



Survey of the Enrollment Management Landscape 2021

Marketing and Student Engagement
Benchmarks Report



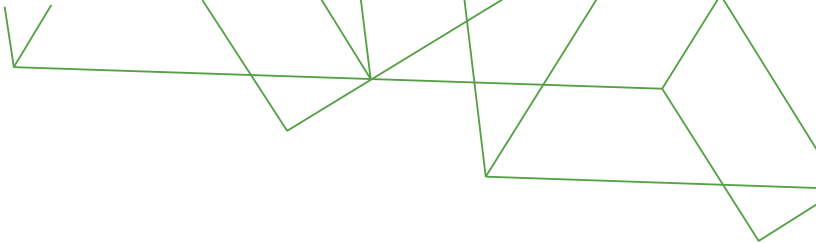
2021 promises to be a landmark year for education.

The pressures of the pandemic have changed how colleges and universities deliver educational opportunities. Marketing, messaging, and enrollment activities shifted as well. Prospective students are spending more time online, engaging with social media and OTT marketing with new intensity. Meanwhile, traditional methods of reaching students, like radio and college fairs, have become less effective.

Some of the changes wrought by the pandemic seem obvious in retrospect. Increased reliance on online learning and higher search volumes were natural side effects of stay at home orders. Other impacts were less intuitive, but brought valuable insight.

More than anything, existing trends were accelerated in 2020. Adult enrollment is increasing and post-traditional learners play a more vital role than ever in the enrollment mix. What were the important trends to understand in 2020, and how are they shaping the higher education landscape for 2021 and beyond?

Colleges and universities were charged with reassuring prospective students even as they grappled with uncertainty themselves. Some rose quickly to the challenge. Those most likely to succeed were student-centered organizations that pivoted quickly in response to unprecedented changes. Success came from consistent and authentic engagement that focused on student outcomes. The colleges that thrived were those that addressed the needs of today's learners throughout the entire student lifecycle from consideration to graduation.



First, focus on the student

The student is the center of any successful enrollment management strategy. Every message, ad placement, and interaction should be crafted with their real needs and wants in mind. For this reason, owning the student lifecycle starts with focusing on the student. When you know who they are and what they want, you can provide the information and the support they need to enroll and persist.

Over the last decade, the student mix has skewed away from traditional students who are 18-24 years old and enrolling directly out of high school. Today's students are more likely to be older, have job experience, and be returning to school after some time away. These post-traditional students comprise the majority of the higher education student population. Because this trend is likely to continue, more institutions are seeking to attract this population pool as a way to shore up flagging enrollments in traditional campus programs.

Reaching today's students may require new offerings and alternative methods of communicating. These students have different needs than their traditional counterparts. Like most students, they want career services, library services, advising, and other student support. But, they more often demand flexibility, different formats, and shorter courses so they can continue to meet their obligations while advancing their education.

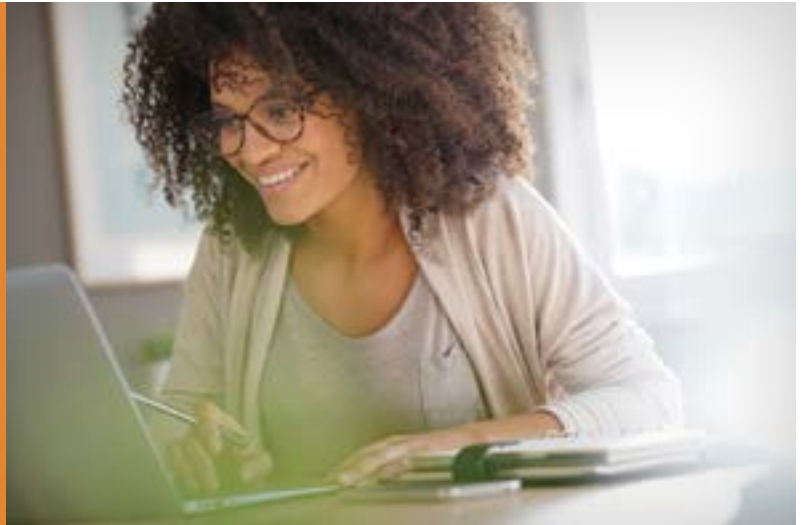
Post-traditional students also connect with colleges and universities in ways that don't match the habits of traditional students. Rather than visiting college fairs to explore potential learning pathways, they more often do their own research online and through conversations with friends, family, and alumni. A post-traditional student likely knows exactly what they want before they make their initial contact with admissions advisors.

Most, if not all, colleges and universities can benefit from better understanding the post-traditional student market. As the population of potential traditional students shrink in the coming years, institutions may look to replace them with post-traditional students. This is only possible if institutions make post-traditional students a primary focus.



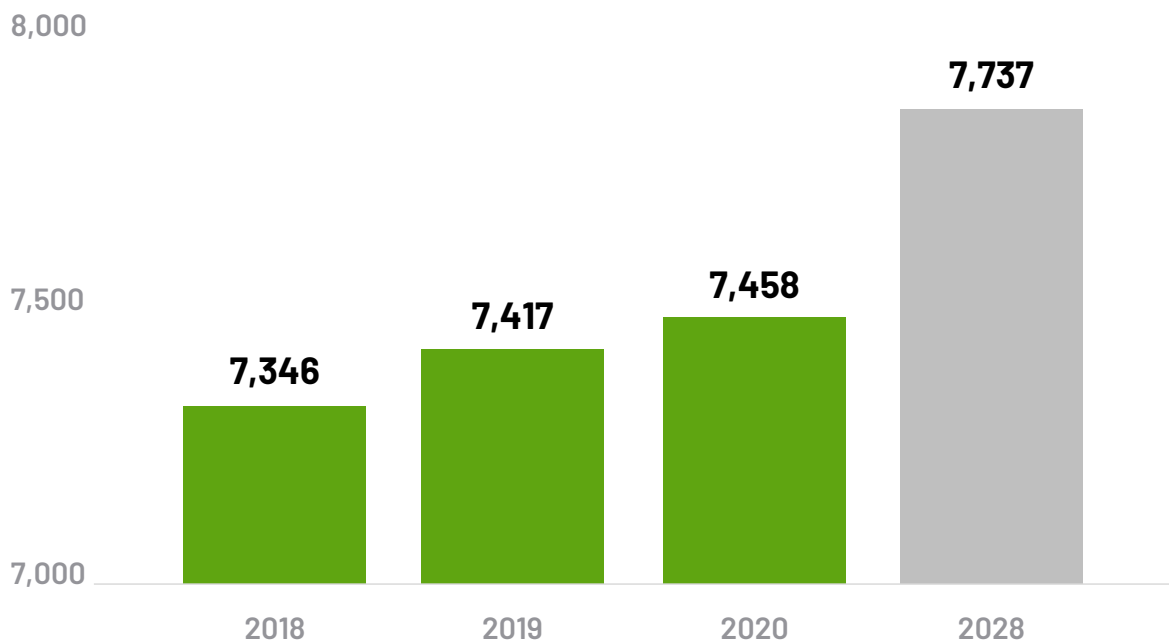
Adult Learner Enrollment Trends Upward

Enrollment of adult students aged 25+ is expected to grow 5.32% in the next 10 years. Among students age 35+ enrollment will grow even faster, at 13.9%. Meanwhile, the enrollment of traditional students aged 18-24 is expected to grow at a rate of just 0.71% over the same period.



Adult Learner (25+) Enrollment Projections

(2010- 2020 + 10 Yr projection 2028)



The primary reasons that post-traditional students give for pursuing further education include: 54% seeking higher salary, 48% needing new skills to advance, 48% having a passion for learning, and 32% looking to develop leadership skills.

The vast majority of post-traditional students enroll in degree programs—bachelor’s degrees at the undergraduate level and master’s degrees at the graduate level. Graduate students are twice as likely to seek out certificate, licensure, or other credit-bearing credentials compared to undergraduate students.

Finding Post-Traditional Students Where They Are

Colleges and universities can best reach post-traditional students by focusing their marketing efforts on the platforms and channels where these students are mostly likely to spend their time. In general, traditional television commercials and direct mail are not the most effective way to reach potential students. However, these options may still play a role in the marketing mix.

Over the Top Media

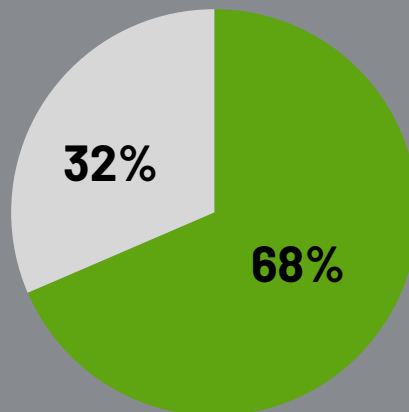
About one-third of post-traditional students have “cut the cord.” They do not have cable or satellite TV and rely on streaming media or other internet sources for news, entertainment, and sports. That still leaves almost 70% of post-traditional students who do watch traditional television. Of these, many also use streaming services or over the top (OTT) media.

Source: *EducationDynamics 2020 Beyond Post - Traditional Students Report*

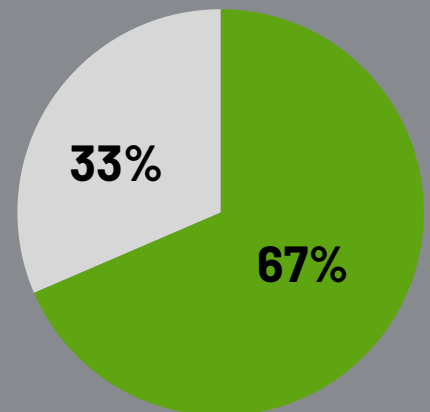
Use of Cable or Satellite Television



About 70% of post-traditional students have cable or satellite television.

