

# Mystery Shopper Report

A Complimentary Report presented on January, 2016



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## Introduction

This complimentary report is presented to you by DWS Associates.

Since we started working with colleges and universities back in 2001, we've heard a constant cry for more leads.

And our response has always been "Maybe...but let's make sure before you start spending more money."

Mystery Shopper research is one way we help our clients quickly identify strengths, weaknesses and gaps in their recruiting process so we can provide them with practical recommendations for improving performance by better leveraging their existing resources.

You see, we're all about improving performance and our work continues to help a growing list of institutions improve performance in key areas such as lowering the cost to enroll a new student. (For a partial list of colleges and universities, please see the next page entitled "About DWS Associates" or visit [www.dwsassociates.com/industries/higher-education/](http://www.dwsassociates.com/industries/higher-education/))

As you read through this complimentary report, you will see what we saw from the perspective of potential student and you will be presented with recommendations on how to more effectively communicate with potential students so you can see a larger number of potential students move through the recruitment process from inquiry to enrollment.

You may have some questions once you have read the report – which is why we are also offering you a free presentation of findings.

## Extra Bonus – How You Compare

This report also includes a section entitled "How you compare" which compares your scores with other colleges and universities that were included in the Mystery Shopper research. The benefit to this insight is that you can begin to see where you have advantages and disadvantages against other institutions which can help you determine where to focus your resources.

## Free Consultation of Findings

Have questions? You can schedule a free consultation of findings by contacting us at 651-315-7588.

## About DWS Associates

Since 1982, has provided market research and consulting services to a wide array of organizations across a wide array of industries. Clients include IBM, Dell Computers, Sears, Kmart, Procter & Gamble and many more. For a full list, visit [www.dwsassociates.com/about-us/our-experience/](http://www.dwsassociates.com/about-us/our-experience/)

In 2001 we began serving colleges and universities, helping them identify more efficient ways to attract and retain students. Our services include:

### *Market Research*

Surveys, in-depth interviews, focus groups – we design the right processes for gathering and analyzing relevant information in order to provide you with practical recommendations for achieving your goals. Audiences typically include potential students, current students, former students, alumni, faculty, staff, employers/community leaders and others.

### *Mystery Shopper*

From the perspective of a potential student, we evaluate the lead nurturing process starting with the submission of a Request Information form through subsequent communications over a fixed period of time (typically varies from 2 to 8 weeks) in order to identify strengths, weaknesses in your process. This research typically includes your institution as well as the competition and focuses on specific programs identified during the planning process.

### *Audience Segmentation, Development of Personas, Message and Offer Development*

You should be targeting those most likely to succeed at your institution – and we walk you through a simple, effective process that helps you target the right segments and test the right messages and offers so you can improve recruitment, enrollment and graduation performance.

### *Competitive Analysis*

Success comes from knowing your competition and offering unique value – we offer you a variety of options for understanding how best to leverage your unique strengths and resources in order to differentiate your institution and offerings from the competition in the hearts and minds of your audiences. The Competitive Analysis can also include:

#### *Tuition & Pricing Analysis*

Determine the optimal cost of your offering for your audience in your market in order to improve recruitment and retention performance.

#### *Market Share Research*

Learn why you are losing students to competing institutions.

#### *Positioning Analysis*

Determine how to best position your institution in the market for greater success

#### *Recruitment Process Analysis*

Provide potential students with a unique, valuable, consistent experience from inquiry through enrollment. This service addresses targeting, messaging, channel selection, contact strategies, key performance metrics, and testing protocols so you can lower the cost to enroll a new student.

*Retention Process Analysis*

Providing current students with a unique, valuable and consistent experience that increases retention and graduation rates. This service addresses the reasons students leave your institution and how to reduce, if not eliminate, the causes you control.

*Academic Program Demand Forecasting*

Assess your audience's demand for your current programs or uncover the ideal opportunities to expand your programs of study.

Within the education sector, our team has worked with:

Alvernia University

Blackboard

Blackboard Transact

Connections Education

Education Dynamics

Eduventures

George Mason University

Gilfus Education Group

Greenville College

Hobsons

Kendall College

Laureate Education Inc.

Mid-America Christian University

Noel Levitz

North Dakota State University

Pearson

University of Chicago

University of Maryland Baltimore County

University of Maryland University College

Walden University

## Methodology

The Mystery Shopper research began on November 10<sup>th</sup>, 2015, and ended on November 24<sup>th</sup>, 2015.

The focus was on two key elements of student recruitment – how simple is it for potential students to request information about a degree program, in this case, the MBA, and what the potential student experiences in response to that request for information.

In the first phase, requesting information, we visited your website and searched for a “Request Information” link or form on your home page and the home/main page of the MBA program. We then evaluated the request form and any automated communications the submission of the form triggered – Thank you page and/or automated email.

In the second phase, we kept a diary of any communications received from your institution and evaluated the communications based on timing, frequency, channel (email, mail, phone, other), messaging and call to action.

In both phases, results are scored on a scale of “1” to “5” with “1” being “Least Desirable” and “5” being “Most Desirable”. The first phase is worth up to 25 points, and the second phase is worth up to 20 points.

There is a “score card” included in the Appendix of this report, for your convenience.

What is shown here is our entry-level option – if you would like to learn more about other options, please feel free to contact us.

NOTE: During the Mystery Shopper phase of this research, we did not speak with any enrollment/admissions staff via the phone because we did not want to take their valuable time. We did note when they called and if they left a message. And if a message was left, we included that in the evaluation.

## Mystery Shopper Scorecard

The following is a summary scorecard for our experiences on your site. Additional details and examples, with comments and recommendations, can be found in the body of the report.

Criteria	Your Score	Average Score – All Institutions
Ease of finding the request information form on the Home Page	1	1.50
Ease of finding the request information form on the Program Home Page	1	3.00
Ease of Filling out the Form	2	2.42
Automatic Thank you page	2	2.17
Automatic Email Response	1	2.25
<b>REQUESTING INFORMATION SUBTOTAL</b>	<b>7</b>	<b>11.33</b>
Appropriate Timing of Follow up Communication (does not include auto-responders mentioned above)	1	2.67
Use of Appropriate and Effective Channels	1	2.00
Appropriate Content in Follow-Up Communication:	1	2.08
Clear CTA in Communication that explains what to do next	1	1.58
<b>FOLLOW UP COMMUNICATIONS SUBTOTAL</b>	<b>4</b>	<b>9.33</b>
<b>TOTAL</b>	<b>11</b>	<b>20.67</b>
<b>TOTAL AVAILABLE POINTS</b>	<b>45</b>	<b>45</b>
<b>SCORE</b>	<b>24.4%</b>	<b>45.93%</b>

This is a summary of the scores awarded for each phase of the Mystery Shopper research. What follows is a narrative of what was experienced at each stage, a rationale for the score awarded and recommendations to improve performance. The Comparison Scores are the average score for each stage for all colleges and universities that have been evaluated.

As you can see in the table above, you scored below average of those institutions in the study – we do feel there is room for improvement and we offer suggestions below.



## Mystery Shopper

### Home Page

The first step in the Mystery Shopper process is to visit the Home Page (<http://www.ycp.edu/>) in order to request information.

For this step, we are evaluating the “ease of finding the request information form on the site” on the following factors.

