



Communications Templates

New Opportunity Communications Plan

Overview

To increase Opportunity conversion rates, Systems Office is encouraging all campuses to establish a relationship with prospective students early in the funnel. Our Opportunities—a.k.a. students who have applied and been accepted to the college—need to understand:

- a) Who their trusted enrollment partner is at the college, and
- b) What steps they need to complete to become a registered student

We do not accomplish this by simply sending an introductory email with the Enrollment Checklist attached and moving on to the next opportunity. Our students are telling us that outdated practice is overwhelming and confusing, and our data on [average days from application to registration](#) solidifies that strategy is NOT WORKING.

We also need to remember - we still need to recruit these students. Just because they applied, doesn't mean they've made up their minds that Ivy Tech is the right fit for them. We need to keep this at the forefront of our engagement - the relationship we establish in the enrollment pipeline sets the tone for overall student success and completion!

The Plan

Systems Office is encouraging any team responsible for engaging with new Opportunities (recruitment/admissions/enrollment/SSP etc.) to begin every new Opportunity relationship with a **30 minute introductory meeting**. With every new Opportunity assigned to you in IvyConnect, the first outreach you have with that person should include the following:

- Welcome the student to Ivy Tech
- Introduce yourself, and include a short description of how you will work with the student
- Request a 30 minute kick off meeting to begin the enrollment process (Zoom, in person, phone, etc.)
- Include a personalized Co-video message
- **Pro-Tip from the Ft Wayne Team** – you can add a scheduling link in your email signature and text messages so the student can select a day and time that works for them, removing the need for you to wait for them to respond to your message. Here's a [how-to guide](#) for setting up Microsoft "Bookings with Me" – any team member can use this function in Outlook.

Once the meeting is scheduled, the following is a recommended meeting agenda:



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Suggested Agenda for Intro Meeting

- I. **Welcome**
 - A. Welcome the student to campus/virtual appointment
 - B. Give the student an overview of what you are about to cover in the meeting.
Explain they will leave the meeting with a set goal to accomplish their next enrollment task.
- II. **Your Introduction**
 - A. Explain who you are and what you can do for them – establish yourself as their partner, helping them through the entire enrollment process.
- III. **Student Introduction (Understanding Their “Why”)**
 - A. Review educational history
 - B. Why are they interested in college/program?
 - C. If the student is unsure of what program they want to take, introduce them to their Career Coach and schedule an appointment as their next step. *Important note: assist the student in scheduling the appointment and don't end the meeting without a date on the calendar.*
 - D. Are there any barriers they're worried might get in their way? (work, childcare, transportation, etc.)
 1. If so, identify them and brainstorm possible solutions if they arise.
 - E. Has the student served in the military/national guard?
 - F. Does the student have prior learning (PLA)?
 - G. Is the student currently employed? (Review AYD program with student)
 1. Is it an AYD employer?
 2. Is it an employer that typically participates in Skills Training offerings?
 3. Set a task in IvyConnect to follow up to confirm employer is AYD
- IV. **Review Services We Offer**
 - A. [Campus Tours](#)
 - B. Explain what [Tuesdays@TheTech](#) looks like at your campus
 - C. [Career Coaching](#) – Give an overview of services available at your campus.
 - D. Student Life – Give an overview of what [student life](#) looks like at your campus. A sense of belonging is an important factor in retention and completion.
 - E. [Paying for College](#) – Explain 78% of our students qualify for financial aid and 4 out of 5 graduates finish with no college debt. Highlight how there are multiple options for support, but make sure the student understands they must complete the FAFSA to get the process started. You don't need to complete the FAFSA in the meeting, but you do want to broach the topic and provide resources for them to learn more.
- V. **Tasks to Complete in the Meeting**
 - A. **MyIvy** - Help the student set up their MyIvy account. Explain this is their student portal that will be how we communicate, schedule meetings, find class info, etc.