% of Undergraduate Post-Traditional Students



% of Graduate Post-Traditional Students













-  Use Cable or Satellite Television
-  Don't have Cable or Satellite TV



In general, undergraduate post-traditional students are more likely to use streaming services daily. Youtube, Netflix, and Hulu are the most popular streaming services among both undergraduate and graduate students. Of these, only Netflix does not offer advertising opportunities. Undergraduate students are slightly more likely to watch Hulu daily compared to graduate students.



| | % of Undergraduate Post-Traditional Students | % of Graduate Post-Traditional Students |
|---|--|---|
| | Daily | Daily |
|  | 43% | 46% |
|  | 37% | 33% |
|  | 20% | 19% |
|  | 21% | 19% |
|  | 19% | 14% |
|  | 19% | 13% |
|  | 19% | 18% |
|  | 12% | 14% |
|  | 13% | 10% |
|  | 10% | 11% |

Mobile and Desktop Devices

Post-traditional students use both smartphones and desktop or laptop computers to access the internet. Undergraduate students use their smartphone more frequently, while graduate students are more likely to rely on their computers to access the internet.

Both groups report completing some or almost all of their college search on a mobile device. In both groups, 10% rely solely on a mobile device to complete all of their college search. The conclusion is obvious: Mobile-friendly sites and forms are essential tools to help post-traditional students find and enroll in your programs.

| Internet Access Device | % of Undergraduate Post-Traditional Students |
|--|--|
| A smartphone (Android, iPhone, etc.) | 45% |
| A desktop/laptop computer | 41% |
| A tablet (such as an iPad) | 12% |
| Something else | 2% |
| I do not regularly access the internet | 1% |

| Internet Access Device | % of Graduate Post-Traditional Students |
|--|---|
| A desktop/laptop computer | 55% |
| A smartphone (Android, iPhone, etc.) | 35% |
| A tablet (such as an iPad) | 10% |
| Something else | 1% |
| I do not regularly access the internet | 1% |

Use of Mobile Device for College Search

Post-traditional students conducted some of their program selection research on a mobile device. About one-quarter did almost all their research using a mobile device.

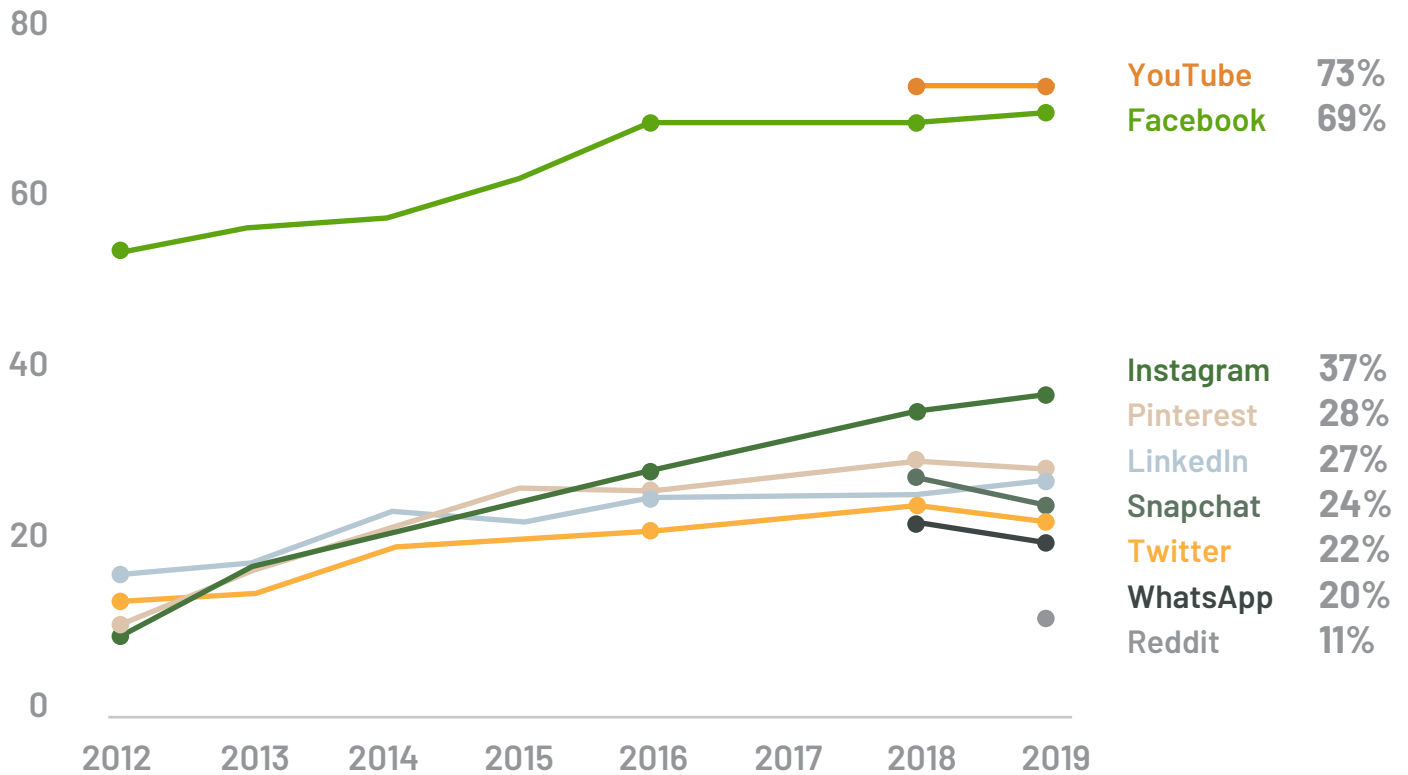
| Use Mobile Device for College Search | % of Undergraduate Post-Traditional Students |
|--------------------------------------|--|
| Not at all | 14% |
| Some | 47% |
| Almost all | 25% |
| All | 13% |

| Use Mobile Device for College Search | % of Graduate Post-Traditional Students |
|--------------------------------------|---|
| Not at all | 21% |
| Some | 42% |
| Almost all | 27% |
| All | 10% |

Social Media

Facebook and Facebook Messenger are commonly used by both graduate and undergraduate post-traditional students. Among undergraduate students, Instagram and Pinterest are the second and third most popular. By comparison, graduate students are more likely to spend time on LinkedIn or Instagram. Students access these social media platforms either daily or weekly and are constantly connected to their devices and social platforms of choice. At a minimum, institutions should be posting content at least three times a week.

% of U.S. adults who say they ever use the following online platforms or messaging apps online or on their cellphone.



Over time, digital habits will continue to evolve. To remain nimble, enrollment marketing teams must continue to branch out and test emerging channels.

Note: Pre-2018 telephone poll data is not available for YouTube, Snapchat and WhatsApp.

Comparable trend data is not available for Reddit.

Source: Survey conducted Jan. 8-Feb. 7, 2019. Pew Research Center

How to Generate Awareness

Colleges, universities, and even individual programs spend considerable time and resources building a brand. Through logo design, colors, and messaging, they try to ensure that their offerings will stand out in the marketplace. This up-front work is vital, but having a brand is not enough.

Programs that achieve their enrollment goals also work to generate awareness of their brand. Their brand promises, messaging, and imagery saturate every interaction between the institution and potential students. This doesn't mean just slapping a logo on an ad and walking away. Instead, every ad, communication with potential students, and organic post is thoughtfully designed to build the brand. Even forms and support materials can strengthen associations between your brand and its promises in the mind of your target audience. As you continue to promote your brand across multiple channels with a well-designed marketing strategy, you generate awareness, earn trust, and build relationships.



Generating Awareness Through Messaging

Students can't enroll, or even inquire, unless they know that the program exists and what it has to offer. Colleges and universities generate awareness by sending the right message to the right audience at the right time. During this awareness or discovery phase, your primary goal is to catch the audience's attention.

This initial contact should only lightly introduce your brand and program. Now is not the time for a hard sell. Instead, effective messages:

- Speak to their passions
- Entertain
- Educate
- Introduce the brand and program

Display Ads, online radio, OTT, and generic search are all powerful channels for awareness marketing.



Awareness

Display Ads/Online Radio/ OTT/Generic Search

Also known as the "discovery" phase of the marketing funnel, this top stage seeks to capture the audience's attention and make them aware of your existence.

Most effective content: In this initial awareness phase, the audience has either not yet seen your brand or is not aware of why they should choose you. The best content for this stage should:

- Speak to their passions
- Entertain them
- Educate them
- Lightly introduce yourself

Creative that can elicit an emotional response from a potential student is ideal at this stage, as this increases the chance that the consumer will remember who you are and what you can do for them. Don't go for a hard sell yet.

Interest

Paid Search/Branded Search/Social Content

At this point in the funnel, your audience may know about you. Now you want them to become interested in you. This is where you start to build trust with your audience and begin to warm them up to your solution to their problem.

Most effective content: They're looking for content to help guide them to a solution. There's no guarantee that they'll inquire, but those who find your content helpful and interesting may move on to the next part of the funnel. The best content for this stage should:

- Highlight the prospective student's problem, your solution or both

Consideration

Blog Posts/Social Media/E-books/E-mails

In this stage of the student journey, the prospective student is actively considering your school.

