



# Continuum 422 Methodology

## *Sound practice makes perfect*

Behind every great organization there are great assets—strong financial resources, appropriate technology and experienced, thoughtful people. But the secret to success for a great organization is not found in the assets themselves, but rather in the ability to leverage the assets in the right ways. And leveraging organizational assets requires more than just a sound business plan; it requires the ability to execute the plan through sound business practices. In other words, it requires an appropriate methodology.

### WHITE PAPER NO. 2

An appropriate methodology transcends organizational differences to offer a scalable, flexible, industry-level framework for developing focused strategies, matching resources to needs, and evaluating success—at both a micro and macro level. An appropriate methodology offers a frame of reference through which changes in market conditions, new technologies and organizational priorities can be considered and addressed. At its best, an appropriate methodology allows an organization to anticipate market needs and exceed customer expectations—time and time again.

In college admission, having an appropriate methodology can be the difference between a successful recruitment strategy and one that consistently struggles to achieve goals. An appropriate recruitment methodology provides a roadmap for building relationships as well as a framework through which enrollment management strategy can be executed and evaluated in a thoughtful, deliberate manner. And that's where Continuum 422 comes in.

Continuum 422 Methodology was created by 422 Group specifically as a framework for recruitment and admission operations at colleges and universities. It offers enrollment managers a set of sound, scalable business practices and key performance indicators (KPIs) that make sense for any institution seeking to proactively shape the size and profile of an incoming class of students. It's been implemented by over 150 institutions of varying sizes, profiles and locations—from Bowdoin College in Maine to the California Institute of Technology. And it has withstood the test of time, proving to be effective

even in the face of new technologies, increased competition for students and changing demographic patterns.

### A Madness to our Methodology

The madness (and beauty) of Continuum 422 Methodology is in its simplicity. The basic premise is that effective communication is the foundation for building deep, long-term relationships with students. To communicate effectively, enrollment managers need to:

- understand the decision stages and related behaviors that guide students through the college selection process,
- appreciate the communication needs of their audience—particularly the difference between activity-driven contacts and calendar-driven contacts, and
- be informed by relevant research that allows for appropriate goals at each stage of the recruitment process.

To understand Continuum 422 Methodology more fully, let's examine its impact on the traditional college admission funnel.

### The Admission Funnel

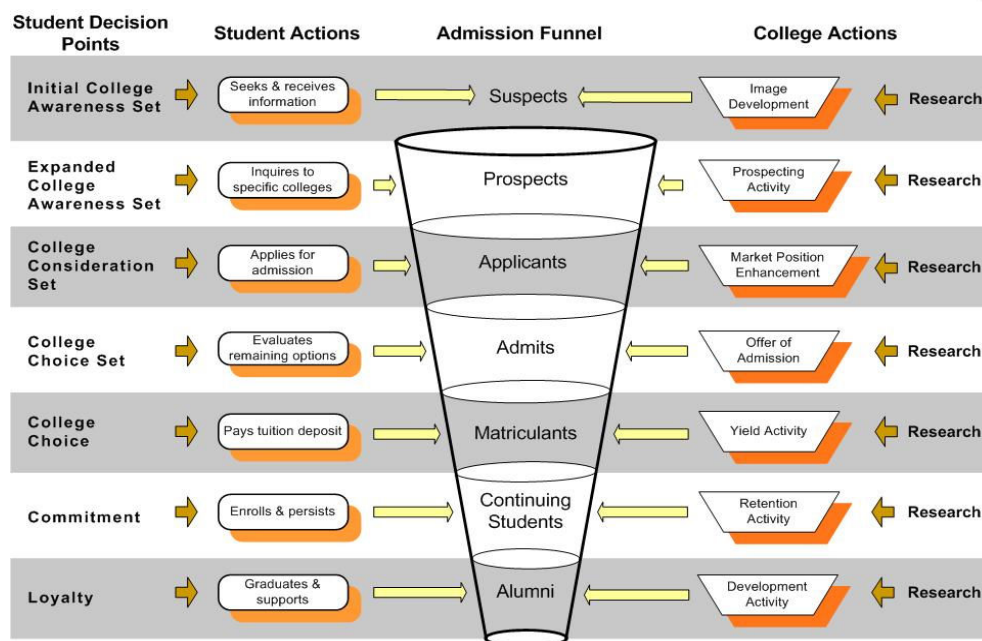
The original Admission funnel was first introduced in the 1970's as a way of looking at the recruitment/admission process at a more systemic level. In many ways the funnel, which has grown over the years to reflect more of an enrollment management orientation, mirrors a traditional sales funnel. In other words, it presents a static view of customers (or prospects) as they "fall out" of interest in a product/service.

