

**BUILDING  
THE FUTURE** 

University of Houston System Student Affairs and Enrollment Services  
2019 LEADERSHIP CONFERENCE

# UHCL Radius Mishmash – Enrollment Management Workflows



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# UHCL RECRUITMENT USING RADIUS CRM

Our Admissions Team will share how they utilize CRM Radius for recruitment, communication, and event planning.

They will share their insight on how it has improved their day-to-day workflow, and how they tackled challenges, they encountered while learning the ins and outs of CRM.

- Undergraduate Recruitment
- Graduate Recruitment
- Events Planning
- Mongoose Texting Platform

# UNDERGRADUATE RECRUITMENT

## Daily Processes for CRM

### Inquiries

- Introduction to their EMC
- Territory Based

Tasks & Cases | Inquiries | Applications | Event Attendees

+ Add Widget | + Add Workspace | Workspace Actions

EMAIL: INTRODUCTION OF EMC

#	Case Subject	Status	Enroll	Primary Co	Email	Creat	Cont	Intended Major - 1st	Most Recent	Fol	Apj	Action
1	Email: Introduction of E	Open	Recruit	Kendra Pen	kendraspe	05/13	Trans	Public Service Leader:	Blinn College			Action
2	Email: Introduction of E	Open		Amanda Ha	amandalh	05/13	Trans	Undecided / Undeclar	Hartnell Colle			Action
3	Email: Introduction of E	Open		Melanie Hin	mrandolpl	05/13	Trans	Legal Studies BS	San Jacinto C			Action
4	Email: Introduction of E	Open	Recruit	Ashley Ram	tellamir@a	05/13	Trans	Psychology BS -Pearl	Robert Turne			Action
5	Email: Introduction of E	Open	Recruit	Alexis de la	20delagar	05/13	Fresh	General Business BS	College of th			Action
6	Email: Introduction of E	Open		Marla Timm	sweetbria	05/12	Trans	Public Service Leader:				Action
7	Email: Introduction of E	Open	Recruit	Priscilla Bet	pbetanco	05/12	Trans	Communication BA	Lee College			Action
8	Email: Introduction of E	Open	Recruit	Allysea Bet	allyseab@	05/12	Trans	Psychology BS	University of			Action

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INQUIRY: FOLLOW-UP W/ PHONE CALL

#	Full Name	Mobile	Phone	Contact Own	Call Descript	Call Outcom	Status	Created Tim	Modified Tim	Action
This view has been loaded and contains no data.										

Refresh | No data to display

MY OPEN TASKS

#	Subject	Iteration Name	Due Date	Contact Name	Student ID	Email	Mobile	Action
This view has been loaded and contains no data.								

PHONE INQUIRY FORM

#	Case Subject	Priority	Status	Primary Cor	Email	Contact	Intended Major	Most Re	Contact	Action
This view has been loaded and contains no data.										

# UNDERGRADUATE RECRUITMENT

## ■ Applications

- Visibly see all Inquires that have applied
- Contact students who are incomplete
- Contact those who are admitted but not registered for Orientation
- Ability to see which transcripts have been submitted