Most effective content: Here, the audience is beginning to directly associate your school with the solution it offers. The best content for this stage should:

- Include program-specific information
- Highlight features and benefits
- Let the prospect know how you can help meet their needs
- Drive them to find out more information (next step in the funnel)
- Convince your audience that you are the right choice

While it's unlikely that your school has gained the prospective student's trust yet, it's a great time to strengthen the relationship by sending prospects more information about the program being considered or why you are a great solution to meet their needs.

Inquire

Chat/Online Forms/Call/Text

This stage is where your brand pushes hard to get the prospective student to inquire. The audience you're reaching at this stage should be those who've already hit stages one through 3 in the funnel, so they're already warm leads.

Most effective content: They're looking for content to help guide them to a solution. There's no guarantee that they'll inquire, but those who find your content helpful and interesting may move on to the next part of the funnel. The best content for this stage should:

- Drive action—Use CTAs that will most quickly drive the prospect to conversion (Apply Now, Apply Today, Get Started, Contact Us, Call Us, etc.)
- Be direct and focus on what you want the audience to do next

Keep it simple. At this last stage, your audience is ready to take action. Help make it as simple and easy as possible.

Once students are aware of your brand, you can use retargeting and other strategies to build their interest. Paid search, branded search, and social content are all effective channels for interest marketing.

Interested students can then seek out blog posts, social media, e-books, and emails that help them consider your school. These assets help them to directly associate your program with the solution it offers.

By the end of these stages, the students should be warm prospects who are ready to inquire. CTAs like Apply Now, Get Started, and Contact Us can drive students to action.



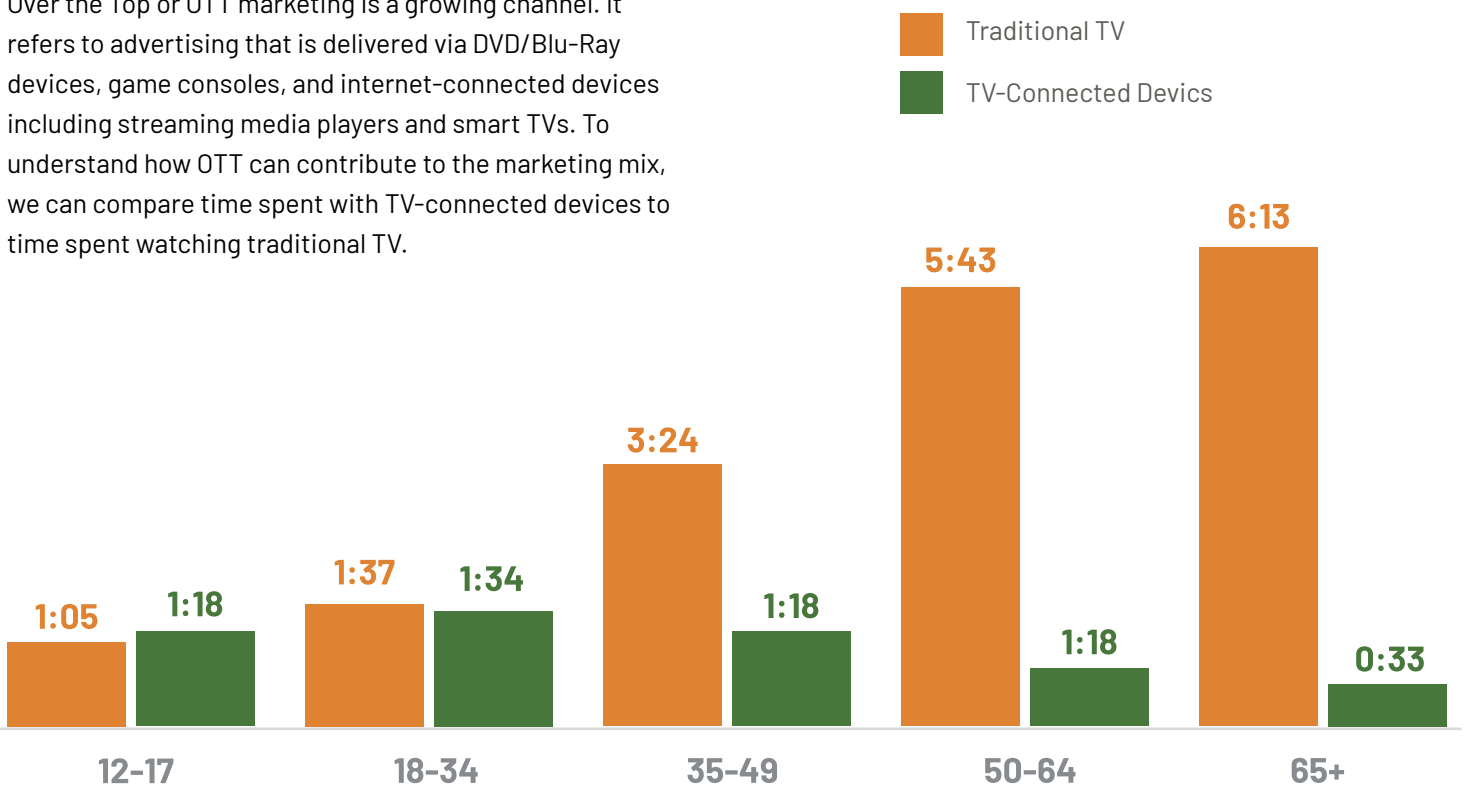
Leveraging the Right Awareness Channels

Of course, placement is almost as important as messaging. Place your message on the wrong channel and prospective students are unlikely to see it. Even the most compelling messaging can't convert under these conditions. A look at the trends affecting some marketing channels can help you decide where your message would be most effective.

Over the Top Marketing

Over the Top or OTT marketing is a growing channel. It refers to advertising that is delivered via DVD/Blu-Ray devices, game consoles, and internet-connected devices including streaming media players and smart TVs. To understand how OTT can contribute to the marketing mix, we can compare time spent with TV-connected devices to time spent watching traditional TV.

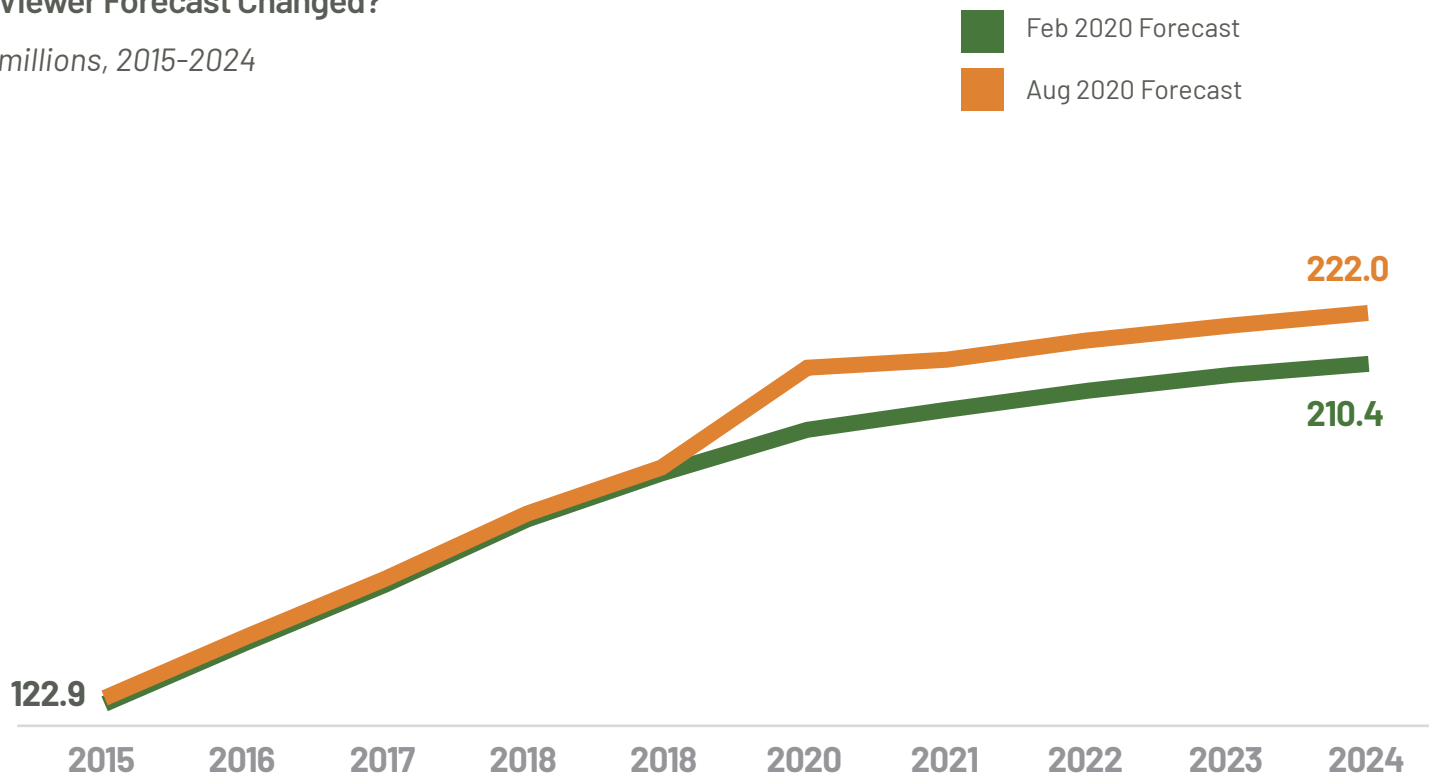
In Q1 2020 (daily hh:mm, total population)



The data reflects huge differences in viewing habits across age groups. Older audiences spend far more time with traditional television, while younger groups gravitate toward streaming devices.