1. Cannot be found on home page
3. Can find the ‘request for information’ but is difficult to find/doesn’t stand out on the page
5. Clearly visible when interacting with all content

### Comments and Findings



Figure 1 York College of PA Home Page First Impression

The first impression a site visitor receives is shown in Figure 1 (above) – and there is no visible “Request Information” option.

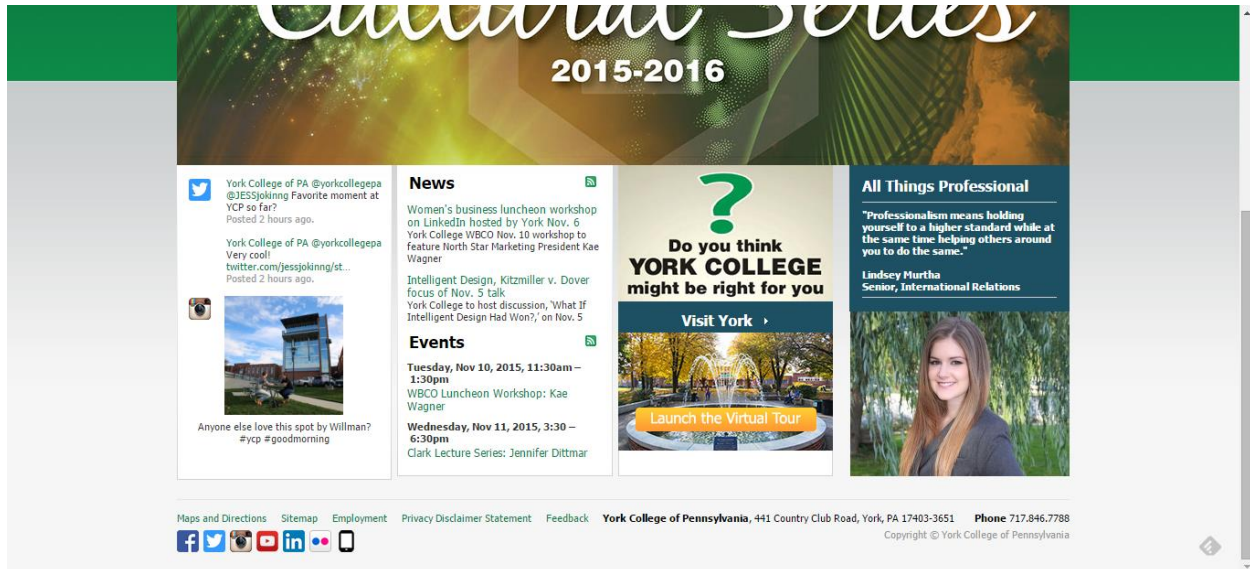


Figure 2 York College of PA Home Page Middle

And as one scrolls down to the next section of the home page, there is no visible option for “Request Information”.

We would recommend that you consider placing “Request for Information” link in the upper header (see below) so that it is at the top every page within your site.



Figure 3 Page Header

*Your Score*

Based on the findings, your score is:

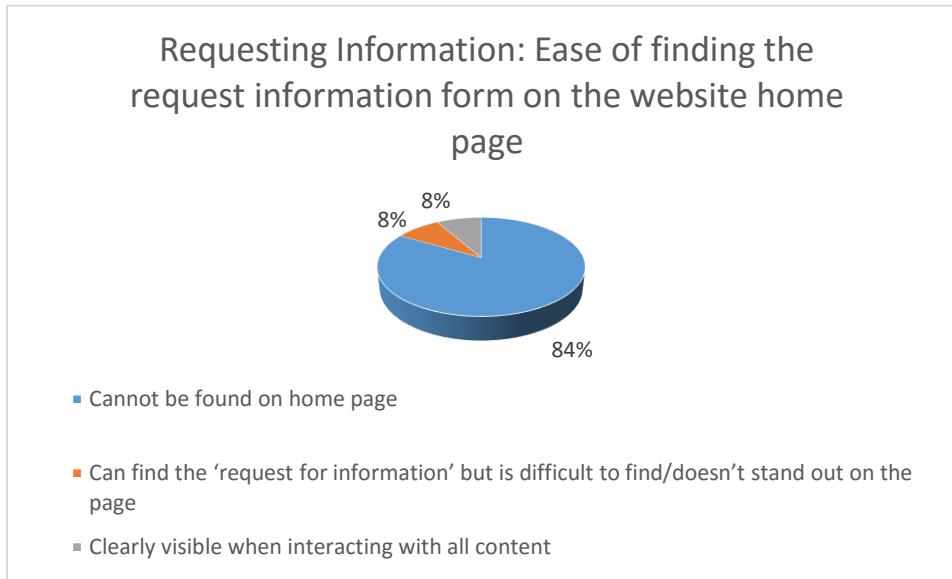
**1**



**Cannot be found on home page**

This score is below average and not ideal.

## How You Compare



Mean	1.5
Median	1
Mode	1

Your score (1) was below average for those institutions included in this research – and we feel there is room for improvement.

### Program Page

The second step is to visit the MBA program home page in order to search for a “Request for Information” link or form.

In order to find the program page, we clicked on “Academics” and found “MBA” as a link in the lower left segment of the page, under “Graduate Programs”. We arrived at <http://www.ycp.edu/academics/graduate-programs/master-of-business-administration/>.

Like the Home Page, this will be evaluated by the “Ease of finding the request information form on the site” and with the same scoring criteria.

1. Cannot be found on program page
3. Can find it but below the fold/must scroll a lot
5. Clearly visible when interacting with all content

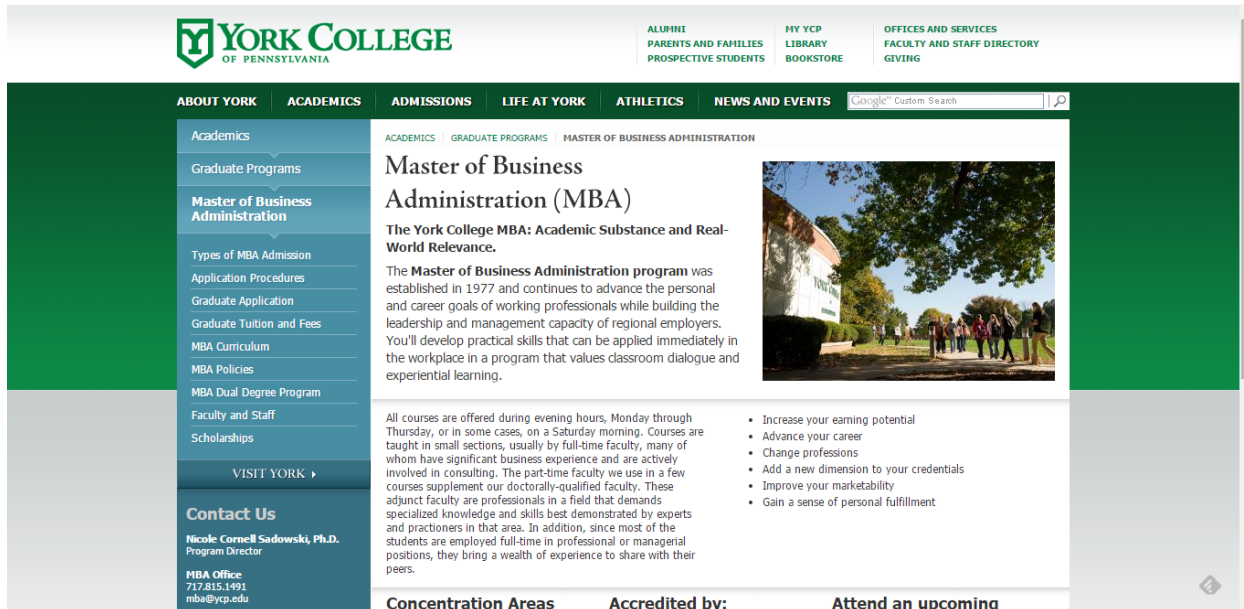


Figure 4 MBA Home Page

On this page, there is no visible “Request Information” button/link.

