Create Pivotal Moments for your Transfer Prospects

Curricular Alignment or Degree Pathways, Partnerships and Collaboration

How often have you heard the question, "how will my credits transfer"? EAB has partnered with universities across the country to deploy the Transfer Portal technology to answer this critical question, while building the transfer pipeline and deploying best practices strategies that reduce transfer barriers. Attendees will learn how EAB members have strengthened their market position, connected with stealth shoppers, and improved the transfer experience with focused and research-informed, high-impact admissions team activity.

Allison Ray Akalonu, Consultant
Matt Sheldon, Client Development Executive
EAB

Create Pivotal Moments for your Transfer Prospects

Leveraging Technology to Strengthen Transfer Yield and Boost Enrollment

EAB

We help schools
support students
from enrollment to
graduation and beyond

> Find and enroll your
right-fit students

> Support and graduate
more students

ENROLLMENT SUCCESS

STUDENT SUCCESS

INSTITUTIONAL SUCCESS

INSIGHTS

EXPERTISE

> Prepare your institution
for the future

⊙ **ROOTED IN RESEARCH**

7,500⁺ Peer-tested
best practices

500⁺ Enrollment innovations
tested annually

⊙ **ADVANTAGE OF SCALE**

1,500⁺ Institutions
served

4 M⁺ Students supported
by our SSMS

⊙ **WE DELIVER RESULTS**

95% Of our partners continue
with us year after year,
reflecting the goals we
achieve together
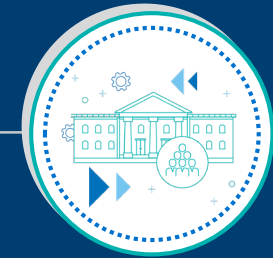
A Roadmap for Our Services

REACH

Cultivate Demand
in the Attention Economy

ENGAGE

Generate Applications
by Engaging Gen Z on Their Terms

CONVERT

Secure Enrollments
in a Competitive Market

THE CORE OF OUR OFFERING

Modern Marketing Designed Around Generation Z

Full-Funnel Analytics

- Targeting Strategy
- Year-Round Search
- Parent-First Search
- **Transfer Portal**

- Multichannel Marketing
- Student-Centric and Interactive Content
- YouVisit Virtual Tour
- .EDU Application

- Financial Aid Optimization
- Yield IQ
- Enrollment IQ Platform
- Benchmarking

Demographic Changes Present Challenges for Enrollment Leaders

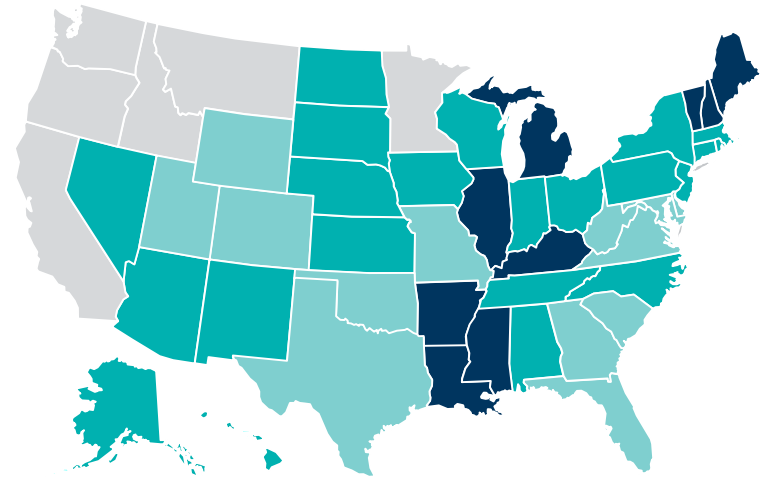The Birth Dearth Is Already Having an Effect on Enrollment