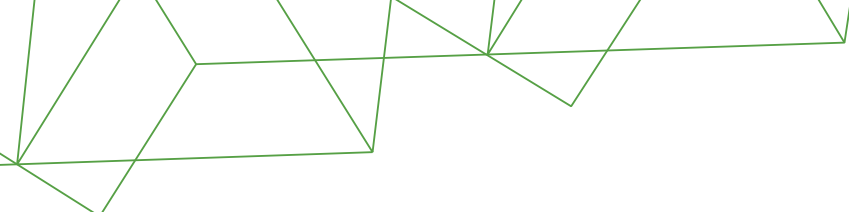
How has the US Subscription OTT Video Viewer Forecast Changed?

millions, 2015-2024



Even before the pandemic, forecasts indicated that OTT viewership would continue to increase. More time spent at home and fewer in-person entertainment options have led to increases in projected viewership.

For colleges and universities that have not yet added OTT to their marketing mix, the time is now.

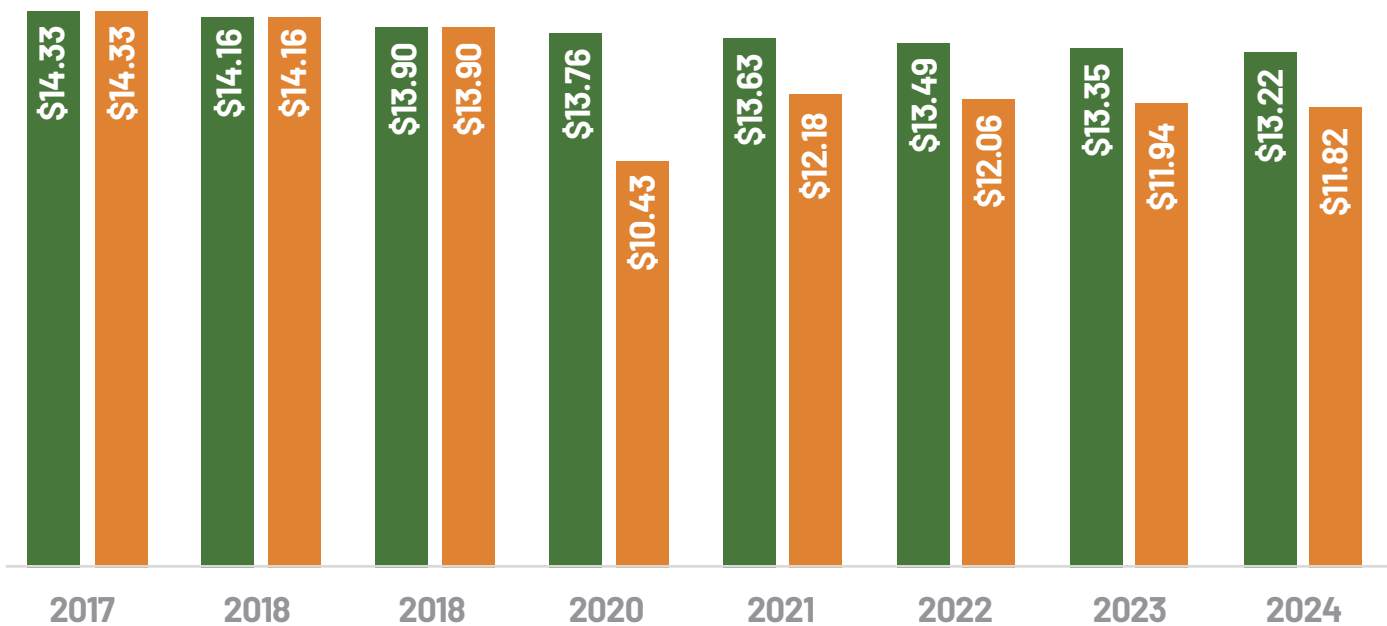
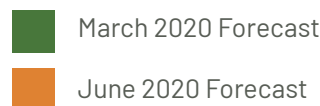


Terrestrial Radio

The same changes that have pushed OTT growth are forcing a decline in local radio. Stay at home orders and overall caution have encouraged people to drive less. Since the majority of radio listening occurs in cars, time spent listening to the radio has also declined. Radio ad spend has dropped significantly over the last year. While these numbers may rebound slightly in the coming years, they are unlikely to return to pre-pandemic rates.

How has the US Radio Ad Spending Forecast Changed?

billions, 2017-2024

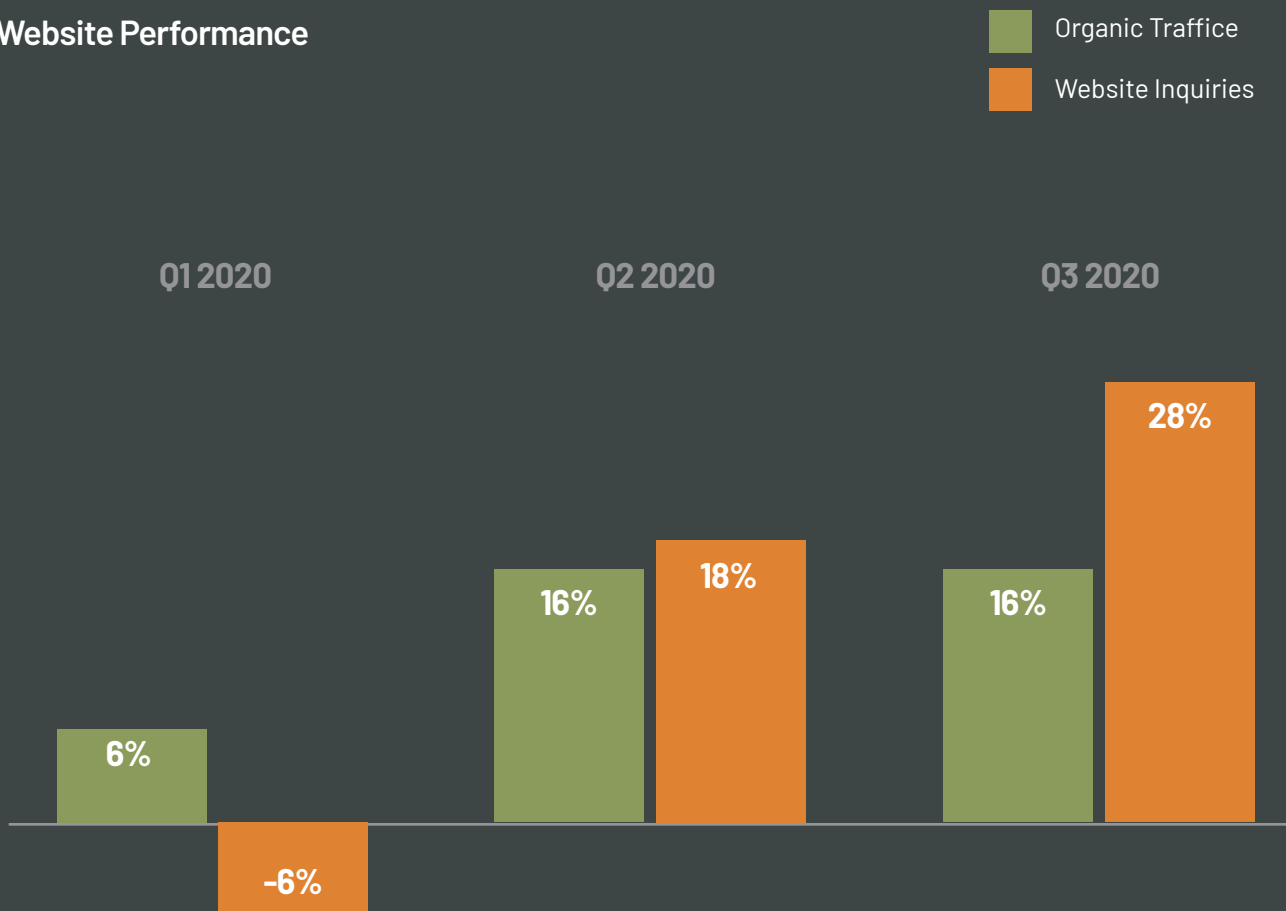


How Digital Has Evolved

It probably comes as no surprise that 2020 has brought major increases in website traffic. More time at home meant more time spent online. It would be logical to assume that an increase in web traffic would bring a corresponding increase in inquiries. However, inquiries actually dropped during the first quarter.

But the mismatch did not last long. In Q2 and Q3, website traffic and inquiries both bounced back to greater than pre-pandemic levels. This organic growth is particularly striking at a time when paid channels were less attractive due to pandemic uncertainty and increased political spending.

