

The complete toolkit to **launch and optimize** a texting platform

“First text just went out and I am already obsessed!
Where has this been all my life?”

- Jill Cole-Spawliski, Director of Residence Life, Hilbert College

More than **75% of high school students** are open to receiving text messages from colleges and universities¹.

Your success depends on your ability to communicate with students, and a good strategy creates the best results. Whether your college is looking to implement texting for one department or at an enterprise level, this toolkit contains proven methods from schools that consistently reach and retain students.

Because, jumping into texting without a plan could burn your investment.

1 - RuffaloNoelLevitz 2019 E-Expectations report

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My boss had told me, if I was able to get 7 full-time enrolled students from that campaign that it would pay for the entire year subscription. And, with it being short notice and the very first time we ever texted anyone, **we actually were able to enroll 51 full-time students.**

That blew the administration away!
We have been extremely pleased.

*Elizabeth Flees
Online Support Specialist/Distance Advisor
Northeastern Oklahoma A&M College*



The legalities of texting students

It is legal to text students and alumni. The FCC updated the Telephone Consumer Protection Act in 2012. This update increased some restrictions related to sending texts to mobile phones. However, the regulations (still) do not apply to nonprofit organizations.

The generally accepted rule is that nonprofit organizations are not legally required to get explicit consent in order to text students. For prospective students, especially at the “inquiry” stage we recommend obtaining some form of opt-in. This can come from the Common App, or from an opt-in box on an inquiry card or website. You should absolutely give students the ability to opt out of text messages if they feel the communication isn’t relevant or helpful.

We should note that, while it’s perfectly legal to text students, **your staff should be strategic about what and when they text** so as not to burn the medium.

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We've found so many good ways to utilize Cadence – Preview Day confirmations, FAFSA pushes, missing transcript/test score reminders, etc. My counselors absolutely love it! We're working on how to streamline things even more with the ability to segment students and run targeted campaigns.
The product is just so functional!

Zach White
Assistant Director of Recruitment
Georgetown College

14 features to look for in your texting platform

1. Mobile App — With the flexibility of the Cadence mobile app, your staff will always be in a position to engage with contacts and inspire action.

2. Automation — Cadence has several automation features to take advantage of! Smart Messages allow you to ask a Yes or No question, and based on the reply, segment your contacts for future communications. Auto Reply enables an automated message to be sent when someone texts a predetermined keyword. And Scheduled Messages help your team plan ahead, with the ability to schedule texts up to 12 months in advance.

3. Out-of-Office Features — You can easily toggle an out of office message that automatically responds to incoming texts when you're unavailable.

4. Text Templates — Not everyone is an experienced copywriter. Providing your team with templates for commonly-used text messages will make them more efficient and ensure proper communication.

5. Unlimited Texting — Ensure your team has no restrictions on the number of text campaigns they send. Unlimited texting provides clarity for your budget.

6. Two-way Integration — With two-way integration, not only will your staff be able to text students immediately — your information system will also be updated with those text interactions as they occur.

7. Multi-department, Multi-information system ready — Provide your team with an enterprise-level platform that integrates with all of your information systems on campus. Differentiate the departments in your school with custom permissions in your texting platform.

8. 100% Self Sufficient — Have the ability to manage users, create new users, import lists and campaigns, and configure different integration options. Start your own campaigns without having to rely on the vendor.

9. Account Caretaking — Staff turnover and vacations are a reality. While they are away, quickly and easily assign their account to another staff member. That way students will not feel ignored nor that their issues are unresolved.

10. Phone Number Validation — Reduce invalid numbers to decrease your undelivered rate, helping you avoid carrier violations and the potential of being blocked by carriers.

11. Opt-out Management — If your text campaigns are personal and relevant, few students will choose to opt out. But, for the students who do, ensure your opt-out management tools are airtight.

12. Segmenting — Ensure your staff will have the ability to quickly send to a group or segment of students. In this medium, being agile is critical.

13. Campaigns — Prove that your outreach is working (or discover that it needs work) by tracking and reporting on activity related to particular groups of text messages.

14. Analytics — With Cadence you can export activity of all incoming and outbound messages, opt-outs and opt-out preferences, undelivered messages, and unread messages.

