditional UG Inquiries	freshman/transfer/international	Plain Text
#08 App Gen	SMS			Any questions about your application?	Connect	Traditional UG Inquiries		
#09 App Gen	Email			Campus Community	Learn More/Apply/Visit	Traditional UG Inquiries		Template
#10 App Gen	Email			Student Resources	Learn More/Apply	Traditional UG Inquiries	freshman/transfer/international	Template
#11 App Gen	Email			Details on how to apply	Apply	Traditional UG Inquiries	freshman/transfer/international	Plain Text
#12 App Gen	SMS			Visit Campus	Visit	Traditional UG Inquiries		
#13 App Gen	Email			Student Life	Apply/Visit	Traditional UG Inquiries		Template
#14 App Gen	Email			ROI	Apply	Traditional UG Inquiries	first-gen	Template
#15 App Gen	Email			Alumni spotlight	Apply	Traditional UG Inquiries	domestic/international	Plain Text
#16 App Gen	Email			Student Perspective	Apply/Connect on Social Media	Traditional UG Inquiries		Newsletter
#03 App Gen Parents	Email			Application Steps	Apply	Parents of Traditional UG Inquiries		Template
#17 App Gen	Email			Learning outside of the classroom	Apply	Traditional UG Inquiries	academic colleges	Template
#18 App Gen	SMS			Apply Now	Apply	Traditional UG Inquiries		
#19 App Gen	Email			What's your interest level?	Apply/Form	Traditional UG Inquiries		Template
#20 App Gen	SMS			Scholarships	Apply	Traditional UG Inquiries	freshman/transfer/international	
Print								
#01 Postcard	Slate Print			Visit Campus	Visit	Traditional UG Inquiries		
#02 Postcard	Slate Print			Apply Now	Apply	Traditional UG Inquiries	freshman/transfer	

2 Creating Slate Data Points

IN THIS SECTION...

- + Key Data Points
- + Data Collection
- + Lead Scoring

Key Data Points

- Student Type
- Person Status
- Academic Interest
- Proximity to campus
- Region
- Expected Entry Term
- Name Buy Market + Ability Level
- Citizenship
- Psychographics

Data Collection

- Surveying Students
- Improving mapping from data imports

CARNEGIE

Plans to Attend Survey

Carnegie University wants to hear from you!

Please select the option that best describes your decision to attend Carnegie University.

I have decided to attend.
 I am considering attending.
 I have decided not to attend.

We'd love to hear more.

Please tell us what considerations you have at this time.

I am waiting on admission decisions from other colleges/universities
 I am waiting on financial aid award from other colleges/universities
 I have not received my financial aid award from Carnegie University
 I received my Carnegie University financial aid award, but unsure if I can afford to attend
 I have not visited campus yet
 I need more information about my academic program/major
 I need information about campus and/or residence life
 I have another concern, please contact me

Tell us more about how we can help you make your decision.

SUBMIT

Message

Sender: Imurnen@carnegiehighered.com




Recipient: {{sys-email}}

CC

Subject: So excited you may attend!

Preheader: Submit your deposit as soon as you decide!

Send Message
Submit Form Test

{{sys-preferred}},

 This is great news and we hope you choose to attend! To officially reserve your place in the incoming class, please **reply to your offer of admission**. You will then be directed to the screen to **submit your tuition deposit**.

 We look forward to you joining us on campus next semester!

 Sincerely,
 {{Staff-Assigned-Name}}
 {{Staff-Assigned-Title}}
 {{Staff-Assigned-Email}}
 {{Staff-Assigned-Phone}}

Scoring Students

- Score students based on what you know about them and based on their level of engagement
- Demographic data points
 - Proximity to campus
 - Feeder schools
 - Legacy student
- Engagement data points
 - Clicked on emails
 - Visited campus
 - Submitted materials
 - Completed a form
 - Pinged on the website

3 Elevating Your Communications

IN THIS SECTION...