What's critical, but usually missing from the diagram, are the actions that take place to influence movement through the funnel—on the part of students as well as the institutions recruiting them (as shown below). When you include these actions and apply Continuum 422 Methodology to the recruitment and admission process, it becomes apparent that the funnel is just the tip of the iceberg.

When viewed with the addition of student decision stages and the actions that create a push/pull effect on students as they move through the funnel, we can see that there is a lot of activity taking place! This activity, and the essence of Continuum 422 Methodology, can be summarized through the following statements:

1. Students do not make a single decision to enroll at a particular college. Instead, they make a number of smaller decisions that move them from one stage of the college choice process to the next.
2. The length and timing of each student decision stage is unique to each college and should be respected when developing a marketing communication strategy.
3. For virtually every college, effectively shaping the freshman class requires shaping the applicant pool through proactive recruitment during the early stages of the college choice process.

4. To achieve the desired outcome from each decision stage, a college must be able to communicate the right messages to the right students through the right media at the right times.
5. Colleges need sophisticated, appropriate data analysis to understand and address the issues and opportunities present for each sub-cohort of students across each decision stage.
6. The effectiveness of a college’s communication strategy with students and families will have a significant impact on the likelihood that the college achieves a desirable match between itself and the students it is recruiting.



For every action...

In the world of Physics, for every action there is an equal and opposite reaction. If only the world of student recruitment and college admission was that efficient! As the preceding illustration shows, we believe that students move through a series of somewhat predictable stages on their way to a college choice. And, at each stage of this process, they do take an action. But the actions that drive effective, efficient student recruitment aren't student actions, they're college actions. And even though these college actions don't usually generate an equal and opposite reaction, when executed in an informed, logical manner they can generate a very desirable—and measurable—reaction that supports the overall enrollment management strategy.

The primary objective behind the implementation of Continuum 422 Methodology is to increase efficiency and enhance effectiveness of the overall recruitment strategy in order to achieve this desirable reaction. This requires that the traditional admission funnel be managed in such a way that it evolves into an admission (or enrollment

management) *cylinder*. In other words, at each transition point you want the percentage of students that moves to the next decision stage to be as high as possible and the investment of resources in that effort to be as low as possible.

...a desirable and measurable reaction

To drive these decisions and ensure that the outcomes are desirable for the prospective students being targeted, colleges need to be thinking strategically about the communication that is needed to move students through each of the decision stages. As we've already pointed out, the college-bound student isn't making a single decision about which college he/she will attend. Instead, the student is making a series of decisions that leads to a choice of college. Matching recruitment and admission actions, particularly communication, to each of these decisions is a key tenet of Continuum 422 Methodology.

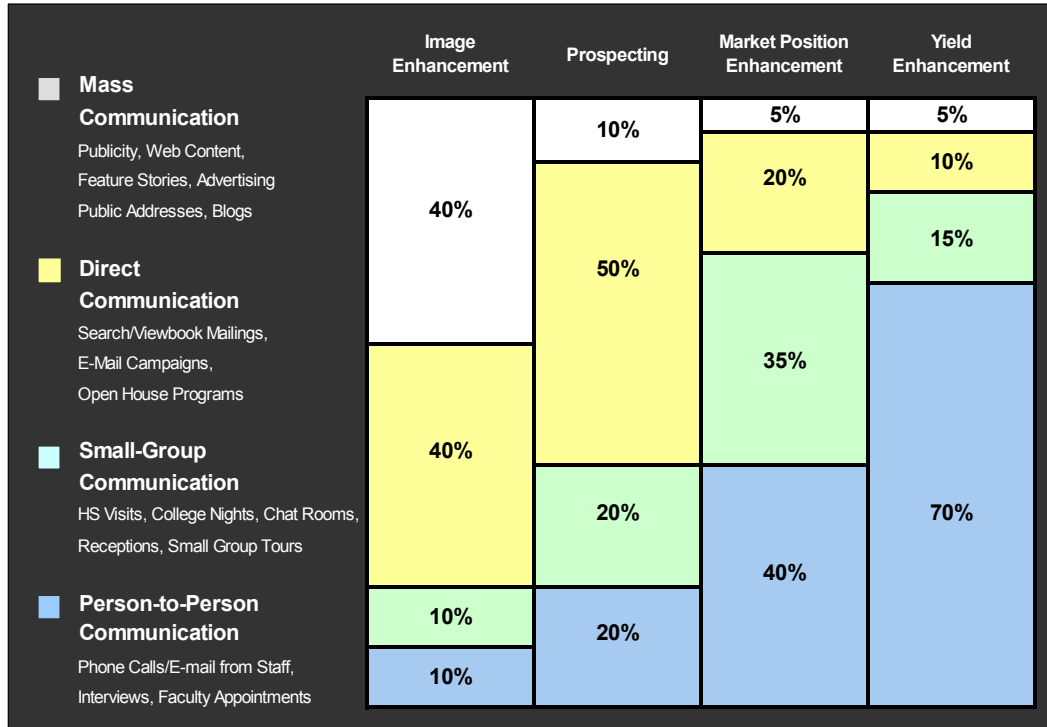
At 422 Group, we believe that the communication is the foundation of an institution's recruitment strategy and the most obvious and effective way to build deep, meaningful relationships between a school and each prospective student. The communication "flow" should begin when the student is initially identified by the school and continue either until the student enrolls or until a decision is made—either by the student or the school—to discontinue the relationship-building process.

