

# Blending **High Tech** with **High Touch** to Drive Continuous Student Engagement and Success

Results, insights, and case studies from **a survey of 300+ higher education leaders** on the challenges and opportunities for better student engagement





# Overview

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Providing a quality educational program was once enough to generate a pipeline of enrolled students. Today, however, colleges and universities recognize that in order to meet their enrollment and retention goals, they must create a sense of belonging and provide students with an experience that matches their expectations. And oftentimes, this belonging and experience has just as much to do with what happens outside the classroom as what happens inside the classroom.

Meeting students' expectations means – above all else – meeting students where they are. It means engaging them at every stage of the student journey from initial interest, through the admissions process, through enrollment, through academic and career advising, and all the way to alumni relations. It means providing students with information in a timely manner, and that – when students need assistance – no matter what time it is – their college is there to support them, and lend them a hand.

The urgency for exceptional student engagement cannot be underestimated. Colleges face unprecedented enrollment and financial pressures. Prioritizing student engagement and making investments in technology that “scale the personal touch” are critical if an institution is going to thrive in the current environment.

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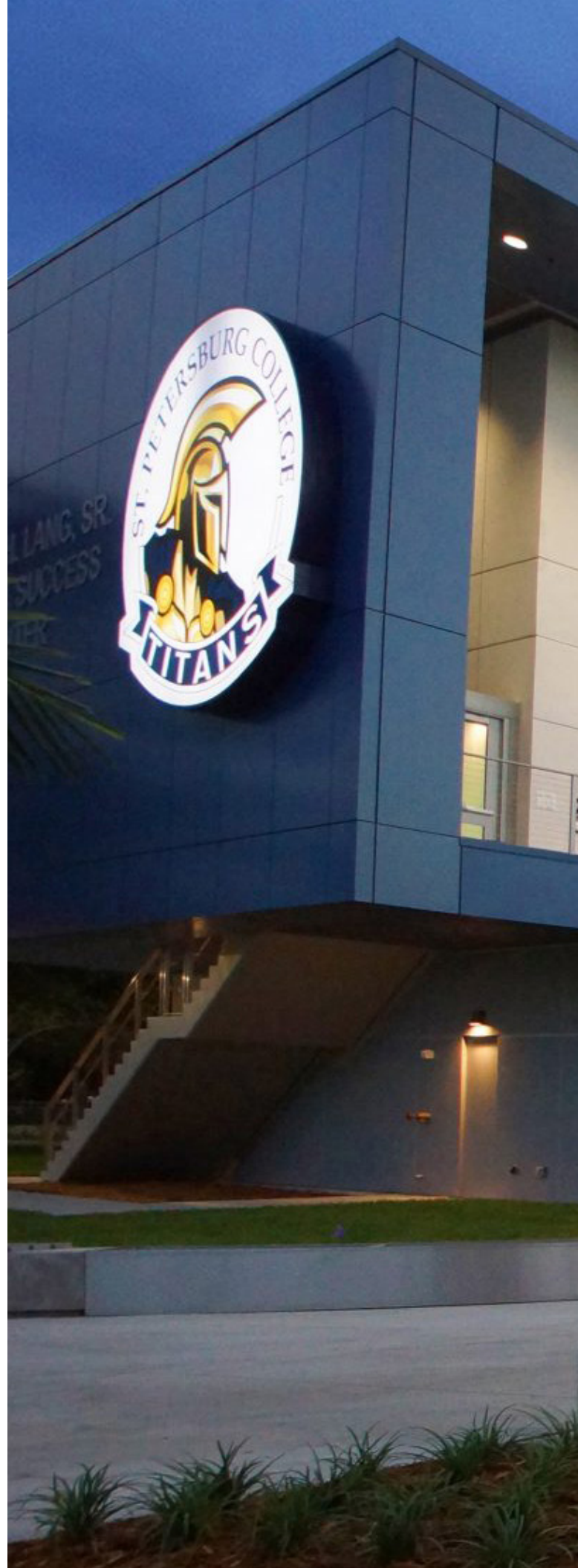
## THE IMPORTANCE OF *CONTINUOUS* STUDENT ENGAGEMENT

It is the engaged student who will stay enrolled. It is the engaged student who will talk to other potential students and help the institution with recruitment. It is the engaged student who will persist to graduation. It is the engaged student who will be ready for the workforce. And engagement requires investment – of both time and money. It requires skilled support staff, a pedagogically-gifted faculty, and lots of technology. The pay-off is not just for students and the institution, it's for the local community, the state, and our country.

