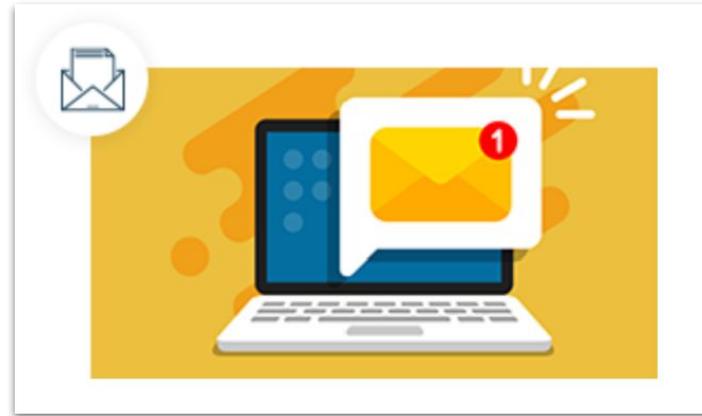# collegexpress

Quick Guide to Your CollegeXpress Connect Service

Access our entire database of college-bound students and their parents and send messages right into their inboxes.


CARNEGIE

How to Access CollegeXpress Connect

1. Log in to your dashboard here:
   https://my.carnegiehighered.com/client/login/

   a. If you do not have an account yet, please email us at
      inquiries@carnegiehighered.com and we will provide
      access.

2. Once you're logged in, navigate to this card on your main page
   and click the "View Outreaches" button.

CXconnect

View Outreaches

Build and monitor your outreaches here.
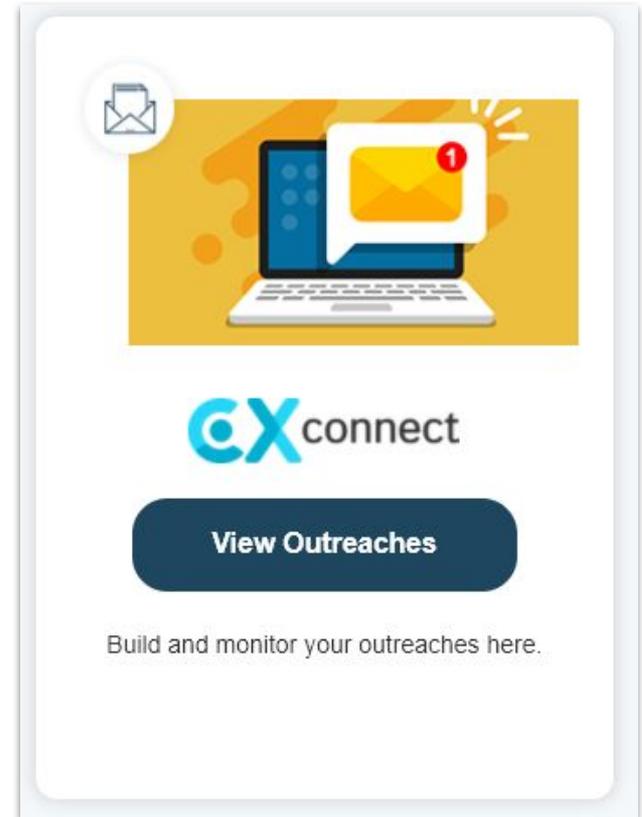
Credits

The number of emails you are able to send through your Connect subscription (250,000)

After logging in to the Connect system, you'll notice a green "Credit" button in the upper right-hand corner that shows how many emails you have left to send. This will decrease as you begin sending your outreaches.

CollegeXpress University Outreaches

Credits 250,000 / 250,000
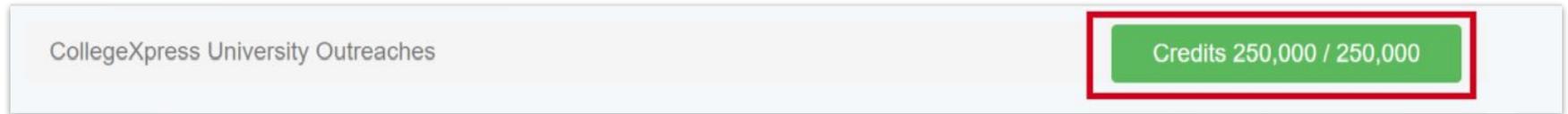
Create Your First Outreach

Choose between two different outreach types.

Welcome to CollegeXpress Connect

CollegeXpress Connect gives you access to connect with students looking for the next step in their education journey. Create your first outreach:

Add Repeating Outreach Create an email that will continue to send on the schedule you decide.

Add One-Time Outreach Create a single send message to generate interest in timely messaging or event promotion.

Repeating Outreach
General emails about your institution that send on a regular basis as new names enter our system.

One-Time Outreach
Think: admissions events or virtual tour invites; specific, timely information you want prospects to know or sign up for

Targeting:
Find Your Audience

Search our entire database in real time to target the exact prospect group you want to send your email outreach.