## ■ Challenges:

- Mass email from applications list

Tasks & Cases | Inquiries | Applications | Event Attendees

Add Widget Add Workspace

### SANJAC APPLICATIONS RECRUITER 4

#	Iteration Name	Contact	People	Created Time	Registrar	Acad Plan 1	Most Recent	Contact Ow	Phone	ATA Text M	Action
1	Summer 2019 U	Austin Due	158979	01/18/2019	Applied	GENBUSBS	San Jacinto C	Jillian Perez	2812832544	Yes	Action
2	Summer 2019	Luke Dobl	190394	01/30/2019	Applied	GENBUSBS	San Jacinto	Jillian Perez	281283254	No	Action
3	Summer 2019	Amanda A	131944	02/01/2019	Applied	MGMTBS	San Jacinto	Jillian Perez	281283254	Yes	Action
4	Summer 2019	Anna Diaz	11338	02/14/2019	Applied	ACCTGBS	San Jacinto	Jillian Perez	281283254	No	Action
5	Summer 2019	Jeannette	19074	02/19/2019	Applied	7-12HISTBA	San Jacinto	Jillian Perez	281283254	No	Action
6	Summer 2019	Marissa A	166851	02/19/2019	Applied	CRIMBSUGPI	San Jacinto	Jillian Perez	281283254	Yes	Action
7	Summer 2019	David Fax	12840	03/14/2019	Applied	MENGBS	San Jacinto	Jillian Perez	281283254	Yes	Action
8	Summer 2019	Joziel Alar	16556	03/26/2019	Applied	FINANCEBS	San Jacinto	Jillian Perez	281283254	Yes	Action

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### RECRUITER 4 - APPLICATION STATUS

#	Iteration Name	PeopleSoft ID	Contact	Registration	Acad Plan	Most Recently	Contact	Create	Mobile
Iteration Name: Fall 2019 Undergraduate									
1	Fall 2019 Undergrax	1560290	Ashkon Rasti	Applied	Biological Sci	U Of Texas-San A	Jillian Pe	05/09/	281/866
2	Fall 2019 Undergr	0150945	Victor Rodr	Applied	Computer I	University of Hc	Jillian I	05/09	832/47
3	Fall 2019 Undergr	1870173	Cynthia De	Applied	Early Child I	Sam Rayburn H	Jillian I	05/09	832/54
4	Fall 2019 Undergr	1341728	Katelynn Ri	Admitted	Managemer	Lee College	Jillian I	05/09	281/63
5	Fall 2019 Undergr	1936226	Stephanie E	Applied	Early Child I	Wharton Count	Jillian I	05/07	979/25
6	Fall 2019 Undergr	1928703	Niels Steph	Applied	Finance BS	Austin Commur	Jillian I	05/07	713/81
7	Fall 2019 Undergr	1026195	Joshua Toa	Applied	Computer I	Proc S Studies	Jillian I	05/07	832/03

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### RECRUITER 4 - ORIENTATION: NOT REGISTERED

#	Iteration	Ter	Peo	Contact	Registrati	Action Da	Car	Campus f	Email	Mobile	Mongoos	Admit Ty	Action
1	Fall 201	18	Mario Cardenas	Admitted	05/08/20				cardjr10@gmail.c	832/872-	Yes	FEC	Action
2	Fall 201	18	Mario Lockett	Admitted	05/08/20				mariolockettjr@i	719/355-		FDN	Action
3	Fall 201	18	ALEXANDER AU	Admitted	05/06/20				taustin797@yah	2819049;	Yes	FDN	Action
4	Fall 201	19	Alexis Guzman	Admitted	05/06/20				alexisg35582@g	512/777-	Yes	FDN	Action
5	Fall 201	19	Melia Dibello	Admitted	05/06/20				meliadibello@gm	832/314-		FDN	Action
6	Fall 201	14	Stephanie Guer	Admitted	05/03/20				gststephanie311@	832/597-	Yes	DUF	Action
7	Fall 201	11	Davina Smith	Admitted	04/25/20				davina427@hotr			DUF	Action
8	Fall 201	19	Mohammed Ral	Admitted	04/19/20				mdrahman321@	405/474-		FDN	Action

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### RECRUITER 4 - ORIENTATION: REGISTERED

#	Iteration Name	Term Ch	PeopleSo	Contact	Registration Status	Campus Eve	Campus Even
Campus Event Attendee Status: A							
1	Spring 2019 Undergrax		1849755	Bria Watkins	Admitted	ORNF	A
2	Spring 2019 Undergr		1805670	Eric Smith	Admitted	ORNF	A
3	Spring 2019 Undergr		1854803	Lujia Wu	Admitted	ORNF	A
4	Spring 2019 Undergr		1863226	Nathan Lopez	Admitted	ORNF	A
5	Spring 2019 Undergr		1397799	Gabriela Saucie	Admitted	ORNF	A
6	Spring 2019 Undergr		1328400	Gabriel Gonzale	Admitted	ORNF	A
7	Fall 2019 Undergrax		1241728	Katelynn Ri	Admitted	ORNF	A

