

# BEST PRACTICES FOR CBE

## CBE ADOPTION GUIDE

### WHAT'S INSIDE

#### BENEFITS OF MARKETING AUTOMATION

- More Prospects
- Higher Enrollment Conversion Rate
- Save Time and Resources

#### BEST PRACTICES

- Increase the Identification Rate of Visitors to Your Website
- The Daily Visitor Report
- Identify Strategic Fit Visitors With the 5-Star System
- Counselor Training
- Organic Leads

#### DYNAMIC CONTENT TYPES AND SUCCESS STORIES

- Popups
- Image Swaps and Inserts
- Triggered Emails
- Progressive ID Forms
- Direct Mail
- Academic Scholarship Calculators
- Email Alerts and Dynamic Lists

## **BENEFITS OF MARKETING AUTOMATION**

Using Capture Behavioral Engagement (CBE) is integral to delivering our targeted results, enhancing the results of our messaging and influencing your prospective students' decision journey.

There are many success stories for Capture partners. Referring to the CBE guides and using CBE to its full capacity can bring your institution success, as well. In short, here are the top benefits of CBE Marketing Automation:

### **MORE PROSPECTS.**

There are two ways to achieve this. First, Progressive Identification Forms (PID Forms) harvest stealth visitors and prospects that haven't filled out a traditional inquiry form. Second, *Capture Prospects* are visitors who are as likely, or even more likely to enroll than traditional inquiries but haven't filled out an inquiry form, either PID or traditional.

### **HIGHER ENROLLMENT CONVERSION RATE.**

Students who are exposed to CBE dynamic content campaigns (DCCs) are two times more likely to enroll than similar students who don't see a DCC. Students who interact with DCC, whether clicking on a toaster message or opening a triggered email, are three-and-a-half times more likely to enroll. Students who fill out a PID form are five times more likely to enroll than traditional inquiries.

### **CBE SAVES TIME AND RESOURCES.**

CBE is fully managed, which means you don't have to train or dedicate your overworked staff on CBE. We do nearly all of the work, and you reap all the benefits. In addition, CBE's dynamic content campaigns communicate with students automatically, in a targeted 1:1 way, at a time they are engaged. This is done without any effort from your staff.

What follows is a discussion of best practices to help your institution achieve those results.

## **BEST PRACTICES**

### **INCREASE THE IDENTIFICATION RATE OF VISITORS TO YOUR WEBSITE**

One of the most important things you can do is to create CBE-enabled links in every email you send. Using four to five CBE-enabled links per email can enhance the main CTA of the email rather than deter from it. Send your mass emails multiple times per week — something our most successful partners do. After each email send, provide Capture with detailed email reports of clicks and open, so we can verify that we are identifying visitors to your website at a high rate. If you add new pages to your website, let us know! New pages can be added, tagged and tracked for CBE. Likewise, provide consistent weekly update data files to Capture. Finally, launch two or more PID Form dynamic content campaigns — these are the short forms that ask basic information.

## THE DAILY VISITOR REPORT

The Daily Visitor Report (DVR) is as crucial as it is valuable. Notify Capture of all staff and counselors that should receive this report each morning. You can add up to four custom fields from your own CRM to display on the DVR; be sure to pass these fields to Capture during the weekly update file exchange. Make the most of DVR by downloading the list of recent identified visitors via a .csv file from the Daily Visitor Report page.

## IDENTIFY STRATEGIC FIT VISITORS WITH THE 5-STAR SYSTEM

Identify the prospects best fit for your institution by creating 5-star market segments with your Advisory Services team. You can target applicants by EPS code, gender, major, median household income and GPA. For example, target female prospects in the EPS code of NJ 4-10, or with a GPA of 2.5 to 3.0, or New Hampshire residents with a median household income of \$65,000 or higher, or target Culinary and Fashion Merchandizing majors. You can easily identify these prospects by the stars indicated on the visitors record in CBE and in the DVR. In addition to the 5-star market segment system, you can also request ad hoc market segments to be created. Each counselor can have their own market segment, and when they log into CBE and review the “Visitors” section, they can filter by their own name and see all identified visitors from their own territory.

## COUNSELOR TRAINING

Get full control over the use of CBE by scheduling a time with your Advisory services team member to train counselors and other staff on CBE components like dashboards, sort-and-filter features and data exports. Successful counselors have told us they utilize the data CBE provides to clarify what kinds of information their visitors are looking at and to identify students that they should intentionally offer interviews to. Successful counselors also use page history, visit details (which also show what types of dynamic content were served to a particular prospect), and the tag cloud to see what prospects are interested in and strategize how to begin conversations with those prospects.