- + Personalizing your communications
- + Following-up with engaged students
- + Continuing beyond enrollment

Personalizing your communications
With Slate's tools

Liquid Markup

- Email body
- Subject lines, pre-header, sender
- Buttons

Display Message X

Sender:

Recipient:

CC:

Subject: Version 1 ▼

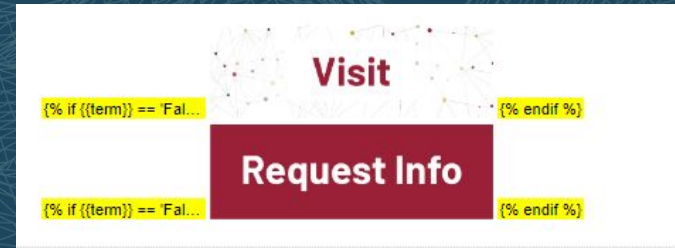
Preheader:

Body Content:

`{% if {{Chicago}} == 'N' %}` Come check out TrollNation, located right in your backyard, by scheduling your visit today! And when you're ready, apply to Trinity and become a Troll for life. `{% endif %}`

`{% if {{Illinois}} == 'N' %}` Greater Chicago is waiting, so schedule your visit today! And when you're ready, apply to Trinity and become a Troll for life. `{% endif %}`

`{% if {{Ohio}} == 'N' %}` Your home away from home in Greater Chicago is waiting, so schedule your visit today! And when you're ready, apply to Trinity and become a Troll for life. `{% endif %}`



Liquid Markup

- Merge fields
 - Translation codes
- Existence exports

Exports

Person Preferred
Person GUID
Person Email
staff_name
Staff Assigned Email
Staff Assigned Title
Staff Assigned Phone Number
Chicagoland Existence Exists: Y Not Exists: N
Illinois Existence Exists: Y Not Exists: N
OOS Existence Exists: Y Not Exists: N

Display Part

Status: Active

Name: Chicagoland

Source: Subquery Export

Type: Dependent subquery

Output: Existence

Value If Exists: Y

Value If Not Exists: N

Exports: [Export]

Filters: Filter NOT OR Join

Join: Addresses

Join: Addresses / Geomarket IN IL-07 Chain of Lakes, IL-08 Northwest Subu...

Groups: Group

Display Width: e.g. 100px or 75%

Close

Display Part

Status: Active

Name: Illinois

Source: Subquery Export

Type: Dependent subquery

Output: Existence

Value If Exists: Y

Value If Not Exists: N

Exports: [Export]

Filters: Filter NOT OR Join

Join: Addresses

Join: Addresses / Geomarket IN IL-01 Rockford, IL-02 Quad Cities, IL-03 Peo...

Groups: Group

Display Width: e.g. 100px or 75%

Close

Display Part

Status: Active

Name: OOS

Source: Subquery Export

Type: Dependent subquery

Output: Existence

Value If Exists: Y

Value If Not Exists: N

Exports: [Export]