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# UNDERGRADUATE RECRUITMENT

## Events

- Easily contact students who register for events
- Attended vs. Did Not Attend

Tasks & Cases   Inquiries   Applications   **Event Attendees**

+ Add Widget

**RECRUITER 4 - EVENT ATTENDEES**

#	Event Name	Attendance	First Name	Last Name	Contact	Mobile	Email	Applied	Inquiry	Action
1	UHCL Campus Tour	Attended	Alejandra	Galaviz	Freshma	956/458-521		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
2	UHCL Campus Tour	Attended	Nathanael	Chapman	Freshma	512/656-41	Chapmann08@gmail.c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
3	UHCL Campus Tour	Attended	Max	Delheim	Freshma	713/299-8	joella.delheimer@outl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
4	UHCL Campus Tour	Attended	Landon	Joseph	Freshma	281/753-9	landonjoseph1234@gi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
5	UHCL Campus Tour	Attended	Sarah	Davenport	Freshma	832/477-2	sdavenport2017@gm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
6	Spring 2017 Campus Tours	Did Not Att	Casey	Holley	Transfe	737/207-1	casey.renee2016@gm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action
7	UHCL Campus Tour - Monday	Attended	Kaleb	Montalvo	Freshma		yusimontalvo@icloud.	<input type="checkbox"/>	<input type="checkbox"/>	Action
8	UHCL Campus Tour - Monday	Did Not Att	Amber	Ross	Transfe		Amberjean113@gmail.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action

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**SPRING 2019 EVENTS**

#	Event Name	Start Date/Time	No of Atten	Event Form	Created	Created
1	Spring 2019 Admissions Preview - January 1	01/10/2019 06:	96	UHCL Admission:	Dan C	11/27,
2	Spring 2019 Admissions Preview	01/10/2019 06:		UHCL Admission:	Tiffany	11/29,
3	Spring 2019 HARN Galena Park H S	01/16/2019 12:	17	Recruiting Event	Veroni	01/28,
4	Spring 2019 Government Shutdown Assista	01/17/2019 12:	1	Recruiting Event	Teresa	01/28,
5	Spring 2019 College of Education EDD Info	01/24/2019 04:	3	Educational Lear	Arfaa I	01/16,
6	Spring 2019 HARN Galveston ISD College F	01/25/2019 12:	1	Recruiting Event	Veroni	01/30,
7	Spring 2019 TACRAO HCC-Coleman College	01/28/2019 12:	7	Recruiting Event	Jennif	02/05,
8	Spring 2019 TACRAO San Jac-Central Collec	01/31/2019 12:	3	Recruiting Event	Jennif	02/07,