## ORGANIC LEADS

Progressive Identification Forms are useful for capturing organic leads or prospects visiting your site that are not in your search pool. With CBE, you can choose from 15 PID form options to serve to visitors when they are engaged and interested in a site, with each example listed in the CBE Playbook. PID Forms have a high conversion rate because of their brevity; they typically include a field asking only for name and email address. Students who complete a PID Form are five times more likely to enroll than traditional inquiries. To make the most of this option, develop both general and niche market PID campaigns; for example, you can display a PID Form for all visitors that visit two or more admissions pages and one or more financial aid page, or you could display a PID Form for all visitors that view four or more nursing program pages. Once they visit the form, some of our partners have set up CBE triggered “Thank You” emails, which a prospect receives when they submit a progressive ID form. All form submissions will be directed to the PID Forms Inbox dashboard where you can view all submissions, download them, and then upload them to your CRM.

## DYNAMIC CONTENT SUCCESS STORIES

### There are many success stories generated by CBE. How can your story be exemplary?

The most important thing you can do is review your CBE Playbook and CBE Reference Document and schedule bi-weekly or monthly calls with your Advisory Services team member to determine both new campaign ideas and the performance of current campaigns. Campaign results should be monitored bi-weekly before Capture will consider adjusting copy or images if results are substandard. Review the CBE Results Export in the Content dashboard under “Analytics”; this provides an overview on site tracking, top pages visited and their corresponding tags, performance on dynamic content campaigns, and progressive identification form campaigns. Here are some particular communications to utilize with associated success stories.

#### POPUPS

When using toasters and popovers, the images should not be cluttered — these are small, concise units — and the landing pages for these campaigns should be pages that CBE is tracking; we do not recommend driving traffic to websites that we are not tracking.

**The University of Toledo** used a toaster to promote scholarship eligibility. Over 12 months, the toaster saw 21,872 unique impressions, and 11.1 percent of those — 1,524 students — clicked through. In the end, 199 applied to Toledo, and 70 students went on to enrollment. UT also used a popup to appeal to Ohio non-commuters, those who lived more than 25 miles from campus. The popup garnered 58,634 unique impressions with 9,931 clicks — a staggering 16.94% CTR! Over 1,000 students applied, and 385 in all went on to be enrolled.

Here’s another idea for the toaster ad: advertising events at a college. **St. Louis College of Pharmacy** used a popup toaster ad for a Transfer Meet and Greet event. The ad received 386 unique impressions, and 11 students completed the form and registered for the event.

#### IMAGE SWAPS AND INSERTS

Like toasters and popups, image swaps and inserts should be concise and uncluttered. Image swaps proved effective for **Bethel College** in their search for nursing students. A banner ad appropriate to the audience — utilizing as an image a nursing graduate — received 2,303 unique impressions and 126 clicks (a 5.47 percent CTR).



University of Toledo Scholarship Eligibility Toaster



St. Louis College of Pharmacy Transfer Toaster



Bethel College Nursing Program Image Swap

## TRIGGERED EMAILS

Triggered emails can be targeted finely or generally, and your Advisory Services team member will recommend which strategy to employ based on your campaign goals. Capture can schedule time with your admissions team or counselors to determine what audience your institution would like to target and what type of automated messaging they would like their prospective students to receive when they visit the site.

In an application push, **Western Kentucky University** sent 700 triggered emails in a seven-month campaign. Fifty-nine students — 8.4 percent — applied to the college, and seventeen of those were enrolled for 2017.

## PROGRESSIVE ID FORMS

**The University of Tennessee** utilized a simple PID Form asking, “What kind of student are you?” — an easy way to get names and email addresses. The form received 138,839 unique impressions, and 13,357 forms were submitted. The form conversion rate was 9.36 percent. In fact, more than 10,000 visitors on UT’s site were *not* part of the pool — organic leads that were stealth inquiries.