YOY Website Performance

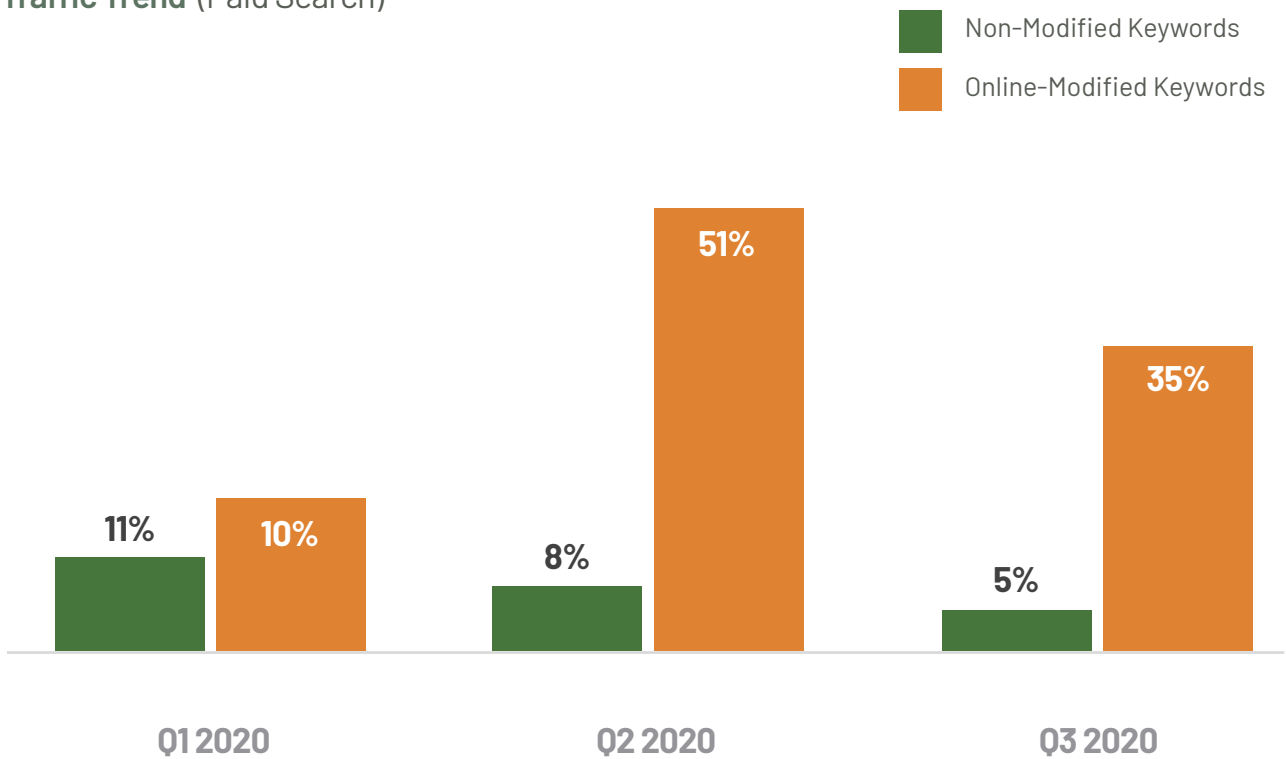


CPC Through Enrollments

As a result of stay-at-home orders and social distancing guidelines, combined with job and career uncertainty in an unstable economy, demand for online education has skyrocketed. Students who might otherwise have sought in-person offerings are turning to online solutions. The potential market for online programs is larger than ever. Despite this increased demand, cost per click has remained affordable, especially for modified search terms.

Demand for online education grows, with less competitive CPCs than last year

YOY Traffic Trend (Paid Search)



The same pressures that pushed students online have also generated heavy increases in traffic for online modified search terms. This was especially prevalent in Q2, when schools first came to grips with the necessary shift away from on-campus education.

Caution by advertisers with uncertain budgets creates an opportunity for everyone else to bid more aggressively on online modified keywords while maintaining profitable CPCs. Despite the increase in student demand, CPCs on these modified keywords have dropped significantly. Meanwhile non-modified keyword CPCs have remained largely comparable to last year.

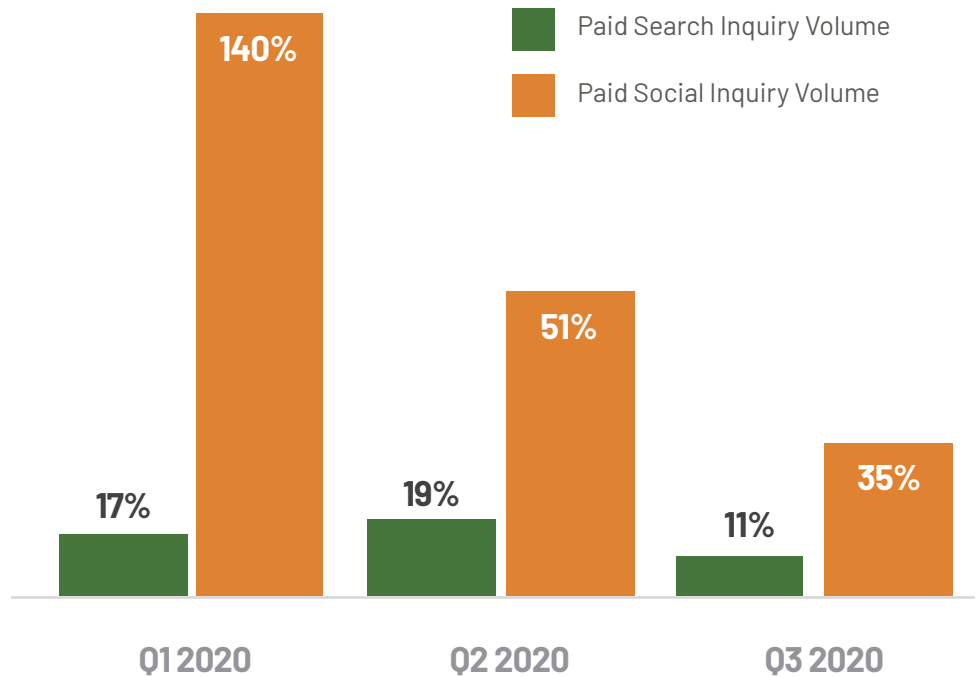
Conversion rate to inquiry has remained relatively stable on these online modified terms, with only a moderate 5% decline YTD in 2020 versus 2019. Despite this slight decrease, online modified keywords still achieve stronger on-page conversion rates than their non-modified counterparts.

Inquiry return from paid social media has seen massive growth year-over-year. Increased social media usage during the pandemic is partially responsible, but improved performance optimization tools play a role as well. With the increases in paid social investment, CPIs in this channel have increased steadily throughout 2020 as compared to 2019.

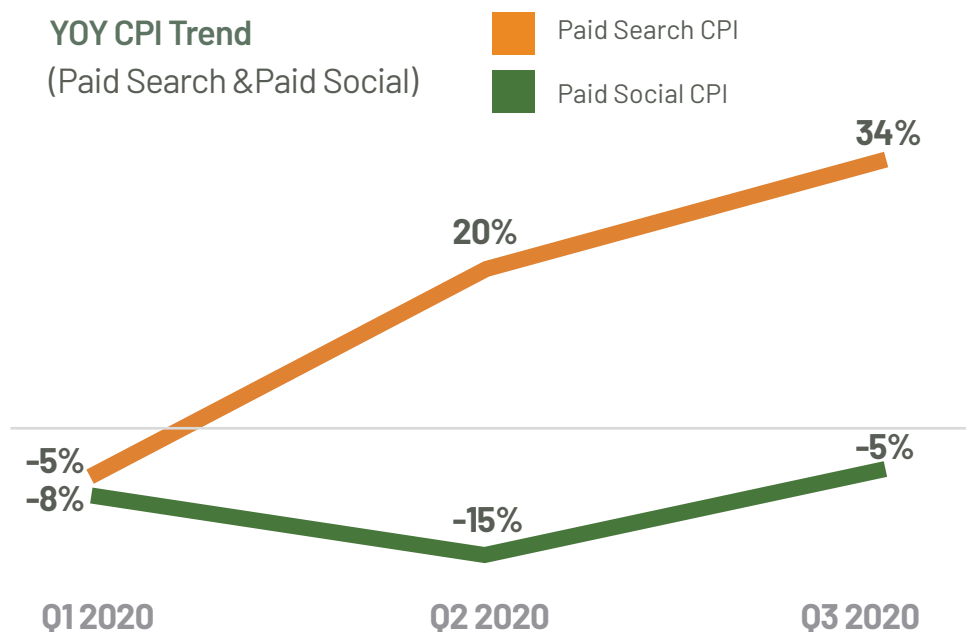
By contrast, more modest paid search inquiry growth has brought greater CPI efficiency. Across all partners, EducationDynamics saw an average 9% improvement in paid search CPI YTD in 2020 vs. 2019.

Strong inquiry growth from paid social, but more cost-effective growth from paid search

YOY Inquiry Volume Trend (Paid Search & Paid Social)