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- B. **Inbox** - Show the student where to find their student email. Confirm how the student prefers you communicate with them (text, email, phone, etc.), then make a note in IvyConnect. If they say text, make sure they understand they still need to check their email weekly.
- C. **Course Placement** - Review [Course Placement](#) and try to get that completed if possible. (Note: Not all students have to take the KA)
 - 1. **Option 1:** Submit test scores and/or transcripts.
 - 2. **Option 2:** Take the Knowledge Assessment – If the Knowledge Assessment is necessary, explain it's not a test and that additional training is provided if they need to work on a certain area.
 - 3. **Option 3:** If the student is unable to complete KA, or does not want to, the student may waive assessment and self-place in remedial courses
- D. **Establish a Cadence of Communication** – Let them know you'll be checking in on them weekly, but they can reach out with questions anytime.

VI. Questions

- A. Leave time so the student can ask any questions they have after you've reviewed information.

VII. Set Their First Goal

- A. Before you close the meeting, be sure to identify which enrollment step the student should tackle first (recommended to start with FAFSA or Course Placement) and agree to a date it will be completed.
 - 1. Set a task for yourself in IvyConnect to follow up 2 days before the due date and check in with the student.
 - 2. Set a task for yourself in IvyConnect to check status the day after the due date and follow up with the student.
 - a) **If they completed the task**, congratulate them and move on to the next task, following the same goal setting and reminder schedule.
 - b) **If they have not completed the task**, find out what's stopping them and set a new goal.



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Case Management Plan After the Intro Meeting

After the introductory meeting happens, it's recommended the enrollment person case manages the opportunity through each step of the enrollment checklist all the way through to registration.

Establish a weekly communication timeline. Encourage them to complete the enrollment checklist one item at a time.

- I. **Course Placement**
- II. **FAFSA** - After course placement is complete, schedule a target date for the student to complete FAFSA. Follow the same follow-up process with IvyConnect tasks.
- III. **Career Coaching** – If campus structure allows, help the student schedule a Career Coaching appointment. Follow the same follow-up process with IvyConnect tasks.
- IV. **Advising** – Follow campus structure – Help the student schedule an advising appointment or assist with first term registration. Follow the same follow-up process with IvyConnect tasks.
 - A. Explain to the student that they may not meet with their advisor until they complete course placement either through KA, self-placement, transcripts, test scores, or GPA.
 - B. Explain what their advisor does and how often they should meet.
 - C. Show the student how to schedule an appointment with their advisor.
 - D. Confirm who will register the student.
 1. Will this happen with their advisor?
 2. Do they need to do it on their own?
 3. Will you help them do this?
- V. **Registration** – Ensure the student is registered for classes. Follow the same follow-up process with IvyConnect tasks.
- VI. **Getting Course Materials** - Walk the student through how to get books and log into IvyLearn
- VII. **Payment Status** - Set up a payment method after the student has successfully registered for classes and ensure they are clear on payment status. Do they have a payment plan established? Have they submitted the FAFSA? Will they apply for scholarships? Explain what drop for non-payment is and how to get re-registered if that happens.

Meaningful Content - Each check in should be task specific with a goal in mind. Do not simply send messages to “check in.” Consider using all the tools in your toolbox:

- Emails
- Text Messages
- Phone calls



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- How to videos
- Co-videos

Suggested Communications Content for Enrollment Funnel Case Management

Initial Outreach

Email (this could also be the script for a Covideo)

Congratulations <<Opportunity Name>>, your application to Ivy Tech has been accepted. Welcome to Ivy Tech <<Campus>>! My name is <<Your Name>> and I am your enrollment partner. My job is to help guide you through the next steps you need to complete before you can register for classes. The next start date is <<start date>>. **OR** Registration for the <<term>> semester opens on <<reg. open date>>.