Filters: Filter NOT OR Join

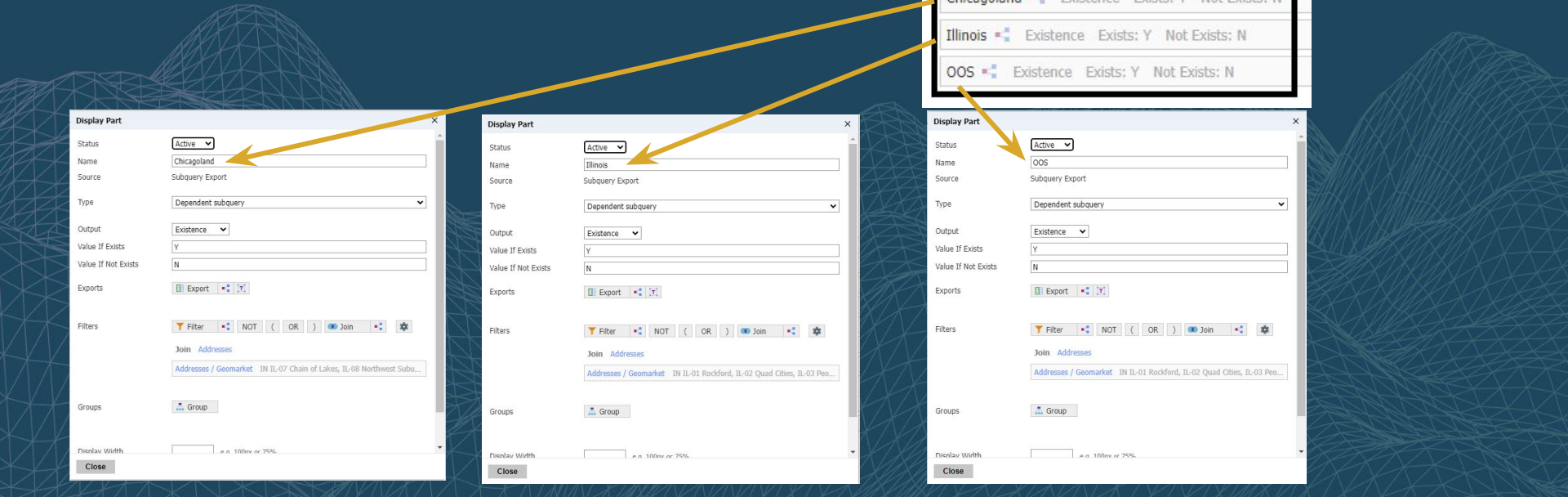
Join: Addresses

Join: Addresses / Geomarket IN IL-01 Rockford, IL-02 Quad Cities, IL-03 Peo...

Groups: Group

Display Width: e.g. 100px or 75%

Close



Content Blocks

- Email Content

Edit Key X

Key:

Folder:

Type: String (Discrete Values)

Default Snippet

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, text color, background color, source, and help.


Normal Font Size A-

99% of students receive scholarships and financial aid.

- Your admissions application automatically considers you for [merit scholarships](#) worth up to \$13,000 \$7,000 each year you're enrolled at YCP.
- Follow our financial aid checklist to apply for financial aid at York. The first step is filing a FAFSA. The Free Application for Federal Student Aid (FAFSA) can make York even more affordable by helping you get grants, work-study eligibility, and loans. When the program opens, projected in December 2023, you can use York's institutional code **003399** to file a FAFSA. The Free Application for Federal Student Aid (FAFSA) can make York even more affordable by helping you get grants, work-study eligibility, and loans. Use York's institutional code **003399** to file a FAFSA.

See how much you might save on college with our [Net Price Calculator](#). It's a free tool.

Save
Delete
Cancel



Hi `{{(Person-Preferred)}}`,

[York College of Pennsylvania](#) lets you live up to your potential without taking on unnecessary debt. Here's how York's affordability will empower you:

`{{(Staff-Assigned-Name-Full-Name | snippet: "inquiries_financialaid")}}` `{{(Person-Preferred)}}`, expect transformative affordability at York College of Pennsylvania. [Apply today](#) and enjoy the benefits of a private college at a lower cost.

Sincerely,





`{{(Staff-Assigned-Name-Full-Name)}}`
`{{(Staff-Assigned-Title)}}`
York College of Pennsylvania
`{{(Staff-Assigned-Email)}}`
`{{(Staff-Assigned-Phone-Number)}}`

[Apply to York](#)

`{% if ((fy-domestic) == 'Y' %}`
 P.S. The savings start now! Earn a **\$1,000 visit grant** when you book a campus visit.`{% endif %}`

YORK COLLEGE
OF PENNSYLVANIA

441 COUNTRY CLUB RD
YORK, PA 17403-3651
COPYRIGHT © YORK COLLEGE OF PENNSYLVANIA

Content Blocks

- Header images

Content Blocks Edit


Key: yield_academics_header
 Type: String (Discrete Values)
 Default: Default exports have been configured. Snapshots

Edit Snippet Prev Next X

Value
[New Code](#)
 College of Engineering
 College of Liberal Arts and Sciences
 Mike Ditch School of Business

State (Wayne State University)

Key: yield_academics_header
 Type: String (Discrete Values)
 Status: Active
 Value: College of Engineering
 Snippet:



Save Save as Copy Delete Cancel

Edit Message X

Sender: "Wayne State University" <admissions@wayne.edu> Reply To: futurewarrior@wayne.edu Application-Major

Recipient: {{Person-Email}} Application-Major-Cat

CC: major

Subject: Opportunity is waiting, {{Person-Preferred}}! Version 1 Person-Email

Preheader: Hear from our students Person-First

Person-Last

Person-Preferred

Prospect-ID

Staff-Assigned-Email

Staff-Assigned-Full-Name

Staff-Assigned-Title

B I U S Normal (...) Font Size A- A+

Where are they now?


