

Part 4 of 5

Future Landscape of College Board Student Search

August 2023



Presenter

Jim Rogers

- + **Senior Vice President, Enrollment Strategy**
- + **Over 25 years of enrollment management experience**
- + **The Determined and Fun Performer**

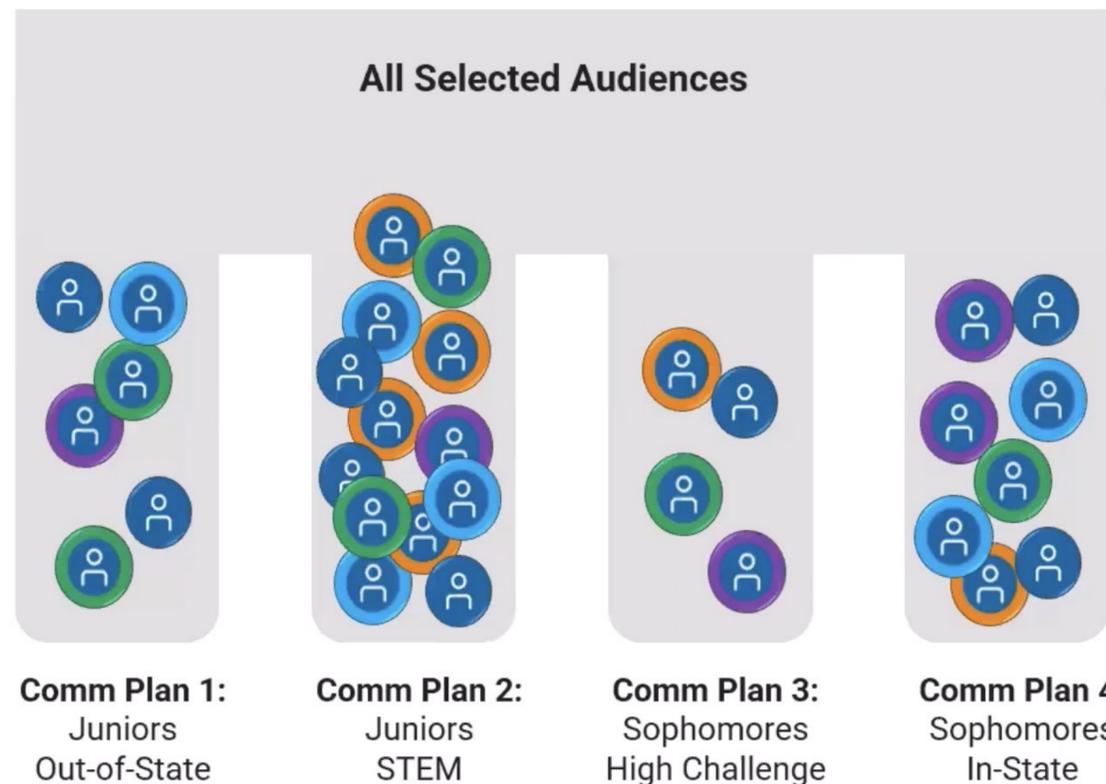


Today's Goal

Preparing for College Board Connections' communications for this year's search cycle.

How do we get started with Connections' Communication Plans?

- + Understand the Student Population
 - + Audiences allow access to the pool of students to target
 - + Filters used to segment and communicate to the whole pool
- + Communication Plan Strategy
 - + Start small and set up a few comm flows initially (up to 10 plans/up to 12 messages each)
 - + Structure comm plans by cohort, geography, academic ability, etc.
 - + Consider which messages need to be general and which need to be segmented more



Connections provides the following fields for filtering your Communication Plans:

- GPA
- Graduating Class
- Score minimum
- State
- Zip Code
- Race/Ethnicity
- Major
- Gender
- High-Challenge Environment (determined by the College Board Landscape resource)

Communication Plans

- + Messages start on Day 0 and must have at least 5 days in between each one
- + Messages can be general or be more segmented throughout the comm plan
- + Call to Action
 - + None
 - + Learn More
 - + Request for Info

Communication plans

Click "Get Started" to begin your Communication Plan. This will allow you to select a population and add other details.

The screenshot shows a dashboard with two communication plan cards. The first card, 'Communication Plan 1', has 9/12 messages available, a population of 'Prospect; ... and 2 more', a start date of 11/5/2023, an end date of 12/30/2023, and is 'Not Active'. The second card, 'STEM Plan', has 12/12 messages available, the same population, a start date of 1/31/2024, an end date of 2/28/2024, and is also 'Not Active'. Both cards feature a 'Build and Edit Messages' button (highlighted with an orange box in the first card) and a 'Publish/Activate Communication Plan' button.