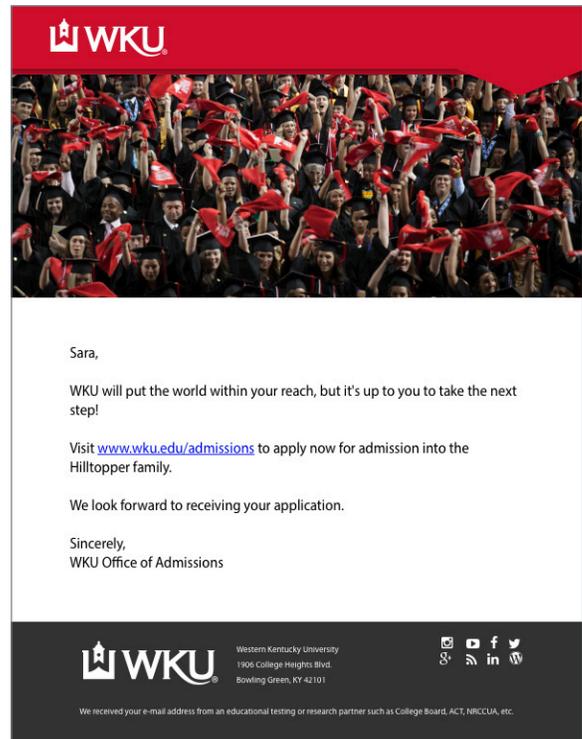
**Wilkes University** had 557 prospective students complete their form — and 227 of those students were *not* in the college’s original targeted lists! The form asked if the student was a first-time freshman or a transfer, and it turned out that 112 of these students were potential transfer students.

## DIRECT MAIL

Lastly, you deliver “drive to apply” messaging using triggered direct mail: postcards, letters and handwritten notes.

**King University**, for example, used a postcard to generate applications. A full 15 percent of students who received the postcard went on to apply; by way of comparison, 7 percent of comparison groups that did *not* receive the postcard applied.

But one success story really stands out — a new dynamic content tactic, the triggered handwritten note. Using a machine that “handwrites” notes, with a choice of 18 different handwriting styles, we targeted Admitted and Deposited students visiting the college’s website.



Western Kentucky University Application Push Triggered Email



King University Triggered Postcard

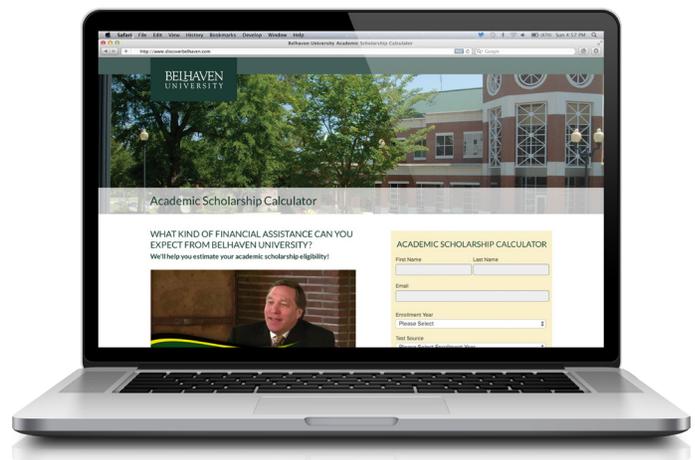
When they visited, the triggered handwritten note — signatures can even be digitized — is delivered to their door, and it saves time and resources that admissions personnel would spend writing and sending letters themselves. For this college, of the 99 Deposited students that received the note, 44 logged onto their computer and visited the site, and 24 of them completed the short form on our landing page. Of the 11 Admitted students that received it, 2 went on to submit their enrollment deposit. One of those students had actually *declined* the offer of admission but changed their mind when they received the note.

## ACADEMIC SCHOLARSHIP CALCULATORS

These calculators represent a new way of providing potential students with awarding amounts while encouraging them to engage with your institution. Beginning with 2018 senior campaigns, providing exact awarding amounts within emails is no longer necessary. By giving prospects a link in the email to the calculator, Capture allows students to input their own information to view their own award eligibility. This gives the student an accurate picture of how much aid he or she is likely to receive, and it helps your school collect GPA and standardized test scores if you didn't already have them.

The form, which can be embedded on an existing partner page or on a custom Capture landing page, can also trigger other forms of dynamic content. A landing page for **Belhaven University** saw, out of 641 unique impressions, a conversion rate of nearly 73 percent, a total of 467 submitted forms. Bethel College used an embedded page, and gathered 277 unique impressions, with nearly half submitting the form.

All of the form submissions go to a new “PID Forms Inbox” for the university admissions team to easily download. Using this cutting-edge CBE technology, Capture also increases identification by tracking every visitor that clicks on the link and fills out the form.



*Belhaven University Academic Scholarship Calculator Landing Page*

## EMAIL ALERTS AND DYNAMIC LISTS

Email Alerts have been successful for our partners when they want each of their counselors notified when a visitor in their territory is engaged on their website. If counselors are traveling or busy, Capture can also create dynamic lists, which are cumulative lists that collect names of visitors performing a certain action on the website. For example, add any identified visitor from Illinois and those that visit a financial aid page more than four times to a list; this could be useful if you are looking to help Illinois students learn more about a special scholarship.