# GRADUATE RECRUITMENT

Moving students through the Admissions funnel

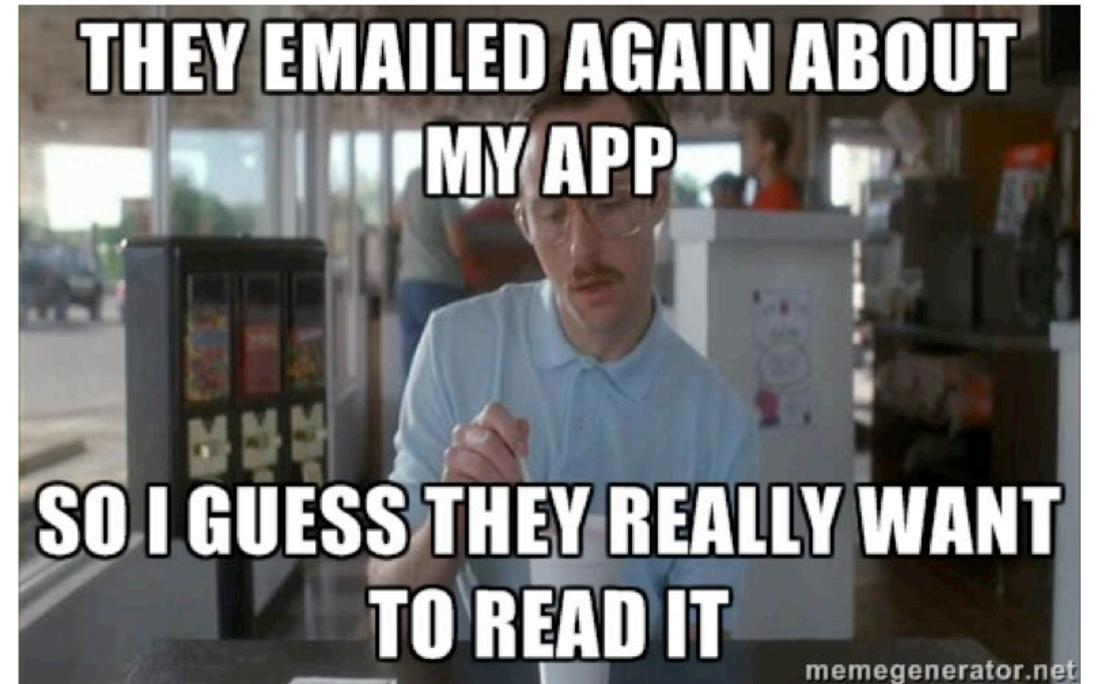
Goal			
<b>Inq. To App Rate:</b>	40%	-	60%
<b>Stealth App Rate:</b>	40%	-	60%
<b>App Complete Rate:</b>	70%	-	80%
<b>Accept Rate:</b>	80%	-	88%
<b>Yield Rate:</b>	70%	-	80%

Source: Ruffalo Nowel Levitz – 2015 Adult Learner Marketing & Recruitment Practices Benchmark Report

# GRADUATE RECRUITMENT

## Personal Communication Approach

- Personal Communication Plan
  - Thank you for Inquiring
  - Thank you for Applying
  - Your Admission file is complete
  - Admission decision



# GRADUATE RECRUITMENT

## Productivity - Two different approaches

**1. Cases** – reflecting our past personal communication through cases. Collecting Qualitative and Quantitative Data

**Source:** Phone Call  
Walk-In  
Counselor Visit  
Email  
Web  
Mongoose Messaging

**Call Type:** Incoming  
Outgoing

**Call Outcome:** Reached Prospect  
Reached Parent/Guardian  
Left Voicemail  
Other  
Wrong Number  
Disconnect Number  
No Answer

**Call Description**

# GRADUATE RECRUITMENT

## Productivity - Two different approaches

### 2. Contact – Collecting and reflecting Recruiting Information

- **EMC Rating**

- Hot
- Medium
- Cold
- Update/Moving\* (This has been key for graduate students)
- Not Interested

- **EMC Rating Notes**

- I, A, F, \*
- Updates/Moving
- Dates of last contacted
- What's missing on the file

# GRADUATE RECRUITMENT

## Graduate Admissions Funnel

	Sp 15	Sp 16	Sp 17	Sp 18	Sp 19	Su 15	Su 16	Su 17	Su 18	Su 19	Fall 15	Fall 16	Fall 17	Fall 18	Fall 19	T 15	T 16	T 17	T 18	T 19
<b>Inq. To App Rate:</b>				36%	40%				26%	47%				36%	22%				35%	34%
<b>App Complete Rate:</b>	62%	71%	66%	73%	75%	53%	63%	72%	76%	43%	78%	58%	73%	78%	31%	68%	63%	71%	76%	54%
<b>Accept Rate:</b>	80%	84%	80%	78%	89%	74%	78%	88%	93%	94%	77%	81%	75%	83%	83%	77%	81%	79%	83%	89%
<b>Yield Rate:</b>	79%	77%	70%	69%	73%	64%	62%	68%	44%	53%	69%	66%	71%	72%	32%	71%	69%	70%	68%	63%

# What We Are Still Learning

## **Finding the best way to reflect the key service experience**

- Setting your Workspace
  - Term Driven
    - Inquires
    - Applicants
    - Updates
  - Campus Events
  - Inquiries
    - All Inquiries, hitting future terms and others the slip through your views.

