

# Enrollment Management

Practical Guidance In Recruitment, Admissions, Retention & Financial Aid

## Report

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### **Leaders & Innovators**

#### **Craig Heldman, chief executive officer, Hobsons**

##### *Challenging economy, competition make CRM a necessity*

When Craig Heldman took a job as national sales director at Hobsons in 1995, colleges and universities hadn't started thinking about how emerging technologies could help them communicate. Institutions had been contacting prospective students and managing enrollment using the same methods for about 50 years. And Hobsons officials weren't focused on technology either.

But higher education and technology both changed rapidly. Hobsons, where Heldman has been chief executive officer since 2008, has been instrumental in helping institutions keep up with the changes. The shift started when officials at California Polytechnic State University-San Luis Obispo recognized the possibilities of using email to communicate with prospective students, Heldman said.

Current Constituent Relationship Management tools offer efficient, effective ways to reach out to students at all stages of the enrollment cycle, from prospect to alum, Heldman said. In fact, he doesn't see how institutions can afford to operate without CRM in the current economic climate.

Besides the poor economic conditions, institutions face increased competition for each student from a wider variety of institution types. Also, in some areas, demographic changes have meant that the traditional applicant pool has gotten smaller, Heldman said. More institutions now try to attract nontraditional applicants, but the competition for them has also increased. Nonprofit institutions must compete for them with the for-profits that have enjoyed a long history of success in attracting adults.

CRM helps institutions address economic concerns with efficiency, and competitiveness with effectiveness, Heldman said. It enables them to enroll better-quality students despite shrinking budgets. Officials can streamline their approach and evaluate how effectively their dollars are being spent.

Enrollment managers who want to use CRM for the best results should adopt the following strategies:

➤➤ Be clear about what your goals are. Don't try an approach just because your competitor is doing it, Heldman said. Consider what type of class you want to enroll. What mix of students do you want in terms of geography and demographics? And what quality of students do you want to attract long term? For example, when Cal Poly began using technology to improve communications, officials there knew what they wanted to accomplish, Heldman said. They wanted to provide information 24/7, and they wanted to be able to personalize communications to high performing students. They used CRM in a multichannel strategy that included online, in-person and U.S. mail communications. As a result, Cal Poly's applicant pools have consistently grown and the quality of enrolled students has improved, Heldman said.

➤➤ Actively engage students to promote their success. CRM can be used throughout the student life cycle — not just for admissions, Heldman said. Its uses extend to student affairs, alumni relations and other areas. Engaging students helps retain them through graduation, he added. Hobsons recently acquired Intelliworks, which has mainly

focused on institutions with nontraditional enrollment. Hobsons officials will combine the strengths of both companies' products in new releases. Heldman expects to see CRM usage expand to more institutions and to see more extensive applications of it.

➤➤ Use the data the system helps you collect to demonstrate your success. Higher education officials can increasingly expect to see their institutions' funding connected to graduation rates, Heldman said. CRM's tools enable users to determine the effectiveness of their messages so that they can decide if they need to make changes to their strategies to promote better engagement.

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### **Remember these strategies for effective CRM use**

Constituent Relationship Management can help your institution enroll and retain the students you want. To get the best use out of CRM:

- Set clearly defined enrollment goals before you even purchase a system. Know what types of students you want in your class.
- Engage students throughout their enrollment and continue to do so after they graduate.
- Make decisions about communications strategies based on the data your CRM system provides.