There Are Fewer Babies Being Born

Projected Percent Change in the Population of 18-Year-Olds, 2017-2029

- 11% to 30% growth
- 0% to 10% growth
- -1% to -9% decline
- -10% to -19% decline
- -20%+ decline
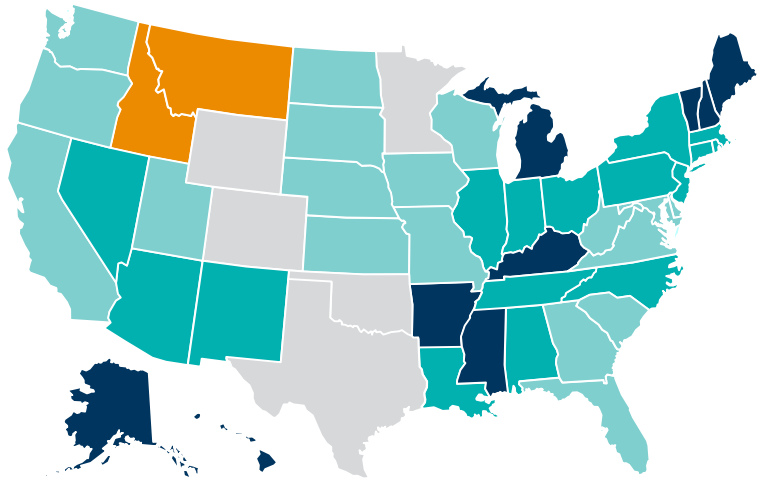
And Fewer Students Going to College

Projected Change in Students Attending Regional Four-Year Colleges and Universities from 2017 to 2029

- 0% to 10% growth
- 1% to 9% decline
- 10% to 19% decline
- Over 20% decline

4

additional challenges

Stealth Prospects

52%

of the transfer applicant pool was comprised of "stealth prospects"[1]

Enhanced Competition

23%

of schools will consider recruiting students who have already committed to another institution[2]

Community College Declines

16%

Projected decline in community college students between 2025 and 2029[3]

4-Year Transfer

31%

of 4-year students end up transferring schools at some point in their college journey[4]

1) "What We Know About Transfer" Community College Research Center
2) EAB Research and Analysis
3) Nathan Grawe, Demographics and the Demand for Higher Education, 2018
4) EAB analysis of National Student Clearinghouse data; Shapiro, D et al. (2018, July), "Transfer and Mobility: A National View of Student Movement in Postsecondary Institutions," Fall 2011 cohort (Signature Report No. 15), Herndon, VA: National Student Clearinghouse Research Center.

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A Closer Look at Community College Students

Intention to Transfer Is High Among Community College Students

Only

85%

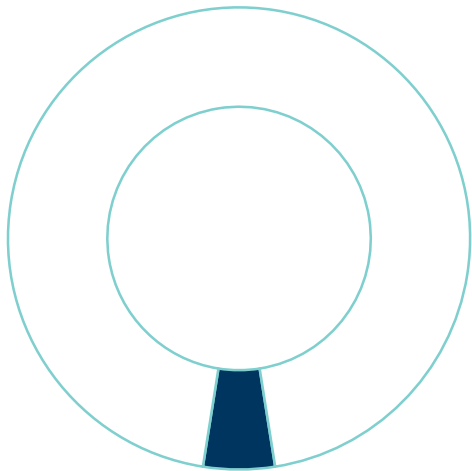of community college students express a desire to earn a bachelor's degree

A Closer Look at 4-Year Students

Few Students Start with Intent to Transfer; Decision Is Often Attributable to Unanticipated Circumstances

**4-Year Students Who
Expect to Transfer**

**4-Year Students Who
End Up Transferring**

5%

of freshmen say there's a "very good chance" they will transfer to another college before graduating

(CIRP)

31%

of students who start at a four-year institution end up transferring to a two-year or four-year school

(National Student Clearinghouse)

Transfer Students Can Support Your Institutional Mission

Achieve Class-Shaping and Student Success Goals

Access and Diversity

Transfer students are more likely to be underrepresented minorities

48%

of community college students identify as minorities

Student Success

Transfer students are just as likely to complete as "natives"