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I'll never forget the first message we sent: we were watching the replies come in. **We had about 65% of those students reply back**, which is just unheard of in marketing metrics. Since using Cadence, 4% more of our applicants have moved to the application completed stage. Don't show this to any of my competitors!

*Risa Forrester
Vice President for Admissions and Marketing
Oklahoma Christian University*



Instituting a texting policy

Governance has ground rules. To ensure you're maximizing the potential of a texting platform, it's important to set those rules before hitting send on your first message.

Of course, every college and university is different, but you can use our non-emergency text messaging policy template as your baseline. Edit as necessary, publish, and share.

Non-emergency Text Messaging Policy

Text Messaging Policy

[Institution Name]

Messages intended for the campus community are best communicated by [INSERT YOUR COLLEGE/UNIVERSITY PLATFORM, e.g., Portal], [INSERT COLLEGE/UNIVERSITY WEB ADDRESS], regular email, and printed materials, such as flyers.

Text messaging is intended to supplement the [INSTITUTION NAME] communications strategy, and this policy is devoted to the texting medium.

The text messaging policy applies to any [INSTITUTION NAME]-affiliated individual granted permission to text groups of constituents regarding university-related matters.

NOTE:

This policy is intended for everyday, non-emergency use. Use your well-formed judgment in case of emergency, and contact [STAFF NAME] with any questions about [INSTITUTION NAME]'s emergency guidelines at [PHONE NUMBER] or [EMAIL ADDRESS].

Text Messaging Across the Student Lifecycle

Text messaging (which includes SMS and MMS messages) can be used by authorized university officials to relay information about cancellations, closures, admissions and academic requirements or deadlines, registration information, financial aid, alumni giving, and other matters that are time sensitive and necessary for student success.

Texting Prospective Students

For prospective student communication, you should ask for permission to communicate via text message during the application process on a request for information form, inquiry card, or on the application itself. Ask them to individually opt in to each communication channel - text, email, phone, mail - for customized preferences. If a student does not choose to attend the institution, an opt-out should be assumed and they should be removed from receiving future communications.

Staff in the Admissions, Financial Aid, and Athletics departments will typically be responsible for texting with prospective students.

The types of text messages that can be sent to prospective students include:

- a. **Application status** - submitted, incomplete, missing documents, etc.
- b. **Financial Aid status** - FAFSA deadline, submitted, missing documents, scholarships, work study, etc.
- c. **Campus visit/tour/orientation information** - visit confirmation, reminder, survey, etc.
- d. **Admission status** - congratulations on acceptance, enrollment next steps, advisor introduction, deposit due, etc.
- e. **Athletics** - recruiting, official visit, letter of intent, etc.

Texting Current Students

When a student decides to enroll at the institution, it is appropriate to ask them to update their communication preferences in case they have changed. Remind them of the types of messages they will receive through text, and ask that they opt in to receiving text messages from each department individually. Do not assume that a student wants to receive text messages from every department on campus.

Staff in the Academic Advising, Student Services, Residence Life, Financial Aid, Registrar, Athletics, Student Life, Career Services, and Commencement offices will typically be responsible for texting with current students.

The types of text messages that can be sent to current students include:

- a. Academics** - add/drop deadline, major selection, transfer credits, etc.
- b. Class registration** - advisor meeting, class registration deadline, etc.
- c. Housing** - housing application/deposit, meal plan payment, RA introduction, etc.
- d. Financial Aid status** - FAFSA deadline, submitted, missing documents, scholarships, work study, etc.
- e. Events** - on-campus events, sports, fundraisers, volunteer opportunities, etc.
- f. Career services** - career fairs, resume review, internship placement, etc.
- g. Graduation preparation** - application for graduation, purchase of cap and gown, commencement details, etc.

Texting Alumni & Donors

Prepare for alumni engagement before the student graduates from the institution and take the opportunity to update communication preferences once again. Ask upcoming graduates how they would like to stay in touch with the university (email, phone, text), and what types of information they would like to receive.

Staff in the Advancement, University Foundation, and Alumni Relations departments will typically be responsible for texting with alumni and donors.

The types of text messages that can be sent to alumni and donors include:

- a. Giving requests** - Giving Day information, initiative-specific gifts, stewardship, etc.
- b. Donor recognition** - acknowledge past donations, share how gifts support the institution, special initiatives, etc.
- c. Alumni engagement** - networking events, regional events, homecoming celebrations, mentoring students, etc.