The essential goal of the communication flow is to build a relationship with each prospective student that grows more personal as the individual's interest in the institution—and the institution's interest in the student—increases and progresses through the decision stages.

The diagram below illustrates the type of communication flow that we've found, based on 20-plus years of higher education consulting experience, to be well-suited to the decision stages affiliated with the college choice process. Obviously, the diagram represents only a small sampling of tactical communication and distribution (%) possibilities that could be developed around a particular brand strategy for a particular institution based on the needs, behaviors, and expectations of its prospect pool. The obvious point we're making here is that personal communication becomes more important as prospective students move from initial awareness of your school to the point of commitment. (It also suggests that just having a really cool Web site alone won't save the day—or bring home the class).

It's critical that an institution's contacts with prospective students and other constituencies (communication flows) be designed to reinforce the critical branding themes an institution wants to convey. They should be *appropriately* personal for each type of institution, and its peculiar audiences (i.e., what makes sense for Penn State probably won't work well for Penn) and delivered through media that are best suited to the needs/desires of the students rather than the convenience of the institution. A successful communication flow can increase the number of applications received by increasing a school's conversion rate (moving a higher percentage of prospects from the Expanded College Awareness Set to the College Consideration Set). It will also positively

impact yield (moving the right number/set of admits from the College Choice Set to the College Choice) by supporting an appropriate set of research-based, proactive market position enhancement strategies.



Of course, increased conversion and yield rates will only occur if the communication flow respects the specific information needs of individual students as well as the pace of their movement through the decision stages. And that’s where activity-driven communication becomes critical. Activity-driven communication, as the name implies, runs on a schedule that is driven by each student’s actions as he/she moves into and through the admission funnel. This is in stark contrast to the more common (even today) calendar-driven approach to prospect communication in which specific contacts with students are scheduled in batches on or around the same dates each year regardless of when prospective students entered the funnel, where they are in their selection process or how long they’ve been engaged. (e.g., the viewbook is sent to all prospects in August, the financial aid piece is sent to all applicants in November, the yield-enhancement phonathon is scheduled for all admits in April, Etc.).

In recent years, technology has made activity-driven communication even more critical because it allows students to begin the college selection process at their leisure and, in many cases, much earlier than they used to (even five years ago). Therefore, the number and types of messages being sent to today’s prospective students must be adapted to a wider range of student-defined communication schedules and related activities. Continuum 422 Methodology supports this in two ways. First, it can help to identify specific information needs for each sub-cohort of students across each decision

stage. Then, it can help shape the development of appropriate messages that address these needs. In doing so, Continuum 422 Methodology helps institutions craft a series of contacts (a communication flow) designed to carry each of these sub-cohorts from one decision point to the next—across a recruitment cycle that may last anywhere from 28 days to 28 months (or more).

#### Implementing Continuum 422 Methodology

To work toward the ideal situation related to effectiveness and efficiency in managing communication with students, as well as overall recruitment and admission operations, Continuum 422 Methodology starts with three basic assumptions:

- Being more efficient and effective in the recruitment of new students is a desired goal of the institution.
- The fundamentals of your recruitment program are sound; improvement will come with fine tuning and by focusing on the exceptions to the norm.
- Successful planning is not possible without a thorough understanding of the external environment (i.e., competition, demographic changes, price elasticity within your market segment).

A college's development of specific recruitment strategies and progress toward specific recruitment goals must be grounded in effective research—particularly the ability to quickly and effectively analyze key performance indicators (KPIs) in support of overall recruitment and admission strategy. But research can't be just a once-a-year retrospective exercise; it must be an active, ongoing process of analysis and evaluation that's embedded into the recruitment and admission operation. As such, it will serve as both a guiding light for strategic design and a tool for evaluating execution—while there's still time to change course.