5-15%

additional likelihood of a transfer student graduating within six years

Transfer Students Can Also Support Your Bottom Line

Mitigate Revenue Pressures
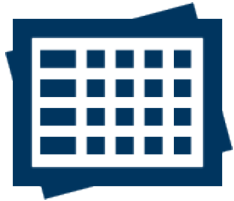
Capacity Utilization
Transfers fill upper-division capacity left open by attrition

74%
of upper-division courses are not full

Increasing Revenue
Transfers typically receive less aid than freshmen

20-40%
Higher average price paid by transfers than first-time, full-time freshmen

Fulfilling State Regulations
State transfer initiatives are expanding

HoustonGPS

NEW YORK STATE EXCELSIOR EVER UPWARD

N★C NC PROMISE

TENNESSEE Promise

Challenging Process for Prospective Students

Students Face Obstacles Throughout Their Journey, Causing Many to Abandon Their Transfer Goal
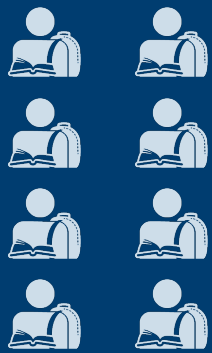
Limited Support for Stealth Shoppers

52%

of transfer applicants are "stealth shoppers"

Lost Credits and Poor Articulation

13

average number of credits lost when transferring

Lack of Clarity on Cost, Time-to-Degree

1-3

weeks spent waiting for credit evaluation

Complex Application Process

11

typical number of distinct application steps

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Create a Transfer Experience That Speaks to Gen Z

Success Relies on Crafting an Experience That Is Different from the Status Quo

Address their **concern about the cost** of college

60%

say their number one concern is to avoid drowning in debt

Provide them with a **frictionless user experience**

62%

will not use apps or websites that are difficult to navigate

Use **plain language** that they can understand

50%

increase in response rate when student-centric copy is used

Maintain their focus with **instantaneous information**

8 sec

attention span

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Take a Holistic Approach to Transfer Readiness: From the Inside Out

Four Ps Measure Readiness for Technology and Optimization Path for Growth

PROCESS	PARTNERS	POSITION	PEOPLE

I Transfer-friendly policies and practices	**E** Enduring, data-driven partnerships	**E** Differentiation resources and reach	**I** Capabilities and capacity to seamlessly support transfer growth
1. Enrollment Planning	1. Pathway Optimization	1. Transfer Marketing	1. Capacity and Capability
2. Course Equivalency Management	2. Transfer Feeder Review	2. Transfer Preparation	2. Admissions Outreach
3. Credit Evaluation	3. Partnership Development	3. Transfer-Friendly Web Presence	3. Transfer Student Success
		4. Affordability	

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Creating a Coordinated, Mission-Based Transfer Enterprise

STATUS QUO: SILOED, ROLE-BASED TRANSFER MANAGEMENT

LEADERSHIP > RESOURCE ALLOCATION

FACULTY > ARTICULATION AGREEMENTS

ADMISSIONS > RECRUITMENT/APPLICANT EVALUATION

FINANCIAL AID > AWARDING & COUNSELING

REGISTRAR > ARTICULATION AND CREDIT EVALUATION

ADVISING > POST-ENROLLMENT GUIDANCE

ACADEMIC SERVICES > TUTORING

STUDENT AFFAIRS > ORIENTATION, SUPPORT, & HOUSING

- REACTIVE   - DISCONTINUOUS PROGRESS
- IMPAIRED COMMUNICATION   - STUDENT CONFUSION

IDEAL STATE: COORDINATED, MISSION-BASED TRANSFER ENTERPRISE

LEADERSHIP

ADMISSIONS

FACULTY

TRANSFER SUCCESS

ENROLLMENT

ENGAGEMENT

TIMELY GRADUATION

ON-TRACK POSTGRADUATE

GOALS, ETC.

REGISTRAR

FINANCIAL AID

ADVISING

STUDENT AFFAIRS

ACADEMIC SERVICES

- STRATEGIC   - MOBILIZED & ACCOUNTABLE
- OPEN COMMUNICATION   - STUDENT-CENTERED

Source: ATI Talent Blind Spot: The Practical Guide to Increasing Community College Transfer to High-Graduation-Rate Institutions.