Text Messaging Guidelines

Each department must appoint at least one authorized official to be responsible for monitoring and approving text messaging requests on behalf of their department to ensure compliance.

Opt-In and Opt-Out Management & Procedures:

Students must opt in (provide name and mobile number) to receive text messages from non-essential departments and ensure their contact information held by [INSTITUTION NAME] is current. This can be done through a form on the website, email, or paper form. They should have the ability to opt out at any time. Exceptions to this rule are limited to the Registrar and Financial Aid departments, which may auto opt-in students.

If a student chooses to opt out of receiving text communications from a specific department, they are not automatically opted out from other departments. Students should have the ability to text 'STOP' or 'OPT OUT' at any time to opt out of messages. It is a best practice for the administrator of the institution's texting platform to run regular reporting and update their system of record to manage contact texting preferences. Students can also be notified of these modified preferences and asked whether or not they would like to receive university communications through another channel - email, phone, mail - or if they'd like to opt out of all types of communication.

Text Message Content:

Messages should be as concise as possible (while still maintaining a conversational tone) and should address the student directly by name or with "you/your." They should include essential points and, if needed, further instruction (e.g. Check your email for full details).

Authorized text messaging officials must abide by all policies and ensure the following:

- a. Content is accurate.
- b. Wording is appropriate and fits the institution's voice and brand.
- c. Tone is casual but professional and ends with a question when a response is desired.
- d. List of recipients is correct and relevant to the message being sent.
- e. Information within the message is directly related to the student and/or their studies.

- f. Message clearly states the action that the student needs to take or how the information impacts the student, and who to contact for additional information.
- g. All messages must be tagged with the appropriate identifier so recipients can immediately recognize who it's from.
 - > For example, if an authorized official is sending an initial text message, open with, "Hi Becky, it's Chris Smith from Admissions." On all subsequent communications, authorized officials can sign off at the end of a text message: "– Chris Smith, Admissions."
- h. The number of messages received by a student are appropriate to ensure he/she will continue to regard the text messages as important information and does not choose to opt out of future communication.
- i. Messages are sent with adequate time for a response, action, or activity.
- j. Abbreviations and text messaging lingo are not used.
- k. Emojis approved for use by the institution are used appropriately, with no more than one emoji per message. Not every text message should include an emoji.
- l. Use hyperlinks sparingly, and instead, use text messaging to encourage a student to check their email or your website for more information. When you do use links, it should be the full website URL and not shortened through a service like bitly.

Emergency vs. Non-Emergency Communications:

Text messaging must not be used as the sole means of communicating an essential message or announcement. The text message must be supplemented by some other means of communication, such as an email, phone call, or paper notice, to ensure that all students, including those who have not opted in, receive the message.

Non-emergency text messaging must NOT be used for the following:

- a. Sole method of communication - to ensure that students that have opted out still receive this information.
- b. Communicating personal or confidential information (e.g. GPA, academic standing).
- c. Sending general information to large populations (e.g. Fall classes start Monday!).
- d. Personal matters (e.g. items for sale, farewell messages).

- e. Appeals on behalf of individuals or groups of students (e.g. to attend social, cultural, or sporting events, unless the student opted in for these text messages).
- f. Sending any messages containing social security numbers, passwords, credit card numbers, or any FERPA-protected data.
- g. Emergency alerts.

For any emergency-related communication, please consult [STAFF NAME] for the emergency communication policy at [PHONE NUMBER] or [EMAIL].

Response Timeframe:

As a best practice, text messages should only be sent during designated business hours (e.g. between 9:00am and 5:00pm Monday-Friday) to be respectful of a student's time and your team's availability to respond.

Any incoming replies to messages should be reviewed and responded to in a timely manner (preferably 24 hours), so as to provide optimal student support and prevent future messages from being ignored or a student opting out.

If a staff member is out of the office for an extended period of time, they are required to create an "Out of Office" away message with information about how a student can receive assistance in their absence, such as another staff member's contact information.

Text Messaging Approvals and Institution Policies

Individuals wanting a message sent on their behalf must complete the Online Text Request Form and receive approval before a text can be sent to students. Authorized officials do not need prior approval to send periodic messages.