# EVENTS: Communication/Marketing

- Schedule various campaigns to market Events
- Track response, days of the week, time etc. that has higher response ratios
- View campaigns to see which individuals opened the message, viewed links and create further contact either calls or texts to these individuals
- Create targets that you can filter into Mongoose texting platform to text active reminders to individuals that registered but have yet to checked-in
- QR code feature for event check-in

# EVENTS: Front Counter Use

- Track student phone calls, documents being dropped off, walk-ins etc.
- Track contact points with the student and any issues they may have with their admissions files or in general
- With CRM the next person that talks to the student can see all of the “cases” and have a better idea of what’s going on with the student. This is truly helpful with undergraduate students who may not be able to work with or talk to the same EMC each time due to travel schedules.

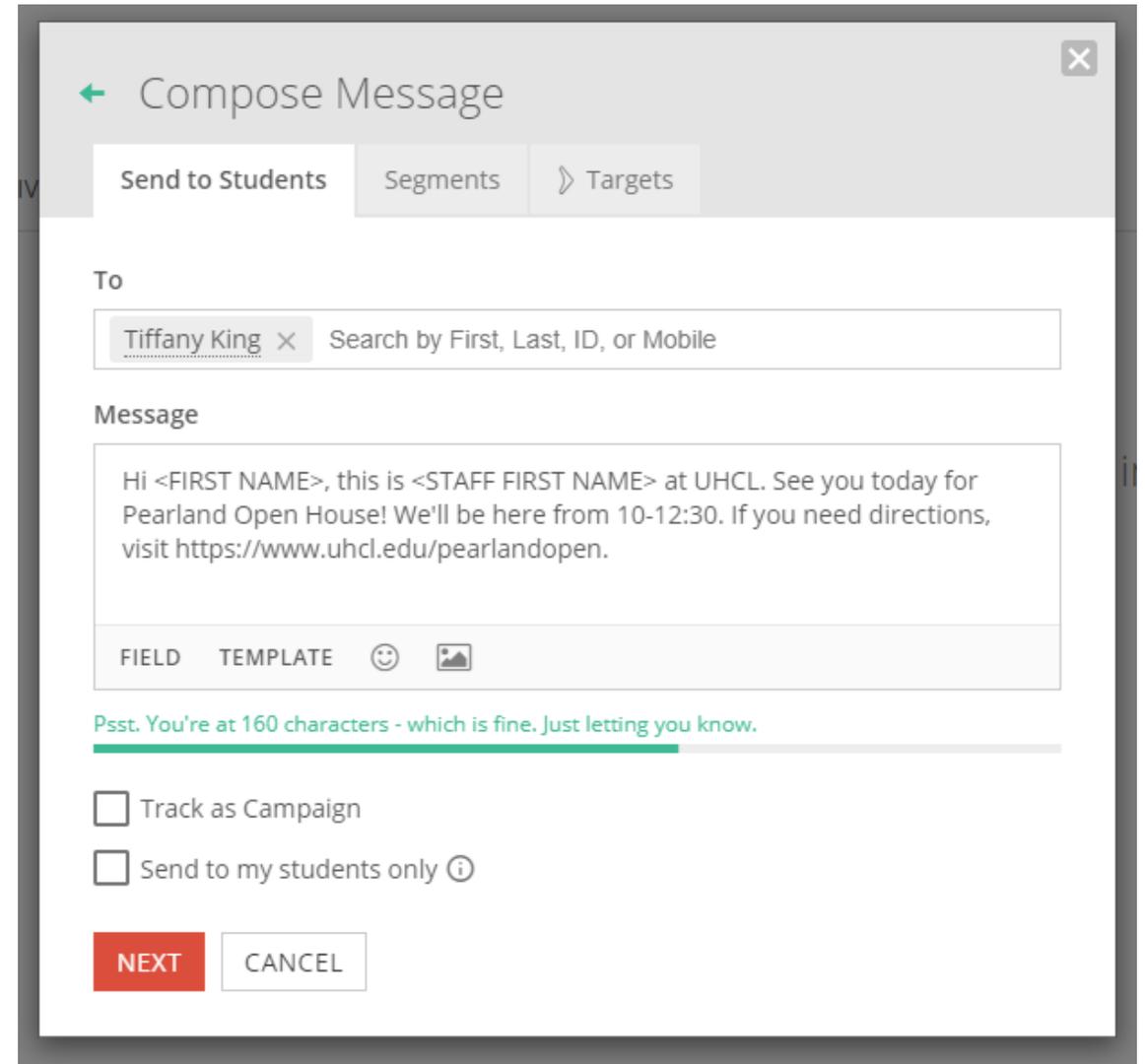
# Mongoose Texting Platform

## Reach a New Generation of Students

- Create instant, meaningful connections with students
- Group Accounts allow you to send text to more students
- Each message can be tailored to the student
- Send to an individual student, segment of students or a target list
