Enrollment Management and the Successful Enrollment Manager: *Puzzle Master, Mathematician and Magician*

Kent Hopkins

David Burge
Managing Enrollment Management

To discuss while we are gathering…

1. What is your institution’s definition of enrollment management? and institutional EM goals and objectives?

2. What are your primary internal and external concerns about managing enrollment management? Potential solutions and/or results to share…
1. How should a university construct its goals and objectives within the division of enrollment management? How should it set multiple, and possibly competing, priorities?

2. How should the enrollment division develop strong working relationships with those “within the enrollment tent” who do not report within the enrollment management division?

3. Sharing tips about setting university, division, department, and individual staff goals and objectives, to the development of work teams and play books— and how we measure success.
How should a university construct its goals and objectives within the division of enrollment management?

How should enrollment leaders set multiple, and possibly competing, priorities?
Arizona State University (ASU) has become the foundational model for the New American University, a new paradigm for the public research university that transforms higher education. ASU is committed to excellence, access and impact in everything that it does.
New American University
Mission and Goals/2014-2020

Demonstrate leadership in academic excellence and accessibility

- Maintain the fundamental principle of accessibility to all students qualified to study at a research university
- Maintain university accessibility to match Arizona’s socioeconomic diversity
- Improve freshmen persistence to 90%
- Enhance university graduation rate to 75%-80% and 25,000 graduates
- Enhance quality while reducing the cost of a degree
- **Enroll 100,000 online and distance education degree seeking students**
- Enhance linkages with community colleges so as to expand baccalaureate degree production to national leadership levels
- Enhance measured student development and individual student learning to national leadership levels
Enrollment Management Division
Goals and Objectives – 2015-2016

1) To achieve university enrollment objectives

2) To devise and execute plans for new student enrollment in order to meet university enrollment objectives

3) To partner in devising and executing plans for continuing students in order to meet university enrollment objectives

1) To devote time and energies in strengthening the work environment for our division staff

✓ To increase new student enrollments of Arizona residents
✓ To devise specific goals and plans for our continuing international students
Develop an attractive, compelling, strong brand that supports recruitment.

Do not leave students saddled with debt upon graduating.

Become the region’s go-to place for executive, professional, and continuing education.

Become a leader in online learning in Virginia, the nation, and the world.

Create new collaborations with Virginia community colleges and other institutions to facilitate affordable access.

Increase international student enrollment.

Increase enrollment of high-potential students who contribute to our diversity.

Increase graduation rates, including raising the six-year graduation rate to 78 percent.

Create new programs in high-demand disciplines.

Enrollment growth is perfectly compatible with improvements in quality.

Increase highly talented students particularly for programs in high-demand STEM-H fields.

Grow both our in-state and out-of-state enrollment.

Focus on retention strategies and reduce the time it takes to attain a degree.
We have a strategic plan. It's called doing things.

Herb Kelleher, Co-founder of Southwest Airlines
The mission of the Division for Enrollment Management at George Mason University is to foster student success by connecting students and families to resources that open doors to a world-class education and the opportunities fundamental to the Mason student experience. We strive to provide quality, timely, and efficient student service from recruitment through graduation and to collaborate with members of the Mason community in support of the University vision and strategic plan.
## Guiding Principles

<table>
<thead>
<tr>
<th>Ensure all of our activities support the achievement of planned enrollment goals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a <em>Culture of Service</em> by placing the student (and family) as the center of our work.</td>
</tr>
<tr>
<td>Collaborate university-wide to achieve objectives.</td>
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<tr>
<td>Take steps to create a <em>Culture of Data Accountability and Transparency</em>.</td>
</tr>
<tr>
<td>Employ a professional attitude and sense of well-being in all we do.</td>
</tr>
</tbody>
</table>
### 2015-2016 Goals