Text messages containing images or video must be reviewed and approved in advance by the Marketing department to ensure proper logo usage, branding, colors, fonts, voice, etc.

All non-emergency text messaging services and software must be approved by the department of Information Technology.

Failure to comply with the above policy may result in the revoking of texting permissions.

Approved by Cabinet: [DATE]

Signature: _____

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Cadence has given me the opportunity to check in and make sure that my students have everything they need. Whether it be admissions help or just someone to talk to during this unexpected time. **I don't know how I'd be able to create such strong bonds with my students if it wasn't for Cadence!**

*Taylor Kirkpatrick
Admissions Counselor/EOF Liaison
Bloomfield College*



Integrating your texting platform with your CRM

CRM systems need to be the system of record for contact data and, ideally, have records of all communication from any medium, including your texting platform. Making sure the two systems integrate is essential.

Some platforms, including **Cadence**, offer multiple data integration options that align with the technologies your college is currently using.

CONNECT
CRM

 capture

 ellucian.

slate

 workday.

 salesforce

customviewbook™

RADIUS
by Campus Management

Here are four ways your texting platform can integrate with your CRM:

1. Simple, file-based manual - Cadence offers a set of import and export tools to make it simple to get data flowing between the texting platform and any CRM. With a few required fields, you can create and use custom data fields to search for contacts, segment them into groups, and store and display additional information that can be useful when communicating with contacts. Cadence also offers a set of exports, all in a CSV format. You can export activity of all incoming and outbound messages, opt-outs and opt-out preferences, undelivered messages, and unread messages.

2. Rest API and webhooks - Using our set of APIs, you can establish a real-time connection to Cadence and automatically create, update, or view data. Text messages can be programmatically triggered based on events occurring in your CRM. Webhooks

can be utilized to automatically push Cadence message activity, delivery failures, and opt-out preference updates to an endpoint as they occur in the platform

3. FTP - Using a simple secure file exchange, automatic data imports and/or exports can be scheduled. Tools for configuring, scheduling, logging, and monitoring the integration are all provided in Cadence.

4. Configuration-based native integrations for certain CRMs - These represent the fastest way to exchange data between Cadence and campus systems and minimize the level of effort required for the campus to implement an integration. They are configuration-based and do not require any custom programming nor development time from the campus. A set of tools exists within Cadence to set up and monitor the data flow.

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In the past, for our senior event, we sent out postcards to all graduating seniors. Last year we had only 17 students show up for the event. This year, with Mongoose Cadence, we sent invitations through text. We have 81 students registered. **That's a 224% increase in participation for this one event!**

*Bert Luallen
Seward County Community College*



ROI Expectations

In a perfect world, a college would have unlimited resources to invest in reaching students. Also, in a perfect world, students would read and respond to every message they receive from your school. The reality is, budgets are real and outcomes are not optional. Your texting platform needs to be an instrument of success for you and your staff.

While we at Mongoose have numerous success stories, here is just one school's return on investment in Cadence.

Results from Rosedale Technical College

Texting gets results:

PRE-CADENCE

SHOW RATE ~60%

START RATE ~65%

WITH CADENCE

START AND SHOW RATES

INCREASED 10% OR MORE

In two years with Cadence:

140,000

Texts sent, enterprise-wide

85,000

Texts sent for recruitment, engagement,
and retention activities

- > Those texts averaged higher than **60% reply rate**
- > Orientation attendance **improved by approximately 15%**
- > Texts sent to confirm appointments average **higher than a 70% show rate**
- > Cadence has helped reduce melt and has given Rosedale a **76% start rate**
- > Show rate for orientation has improved to **more than 90%**

After a short time frame of testing Cadence and monitoring results, the staff at Rosedale realized that the platform could (and should) be implemented enterprise-wide.

Amount of texts sent across departments:

ALL DEPARTMENTS

2016-2017 **55,000+** → 2017-2018 **70,000+**

ADMISSIONS, EDUCATION OUTREACH, AND FRONT OFFICE

2016-2017 **35,000** → 2017-2018 **40,000**

INSIDE ADMISSIONS

2016-2017 **10,000** → 2017-2018 **20,000**

Both years averaged a **60% reply rate!**

Want to learn more about how Cadence can help your institution reach students, parents, and alumni?

Schedule a demo today!

Learn more at MongooseResearch.com/Cadence