- Ability to track response within CRM as a campaign
- Engage a generation of students that are constantly connected

# Texting

- Composing your message
  - Select individual
  - Existing templates or can send a personalized message
  - Variety of uses



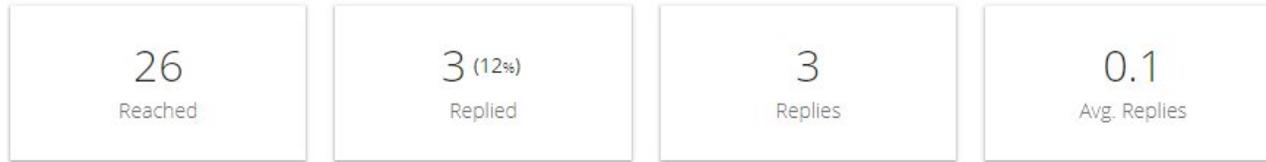
The screenshot shows a 'Compose Message' window with a close button in the top right. Below the title bar are three tabs: 'Send to Students' (active), 'Segments', and 'Targets'. The 'To' field contains 'Tiffany King' with a close icon and a search prompt 'Search by First, Last, ID, or Mobile'. The 'Message' field contains a template: 'Hi <FIRST NAME>, this is <STAFF FIRST NAME> at UHCL. See you today for Pearland Open House! We'll be here from 10-12:30. If you need directions, visit <https://www.uhcl.edu/pearlandopen>.' Below the message field are options for 'FIELD', 'TEMPLATE', a smiley face icon, and an image icon. A green progress bar at the bottom of the message field indicates 'Psst. You're at 160 characters - which is fine. Just letting you know.' At the bottom of the window are two checkboxes: 'Track as Campaign' and 'Send to my students only' (with an info icon). At the very bottom are two buttons: 'NEXT' (red) and 'CANCEL' (white).

# Texting Campaign Results

- Number reached
- Number of Replies
- Average reply Time
- Number of Replied
- Message