Target by:

- Parent or Student
- High school graduation year
- High school GPA
- Gender
- Sport interest
- Race
- Religion
- Major interest
- ZIP Code
- State
- Competitor set

Count: The non static number that will match the criteria that you're outreaching to.

Be as broad or as niche as you want for your specific outreach.

Targeting:
Find Your Audience
Quick tips + information

1. **New Prospects Only?**

   a. This toggle is asking if you want to send this outreach to a prospect who has never received an email from you out of this service before. If you want to only email new names each time, then choose "yes"; if you want to outreach to names you've emailed before, this should be switched to "no."

2. **Suppression Lists**

   a. You'll want to use this feature if you're sending graduate or transfer student outreaches. By uploading emails of current students in your system here, you are ensuring you are not using your credits for names you already own.
   b. It's also helpful if you have an opt-out or unsubscribe list so you won't be emailing students who you know do not want to hear from you.
   c. Unlimited lists can be uploaded here (and will be saved for later use).

3. **Student School Choice**

   a. Target your competitor set right here! Send content directly to students who have expressed interest in your competitor schools. (Minimum number of schools to target: 3)

Targeting:
Students vs. Parents

CollegeXpress is able to collect parent data when a student registers with us. Our registration asks the student to input their parent's email address (as a non-required field).

When targeting parents for your outreaches, please keep the following in mind:

- Not all students in our database provide parent email addresses. Therefore, there is a much smaller subset of parent emails compared to students.

- By selecting "Parents" as the recipient of your email, you are targeting based on the student data we have but are emailing the parent of that student.

- If a parent is interested in learning more about your institution from your outreach, the data you receive in your daily/weekly files will be the **entire student record** plus the parent email address. There will not be any additional parent information provided.

Mail Content: Build Your Email

Where your email comes to life in real time. Add images, format content, and push prospects to your website.

Steps to building your email:

1. **Add your subject line**

2. **Upload images**
   a. Two images are required to be added to this email (banner and inline) template. Upload your own images or use our stock library to populate those areas. Be creative and show off your school's personality! As you upload images, we will store them for you to use on future outreaches.
   b. As you upload images, you'll see them populate on the preview to the right. There, you can see the email as you build it and decide if your image/word choices are rendering the way you want.

3. **What's your message?**
   a. Type your email here. You can also add in some basic formatting: bolding, italicizing, and lists. Click on the *markdown* link for instructions. **Note: Avoid using any links in this section.**

4. **The CTA**
   a. Create your own CTA, or leave it blank and our default "*This school sounds interesting!*" will be used.
   b. This is the most critical part of your email, as this **one button** is where we are able to collect student data and send it to you. It's the only spot on the email we can collect this data.

5. **Landing Page URL**
   a. Where do you want a prospect to land after clicking the green button? Send them to another RFI form or push them to an academic major page or your athletics site—it's up to you! Once the student makes it to your site, you've officially got them tied to your digital marketing efforts!

Mail Content: Build Your Email

Quick tips + FAQs

- **Why can't I include a URL in the message block?**
  - We want to ensure that the student clicks on the green button only and not distract with multiple CTAs; the **green button** is the only area that our system is able to collect data from and send it to you in your daily or weekly files.

- **If a student or parent clicks the green button or "no" button, what happens?**
  - If an action is taken on either button, you will not be able to outreach to that individual again through Connect. If the student or parent clicks the green button, you'll receive that data in your daily/weekly files. A "no" button click will be suppressed on our end.

- **Do I have to write a CTA or add a URL landing page link?**
  - No, you can leave these blank if you want and our defaults (a message with a link to your CX profile) will run instead.

- **Can I add UTM codes to the landing page URL?**
  - Yes, and we encourage you to do that!

Mail Schedule: Time to Send

Scheduling your outreaches for one-time and recurring sends

One-Time Outreach Scheduling
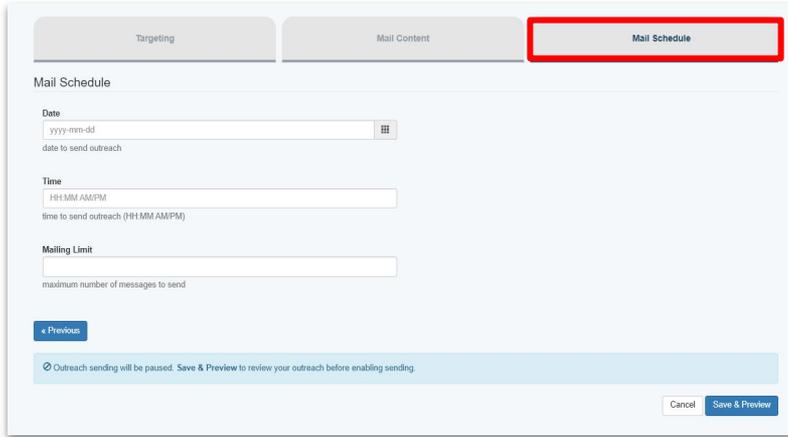
- Choose the date you'd like to send your outreach
- Choose the time you'd like your email to send (set to Eastern Time)

Mailing limit (both outreach types): How many prospects would you like to email? Hint: look back at your targeting count; if it's a large population, you might want to scale back so you don't use a large amount of credits in one send.
Ex: If you have "100" in the limit as a recurring send, the email will only send once.