Transfer Portal Demo

Transfer Portal Recap & Questions

Provides End-to-End Support to Boost Enrollment and Drive Yield

Student-Facing Dashboard

✓ Unique **Self-Service Credit Estimations**, Including Progress to Degree

✓ Unparalleled **Major and Career Exploration**

✓ Customizable, **Personalized Checklist** to Keep Prospects on Track to Enroll

✓ Consolidated List of **Key Institutional Resources**

Administrator-Facing Dashboard

✓ Pipeline **tracking and analysis**

✓ **Full-funnel metrics** and gap-to-goal

✓ Use data to inform targeted outreach strategy and prioritize recruitment efforts

"I've spent a lot of time looking for information on different college websites and this [EAB Portal] was 10-times easier. Having all the information in one place makes the whole process seem way less intimidating."

Transfer Portal Student User

"The portal provides insight into what the student is thinking and what is important to them, allowing us to adjust marketing and course offerings accordingly."

David Wright
Chief Data Officer

Next Steps

Matt Sheldon

Partner Development Executive
Email: msheldon@eab.com

Allison Akalonu

Consultant, Transfer
Email: AAkalonu@eab.com

Schedule a following **Transfer Portal demo** or exploratory conversation

Stop by our table, email us or find us on LinkedIn if you want to chat further!

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PLEASE COMPLETE A SESSION EVALUATION

AVAILABLE IN THE MOBILE APP

OR VIA THE QR CODE ABOVE

https://tinyurl.com/NISTSEval

Impressive Early Results from Alpha Members

Expanding Beyond Core Markets

1 in 3

Portal users comes from out of state

Building the Future Pipeline

40+%

Share of Portal users who intend to transfer in 2019 or 2020

Driving Application Velocity

30+%

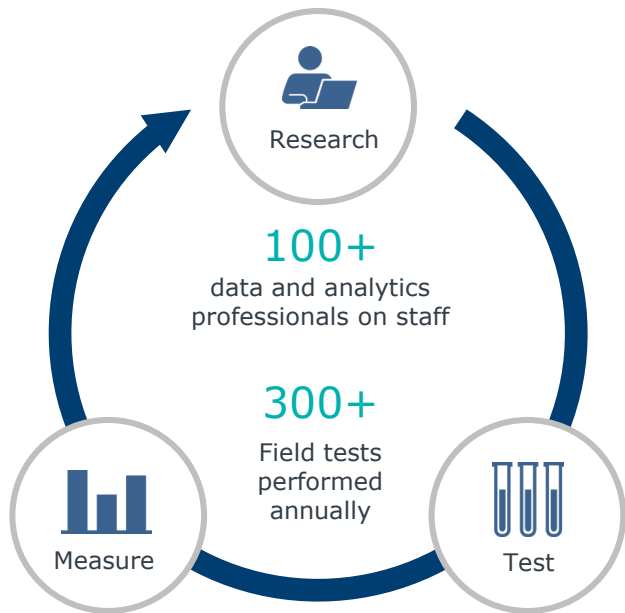Increase in application completion percentage among Portal users
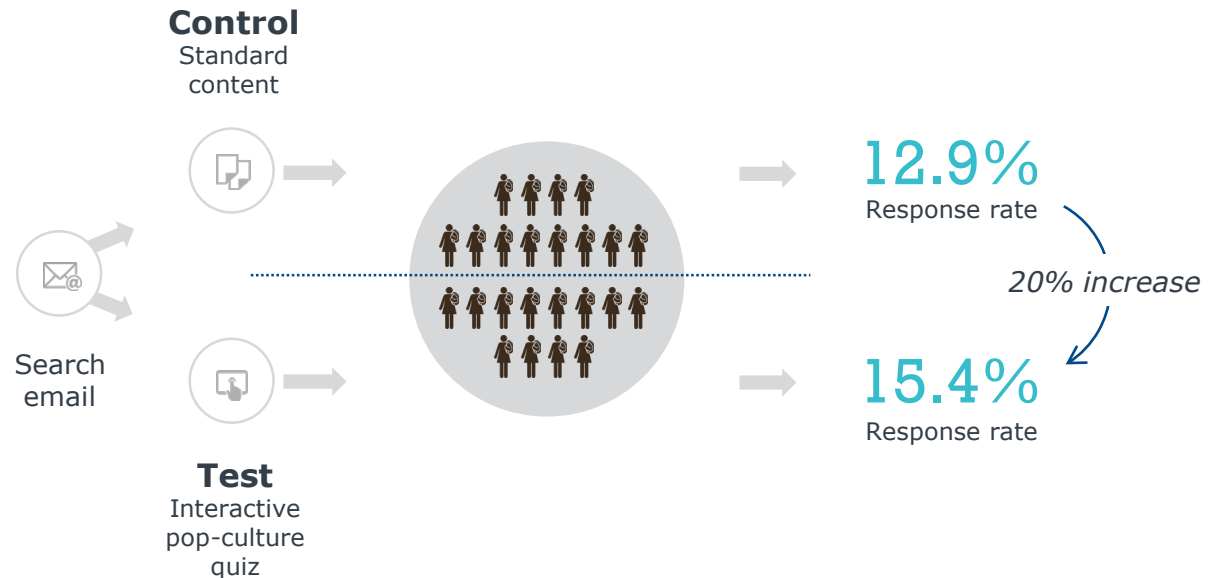
Improving Yield