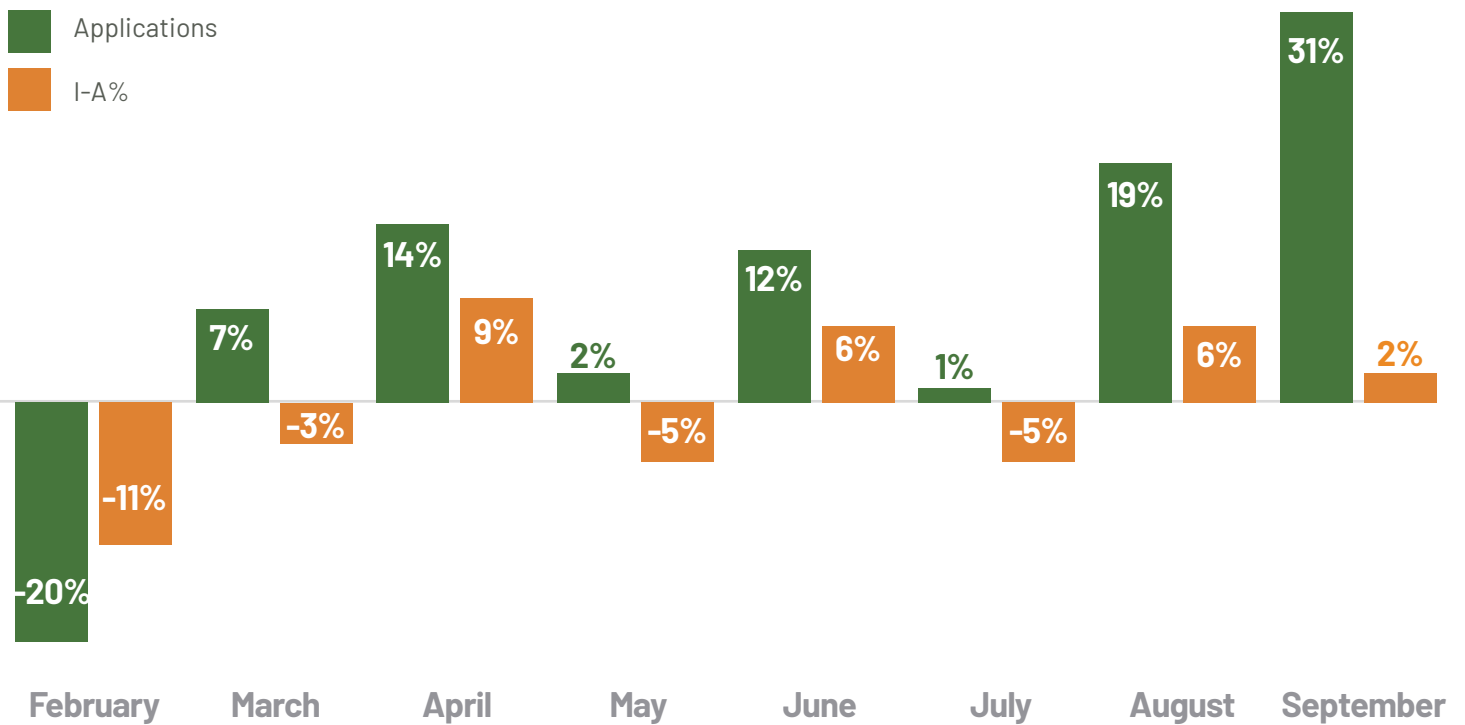


YOY CPI Trend (Paid Search & Paid Social)



Application Growth is Accelerating

2020 MOM Application Trending



When it comes to applications, the news is good. Across EducationDynamics' partners, we have seen strong application performance throughout the pandemic. Application volume saw large gains heading into the fall semester. In short, despite uncertainty across the industry, our partners are seeing a strong funnel. They are primed for continued enrollment growth from digital channels.

Effective Enrollment Management

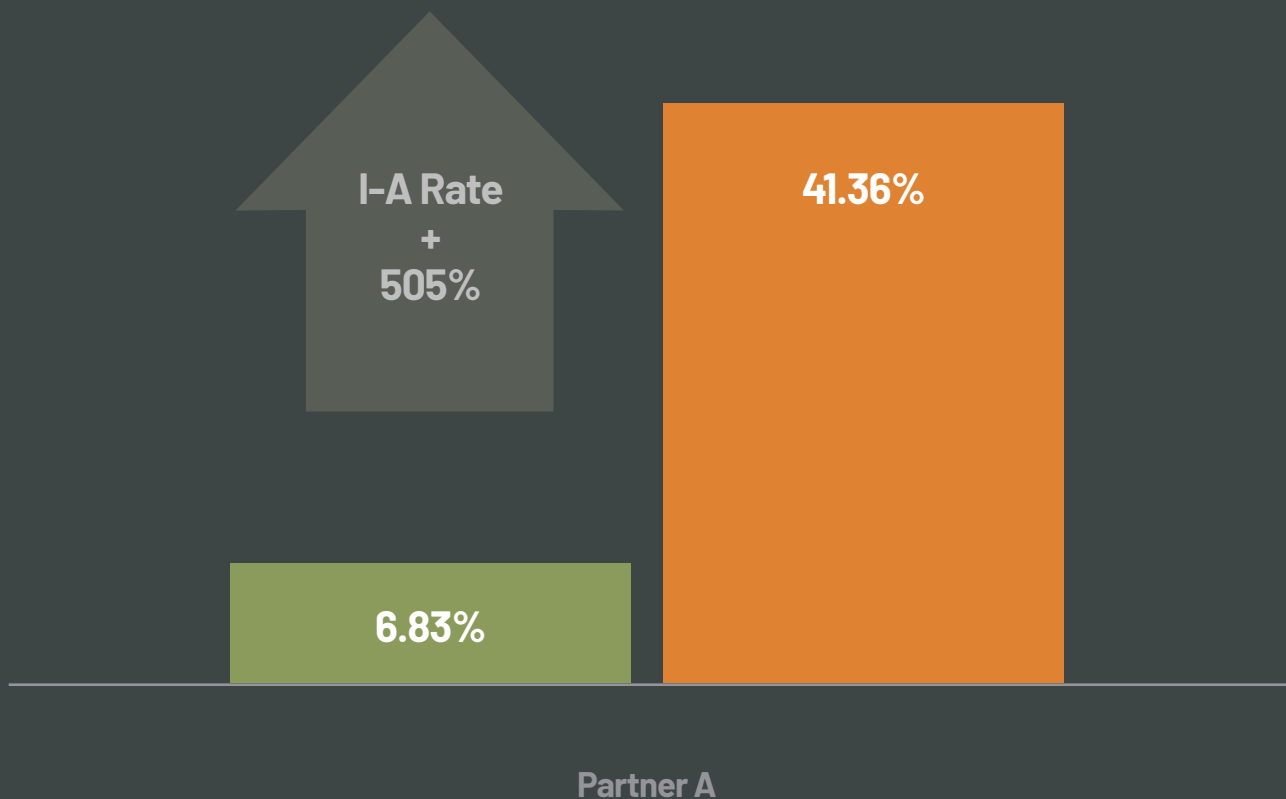
Most post-traditional students know exactly what they want from a program. They've done their research before they enroll. In short, they're motivated to move quickly and they expect the program to do so as well. Nurturing prospective students across multiple channels, and responding quickly to inquiries can make a real difference in enrollment rates.

Same Day Contact

Faster response rates increase applications. Same-day contact can dramatically impact results. Below, you can see how changing the speed of response increases inquiry to application rates by more than 500%. Improving speed to respond may be the single most impactful change an enrollment team can make.

I-A Rate Difference by Partner: Same Day Contact

- Did not Contact Same Day I-A
- Contacted Same Day I-A



Multichannel Lead Nurturing

Although most students are ready and eager to enroll, they're also busy. A multi-channel approach can ensure that your program stays front of mind for those students who aren't yet ready to inquire. It can include email, SMS, ringless voicemail, and paid social.

Among our partners who implemented a multi-channel nurturing approach, we have seen up to a 22% increase in Inquiry to Enrollment conversion rate.

Inquiry campaigns that nurture inquiries to application, generally see improvements from multichannel nurturing as well. Schools with rolling starts can achieve between 10% and 16% improvement in maturation of lead to application in the first 30 days of becoming a lead.

SMS pushes are particularly effective. They achieve a 6% average click rate and 14% average click-to-action rate on CTAs like "inquire again," "apply," or "schedule a visit." These pushes lead to a 300% increase in daily website traffic the day the SMS drops.


For ringless voicemail, on average, we see a successful delivery rate of 75%.



22% increase in enrollment

10%-16% improvement in maturation with rolling starts

300% increase in web traffic the day of an SMS drop



Enrollment Insights

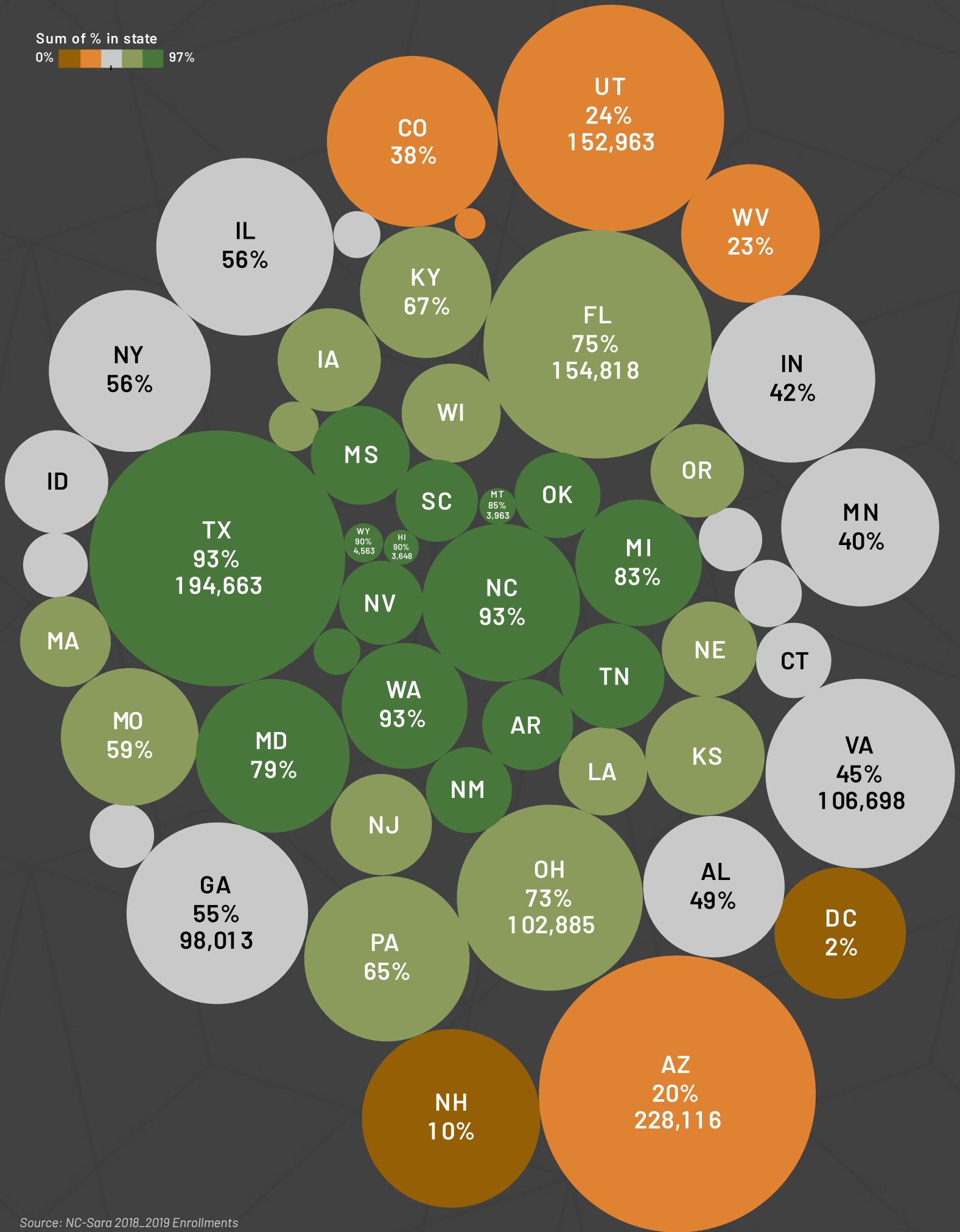
The last few years have revealed a tendency for students to enroll at colleges and universities close to home. That trend continued this year, at least for public institutions. In these programs, 83% of enrollments originated from in-state residents. However, for-profits and private non-profits saw enrollment from a wider geographic map.