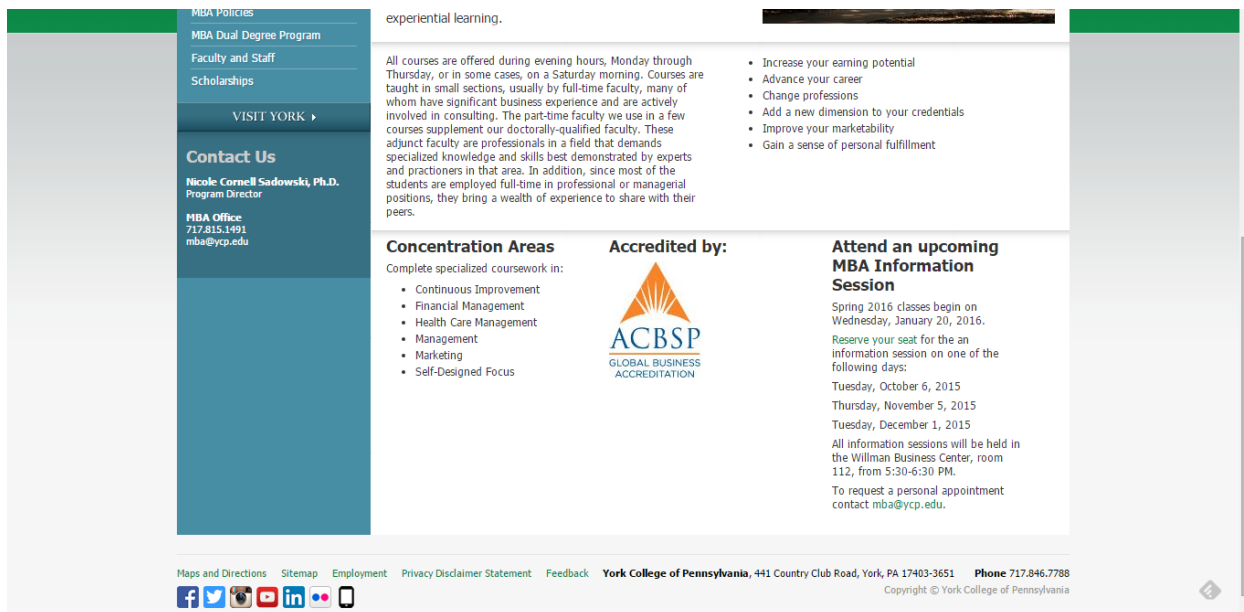


Figure 5 MBA Home Page Bottom Half

There is also no visible “Request Information” link on the bottom half of the page, though there is a “Contact Us” section with a phone number and click to email link.

Again, we recommend that you should consider placing a “Request Information” link in the page header across the site for consistency and ease.

*Your Score*

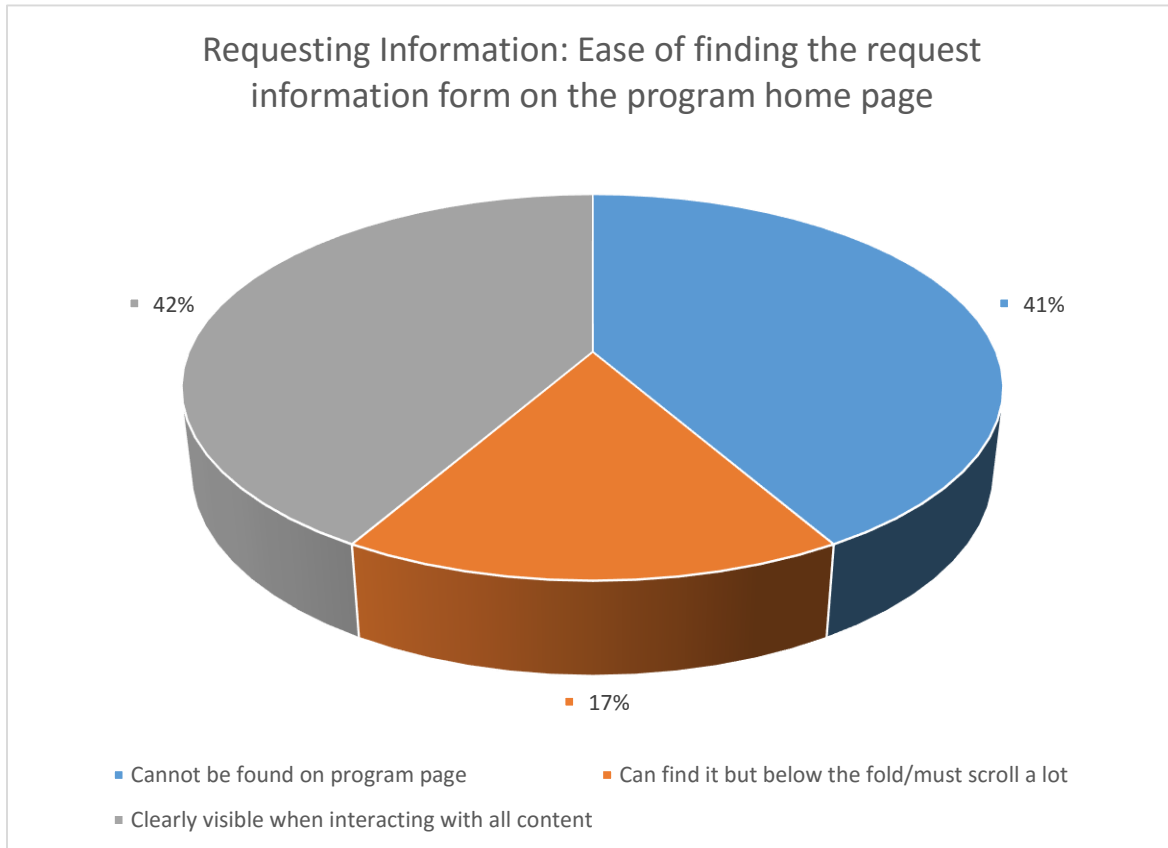
Based on these findings, your score is:

**1**



**Cannot be found on the program page**

*How You Compare*



Mean	3.0
Median	3.0
Mode	5.0

Your score (1) was below the average for the institutions included in this research – and we feel there is room for improvement.