24%

Higher yield among Portal users

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Our Testing Philosophy

Channeling Your Recruitment Spend to Where It Has the Greatest Impact

Research

100+
data and analytics professionals on staff

300+
Field tests performed annually

Measure

Test

Example A/B Split Test

Control
Standard content

Search email

Test
Interactive pop-culture quiz

12.9%
Response rate

20% increase

15.4%
Response rate

Guiding Principles of Our Approach

Broadly Scoped
We simultaneously test many different aspects of outreach; the resulting findings aggregate into large-scale impact

Insight-Oriented
We mine our testing results for findings with broader applicability across your recruitment efforts

Vigilant
We continuously scan the market for recruitment-marketing innovations and test the most promising of them

Support Throughout Process Leads to Powerful Impact

Technical Implementation Support Minimizes Demands on Team Time

Partnerships and Process
Readiness Accelerator

In-depth Review of Current Transfer Program

People
- Survey transfer-facing staff to identify roadblocks or non-scalable processes
- Interview VPEM and Registrar to identify staffing, structure, and resource challenges

Process
- Review strategic transfer goals, policies, prospect touchpoints, and transfer data
- Review transfer processes and map ideal admissions, credit evaluation, and course equivalency workflows

Position
- Audit website and outreach materials to ensure transfer-friendliness
- Support Portal promotion plan development to build early momentum

Partners
- Review regional transfer trends and market landscape
- Interview local two-year partners to identify opportunities for strategic alignment
- Analyze degree conferment rates to identify program articulation opportunities

Data
Data Acquisition Team

EAB-led Implementation Minimizes Member Time

4-6 months — Estimated time-to-implementation[1]

40-50 — Estimated hours required of member during implementation[1]

Key Build Activities

Data extraction and validation
- EAB data acquisition services team leads extraction process
- Establish regular data refresh cycle to keep Portal data up to date

Site build and configuration
- Site styling to match look and feel of institution website
- Customization of Portal content

Testing and launch
- Soft launch to institution team for testing
- Full launch

Launch
Dedicated Support Team

Dedicated Follow-up Support Ensures Successful Deployment

- Dedicated Project Support
- Expert Consultation
- Collaborative Calls and Onsite Workshops
- Implementation Toolkits

Transfer Consulting Supports Technology

Research Across Multiple Fronts to Generate Comprehensive Assessment

Feedback on Existing Infrastructure and Process

Cross-Functional Survey

- In-depth questionnaire to capture current state perspectives
- Respondents completed across Admissions, Enrollment, and Marketing