<table>
<thead>
<tr>
<th>Objective</th>
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</thead>
<tbody>
<tr>
<td>In collaboration with academic units, lead the effort to meet overall student enrollment projections – new and continuing, graduate and undergraduate.</td>
</tr>
<tr>
<td>Grow non-resident enrollments for undergraduate and graduate students.</td>
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<tr>
<td>Utilizing a student-centered approach, employ new technologies and best practices for data analysis to re-engineer Enrollment Management processes.</td>
</tr>
<tr>
<td>Support existing and emerging University Partnerships for Online, Degree Completion, and Executive Education.</td>
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<tr>
<td>Define modern student/family expectations for service delivery and develop metrics to assess satisfaction.</td>
</tr>
<tr>
<td>Devote time and energies in strengthening a work environment that supports well-being for our division staff.</td>
</tr>
</tbody>
</table>
Setting Multiple, Competing Goals

1. Excellence, access and impact
2. College/school enrollment targets
3. Technologies and Analysis
4. Merit and need assistance
5. K-12 preparation for postsecondary education

What say you?
How should the enrollment division develop strong working relationships with those "within the enrollment tent" who do not report within the enrollment management division?
EM Division and its evolution

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Admissions (74)</td>
<td>Undergraduate Admissions (107)</td>
<td>Admission Services (107)</td>
<td>Admission Services (105)</td>
<td>Admission Services (115)</td>
</tr>
<tr>
<td>Student Financial Assistance Office (56)</td>
<td>Student Financial Assistance Office (70)</td>
<td>Financial Aid and Scholarship Services (66)</td>
<td>Financial Aid and Scholarship Services (72)</td>
<td>Financial Aid and Scholarship Services (74)</td>
</tr>
<tr>
<td>University Registrar (74)</td>
<td>University Registrar (63)</td>
<td>University Registrar Services (62)</td>
<td>University Registrar Services (57)</td>
<td>University Registrar Services (57)</td>
</tr>
<tr>
<td>Provost Communication Group (7)</td>
<td>Provost Communication Group/Marketing and Communications (20)</td>
<td>Enrollment Services Communications (22)</td>
<td>Enrollment Services Communications (22)</td>
<td>Enrollment Services Communications (22)</td>
</tr>
<tr>
<td>Pat Tillman Veterans Center (6)</td>
<td>Pat Tillman Veterans Center (10)</td>
<td>Pat Tillman Veterans Center (10)</td>
<td>Pat Tillman Veterans Center (10)</td>
<td>Pat Tillman Veterans Center (10)</td>
</tr>
<tr>
<td>International Students and Scholars Center (15)</td>
<td>International Students and Scholars Center (21)</td>
<td>International Students and Scholars Center (31)</td>
<td>International Students and Scholars Center (31)</td>
<td>International Students and Scholars Center (31)</td>
</tr>
<tr>
<td>Enrollment Services Information Systems Development (19)</td>
<td>Enrollment Services Information Systems Development (19)</td>
<td>Enrollment Services Information Systems Development (22)</td>
<td>Enrollment Services Information Systems Development (22)</td>
<td>Enrollment Services Information Systems Development (22)</td>
</tr>
</tbody>
</table>

Vice Provost November 2009
Added Transfer Admission and Processing
Increased freshman and international recruitment staff

Pat Tillman Veterans Center opened in August 2011, permanent director hired July 2012
International Students and Scholars Center move
ESISD became a unit in November 2013
Graduate Admission to Admission Services November 2013
Department name changes November 2013

University Registrar moved to Provost direct report February 2015
Developing Strong Working Relationships

1. Enrollment and Revenue Management Executive Group
2. Undergraduate Enrollment Planning Team
3. Graduate Recruitment Planning
4. Monthly College and School Recruitment Planning Meeting
5. Campus Planning Meetings
6. International Enrollment and Services Task Force
Collaboration is key to success

- **Housing** → Capacity, engagement
- **Intensive English** → Conditional admission
- **Institutional Analysis** → Uniform reporting, data informed decision-making
- **Early Outreach** → Planning, Increase Readiness
- **Marketing Hub** → Strategy alignment
- **Media Relations** → Media Management
- **Athletics** → Partnership power
- **Business/Finance** → Visit experiences, enrollment and revenue, defining finances
And within the division...