Wayne State University is proud to have a powerful network of more than 290,000 alumni—one day, you'll join them!

{{major | snippet: 'yield_academics_alum'}}

See where Wayne State could take you when you *make things official*, {{Person-Preferred}}!

With Warrior pride,

Ericka M. Jackson
 Senior Director of Undergraduate Admissions



```

67 <table cellpadding="0" cellspacing="0" class="es-wrapper" role="presentation" style="mso-table-lspace:0pt;mso-table-rspace:0pt;border-
collapse:collapse;border-spacing:0px;padding:0;Margin:0;width:100%;height:100%;background-repeat:repeat;background-position:center
top;background-color:#F6F6F6" width="100%">
68 <tbody>
69 <tr style="border-collapse:collapse">
70 <td style="padding:0;Margin:0" valign="top">{{major | snippet: 'yield_academics_header'}}
71 <table cellpadding="0" cellspacing="0" class="es-content" role="presentation" style="mso-table-lspace:0pt;mso-table-
rspace:0pt;border-collapse:collapse;border-spacing:0px;table-layout:fixed !important;width:100%">
72 <tbody>
73 <tr style="border-collapse:collapse">

```

Slate Print

- Merge fields
- Translation codes

Edit Key ✕


Key:

Type:

Default Export Value:

Default Export Value 2:

Default Export Value 3:




We're talking about scholarships and grants that work for you, Selma.

Even better? You could qualify for our Discover Detroit Scholarship that covers the difference between in-state and out-of-state tuition.

DID YOU KNOW?

Wayne State University has been named one of the **50 Most Affordable Colleges in the Country** by *study.com*. We work hard to ensure that students just like **you** are given big opportunities, without cost getting in the way.



WAYNE STATE UNIVERSITY
42 W. Warren Ave.
Detroit, MI 48201
313-577-2900



We're talking about scholarships and grants that work for you, {{Person-Preferred}}.



We're talking about tuition pledge programs that result in zero out-of-pocket expenses for tuition and fees for up to four years of full-time study.

Through WSU's scholarships and financial aid programs, 46% of incoming first year students qualify for free tuition and fees.



And we're talking about a Financial Aid staff that will work with you to apply for our various scholarships ranging from specific academic scholarships to need-based or leadership scholarships.



SC: sch for: wa

Edit Translation Code ✕

Key: scholarship_segment

Type: String (Discrete Values)


Status:

Value:

Export Value:

Export Value 2:

Export Value 3:



We're talking about scholarships and grants that work for you, Ericka.

As soon as you apply, you'll be automatically considered for up to \$6,000 in merit scholarships.

Slate Print

- Personalized QR Codes

Edit Part

Status:

Name:

Source:

Type:

Output:

Row Separator: \n = New Line; \t = Tab; \\ = Escaped Backslash

Row Offset: Row Limit:

Export Separator:

Exports:

Link:

Person GUID:

LET'S GET TO KNOW EACH OTHER, RACHAEL-TEST.

We know you're ready for the next step: college. You just need to choose your path. Here's what makes Transylvania University your best choice.

27 intercollegiate athletic teams

1 of only 9 top-100 liberal arts colleges in an urban area

99% of students receive scholarships or grants


15 average class size

TRANSYLVANIA UNIVERSITY
Office of Admissions
300 North Broadway
Lexington, KY 40508

PLACE STAMP HERE

RACHAEL-TEST YATES-TEST

5




READY TO BEGIN YOUR JOURNEY? GET TO KNOW US BETTER HERE!