“ Engagement drives enrollment and retention.”

**Michael Bennett**

Associate Vice President,  
Financial Assistance Services  
at St. Petersburg College



# SURVEY METHODOLOGY

333 responses were collected, including:

## BY HIGHER EDUCATION INSTITUTION TYPE

- Public 4-year non-profit: 148
- Public 2-year non-profit: 92
- Private 4-year non-profit: 88
- 4-year for-profit: 5

## BY RESPONDENT PURVIEW

- Enrollment Management: 48
- Student Affairs: 46
- IT: 43
- Admissions: 39
- Institution Wide: 38
- Student Services: 36
- Financial Aid: 27
- Other: 56

## BY RESPONDENT TITLE

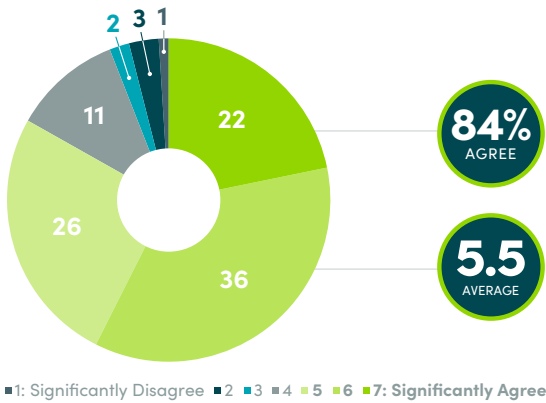
- Director: 192
- VP/C-Level/Dean/Vice-Chancellor: 84
- Other: 57

Percentage segments in select charts may not sum to 100% due to rounding.

# SURVEY RESULTS: FRICTION POINTS AND BOTTLENECKS

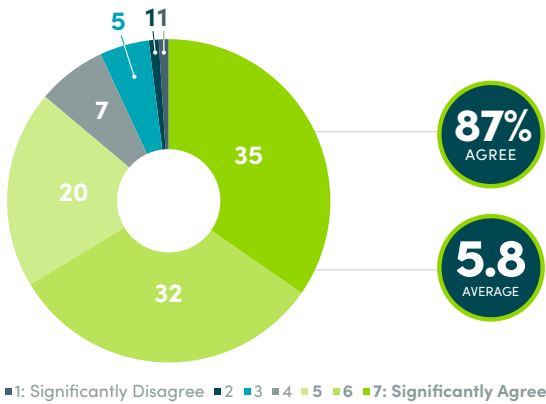
## Lack of Access & Clarity

On a scale from 1-7, to what extent do you agree with the following statements?



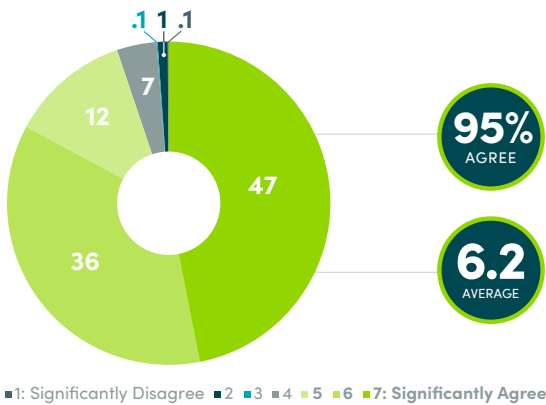
### STATEMENT 1:

Students who **aren't engaged in broader student life** activities are more likely to dropout or take longer to graduate



### STATEMENT 2:

Students that **can't easily access information** about admissions requirements and lack support with admissions processes are less likely to complete applications