- **Division Leads**
  - 1:1 weekly meetings
  - Group meetings every three weeks
  - Division leads and their connections

- **ES Division Managers**
  - Meet monthly (initially) then every six weeks
  - Focus on division training and development and customer service initiatives
IT'S SIMPLE UNTIL YOU MAKE IT COMPLICATED.
MASON STUDENT EXPERIENCE REDESIGN PROJECT

Goal:
Through deliberate actions to achieve the vision of the George Mason University 10-year plan, by 2019 we will modernize the student experience in order to better enable student success.

Objectives:
• Enhance the student experience from beginning to end.
• Increase the number of students participating in elements of the student experience deemed to be essential activities of earning a George Mason University degree.
• Reduce the number of challenges students face throughout the entire educational process.
• Close gaps in student-facing processes.
• Enhance the effectiveness in serving Mason students and their families.
MASON STUDENT EXPERIENCE REDESIGN PROJECT

- Center for Advising, Retention & Transition
- Dean of Students
- Enrollment Management
- Office of Alumni Relations
- Retention and Student Success
- Institutional Research and Assessment
- Orientation, Family Programs & Services
- Academic Affairs
- Counseling and Psychological Services
- Undergraduate Education
- Student Fiscal Services
- Information Technology Services
- INTO George Mason University
- University Registrar
- Administration and Finance
- Office of Global Strategy
- Graduate Education
- Academic Administration
- Enrollment Central
- Admissions
- Learning Support Services
- Student Financial Aid
- International Programs & Services
- Auxiliary Enterprises, University Life
- Faculty Link (Chair, English/Folklore Studies Concentration)
- Housing/Residence Life
- Disability Support Services
<table>
<thead>
<tr>
<th>Topics</th>
<th>Stated Objectives</th>
<th>Determine what kind of student chooses Mason and thrives here. (Are we doing a good job of matching students to Mason’s attributes?)</th>
<th>What kind of student(s) should we be recruiting for the Honors College?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Strategies/Best Practices</td>
<td>The meeting should serve as a forum for disseminating marketing strategies—that content either coming from university experts or from attendees’ experiences—“what worked.”</td>
<td>Identify areas of improvement in undergraduate marketing strategy.</td>
<td>Get an understanding of what might be possible if Mason were effective at enrollment management. By this I mean having a vision of the range of data that might be available, the relevant questions to ask, and the approaches that we might take to exploit the data and our situation. Another way of saying this might be that I’d like to know what our &quot;wish list&quot; for enrollment management should look like.</td>
</tr>
<tr>
<td>Enrollment Management tools/Effective enrollment management</td>
<td>Developing a rich and nuanced model for enrollment management, built upon detailed data.</td>
<td>There is a need for a reliable, valid, and useful data for decision making (including parallel sources of information on graduate and undergraduate enrollment). There is also a pressing need to expand focus not only on recruitment but retention initiatives at the university, and implementation of more thorough systems for tracking all students over time (e.g., complete LRM, communications plan).</td>
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<tr>
<td>Enrollment Planning</td>
<td>Meeting should serve as a clearinghouse for information on numbers of incoming students, in order to facilitate planning of course schedules (i.e. offering enough courses to accommodate the current number of expected students). This info should be update at each meeting during the admissions cycle.</td>
<td>Planning for how to accommodate enrollment growth – if a program has substantially more students than projected, there is an immediate need to add more courses.</td>
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<tr>
<td>Topics</td>
<td>Stated Objectives</td>
<td>Remarks</td>
<td></td>
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</table>
| Data systems available for units' use/access to data/training | Training in how to seek and use the data we have access to, particularly what sorts of analyses of our data will be productive in recruitment, enrollment, and retention.  
Identify strengths/weaknesses/redundancies of current reports and systems (Banner, Discoverer, MicroStrategies, SSC, IRR, departmental tracking, etc.) to maximize use of data for recruitment, admissions, and retention efforts. | Education/training on how to use Microstrategy or other tools for specific enrollment planning purposes.  
There is a need for a reliable, valid, and useful data for decision making (including parallel sources of information on graduate and undergraduate enrollment). There is also a pressing need to expand focus not only on recruitment but retention initiatives at the university, and implementation of more thorough systems for tracking all students over time (e.g., complete LRM, communications plan). |                                                                                                                                                                                                                                                                              |
| Scope of collaborative & supportive units on campus | Get to know the scope of collaborative and supportive units campus-wide.  
How some non-traditional offices (Office of Military Services, Office of Diversity, Inclusion, and Multicultural Education (ODIME), and the Office of International Programs and Services (OIPS)) can help in recruitment and retention efforts. | What do you (the colleges) believe your relationship with the Honors College should be? Would you like to be more involved? What percent of honors students should your college have? |                                                                                                                                                                                                                                                                              |
| Retention/Graduation Rates | Discuss best retention practices.  
Discuss how to raise our graduation rates (including stream-lining re-enrollment/application processes). | Analyze methods/mechanisms for determining and following the retention rate of graduate students (similar to systems being devised for the undergraduate programs). |                                                                                                                                                                                                                                                                              |
University Working Relationships in Enrollment Management