**Ease of Filling out the Request Information Form**

Since we were unable to find a “Request Information” link on either the home page or the MBA program home page, we drew upon our experience and clicked “Admissions” where we found “Information Request Form” as a link in the left navigation links. We clicked on that link and were taken to

[https://ycp.askadmissions.net/emtinterestpage.aspx?ip=info&\\_ga=1.253253577.1553529274.1447171113](https://ycp.askadmissions.net/emtinterestpage.aspx?ip=info&_ga=1.253253577.1553529274.1447171113)

Requesting information on your website is how a potential student makes themselves known to your institution. Typically it is the first time they share their information with you in order to get something of high perceived value in return. However, based on testing 'Request Information' forms over the years, it has been found that "shorter is better" – get what you really need and be concise.

We strongly recommend asking for (and requiring) the following 5 data points:

1. First Name
2. Last Name
3. Email
4. Program of Interest
5. Expected Start Date

With this information, you can begin sharing appropriate information (program of interest) and prioritize the inquiry (expected start date) so that your enrollment team can best manage their time. For example, your enrollment team can focus on those that select the nearest start date over those that have selected start dates that are further out into the future.

One other point – you can ask for the individual's phone number but we suggest that, at this time, you do not make that a required field. You will have plenty of other opportunities to ask for additional information and we recommend that you take the time to build trust with the individual and ask for that additional information at more appropriate times.

Too much, too soon can damage your chances to enroll that student!

Based on this, the 'Request Information' form is evaluated by the "Ease of filling out the form" using the following criteria:

1. Form doesn't exist
2. Form exists but has more than 5 fields with most, if not all required
3. More than 5 fields only basic information required (Name, Email, Phone, Program of Interest, Start Date)
4. Form exists and requests 5 fields (Name, Email, Phone, Program of Interest, Start Date)
5. Form exists and requests 5 fields (Name, Email, Phone, Program of Interest, Start Date) but also responds to errors on the form such as "Not Phone Number" or "Not email address"

**YORK COLLEGE OF PENNSYLVANIA**

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Please fill out the form below to receive information and special announcements from the Admissions Office. You may also contact Admissions at 800.455.8018.

**Information Request**

Full Name: First Name \* [Pat], M.I., Last Name \* [McGraw]  
 Address Line 1 \* [5601 Honeygo Ridge Court]  
 City \* [White Marsh]  
 State \* [Select One]  
 Zip \* [ ]  
 Country \* [Select One]  
 Citizenship [Select One]  
 Phone Number \* [ ] - [ ] - [ ]  
 Gender \* [Select One]  
 Date of Birth \* [Month] [Day] [Year]  
 Click here to find your school. If unavailable, click here to type in your information below.  
 High School Name [ ]  
 Year of High School Graduation \* [ ]  
 I have attended a college or university since I graduated from high school.  Yes  No  
 Major [Select One]  
 E-mail \* [ ]  
 Verify E-mail \* [ ]  
 Parent Email 1 [ ]  
 Submit Information

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The form is extremely long and goes well beyond what is considered best practices for an information request form – with 10 required fields including Country, Phone, Gender and Date of Birth.

We completed the form with the following information:

Field	Response
First Name*	Pat
Middle Name	
Last Name*	McGraw
Address Line 1*	5601 Honeygo Ridge Court
City*	White Marsh
State*	Maryland

Zip*	21162
Country*	United States of America
Citizenship	US Citizen
Phone Number*	410-977-7355
Gender*	Male
Date of Birth*	November 17, 1959
High School Name	CATHOLIC CENTRAL HIGH SCHOOL
Year of Graduate*	1977
Attended College since graduation?	Yes
Major	Business Administration (A)**
Email*	patmcgraw@comcast.net
Confirm Email*	jim@abc.com***
Parent Email	mommy@abc.com

\*\* There were two choices for “Business Administration” and “Business Administration (A)” – and we weren’t sure what the difference was between the two.

\*\*\* We entered a different email for “Confirm Email” and that error was caught so we could correct it.

We recommend that since you asked for ‘Phone’ as required, you consider asking if the phone is mobile and if the individual would like to receive SMS texts – assuming you have the ability to text as part of your nurturing/conversion efforts. This provides you with the email address as well as the opportunity to call and/or text.

The form is obviously designed for an undergraduate student – with high school and parent’s email fields – which may cause working adults interested in a graduate degree to think twice about completing the form. We would suggest a graduate form – ideally one on the program home page with the proper coding so you know what program they are interested in based on the location/page.

### *Your Score*

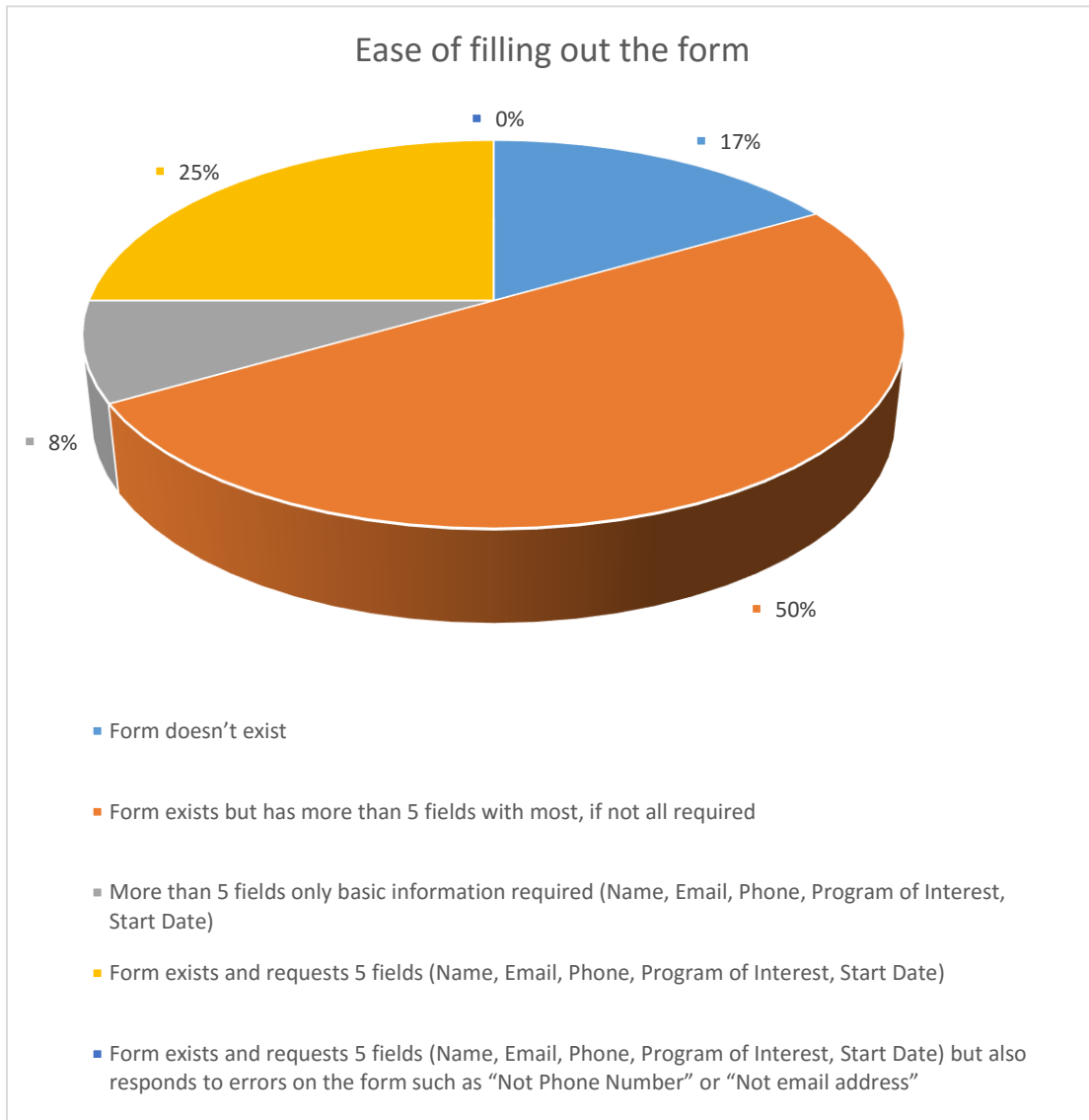
Based on the above findings, your grade is:

**2**

**Form exists but has more than 5 fields with most, if not all required**



How You Compare



Mean	2.42
Median	2
Mode	2

Your score (2) was below the average of the institutions included in this research – and we feel there is room for improvement.