PLUS, YOU'LL BE IN THE PERFECT COLLEGE CITY.

It's not far from you! Lexington is packed with opportunities. You'll have access to big-name businesses, beautiful green spaces and a thriving arts scene. You'll find jobs and internships that will put you on a path to success.

10:45



JESSICA NEALEY
+1 859-233-8501

HI, RACHAEL-TEST!

Congratulations on beginning your college search. I'm so glad it has led you to Transylvania University.

This is where you'll become a Pioneer, Rachael-TEST. You'll innovate and explore as you pursue your passions. You'll forge a path filled with rich relationships, lifelong learning and personal achievements.

This is your journey. As your admissions counselor, I'm here to guide you. Ask me any questions.


Let's connect to start this journey together!

Sincerely,
Jessica Nealey

CONNECT

apply.transy.edu

10:46



Request Information

Rachael-TEST Yates-TEST
(ryates@carnegiehighered.com)
Not Rachael-TEST Yates-TEST? [Click here](#)

Thank you for your interest in Transylvania University!
Complete the form below to begin to receive information and communication.

First Name

Last Name

Birthdate

apply.transy.edu

Following Up

With engaged students

Follow-Up Engagement Emails

Edit Part
✕

Status Active ▾

Name

Source Subquery Filter

Type Dependent subquery ▾

Aggregate Exists ▾

Exports
 Export

Filters
 Filter
 NOT
 (
 OR
)
 Join

[Join Messages](#)

[Join Messages / Message Mailing](#)

[Message Mailing / Name](#) IN Carnegie / Senior Search - #04 Senior Search

[Messages / Status](#) IN Click, Open

Save
Save and New
Cancel

Edit Part
✕

Status Active ▾

Name

Source Subquery Filter

Type Dependent subquery ▾

Aggregate Formula ▾

Formula

Exports
 Export

Filters
 Filter
 NOT
 (
 OR
)
 Join

[Join Pings](#)

[Pings / Timestamp](#) >= today - 30 days

Save
Delete
Cancel

Print Mailing Lists

Filters [Check Logic](#) Matching Rows: 3,972

Status IN Inquiry

Campus IN Undergraduate

Applicant Type IN First Time Freshman

Intended Entrance Term IN Fall 2024

Tag Not in Opt-Out or Test Record Not Exists

Address exists in the US Exists

(

Changed to an inquiry within the last 90 days Exists

OR

Clicked an App Gen Email Exists

OR

Primary Market Exists

OR

Visited Campus in the Last 60 Days Exists

)

Filters [Check Logic](#) Matching Rows: 7,055

Status IN Inquiry

Student Type IN First-Time Freshman

Entry Term IN Fall 2024

Not in Tag of Opt-Out or Test Record Not Exists

Address Exists in the US Exists

Lead Score with Engagement >= 7

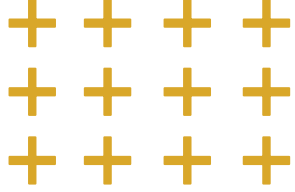
Capitalizing on Event Communications

- Event communications = high engagement
 - Confirmation emails
 - Reminder emails
 - Thank you emails
 - “Sorry we missed you” emails
- Add more content than the standard event message
 - Utilize your darts for personalization
 - Remind students of upcoming items that are pertinent to them:
 - Is their app still incomplete?
 - Are you still waiting on their intent to enroll?
 - Do you want them to talk to their counselor?

Continuing personalization
Beyond enrollment

Student Success and Advancement

- Personalization should not stop once the student enrolls
- Use key data points and tools in your Student Success and Advancement instances to segment by:
 - Student Success
 - Amount of credits earned
 - New students vs upperclassmen
 - Academic standing
 - Major/program
 - Advancement
 - Giving history
 - Volunteer Engagement
 - Age/Years since graduation
 - Association/Relevance to the alum



Thank you to our partners!

Transylvania University

Trinity Christian College

York College of Pennsylvania

Wayne State University





CARNEGIE

Thank You!



CarnegieHigherEd.com