Communication Plan 1

Messages Available: 0/12
 Population: Prospect; Pennsylvania;
 Start: 11/5/2023 End: 12/30/2023
 Communication Plan Status: Not Active

Message: Details *=-required

Message Name *

Day 0+ * Minimum of 5 days between any 2 sequential messages.

CTA *

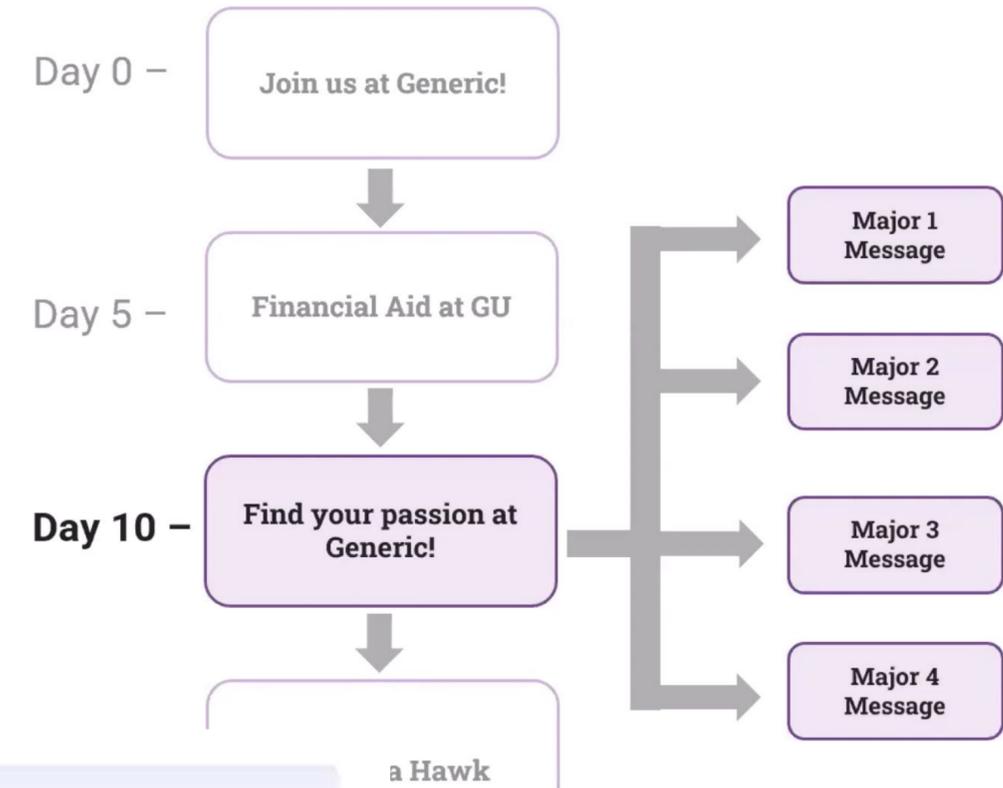
Segmentation

Segment Criteria

- Select
- Graduation Year
- State/Territory
- Zip Code(s)
- Score Minimum
- High School GPA
- Academic Major
- Race/Ethnicity
- Gender
- High Challenge Environment

Communication Plans

- + Some messages go to all in the comm plan
- + Some messages get further segmented throughout the plan
- + Be sure to label message names clearly



Day 0+	Message Name	Segmentation		
0	Join us at Generic!	None	Remove	Edit Details
5	Financial Aid at GU	None	Remove	Edit Details
10	Find your passion at Generic!	None	Remove	Edit Details