Let's get started by scheduling time to talk. We can meet on campus, by phone, or on a Zoom call. The meeting shouldn't take more than 30 minutes. I'll help you set up your MyIvy account, show you how to check emails, and talk about your next steps.

Here are a few dates I am available to meet. Please let me know which day and time works for your schedule or let me know if you need another time. (If you're using Bookings with me, you can just say 'click' the link to schedule)

- Option 1
- Option 2
- Option 3

Welcome again to Ivy Tech! I'm looking forward to getting to know you and helping you get started on the next steps of your education.

<<Your Name>>

Text

Welcome to Ivy Tech! My name is <<Your Name>>. I'll be sending you texts to help you through the enrollment process. If you have any questions, you can text me here.

Do you have time to connect so we can talk next steps?



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If Yes

Great, which date works best for your schedule?

- Option 1
- Option 2
- Option 3

None of these dates work? What day and time work better for you?

If No

No problem. Let me know if there's a time that works better for you.

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> with Ivy Tech. I'm so glad you've taken the first step toward joining us! I'd like to schedule a time to get started on your enrollment steps. Please call me at <<your phone and extension>> to set up your appointment. I look forward to meeting with you soon. Have a great day!

Enrollment Checklist: Course Placement

Email

Hi <<Opportunity Name>>, it was great talking with you last week. <<I noticed you haven't submitted your transcripts yet. I hope you can get those uploaded soon. As a reminder, we have [instructions](#) on how to send your transcripts to Ivy Tech. **OR** I noticed you haven't completed your Knowledge Assessment yet. I hope you're able to get that done soon. If you need help accessing it, we have step-by-step instructions available on our [website](#).>>

Try to complete this step by <<insert date>> so we can take care of your next enrollment task. And don't forget, I'm here to help you get through your enrollment steps! [Click here](#) to schedule an appointment with me if you need help.

Talk with you soon,
<<Your Name>>

Text

Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech. Don't forget to complete your Knowledge Assessment! Try and get it done by <<insert date>> so we can take care of your next enrollment step. Text me back if you need any help.



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Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech. Don't forget, you need to submit your transcripts! Try and get it done by <<insert date>> so we can take care of your next enrollment step. Text me back if you need any help.

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> from Ivy Tech. I noticed you haven't started your Knowledge Assessment yet. If you need help, you can join us for Tuesdays@TheTech and take the assessment on campus. Our tutors will be onsite and can answer any questions if you get stuck. We'll be here from <<time>> to <<time>> and you can go to <<location>> to get help. Hope to see you Tuesday! Have a great day.

Enrollment Checklist: FAFSA

Email

Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech. I noticed you haven't completed your FAFSA yet. I wanted to make sure you know that Ivy Tech hosts a FAFSA workshop the first Tuesday of every month. You can learn more [here](#).

<<Registration opens on XX **OR** Classes start on XX>>. Classes fill up quickly so don't wait to finish your enrollment steps! And don't forget I'm here to help you every step of the way. [Click here](#) to schedule an appointment with me if you need help.

Talk with you soon,
<<Your Name>>

Text

Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech. I noticed you haven't completed your FAFSA yet. <<Did you know that Ivy Tech hosts a FAFSA workshop the first Tuesday of every month? You can learn more at ivytech.edu/tuesdays **OR** Do you need help getting this done?>>

If Yes

Great, which date works best for your schedule?

- Option 1
- Option 2
- Option 3

None of these dates work? What day and time work better for you?

If No

No problem. Let me know if you have any financial aid questions!



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Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> from Ivy Tech. I noticed you haven't completed your FAFSA yet so I wanted to invite you to campus this Tuesday for Tuesdays@TheTech. Our Financial Aid team will be here to help with any questions you might have. We'll be open from <<insert times>> at <<campus location>>. Please call or email me if you have any questions. I hope you can join us for Tuesdays@TheTech. Goodbye.