Repeating Outreach Scheduling
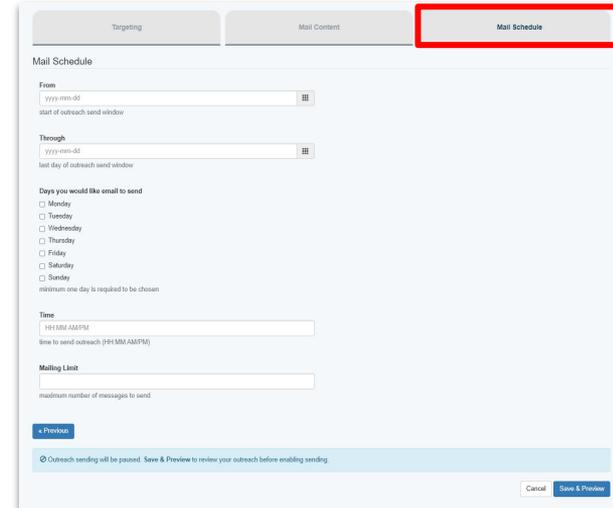
- Set the start and end date of your send
- Choose the specific days of the week the email should send (Daily? Weekly? Biweekly?)
- Choose the time you'd like your email to send (set to ET)

Send Your Email

Take a look at your email one last time, send yourself a test if you'd like, and set it to send.

Once you have reviewed your email through the mobile and desktop views, click on the "Enable Sending" button and your email is scheduled! You will find this email added to your dashboard queued up and ready to go.

You can also choose to **not** click the "Enable Sending" button and leave your email *Paused* until you're ready to send it. This mailing will still show up on your dashboard, but it will greyed out so you can tell what is live and what is not.

Preview Outreach Junior Search

Mobile View   Desktop View

▶ Enable Sending

Click envelope icon to send yourself a test email

Real-Time Data + Results

See immediate results on your main dashboard.

											Add Repeating Outreach
Start	**End**	**Schedule**	**Phase**	**Sending**	**Mailable**	**Sent**	**Opens**	**Yes**	**Format**	**Actions**	
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	2,152	736	0	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	5,131	2,284	6	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	5,432	1,678	3	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	958	299	1	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	3,979	1,360	1	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	588	275	2	CSV Weekly		
09/28/21	07/31/22	Mon at 11:00 AM ET	Ongoing	Enabled	0	476	194	2	CSV Weekly		

EXAMPLE DATA

# of students who are still available to email (in this example, all emails were used for these outreaches)

# of emails that were sent (credits used)

# of students who opened your email

# of students who clicked the green button on your outreach (these are your leads)

Download names from your individual outreaches immediately by clicking this button

Daily/Weekly File Delivery

Your CollegeXpress Connect names are set to flow directly into your daily/weekly files you're already receiving!

How to find them in your files:

1. If you see an "Issue Date" in Column B of your file, the code for this will be **"552121"**
2. If you see an "Edition" in Column B of your file, the code for this will be **"CX Connect"**

In both cases, this means the student or parent attached to that code expressed interest in your institution via the CollegeXpress Connect service (one of your outreaches).

Where can you access your files? You may be getting your data via automatic upload in Slate, or you may be receiving emails notifying you that your leads are ready to download. In either circumstance, you can access your leads on the "My Files" card on your main dashboard.

My Files

View Your Files

Download your latest set of inquiries here.
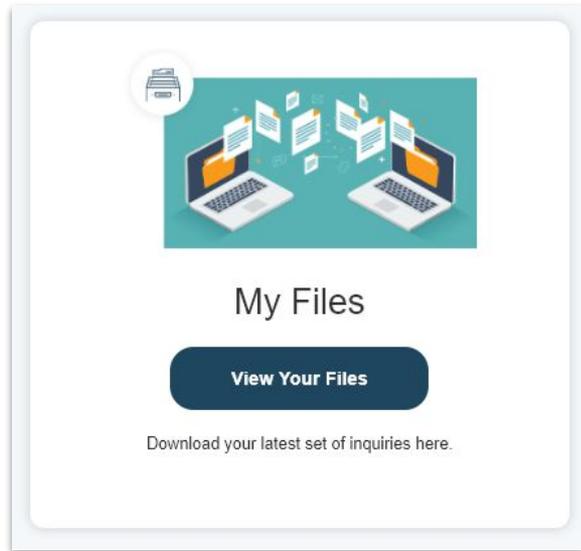
Questions?

We are here to help!

For any questions, comments, feedback, troubleshooting, problems, etc., please email inquiries@carnegiehighered.com.

— Your **cx collegexpress** team