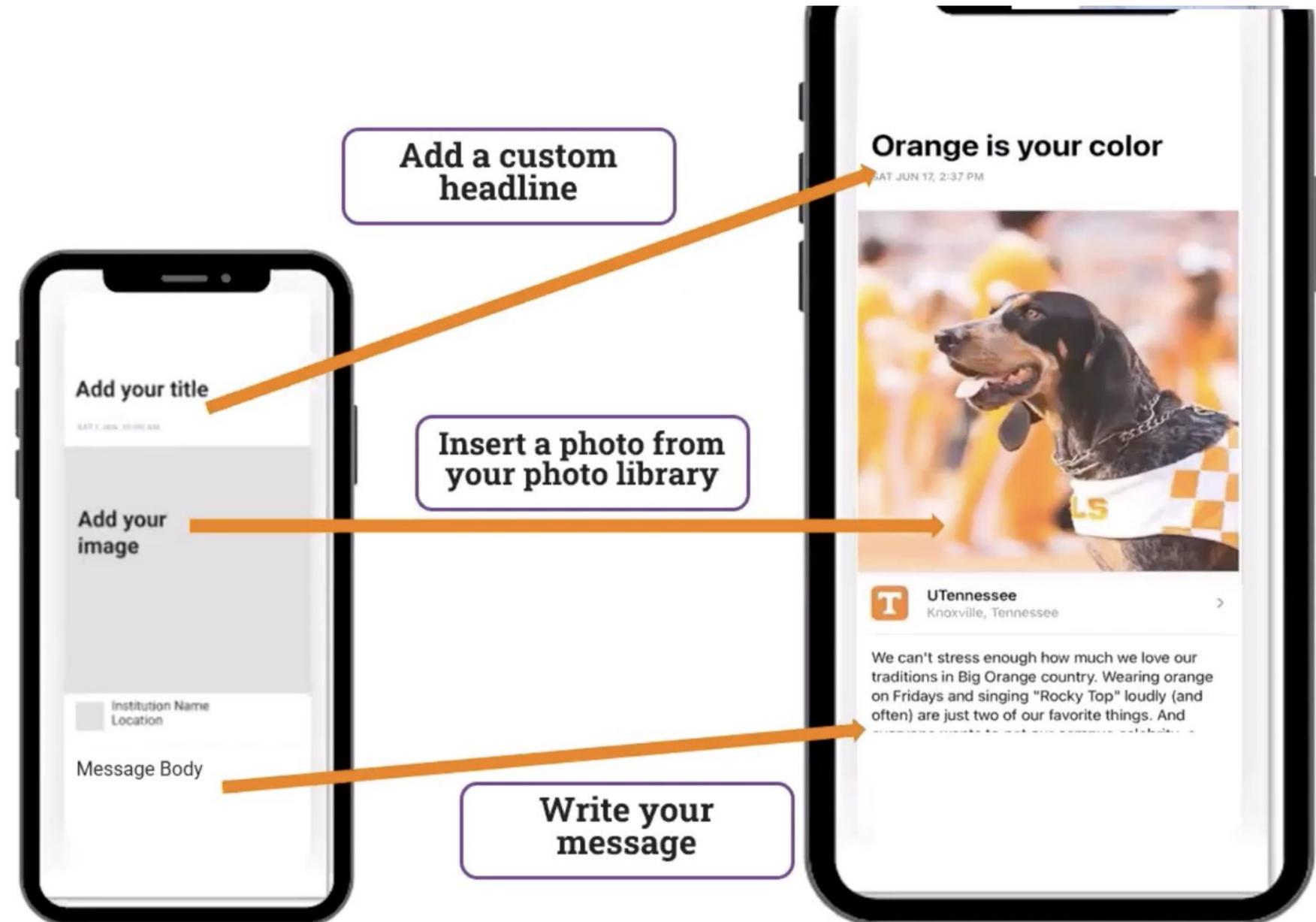
Create New Message

Communication Plans

Message Builder

Key Message Specs:

- Optimal **photo** size is 2048 x 2048
- 50-character limit for your **headline**
- 3,000-character limit for **message content**
- Message **calls-to-action** can drive to:
 - BigFuture School Profile
 - Your school's RFI Form