Enrollment Checklist: Career Link Follow Up

Email

Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech checking in to see how your meeting went with <<Career Link Name>>. I hope you now have a better idea of what program you'd like to study at Ivy Tech. If so, I think we're ready to get started on your next enrollment step! It looks like you haven't completed your FAFSA yet. Did you know that Ivy Tech hosts a virtual FAFSA workshop the first Tuesday of every month? You can learn more [here](#).

<<Registration opens on XX **OR** Classes start on XX>>. Classes fill up quickly, so don't wait to complete your enrollment steps! And don't forget, I'm here to help. [Click here](#) to schedule an appointment with me if you need any assistance.

Talk with you soon,
<<Your Name>>

Text

Hi <<Opportunity Name>>. I hope your meeting with <<Career Link Name>> gave you a better idea of what program you'd like to study. Are you ready to take the next step toward registration?

If Yes

Great, let's start with finishing course placement. Let's set a goal of completing your Knowledge Assessment by <<date>>. If you need help, you can come to campus to complete the assessment here.

If No

No problem. Do you have any questions I can try and answer?

Call Script

Hi <<Opportunity Name>>, it's <<Your Name>> from Ivy Tech checking in to see how your meeting went with <<Career Link Name>>. I hope you have a better idea of what program you'd like to study at Ivy Tech. Classes fill up quickly, so don't wait to finish your enrollment steps! I'm



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here to help you navigate what comes next. You can call me at <<your phone and extension>>. Let me know how I can help you. Have a great day!

Enrollment Checklist: Registration

Email

Hi <<Opportunity Name>>,

Congratulations, it looks like you're ready to register for classes! <<Registration opens on XX
OR Classes start on XX>>. Classes fill up quickly, so don't wait. Your next step is to <<schedule
an appointment with your advisor **OR** meet with me to select your classes>>.

If advisor is the next step

Your advisor's name is <<Advisor Name>>. You can meet with them on campus, over the phone, or virtually. I can help you schedule an appointment with them. Let me know when you're available to meet with <<Advisor Name>>.

If you're the one registering them for first semester

I can help you create your first schedule. We can meet on campus, over the phone, or virtually. [Click here](#) to schedule a time for us to meet.

Looking forward to getting you registered for class!
<<Your Name>>

Text

Hi <<Opportunity Name>>, it looks like you've completed all your enrollment steps and you're ready to register for classes. Do you need help scheduling an appointment with your advisor?

If Yes

Great, which date works best for your schedule?

- Option 1
- Option 2
- Option 3

None of those dates work? What day and time work better for you?

If No

No problem. Let me know if you have any other questions.



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Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> from Ivy Tech. Congratulations, it looks like you've completed all your enrollment steps and are ready to register for classes! Classes start on <<date>> and fill up fast. Please call or email me if you need help getting registered. We're looking forward to seeing you on campus this semester!

Enrollment Checklist: Aid Awarded/Registration

Email

Hi <<Opportunity Name>>,

Good news, your FAFSA application has gone through! That means you're ready to register for classes. <<Registration opens on XX **OR** Classes start on XX>>. Classes fill up quickly, so don't wait. Your next step is to <<schedule an appointment with your advisor **OR** meet with me to select your classes>>.

If advisor is the next step

Your advisor's name is <<Advisor Name>>. You can meet with them on campus, over the phone, or virtually. I can help you schedule an appointment with them. Let me know when you're available to meet with <<Advisor Name>>.

If you're the one registering them for first semester

I can help you create your first schedule. We can meet on campus, over the phone, or virtually. [Click here](#) to schedule a time for us to meet.

Looking forward to getting you registered for class!
<<Your Name>>

Text

Hi <<Opportunity Name>>, this is <<Your Name>> from Ivy Tech. Good news, we've heard back on your FAFSA application. Let's get you registered for classes! Do you need help making an appointment with your advisor?

If Yes

Great, which date works best for your schedule?

- Option 1
- Option 2
- Option 3



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None of these dates work? What day and time work better for you?