## Thank you page

The 'Thank you' page offers you the ability to confirm the content submitted and, if you so choose, have the individual correct any errors. It also provides you with the opportunity to provide the individual with relevant information and clearly explain appropriate next steps so that their expectations are clearly set.

Based on this, the following criteria are used to evaluate the 'Thank you' page:

1. No thank you page
2. Thank you page but does not address any of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
3. Thank you page but lacks some of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
4. Thank you page with [a] confirmation of Name, Program of Interest and Desired Start Date, but lacks some or all of the following [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
5. Thank you page with [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information

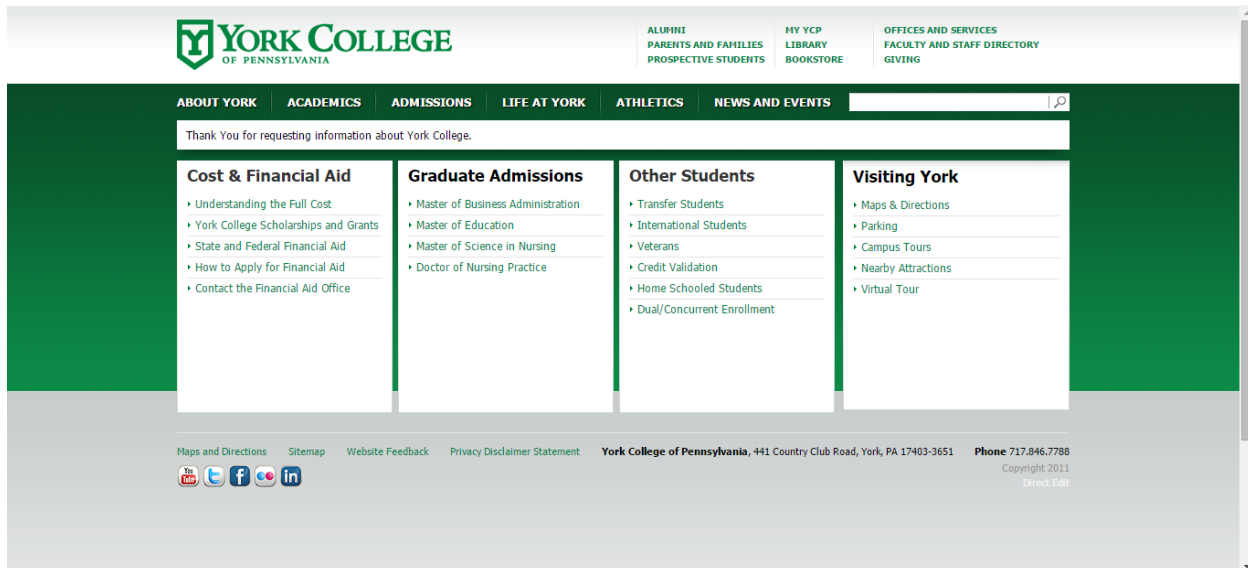


Figure 8 Thank you page for Form Submission

## Comments and Findings

There is a "thank you" page with a brief note that is general in nature and does not establish a clear cut next step for the individual. Remember the individual expressed interest in the Professional's MBA program and there is no proposed/recommended next step for them to take – just information on how to call or email which are two channels they rejected when they elected to complete and submit the form.

The person wants information on the program. They also have other questions that need to be answered in order for them to make their decision as to if they should enroll in your program.

Why not find out what those other questions are so you can provide them with the relevant information they need?

Are some concerned with costs and being able to afford your program? If so, why not some links to content on those topics so they can educate themselves to the options available to them and determine if they wish to proceed?

Are some concerned about career services/job placement services? If so, why not some links to content on these topics?

Best of all, when they go down one of the paths from this page, you can use that topic to drive your upcoming nurturing effort! Imagine the individual concerned about cost receiving an email about tuition rates, book fees, financial aid, scholarships, interest free payment plans etc. And the person interested in career services/job placement receiving information about upcoming company visits, how to register with career services, etc.?

One final thought – is it possible to present the assigned enrollment counselor/admissions specialist on this page? Or what about a ‘team photo’ with names and contact information so you begin to bring in the personal/human relationships.

Imagine the impression if you used this page to introduce the potential student with their assigned counselor/specialist, asked 3 to 5 key questions about motivation and concerns in order for the counselor/specialist to be better prepared to assist them, and told the potential student to expect a call from the counselor/specialist within 48 hours. Or better yet, had one of the questions address a day/time for the counselor/specialist to call!