### STATEMENT 3:

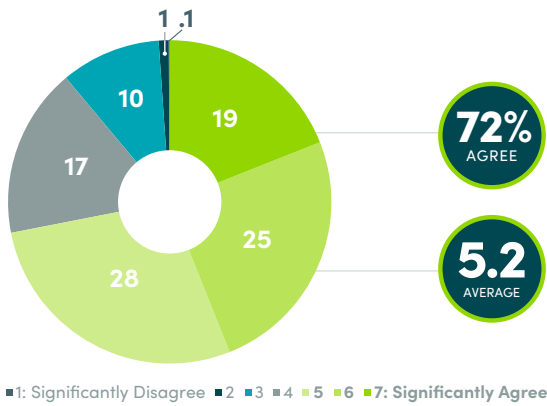
Students that have **financial aid and tuition issues** are more likely to drop out or have greater issues with debt after graduating



*There's overwhelming agreement that a lack of access and clarity in admissions as well as financial aid challenges present significant friction for students. Naturally, paying for college is a critical issue for students, but this is not just about the dollars, but also friction related to the process of understanding and navigating financial aid.*

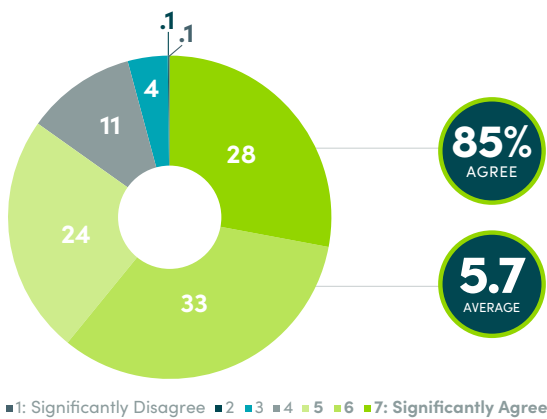
## Confusing Content & Advice

On a scale from 1-7, to what extent do you agree with the following statements?



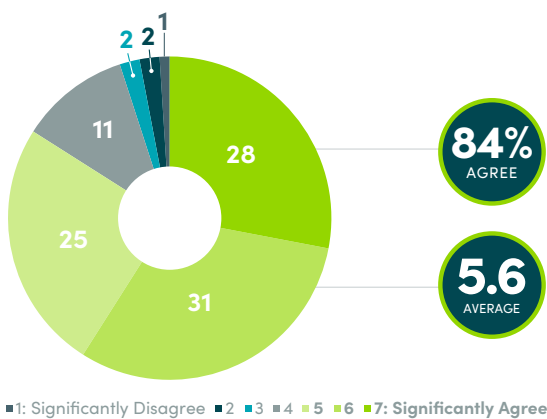
### STATEMENT 4:

Higher education **regulatory content is constantly changing**, creating a challenge for students during admissions and the student lifecycle that can impact enrollment and retention



### STATEMENT 5:

**Changing and complex regulations** make financial aid a key pain point for students throughout their college experience



### STATEMENT 6:

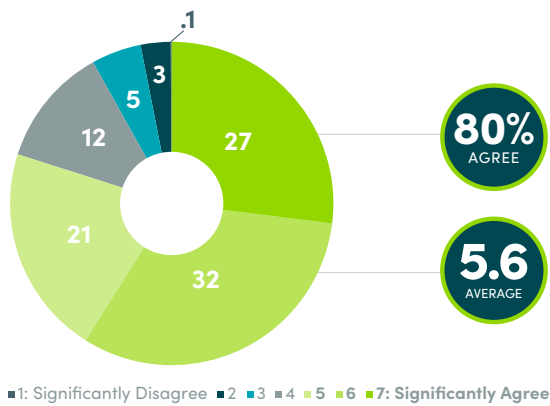
**Consistency of advice** around financial aid can be a challenge when students are receiving advice from financial aid staff, external call centers, and websites that may be out of date

## TAKE AWAY

*Some things are in our control; others are not. For example, complex regulations may be here to stay and beyond what we can influence. But we can ensure students get consistent and informative guidance.*

## Confusing Systems

On a scale from 1-7, to what extent do you agree with the following statements?