If No

No problem. Let me know if you have any other questions.

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> from Ivy Tech. I wanted to let you know that we heard back on your FAFSA application! Now, let's get you registered for classes. <<Registration opens on XX **OR** Classes start on XX>>. Please call or email me if you need help getting registered. We're looking forward to seeing you on campus this semester!

Transition to Academic Advisor

Hi <<Opportunity Name>>,

It's been great working with you as you got started at Ivy Tech. Now that you're ready, I'd like to connect you with your academic advisor: <<Advisor Name and email address>>.

Your academic advisor will be your guide as you determine which courses to take each semester. If your goal is to transfer to a four-year college or university, your advisor can help you with that too!

Because we want to ensure that all our students have the best possible experience at Ivy Tech, we require all students to meet with their advisor to build an Academic Completion Plan. This plan will be your guide to course selection through the completion of your college degree. Working with your academic advisor to create and possibly update your plan could save you time and money.

Best of luck this term! Don't hesitate to reach out if you need anything along the way.

Sincerely,
<<Your Name>>

Post Registration: Payment Status

Email

Hi <<Opportunity Name>>,



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Congratulations on registering for classes! You're going to do great next semester.

It looks like you still need to make a payment. I wanted to share this helpful [video](#) that explains how you can set up a payment plan to make sure you don't get dropped from your classes. Please take a few minutes to watch the video and then let me know if you have any questions. [Click here](#) to schedule an appointment with me if you need help.

Talk with you soon,
<<Your Name>>

Text

Hi <<Opportunity Name>>, congrats on registering for classes! Don't forget, the payment deadline is coming up. Pay off your balance or set up a payment plan soon. Let me know if you have any questions!

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> with Ivy Tech. I wanted to remind you the payment deadline is coming up. Don't forget to pay your balance or set up a payment plan! You can learn how to get started at ivytech.edu/payments. Call or email me if you need any help. Have a great day.

Post Registration: Course Materials

Email

Hi <<Opportunity Name>>, congratulations on registering for classes! I can't wait for you to join us as a student next term.

Before classes start, make sure you look over your course materials and download your textbooks. You need to confirm your textbooks in the [BNC Ivy+ Textbooks Portal](#) after receiving an email from Barnes & Noble. We have step-by-step instructions available on our [website](#), along with FAQs about our Ivy+ Textbooks program.

Feel free to reach out if you have any questions!
<<Your Name>>



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Text

Congratulations on registering for classes! Don't forget to download your textbooks and course materials before classes start. Visit ivytech.edu/bookstore if you have any questions about your books. Good luck this semester!

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>> with Ivy Tech. I was happy to hear you finished registering for classes! Don't forget to download your textbooks and course materials before the term begins. We have step-by-step instructions at ivytech.edu/bookstore if you need help figuring out how to access those. Don't be afraid to reach out if you have any questions!

Post Registration: Orientation Reminder

Email

Hi <<Opportunity Name>>, are you ready for classes to start? Don't forget, Ivy Tech <<Campus>>'s new student orientation is happening <<date and time>>. This is a great opportunity to tour helpful locations like the library and tutoring center, learn more about student organizations, and make sure you're prepared for the first day of classes.

They'll be able to answer any questions you may still have at orientation, but if you need anything else, don't hesitate to reach out! I'm happy to help with anything else you may need before the term starts.

Good luck with your first term!
<<Your Name>>

Text

Hi <<Opportunity Name>>, are you ready for classes to start? Don't forget, new student orientation is <<date and time>>. Be sure to attend to meet other new students and make sure you're prepared.

Call Script

Hi <<Opportunity Name>>, this is <<Your Name>>. Congratulations on getting registered for classes. Don't forget to attend orientation on <<date and time>>. This will be a great chance to meet other new students and make sure you're ready for classes. Call or email me if you have any questions. Good luck this semester!



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