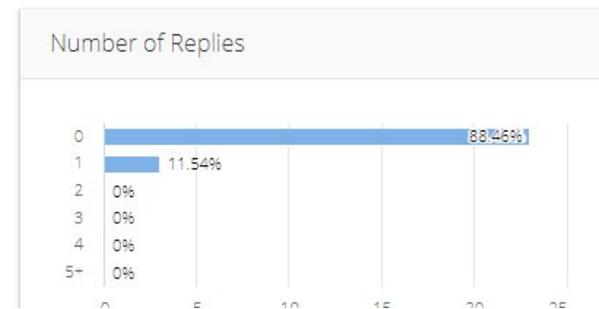
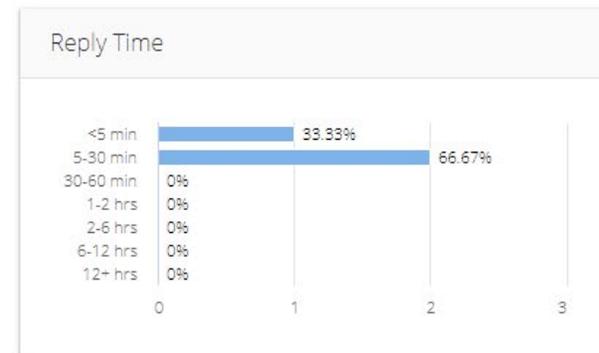
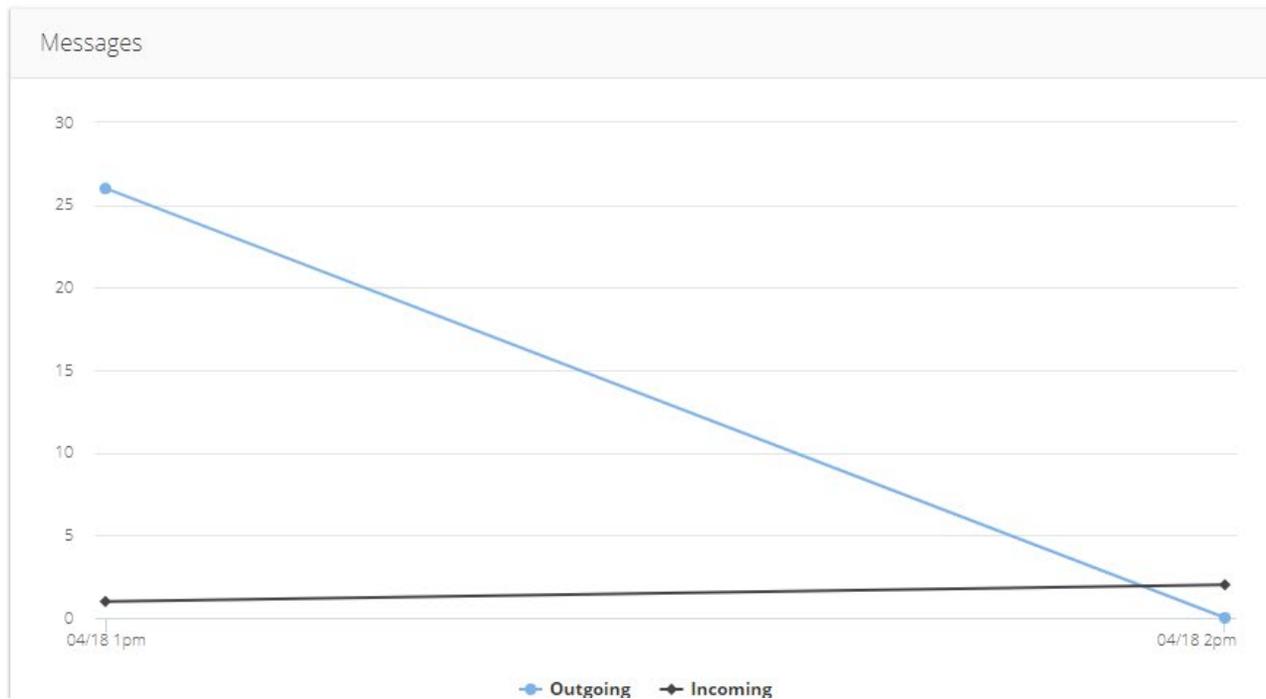
# Texting Campaign Results

[Help me understand this report](#)



Status - Active

Created - 4/18/19, 1:52pm



Thank You!

Questions? / Comments?