

## TargetX and Averett University

### TargetX CRM Increases Application Conversion at Averett University

**Challenges: Averett had aggressive retention targets but did not have a system in place to support their efforts**

Vice President for Enrollment Management at Averett University, Stacy Gato, was concerned with “what a miserable experience [it was] for a student to hear from five different offices that they hadn’t done what they needed to,” instead of receiving one targeted, supportive call that led to a timely solution. She knew this was not the way to enroll or retain students. This problem existed as a result of Averett University staff members working with multiple systems that made their work unnecessarily time consuming, frustrating, and inefficient.

Students suffered from confusing and disjointed experiences with campus contacts as a result of the previous system. When Gato did an inventory of the varying “points of contact” students were having all over Averett’s campus—in the 24-hour student success center, with a coach, or in the financial aid office—the list was long. Gato describes the old process. “Originally, we used PowerFAIDS for financial leads, we had TargetX for admissions, and we had our SIS for everything else. We desperately needed some sort of solution to bring all of this information together.”

**Solutions: The adoption of the TargetX CRM deemed a “game changer”**

“I knew right away that the TargetX CRM was the answer for us,” says Gato. “The TargetX CRM not only provided core recruitment tools, such as Prospect, Application and Decision, but most importantly gave all staff a single view of a student to support our retention efforts.”

The launch of the TargetX CRM at Averett University proved to be a “game changer for the university,” says Gato. The CRM allows for easy launch and integration and simple data dashboards—pulled into a centralized data system—that are immediately actionable.



### Averett University at a Glance

- Founded in 1859
- Located in Danville, Virginia
- Private, non-profit university
- Approximately 1,900 total students
- Home of the Cougars

### TargetX Solutions

- Application
- Recruitment Suite
- Retention Suite
- Schools App

### Goals

- Averett University needed a CRM to manage their retention activities that:
  - Centralizes information into one user-friendly solution;
  - Provides a full 360-degree view of a student;
  - Offers quick alerts and flags about individual prospects;
  - Empowers staff to “work smarter, not harder” with the right data and simple dashboards;
  - Improves retention rates and is easily implemented

Now, instead of students hearing from multiple offices to solve challenges, Gato says, “we are able to have one very strategic, caring, nurturing call.” With the TargetX Retention CRM, staff are able to identify flags quickly and reach out to students by email, text, or through a mobile app.

The launch and integration was “virtually seamless,” says Gato, and the CRM’s worth was felt all the way to the top. Gato describes the “moment she will never forget” when she showed the Averett University President the power of the TargetX CRM data dashboards.

The President said, “These are wonderful, but so what? What can we actually do with these dashboards?” Gato replied, “I’m so glad you asked! Each of these dashboards gives us information that we can take immediate action on. We have a centralized place to house our most important data, but also, the tools to interact with students to improve their experience.”

The President was sold.

### **Results: A dramatic increase in freshman retention rates from 57 percent to 71 percent**

Gato saw the adoption of the TargetX Retention CRM as a real opportunity to implement a “student-centered approach” at Averett. With the new tools in place, Gato was able to realize tremendous results. She says, “In 2014, our first-time freshman retention rate was 57 percent. When we launched the TargetX CRM, we set the lofty goal of getting to 65 percent. We actually landed at 71 percent retention!” says Gato. “Moving the needle 34 percentage points is very difficult. We were ecstatic with the results.

We also moved from 72 percent overall retention to 77 percent [in the year after]. These results are absolutely because we had the ability to bring together all the groups that interact with our students and maintain a high touch throughout the process of re-registration.”

She says, “We’d been building the pillars for this approach for a long time, constantly asking ourselves, ‘How do we best serve students?’ at every meeting, but we had nowhere to plant it.” The TargetX CRM changed that and Averett’s ability to create a more seamless, supportive experience for students.

“For us, it wasn’t about collecting more data, but about connecting the data we already have to the right people and to the needs of the student,” points out Gato. “We know that student engagement is a huge predictor of success. And, I don’t think we can overstate the importance of re-recruiting our students after they are enrolled.”

Beyond a hugely successful rise in retention rates, Averett also enjoyed a significant increase in admissions and admit numbers: 28 percent and 35 percent, respectively.