1. Where to start – and why?
   - Definitions: EM is bigger than new student recruitment/enrollment
   - Role Clarifications: Setting up a relay race

2. Data, data, data...

3. Wash, rinse, repeat...

What say you?
Setting university, department, and individual staff goals and objectives, to the development of work teams and play books—and how we measure our success.
• Enrollment targets are set by University leadership with participation from colleges and schools.
• Create incentives to meet enrollment targets.
• Build campus-wide teams dedicated to achieving enrollment goals.
• Share data freely across the campus community.
BUDGET AND ENROLLMENTS

- Develop business intelligence tools to track progression towards established budget goals related to student enrollment.
- Regularly provide in-person and written reports to University leadership. Determine a schedule that provides timely and contextual updates.
- Develop year-over-year enrollment targets consistent with university objectives.
- Develop the appropriate forecasting tools to test different scenarios with conversion formulas based on empirical data.
## Needed Improvements on Retention and Graduation

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<tbody>
<tr>
<td><strong>First-year Retention</strong></td>
<td>88.7%</td>
<td>89.0%</td>
<td>89.3%</td>
<td>89.6%</td>
<td>89.8%</td>
<td>89.9%</td>
<td>90.0%</td>
</tr>
<tr>
<td><strong>4-year Graduation</strong></td>
<td>48.0%</td>
<td>48.9%</td>
<td>49.8%</td>
<td>50.6%</td>
<td>51.4%</td>
<td>52.2%</td>
<td>52.9%</td>
</tr>
<tr>
<td><strong>6-year Graduation</strong></td>
<td>69.50%</td>
<td>70.40%</td>
<td>71.30%</td>
<td>72.10%</td>
<td>72.90%</td>
<td>73.70%</td>
<td>74.40%</td>
</tr>
</tbody>
</table>

**Fall 2015 Actuals . . .**
- First-year Retention: 87.2%
- 4-year Graduation: 48.8%
- 6-year Graduation: 69.2%
“Aren't these just buzzwords that dumb people use to sound important? Not that I'm accusing you of anything like that... I'm fired, aren't I?” - Simpsons, Season 8
The clear majority of our Spring transfer **ADmits** come in during the month of **November**.

The majority of our Spring transfer **Enrollments** come in **January**.
### FIVE-YEAR GRADUATE ENROLLMENT, VIRGINIA PUBLICS