### STATEMENT 7:

Students are **confused by the multitude of systems** they have to interact with to get information which increases the risk of them not completing the admissions process, dropping out, or taking longer to graduate

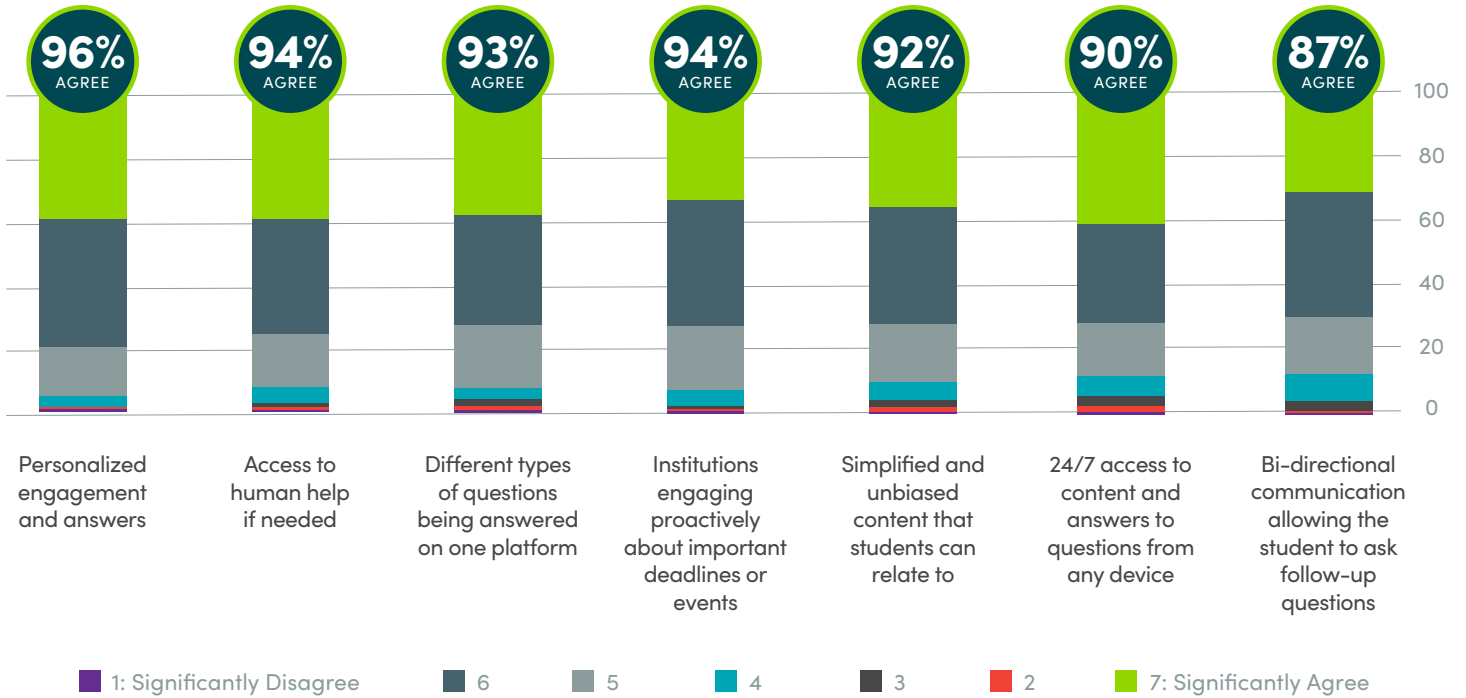
### TAKE AWAY

*Several factors are converging and compounding enrollment challenges: the need for students to access information 24/7, students receiving inconsistent information and advice, and the student frustration with navigating multiple systems.*



## SURVEY RESULTS: STUDENT PREFERENCES

On a Scale of 1-7, with 1 being "Significantly Disagree" and 7 being "Significantly Agree", Current and Prospective College Students Prefer...



## TAKEAWAYS

There is friction in the student experience that negatively impacts enrollment and retention.

WHY?