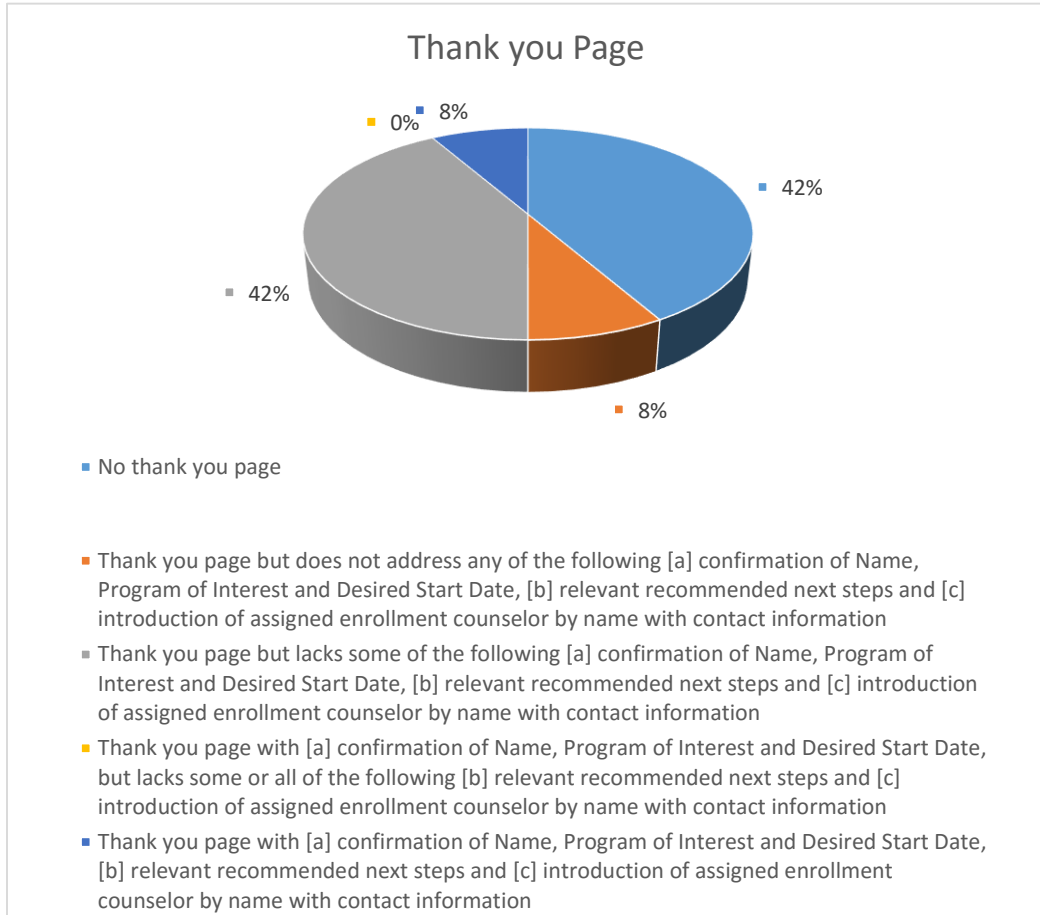
*Your Score*

Based on what was experienced, your score is:

**2**

**Thank you page but does not address any of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information**

How You Compare



Mean	2.25
Median	2.5
Mode	1

Your score (2) was below the average for the institutions included in this research – and we feel there is room for improvement.

Auto Email Response for Form Submission

The automated email offers you the ability to re-confirm the content submitted and, if you so choose, have the individual correct any errors with a link to an “update information” page. It also provides you with the opportunity to provide the individual with relevant information and clearly explain appropriate next steps so that their expectations are clearly set.

Based on this, the following criteria are used to evaluate the automated email response:

1. No reply no confirmation of submission

2. Automatic email but does not address any of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
3. Automatic email but lacks some of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
4. Automatic email with [a] confirmation of Name, Program of Interest and Desired Start Date, but lacks some or all of the following [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
5. Automatic email with [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information

*Comments and Findings*

After more than 24 hours, no automated email had been received. We would recommend an automated email be sent as soon as possible after the submission of the form and that the email be used to [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information.

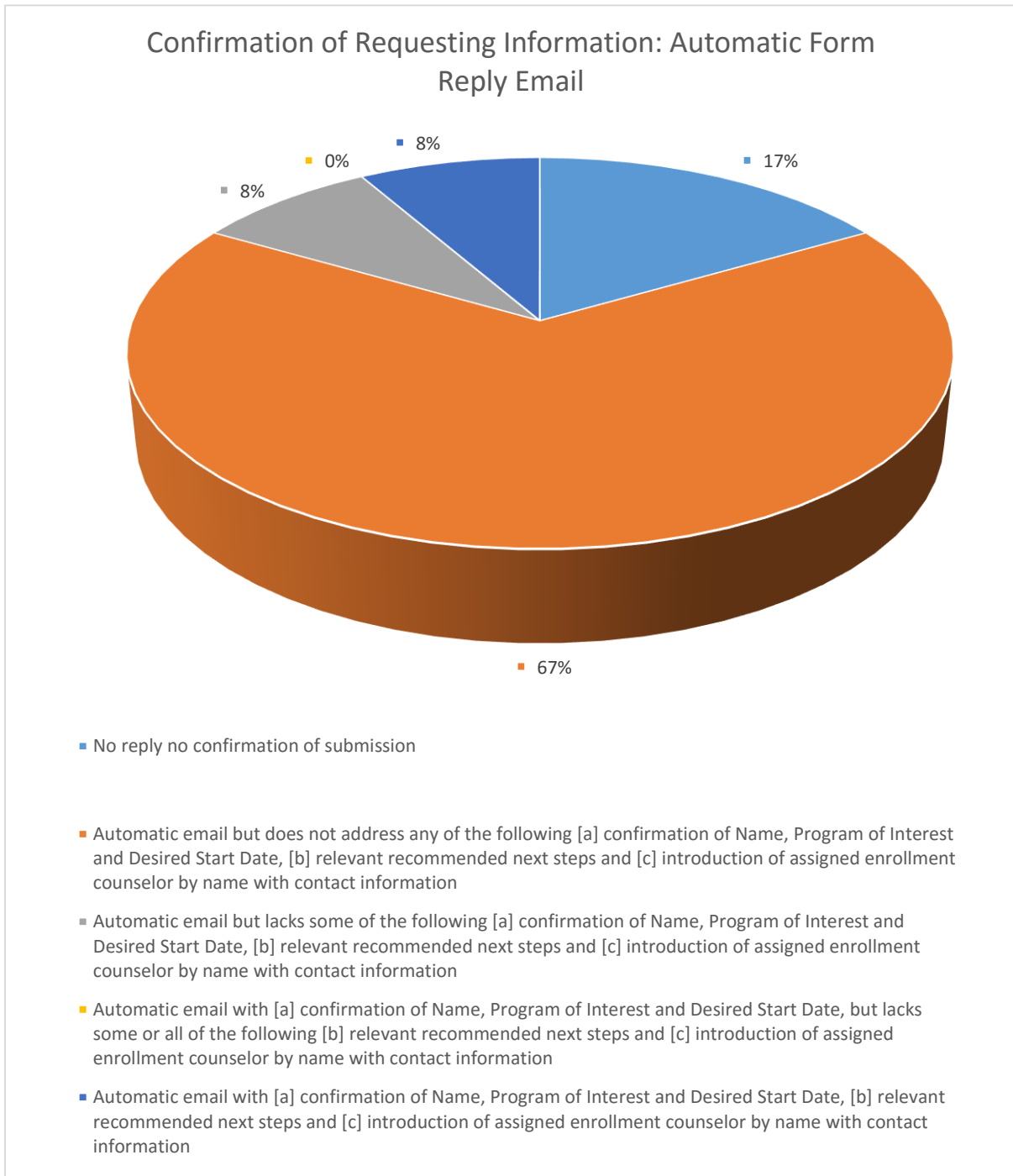
*Your Score*

Based on the experiences described above, your score is

1



**No reply no confirmation of submission**



Mean	2.17
Median	2
Mode	2

Your score (1) was below the average of those institutions included in this research – and we feel there is room for improvement.

## Follow up Communications

Delivering the right message to the right person at the right time via the right channel with the right call to action in order to motivate the individual to make the right next step – that’s what your nurturing campaign needs to focus on. Some will go too quickly to “Apply Now” without making sure the individual has all the information they need in order to make an informed decision. Others will write about features – “...36 credit hour program...” – instead of benefits – “...you can complete this program in less than 18 months which is 6 months faster than most other programs...”