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Christopher Newport University</td>
<td>153</td>
<td>140</td>
<td>138</td>
<td>125</td>
<td>121</td>
<td>-20.90%</td>
</tr>
<tr>
<td>College of William and Mary</td>
<td>1,484</td>
<td>1,456</td>
<td>1,473</td>
<td>1,509</td>
<td>1,542</td>
<td>3.90%</td>
</tr>
<tr>
<td>George Mason University</td>
<td>11,824</td>
<td>11,668</td>
<td>11,407</td>
<td>10,896</td>
<td>10,382</td>
<td>-12.20%</td>
</tr>
<tr>
<td>James Madison University</td>
<td>1,822</td>
<td>1,820</td>
<td>1,750</td>
<td>1,711</td>
<td>1,831</td>
<td>0.50%</td>
</tr>
<tr>
<td>Longwood University</td>
<td>623</td>
<td>479</td>
<td>463</td>
<td>522</td>
<td>474</td>
<td>-23.90%</td>
</tr>
<tr>
<td>Norfolk State University</td>
<td>827</td>
<td>733</td>
<td>702</td>
<td>671</td>
<td>585</td>
<td>-29.30%</td>
</tr>
<tr>
<td>Old Dominion University</td>
<td>5,386</td>
<td>5,058</td>
<td>5,009</td>
<td>4,817</td>
<td>4,571</td>
<td>-15.10%</td>
</tr>
<tr>
<td>Radford University</td>
<td>1,020</td>
<td>963</td>
<td>1,015</td>
<td>913</td>
<td>863</td>
<td>-15.40%</td>
</tr>
<tr>
<td>University of Mary Washington</td>
<td>706</td>
<td>578</td>
<td>448</td>
<td>368</td>
<td>327</td>
<td>-53.70%</td>
</tr>
<tr>
<td>University of Virginia</td>
<td>6,839</td>
<td>6,390</td>
<td>5,694</td>
<td>5,616</td>
<td>5,582</td>
<td>-18.40%</td>
</tr>
<tr>
<td>Virginia Commonwealth University</td>
<td>6,454</td>
<td>6,094</td>
<td>5,924</td>
<td>5,482</td>
<td>5,454</td>
<td>-15.50%</td>
</tr>
<tr>
<td>Virginia State University</td>
<td>589</td>
<td>638</td>
<td>690</td>
<td>527</td>
<td>455</td>
<td>-22.80%</td>
</tr>
<tr>
<td>Virginia Tech</td>
<td>6,856</td>
<td>6,808</td>
<td>6,723</td>
<td>6,512</td>
<td>6,792</td>
<td>-0.90%</td>
</tr>
<tr>
<td>Total Public Four-year Institutions</td>
<td>44,583</td>
<td>42,825</td>
<td>41,436</td>
<td>39,669</td>
<td>38,979</td>
<td>-12.60%</td>
</tr>
</tbody>
</table>

Source: State Council of Higher Education for Virginia (SCHEV)
University Enrollment Goals

1. Modeling constructed by provost office
2. Modeling connected to business and finance division, for revenue modeling overlay
3. Goals distributed to college and school leadership for review, commentary and return to provost office
3. To devote time and energies in strengthening the work environment for our division staff
Strengthening the Work Environment: Core Objectives

• Continue to develop clear annual performance goals and plans
• Assess division training and development needs
• Assess staff diversification needs
Individual goals

**Core Expectations for Staff**

<table>
<thead>
<tr>
<th>Core Expectations for Staff</th>
<th>Rating</th>
<th>Weight (opt)</th>
<th>Supervisor Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates a Culture of Service to Students and Colleagues</td>
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<tr>
<td>Sells the Standard of Trust, Integrity, Transparency</td>
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<tr>
<td>Develops Staff and Student Teamwork</td>
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</tr>
<tr>
<td>Executes Strategies to Get Results</td>
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<td></td>
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<tr>
<td>Decision Making and Accountability</td>
<td></td>
<td></td>
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<tr>
<td>Cultivates Intellectual and Cultural Diversity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiscal Responsibility, Process Improvement, Sustainability</td>
<td></td>
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</tbody>
</table>