*Research is the art of  
seeing what everyone  
else has seen, and  
doing what no-one  
else has done.*

Anonymous

Continuum 422 Methodology is grounded in a comprehensive research orientation designed to identify relevant business metrics, evaluate return-on-investment (ROI), and monitor progress toward recruitment goals. In doing so, Continuum 422 Methodology allows a college to better understand its peculiar student decision stages, identify specific student information needs and maximize its communication efforts. Additionally, Continuum 422 Methodology enhances staff productivity (as well as accountability) through the identification and monitoring of year-to-date recruitment/admission metrics on an ongoing (daily) basis.

As part of this research orientation, Continuum 422 Methodology uses an institution's existing metrics as the benchmarks for identifying problem areas. To do this, we set up a series of analyses that establish rules for what we refer to as *exceptions* reporting. Exceptions reporting assumes that the existing operational recruitment plan is working well for the *majority* of prospective students. Therefore, significant decision time and energy doesn't need to be spent dealing with it. However, enrollment managers do need

to identify, and focus on, the strategies and related actions that are not working well—the exceptions. Exceptions reports allow the enrollment manager to easily maintain what's being done right while focusing necessary time and resources on the exceptions—and improve performance in a manageable way.

To develop the rules that enable exceptions reporting, an institution must not only understand its own historical trends and internal actions as they relate to recruitment, but also appreciate the impact the external environment has on the success of the recruitment and admission operation (past, present and future). This type of environmental scanning is of crucial importance to every college or university because it provides a context for assessing market position and developing effective, informed strategies. Unfortunately, because of constraints related to budget and experience, few schools can consistently and effectively engage in this type of external environment scanning.

Fortunately, 422 Group is able to continuously assess the external environment and its relationship to the college choice process. We can regularly collect, interpret and analyze environmental data in a cost-effective way and make this information available to schools using Continuum 422 Methodology. This benchmarking data, when combined with historical trend and activity data from an institution can provide a powerful basis for developing appropriate exception reports, establishing goals related to prospect sub-cohorts and conversion rates, and developing benchmarks that enable enrollment managers to monitor and assess progress toward end-of-year goals.

Finally, the combination of exceptions reporting, institutional data analysis and environmental scanning also allows an institution to take a very different and distinct approach to targeted student recruitment. Typically, targeting identifies large groups of students in broad categories (i.e., minority students, high-ability students, out-of-state students, athletes, Etc.). By combining the exceptions reporting analysis with institutional data analysis and environmental scanning information available through 422 Group, Continuum 422 Methodology allows institutions to differentiate behavior not only among these broader student groups, but also within specific geographic markets and across their distinct student decision stages. This analysis can pinpoint which prospective students need to be targeted, where those students live and go to school, at what point in the decision process they need increased attention, and which messages they need to hear as they move through their decision stages toward a college choice.

### Conclusion

Continuum 422 Methodology provides a proven framework for recruitment and admission operations at colleges and universities that emphasizes and supports effective communication with prospective students and other relevant constituencies. It helps enrollment managers evaluate and refine their business practices and KPIs while

enabling them to remain focused on areas of their operations that are not performing up to expectations.

Continuum 422 Methodology is based on the reality that college-bound students aren't making a single college-choice decision. Instead, they're making a *series of decisions* that lead to a choice of college. Understanding each of these decisions and matching recruitment and admission actions to them, particularly communication, are key tenets of Continuum 422 Methodology. This matching requires a significant commitment to research and the related ability to identify goals for each student decision stage, particularly the initial stages of the college choice process that can shape the size and profile of the applicant pool.

The success of Continuum 422 Methodology has much to do with its focus on student movement through the aforementioned student decision stages and the development of appropriate monthly benchmarks related to this movement. Through a combination of institutional data analysis, environmental scanning and exception reports, Continuum 422 Methodology provides a roadmap for building relationships between institutions and targeted students as well as a framework through which enrollment management strategy can be executed and evaluated in a thoughtful, deliberate manner.

#### About 422 Group

422 Group LLC is a Microsoft Gold Certified technology and professional services company that helps colleges and universities manage relationships more effectively. 422 Group professionals are among the most experienced product development people associated with higher education relationship management today. Over the past twenty-five years they've worked to develop specialized CRM systems, business intelligence tools and market research services for more than 500 institutions in the U.S. and abroad.



ISV/Software Solutions