Stakeholder Interviews

- Discussion with institutional representatives to verify survey response
- Provides insight on current program objectives and challenges

Study of Institutional Funnel and Market Data

Funnel Metrics Review

- Analysis of internal application, admission, and enrollment data
- Review top feeder institutions and key program competitor list

2-Year/4-Year Market Scan

- External data review of relevant 4-year peers and competitor groups
- IPEDS review of conferment rates and program alignment opportunities

Feedback from External Stakeholders

Website and Materials Audit

- Review of website and application against national best practices
- Outlines steps necessary to improve website utilization and application completion

2-year Partner Interviews

- Interviews with local 2-year partner institutions
- Provides external lens on program

Timeline to Impact

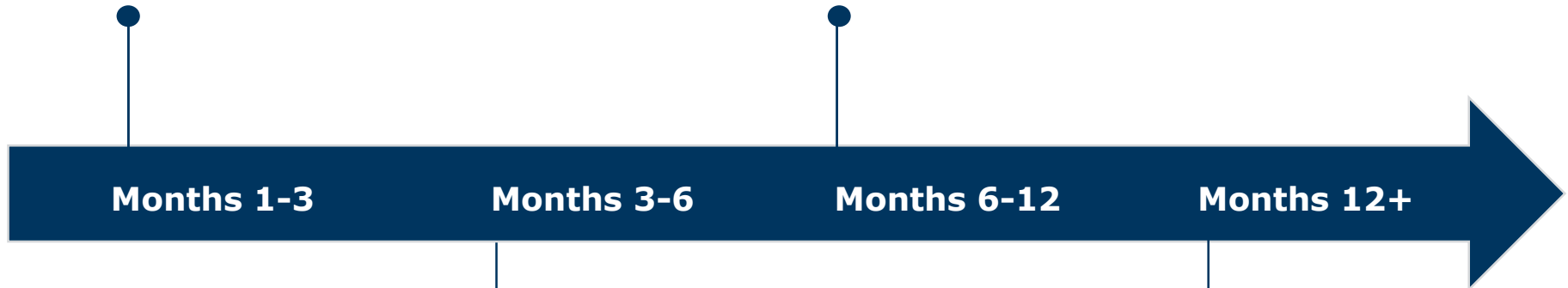Upfront Support Combined with Data and Marketing Expertise Smooth Rollout and Drive Impact

Portal Readiness and Optimization Accelerator

Assess transfer program and develop recommendations for customized launch plan

Full Launch

Launch Portal with press releases, website links, and marketing collateral

Months 1-3 — **Months 3-6** — **Months 6-12** — **Months 12+**

Portal Build and Testing

Complete Portal build, including customization of checklist and list of key resources; pilot in soft launch with transfer team

Marketing Expansion

Extend Portal marketing and use Portal to deepen existing partnerships and add new ones

Transfer Marketing Services to Support the Entire Pipeline

Resources Align with the Transfer Portal to Support Students at Every Stage

Search
**Building
a Robust Pipeline**

Transfer Search
- Strategy setting
- List acquisition and management
- Innovative use of institutional inquiry and National Clearinghouse data to find prospective students
- Messaging, content development

Application
**Driving
Immediate Results**

Application Marketing
- Custom application design
- Brand/messaging refinement
- Web hosting, mobile optimization
- Application document management
- Multi-channel campaign, including print, persistent email, and digital display ads
- IP Targeting and Geofencing