**Final Overall Evaluation (Leader’s summary comments)**

**ENTER AN OVERALL RATING (low) 1 2 3 4 5 (high):** (if weighted, please describe.)

**Planning (next 12 months)**

<table>
<thead>
<tr>
<th>Performance (core job duties, expectations, standards and defined goals)</th>
<th>Professional Development (growth in place or for advancement)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 - Consistently Exceeds Performance Expectations</td>
<td></td>
</tr>
<tr>
<td>4 - Frequently Exceeds Performance Expectations</td>
<td></td>
</tr>
<tr>
<td>2 - Performance Expectations Fulfilled</td>
<td></td>
</tr>
<tr>
<td>2 - Inconsistently Fulfills Performance Expectations</td>
<td></td>
</tr>
<tr>
<td>1 - Fails to Meet Performance Expectations</td>
<td></td>
</tr>
</tbody>
</table>

**Focus**

1. Continued development of centralized reporting and contact service strategies for continuing undergraduate students to improve persistence, progression to degree and satisfaction with the university experience.
2. Assist and enhance the communication cycle to continuing students, in support of university retention, persistence and graduation goals.
Work Teams

- Customer Service
- Training and Development

### 2013 Enrollment Services Customer Service, Training & Development Staff Survey

<table>
<thead>
<tr>
<th>Your Enrollment Services unit:</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission Services</td>
<td>28.0%</td>
<td>70</td>
</tr>
<tr>
<td>Enrollment Services Communications</td>
<td>8.6%</td>
<td>23</td>
</tr>
<tr>
<td>Enrollment Services Information Systems Development</td>
<td>7.5%</td>
<td>20</td>
</tr>
<tr>
<td>Financial Aid and Scholarship Services</td>
<td>20.7%</td>
<td>55</td>
</tr>
<tr>
<td>Pat Tillman Veterans Center</td>
<td>2.6%</td>
<td>7</td>
</tr>
<tr>
<td>University Registrar Services (including First-Year Success Center and International Students and Scholars Center)</td>
<td>31.2%</td>
<td>83</td>
</tr>
<tr>
<td>Vice Provost's Office</td>
<td>0.8%</td>
<td>2</td>
</tr>
</tbody>
</table>

Answered Question: 266
Skipped Question: 0
Playbooks – Objectives and Targets

Admission Services – Enrollment Services
Undergraduate New Student Enrollment Plan – Domestic Freshman 2016-2017

Objectives
- Increase overall domestic freshmen enrollment by XX
- Increase Arizona freshmen enrollment by XX
- Increase California freshmen enrollment by XX
- Increase Other Out of State freshmen enrollment by XX
- Increase WUE freshmen enrollment from XX
- Shape the domestic nonresident enrollment pool by reducing the reliance on retention risk students with CI scores of 102 and below, and with high and very high unmet financial need
- Expand Arizona marketshare of ABOR eligible high school graduates focusing on:
  - The Tucson market
  - Among high performing students
  - Among high and very high financial need families
- Focus enrollment growth on the West and Polytechnic Campuses
- Increase Barrett new freshmen enrollment to XX students, focusing growth on the Poly, West and Downtown campuses

## Fall 2017 Freshman Recruitment Funnel Targets:

<table>
<thead>
<tr>
<th>Fall 2017 FTF Targets</th>
<th>Applications</th>
<th>Completed Apps</th>
<th>Admits</th>
<th>Deposits</th>
<th>Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>AZ</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>CA</td>
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<tr>
<td>OOS</td>
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<tr>
<td>WUE</td>
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<tr>
<td>INTER</td>
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<tr>
<td>TOTAL</td>
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Significant Change Assumptions
Playbooks – Core Strategies

• Funnel Development
  – Lead Generation
  – Application Completion
  – Yield
  – Capture
• Market
• Financial assistance
• Communication
Take time to celebrate
Goals and Staff

1. Managing Goals
2. Articulating Goals
3. Monitoring Goals

1. Clarifying staff roles
2. Constructing annual goal setting schema
3. Providing continual feedback

What say you?
Did we do what we said we’d do?

1. How should a university construct its goals and objectives within the division of enrollment management? How should it set multiple, and possibly competing, priorities?

2. How should the enrollment division develop strong working relationships with those “within the enrollment tent” who do not report within the enrollment management division?

3. Sharing tips about setting university, division, department, and individual staff goals and objectives, to the development of work teams and play books—and how we measure success.
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Questions?