In this area, follow up communications will be evaluated on the following criteria:

Appropriate Timing of Follow up Communication (does not include auto-responders mentioned above)

1. No Follow up Communication
2. One contact/attempt only
3. 2 contacts/Attempts in 2 weeks
4. 3 contacts/Attempts in 2 weeks
5. More than 3 contacts/Attempts in 2 weeks

Use of Appropriate and Effective Channels

1. No Follow up Communication no channels used
2. Only one channel
3. Used 2 channels
4. Used 3 channels
5. Used more than 3 channels

Appropriate Content in Follow-Up Communication:

1. No Follow up Communication no channels used
2. Content not specific to degree chosen nor stage of your process [ex] fails to mention program of interest and suggests you “enroll now” when it is more appropriate to provide information on the program, institution, etc.
3. Content degree specific and appropriate to stage, builds on previous content with benefit rich content
4. Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line)
5. Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line) with clear instructions on what to do next

Clear Call to Action (CTA) in Communication that explains what to do next

1. No Follow up communication
2. Content has no CTA is just long list of information
3. Content has CTA but onus is on prospect, not the school
4. Clear and engaging CTA with the onus on the school to help you take the next step

- Clear and engaging CTA with the onus on the school to help you take the next step and materials to read/engage with during the waiting period. Clearly define when they will talk to you next and/or offer help in the next step (keep conversation open)

Date	Time	Channel	Comments

*Comments and Findings*

There were no follow up communications received – and we would suggest a follow up communication plan that leverages your available resources, and plays to your strengths. We would also recommend testing messages, calls to action, creative, communication channels etc. in order to identify the most effective communications.

*Your Score*

Appropriate Timing of Follow up Communication (does not include auto-responders mentioned above)



**No Follow up Communication**

Use of Appropriate and Effective Channels



**No Follow up Communication no channels used**

Appropriate Content in Follow-Up Communication:



1

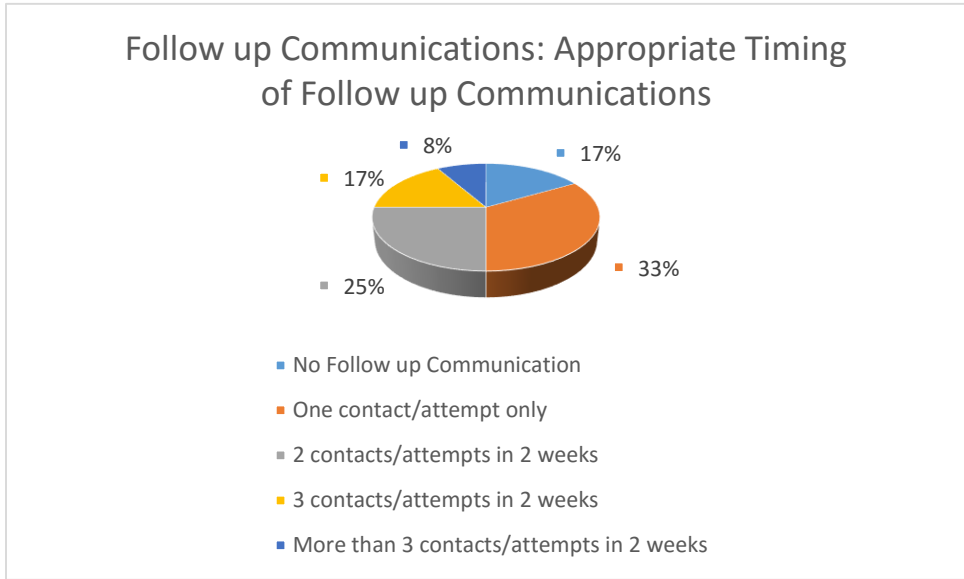
No Follow up Communication no channels used

Clear CTA in Communication that explains what to do next

1

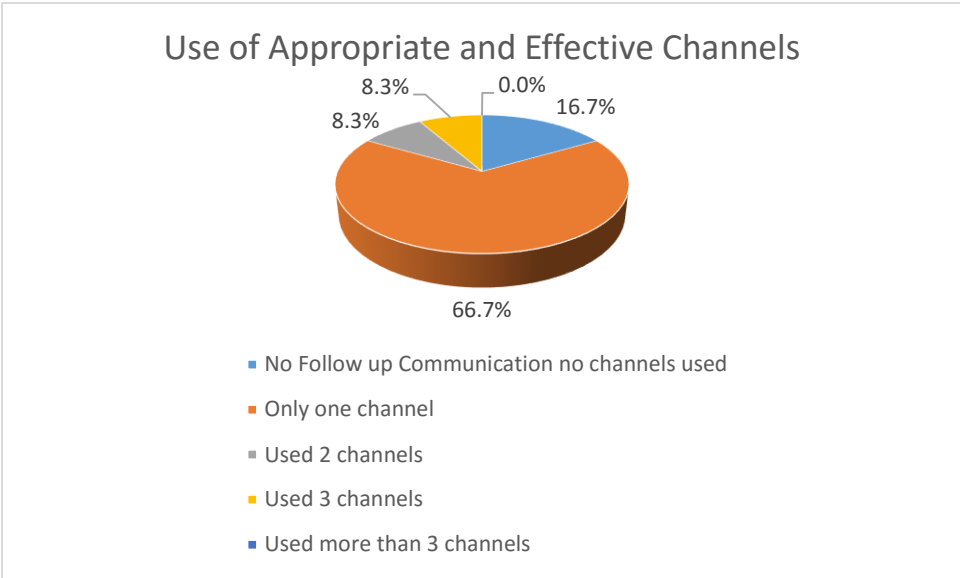
No Follow up communication

*How you compare*



Mean	2.67
Median	2.5
Mode	2

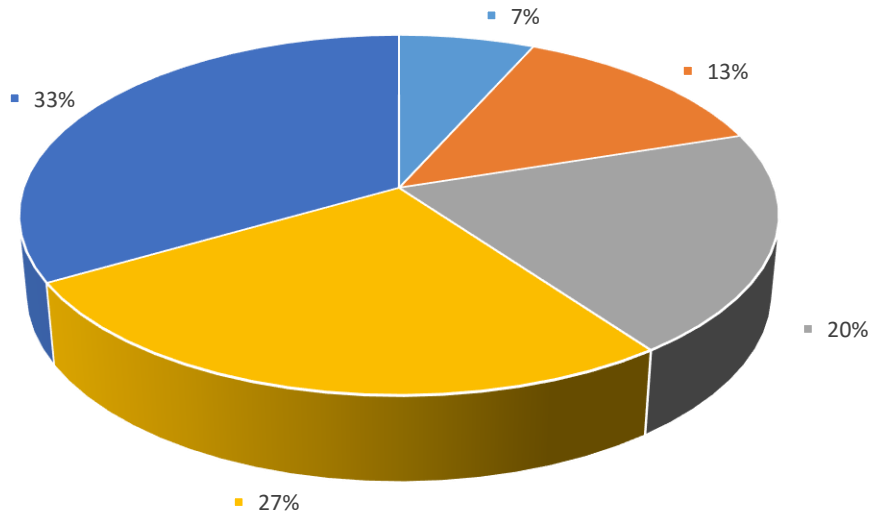
Your score (1) was below the average for those institutions included in this research – and we feel there is room for improvement.



Mean	2.08
Median	2
Mode	2

Your score (1) was below the average for those institutions included in this research – and we feel there is room for improvement.