| | In-State Students | Total Students | Percent in state |
|------------------------|-------------------|------------------|------------------|
| Public | 1,211,038 | 1,459,969 | 83% |
| Private/non-profit | 267,280 | 785,582 | 34% |
| Independent/for-profit | 38,415 | 439,698 | 9% |
| Other | 797 | 1,005 | 79% |
| Grand Total | 1,517,530 | 2,686,254 | 56% |



Overall, about 56% of students enroll in the same state in which they live. This simple statistic hides some deeper insights. When you drill down to specific states, distinct patterns emerge.

Sum of % in state
0% 97%



After removing for-profits from the mix, we see that only 8 states had less than 50% enrollment origination from in-state.

Same state enrollment
(not including For-Profits)
under 50%

| | |
|----|--------|
| VT | 46.02% |
| VA | 45.33% |
| IN | 44.91% |
| AZ | 36.36% |
| RI | 36.12% |
| UT | 23.63% |
| NH | 10.39% |
| DC | 5.75% |

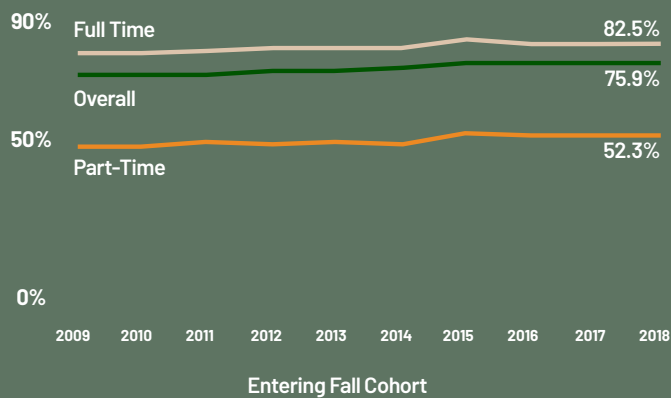


These insights can help colleges and universities to allocate marketing dollars. It is important to own your local market first, then look at opportunities for market expansion where you have low share-of-market or more opportunities for your program portfolio. Advertising and other communication aimed at in-state students are likely to deliver a positive ROI. Programs may also wish to partner with local employers to create strong student pipelines and placement opportunities.

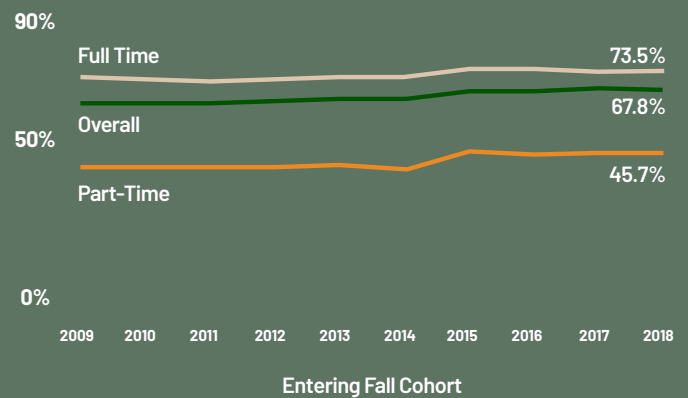
Persistence and Retention

The past few years have brought few changes to persistence and retention rates for most age groups. While persistence varied by age, date of enrollment and full-time/part-time status, the overall persistence and retention trends were consistent. Of the 2.6M students enrolled in the Fall 2017 cohort, 75.9% persisted as of the Fall 2018 semester.

Persistence Rates by Starting Enrollment Intensity: All Institutions



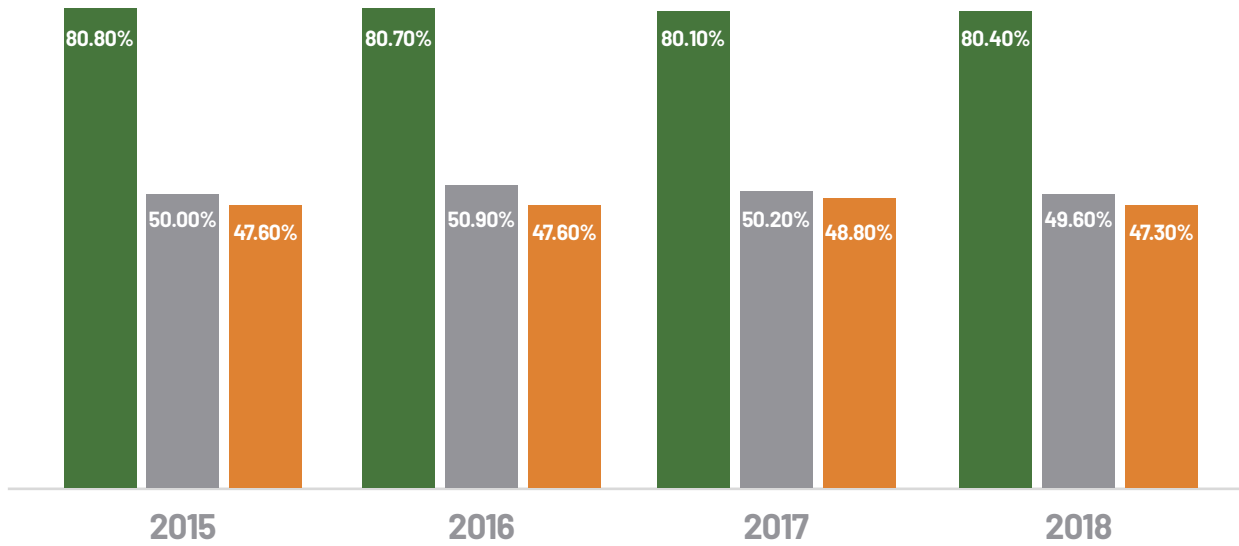
Retention Rates by Starting Enrollment Intensity: All Institutions



| | | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|------------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Overall | Retention | 63.2% | 62.9% | 62.9% | 63.9% | 65.0% | 64.9% | 66.3% | 66.5% | 66.7% | 67.0% |
| | Persistence | 72.4% | 72.3% | 72.3% | 73.2% | 74.1% | 74.1% | 75.6% | 75.8% | 75.6% | 75.9% |
| Full-Time | Retention | 70.2% | 69.7% | 69.6% | 70.5% | 71.7% | 71.7% | 73.3% | 73.4% | 73.2% | 73.5% |
| | Persistence | 80.0% | 79.6% | 79.5% | 80.2% | 81.3% | 81.3% | 83.0% | 83.0% | 82.4% | 82.5% |
| Part-Time | Retention | 42.0% | 41.4% | 41.3% | 42.1% | 42.3% | 42.3% | 46.2% | 45.7% | 45.7% | 45.7% |
| | Persistence | 49.5% | 49.3% | 49.1% | 50.0% | 50.2% | 50.2% | 53.1% | 52.6% | 52.3% | 52.3% |

In Fall 2018, students aged 21-24 at college entry had a persistence rate of 49.6%. Older students had similar persistence rates at 47.3%. Rates were highest among the youngest students, who achieved a persistence rate of 80.4%.