Yield
**Ensuring
Targeted Execution**

Yield IQ
- Predictive analytics
- Advanced surveying techniques
- Workflow management
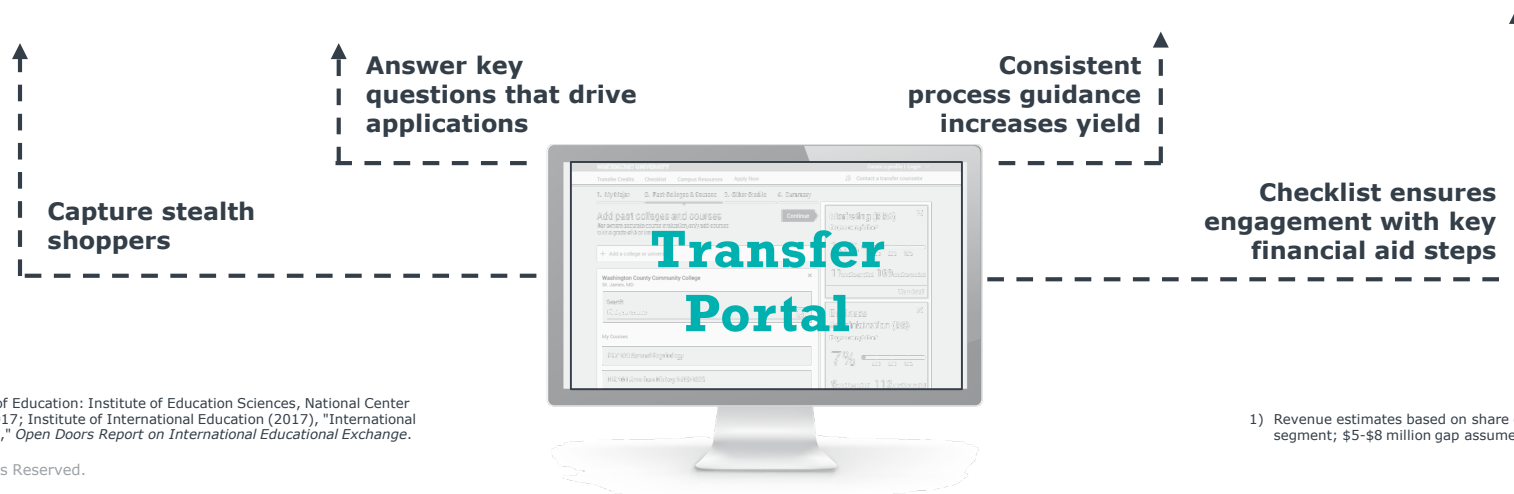- Routinely updated intelligence about affinity-level of every admitted student

Financial Aid
**Maximize
Financial Aid**

Financial Aid Optimization
- Live modeling
- Deep customization
- Net price calculators

Capture stealth shoppers

Answer key questions that drive applications

Consistent process guidance increases yield

Checklist ensures engagement with key financial aid steps

Transfer Portal

1) Revenue estimates based on share of total enrollment for each segment; $5-$8 million gap assumes net tuition revenue of $15k

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Solutions Derived from Local Expertise and National Research

40+
Research conversations on state initiatives

80+
Interviews with 4-year EMs about transfer opportunity

100+
On-sites with 2-year presidents on strategic issues

500+
Interviews with 2-year students about transfer challenges

Transfer-Friendliness a new imperative, but institutional barriers persist...

Reach Unengaged Prospects
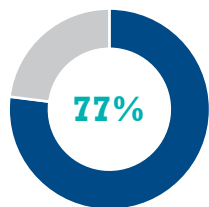
❌ *Insufficient detail and sparse contact by recruiters*

Keep On Track to Transfer

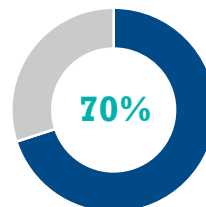❌ *Confusing transfer practices and guides*

Guide to Deposit

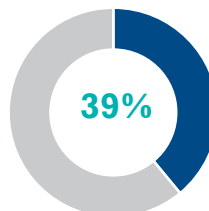❌ *Limited/inconsistent information on credit, speed, and cost to degree*
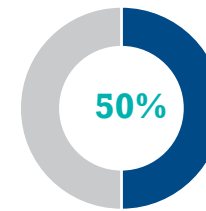
2-year transfer prospects highly affected by challenges

77% are unsure where to transfer, and apply to fewer institutions

70% lack adequate advising on which classes best prepare them to transfer to a four-year institution

39% cannot articulate a single credit to a four-year institution

50% call the 4-year transfer process "challenging and confusing"

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