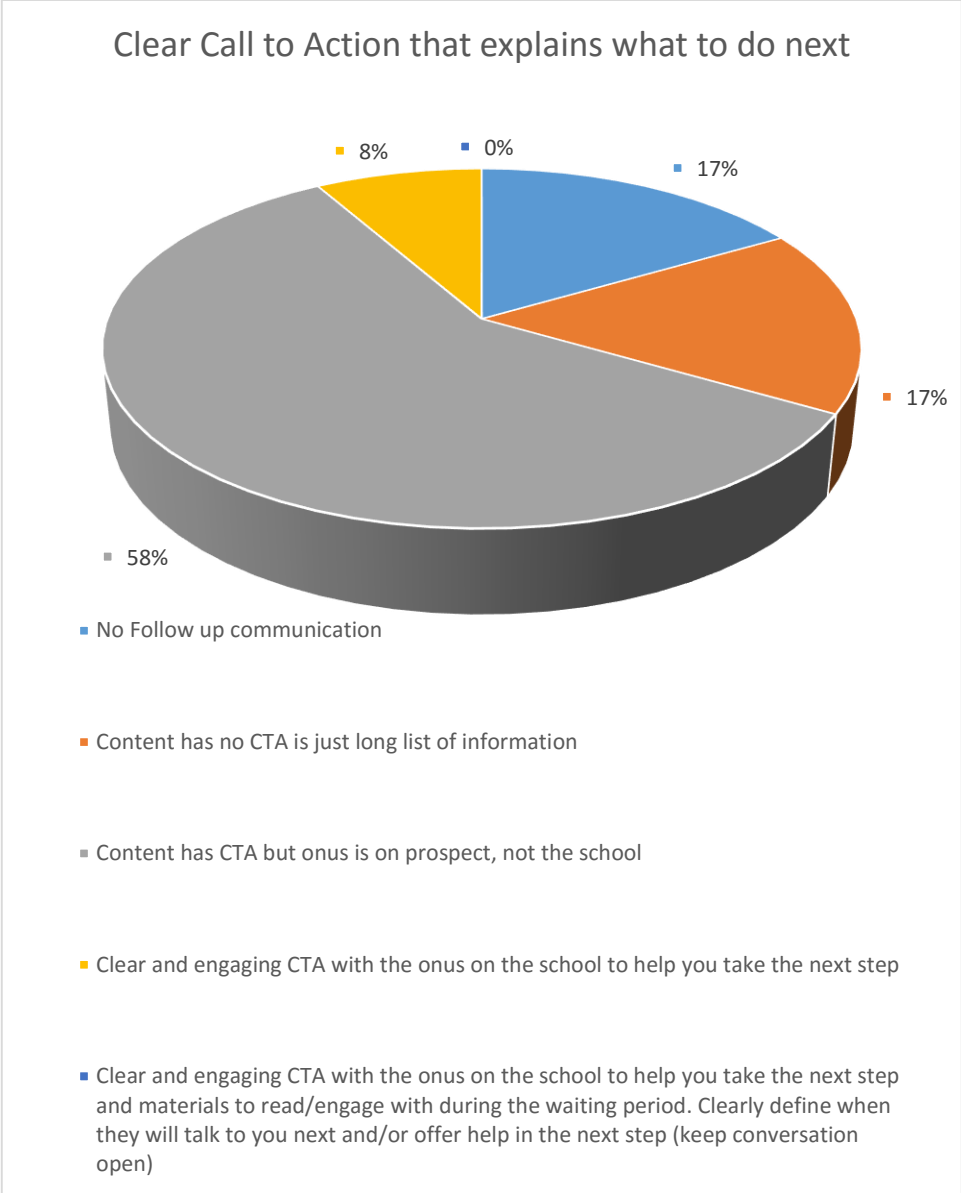
### Appropriate Content in Follow up Communicaiton



- No Follow up Communication no channels used
- Content not specific to degree chosen nor stage of your process [ex] fails to mention program of interest and suggests you “enroll now” when it is more appropriate to provide information on the program, institution, etc.
- Content degree specific and appropriate to stage, builds on previous content with benefit rich content
- Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line)
- Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line) with clear instructions on what to do nex

Mean	2.08
Median	2
Mode	2

Your score (1) was below the average for those institutions included in this research – and we feel there is room for improvement.



Mean	2.58
Median	3
Mode	3

Your score (1) was below the average for those institutions included in this research – and we feel there is room for improvement.

## Appendix:

### Phase I: Requesting Information

Requesting Information: Ease of finding the request information form on the website home page.

- 1 Cannot be found on home page
- 3 Can find the 'request for information' but is difficult to find/doesn't stand out on the page
- 5 Clearly visible when interacting with all content

Requesting Information: Ease of finding the request information form on the program home page

- 1 Cannot be found on program page
- 3 Can find it but below the fold/must scroll a lot
- 5 Clearly visible when interacting with all content

Ease of filling out the form

- 1 Form doesn't exist
- 2 Form exists but has more than 5 fields with most, if not all required
- 3 More than 5 fields only basic information required (Name, Email, Phone, Program of Interest, Start Date)
- 4 Form exists and requests 5 fields (Name, Email, Phone, Program of Interest, Start Date)
- 5 Form exists and requests 5 fields (Name, Email, Phone, Program of Interest, Start Date) but also responds to errors on the form such as "Not Phone Number" or "Not email address"

Thank you Page

- 1 No thank you page  
Thank you page but does not address any of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 2 Thank you page but lacks some of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 3 Thank you page with [a] confirmation of Name, Program of Interest and Desired Start Date, but lacks some or all of the following [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 4 Thank you page with [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 5 Thank you page with [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information

Confirmation of Requesting Information: Automatic Form Reply Email

- 1 No reply no confirmation of submission  
Automatic email but does not address any of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 2 Automatic email but lacks some of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
- 3 Automatic email but lacks some of the following [a] confirmation of Name, Program of Interest and Desired Start Date, [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information

- Automatic email with [a] confirmation of Name, Program of Interest and Desired Start Date, but
- 4 lacks some or all of the following [b] relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information
  - Automatic email with [a] confirmation of Name, Program of Interest and Desired Start Date, [b]
  - 5 relevant recommended next steps and [c] introduction of assigned enrollment counselor by name with contact information

## Phase II: Follow up Communications

### Follow up Communications: Appropriate Timing of Follow up Communications

- 1 No Follow up Communication
- 2 One contact/attempt only
- 3 2 contacts/attempts in 2 weeks
- 4 3 contacts/attempts in 2 weeks
- 5 More than 3 contacts/attempts in 2 weeks

### Use of Appropriate and Effective Channels

- 1 No Follow up Communication no channels used
- 2 Only one channel
- 3 Used 2 channels
- 4 Used 3 channels
- 5 Used more than 3 channels

### Appropriate Content in Follow up Communications

- 1 No Follow up Communication no channels used
- 2 Content not specific to degree chosen nor stage of your process [ex] fails to mention program of interest and suggests you “enroll now” when it is more appropriate to provide information on the program, institution, etc.
- 3 Content degree specific and appropriate to stage, builds on previous content with benefit rich content
- 4 Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line)
- 5 Content degree specific and appropriate to stage, builds on previous content with benefit rich content, presented in clear, concise manner and easy to read/scan format (ex: bullets, clear subject line and to line) with clear instructions on what to do next

### Clear Call to Action (CTA) that explains what to do next

- 1 No Follow up communication
- 2 Content has no Call to Action (CTA) is just long list of information
- 3 Content has CTA but onus is on prospect, not the school
- 4 Clear and engaging CTA with the onus on the school to help you take the next step

- 5 Clear and engaging CTA with the onus on the school to help you take the next step and materials to read/engage with during the waiting period. Clearly define when they will talk to you next and/or offer help in the next step (keep conversation open)