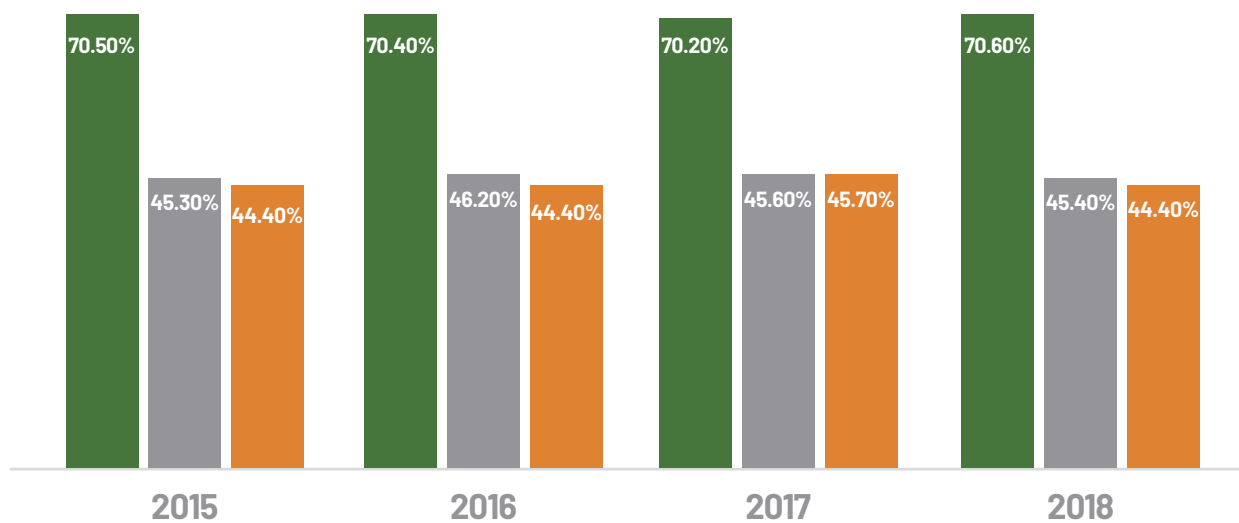
Persistence

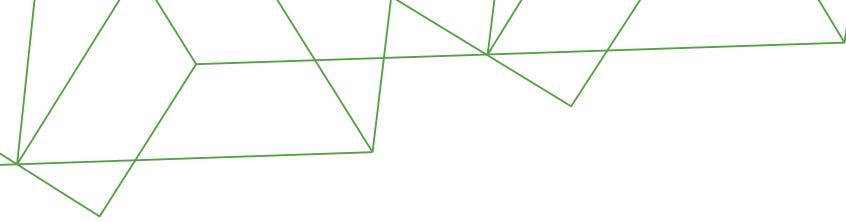


Only students 25 and older saw slight declines from 2017 to 2018, but this comes after a slight improvement in persistence between 2016 and 2017.

- Age 20 or Younger
- Age 21-24
- Age 25 or Older

Retention





Despite the massive uncertainty of the past year, success was possible. Many colleges and universities transitioned quickly to remote learning. Unsurprisingly, those that were most successful were those that already significantly offered online learning programs.

Based on EAB research, over 64% of academic departments saw a decrease in course completion from Spring 2019 to Spring 2020. But more than a third of departments increased their course completion rates.

It's not always easy to tell which students will persist. But certain strategies increase the odds of retention for all students. Both the number and quality of advisors on staff is critical. Having the right resources available is always a good starting place, but data can help improve results even further. The more data you have, the better.

Pro-active institutions pay attention to activity levels, attendance, and advising meeting activities. Students will often show you they are at risk long before they drop out. For in-person learners, meal plan usage, gym attendance, and library visits can all convey valuable insights.

Colleges and universities can develop plans to reconnect with students who are showing signs of disengagement. Addressing their concerns and challenges early can help them to persist all the way through graduation.



Placement: Connecting the Dots to the Labor Market

Most post-traditional students enroll with a career goal in mind. They hope to earn a promotion, start a new career, or increase their salary. Colleges and universities succeed at attracting and retaining students when they connect the dots between education and the labor market.

Labor market data can help institutions draw a clear connection between their programs and student outcomes. It can support students to make informed decisions about which programs to enter to increase their likelihood of finding a well-paying job.

Institutions can also use labor market data to improve their own decision-making processes. It can inform whether they add new programs and when it might be time to retire underperforming ones. Finally, student placement insights can help colleges and universities assess the effectiveness of their existing programs.

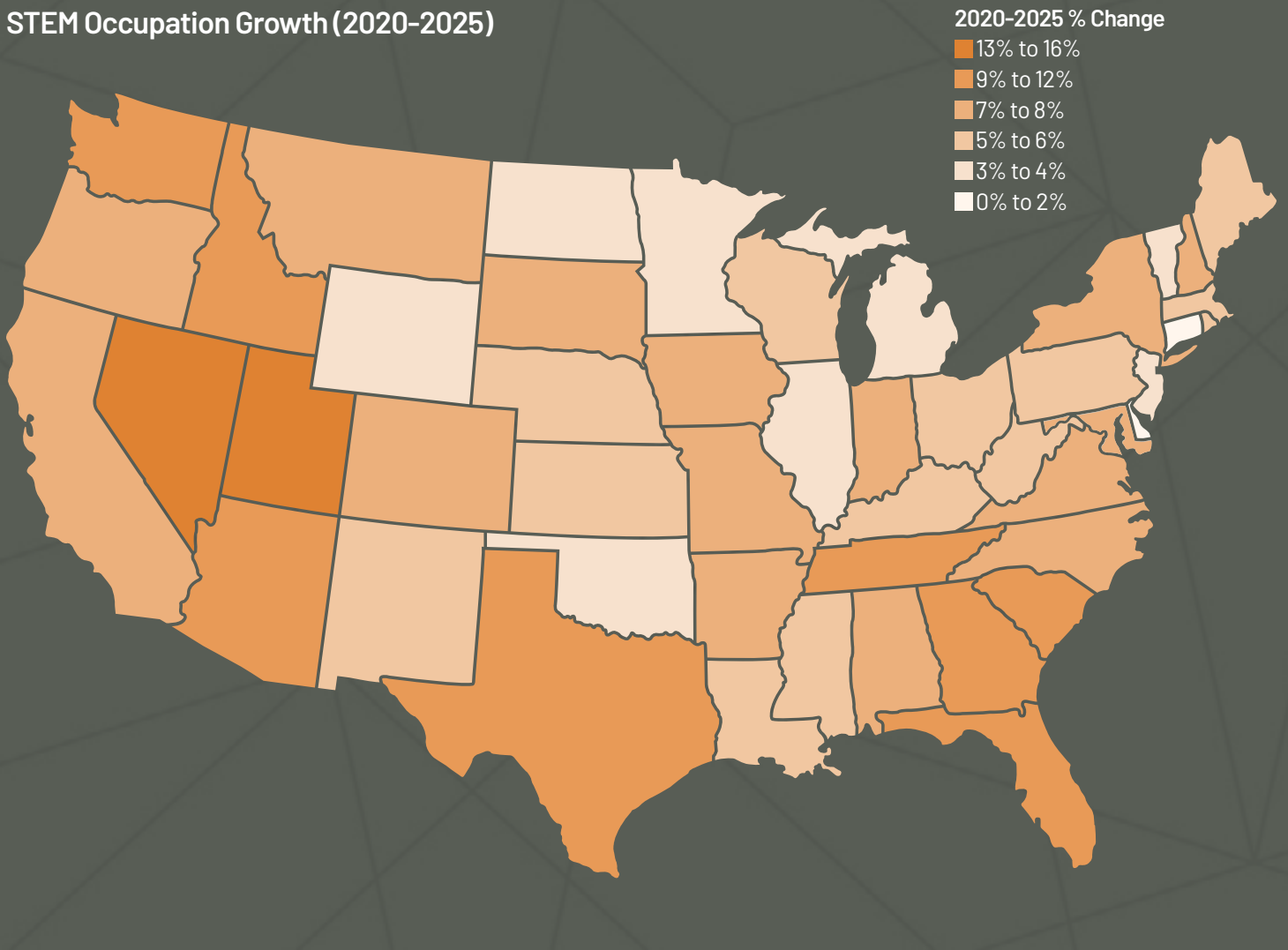


Key Industries for Growth

Some occupations are growing faster than others. Understanding changes in the labor market can help institutions remain viable in a shifting economy. Both STEM and Healthcare have emerged as growing industries in recent years. Below, we have provided a picture of projected job posting growth in these industries over the next five years.

Needs in these industries vary from state-to-state. It's extremely important for you to connect the dots within your own market, assuming that many graduates stay within the area in which they have graduated.

STEM Occupation Growth (2020-2025)



Conclusion

The events of 2020 accelerated developing trends in student attraction, nurturing and enrollment. Post-traditional students are an even more vital part of the enrollment mix. At the same time, more students than ever are embracing the opportunities of online learning. These changes, wrought by the pandemic, are likely to persist even after the worst of the crisis has passed.

Meanwhile, economic pressures and wide-spread uncertainty have challenged colleges and universities to remain nimble in the ways that they communicate with prospective students. In an increasingly digital market, simply having a brand is not enough. The institutions that succeed are those that build strong connections between their brand and its promise. With innovative programs, timely communication, and the right student support resources, these colleges nurture students from awareness through graduation. They highlight the connections between their programs and student career goals.

The world may have changed, but colleges and universities can still own the student life cycle. Effective enrollment management requires a strong brand presence, speedy responses, and a willingness to really listen to the student. When it comes to meeting enrollment and retention goals, this focus on the student remains the secret to success.

Grow Your Enrollments in 2021

At EducationDynamics we continuously monitor the post-traditional enrollment management landscape. By evaluating external forces, monitoring marketing and student engagement trends, and speaking with current and prospective students, we gain unmatched insights into the student journey. Our full suite of services and solutions touch the entire student lifecycle, from inquiry generation to enrollment management, marketing, branding, contact center services, and more. We give our college and university clients the flexibility to talk to prospective students where they live, moving them smoothly through the engagement funnel from the first point of contact to graduation. Ready to grow your enrollments? Speak with the experts that understand the student journey from consideration to graduation.

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