Next Steps & Reminders

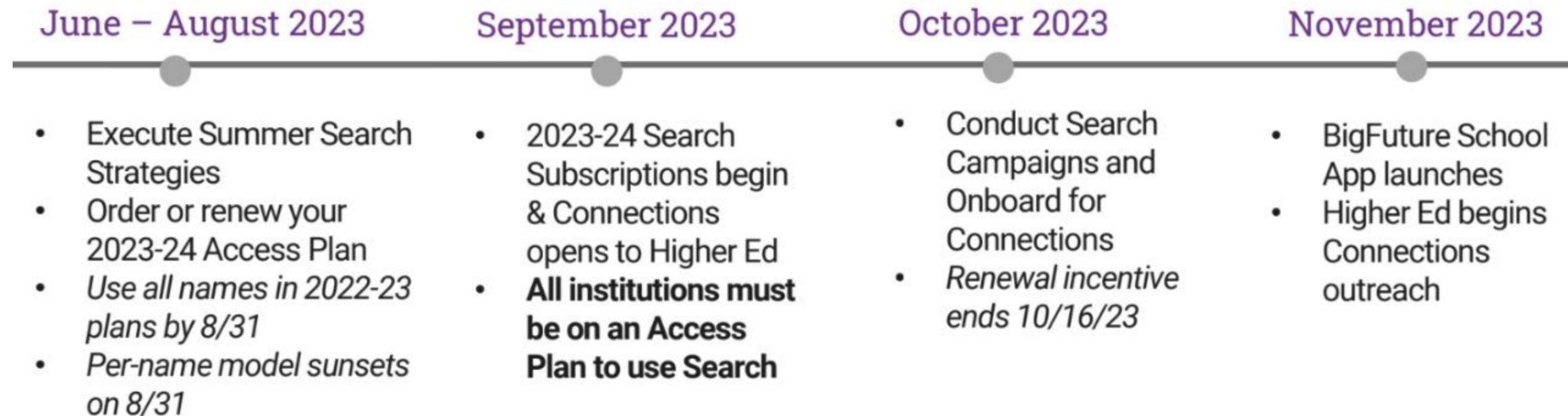
- + Renew your College Board subscription if not already
- + Students will be in Connections starting November 6
- + Be sure to track Connections leads in your CRM
 - + Utilize specialized RFI forms
 - + Configure a first source origin code for Connections leads
- + [Review the online resource guide](#)
 - + Profile Creation
 - + Comm Plan Instructions
 - + Audience Planning Workbook

2023-2024 Subscription Model Access Plans

	Access A*	Access B	Access C	Access D	Access E	Access F	Access G	Access H
Search records included:	5,000	20,000	50,000	100,000	200,000	400,000	600,000	Unlimited
Connections audiences included:	3	6	15	30	60	120	190	290
Included in All Access Plans:								
Essential Information <i>(including Interest in My College and National Recognition Programs)</i>	●	●	●	●	●	●	●	●
Landscape® Context	●	●	●	●	●	●	●	●
Connections <i>New!</i>	●	●	●	●	●	●	●	●
Additional Search features:								
Enrollment Planning Service™			●	●	●	●	●	●
Segment Analysis Service™				●	●	●	●	●
Interest in My Peers				●	●	●	●	●
Parent/Guardian Contacts					●	●	●	●
Living Record						●	●	●
Student Plans and Preferences						●	●	●
	\$2,575	\$10,300	\$25,875	\$52,000	\$105,000	\$213,000	\$322,500	\$540,000

Next Steps & Reminders

- + Look forward to our final webinar in September
- + Alert your creative team of content needs for Connections' segmented messaging
- + Prepare your Slate team for additional implementation and configuration will be needed this cycle
- + Order all remaining names before they expire on 8/31/23 or add a small plan to get through the summer if needed



Call in the Slate experts

Consulting on all aspects of Slate—we're here to help!

+ SLATE & COLLEXPRESS

Underscore can assist with setting up this important integration piece for your lead generation tracking and reporting. With custom source formats and data mapping, ensure all the data is in the right place for every student.

+ SLATE & DIGITAL

Whether embedding inquiry forms on landing pages or building out data feeds to load digital ad conversions, Underscore can provide the guidance to collect all the relevant data you need in your Slate instance.

+ APP TRACKING

The ultimate goal of any campaign is enrolled students. With Slate, and our technical experts, we can ensure we are tracking full application conversions to show true ROI with your digital and other marketing efforts.

+ SLATE TRAINING + WORKSHOPS

Underscore follows the Technolutions Implementation Road Map and will train your team to maintain your instance. We also provide on-campus and virtual workshops before, during and after an implementation - really we're here for you at any time!

+ PORTAL DEVELOPMENT

Our Slate innovators can build out user-friendly portals and other features of Slate to ensure your students experience all the benefits of your instance.

+ IMPLEMENTATION

We're here to help with new implementations or re-implementations; getting it right the first time or reinvesting in an optimized set-up - we'll help you maximize your CRM investment.

Resources

Dive Deeper

[It's a New Day for Student Search in Higher Education](#)

[Creative a Successful Student Search RFP](#)

Learn More

[Carnegie's Student Search](#)

Explore

[Partner with Carnegie](#)

Thank You!

Jim Rogers

jrogers@carnegiehighered.com