Can't easily access information

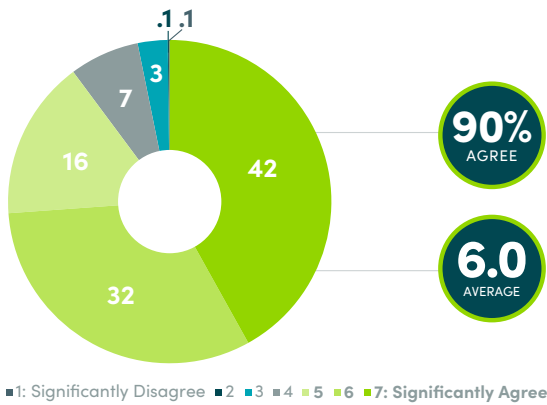
Confusing content, confusing systems, inconsistent advice.

Engagement bottleneck; reaching students where they are in accessible and inclusive ways

# SURVEY RESULTS: OPPORTUNITIES

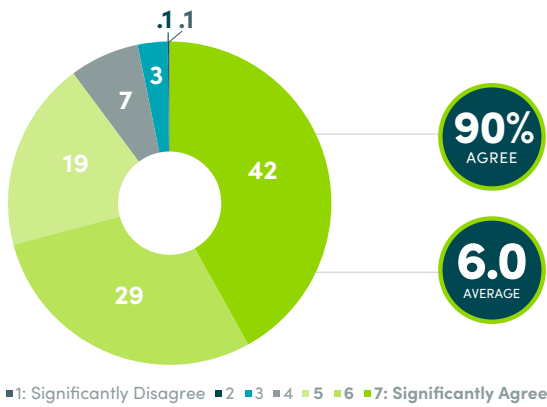
## Admissions

On a scale from 1-7, to what extent are the following likely to help student success?



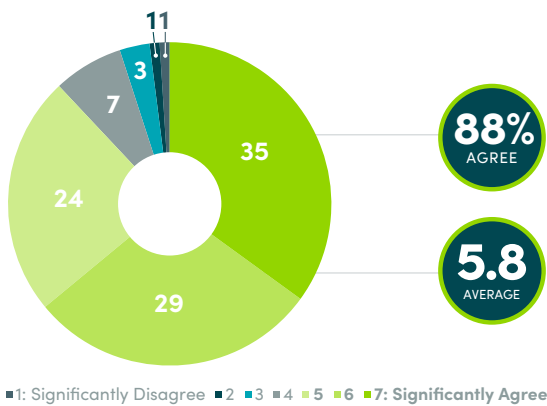
### STATEMENT 8:

Reminding prospective students about upcoming deadlines for applications



### STATEMENT 9:

Answering questions about forms and requirements needed to complete the admissions process

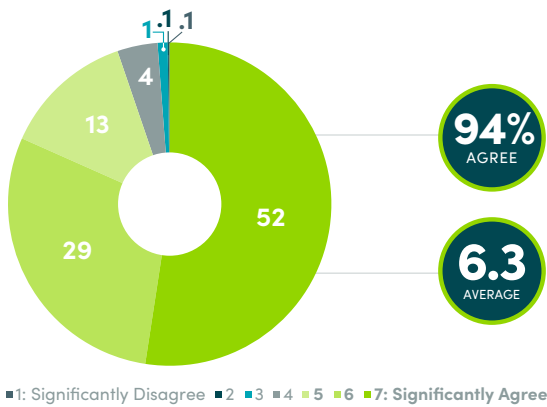


### STATEMENT 10:

Answering questions about tuition and alternative options

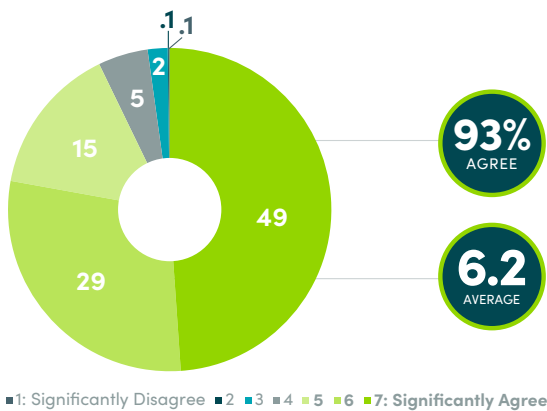
## Financial Aid

On a scale from 1-7, to what extent are the following likely to help student success?



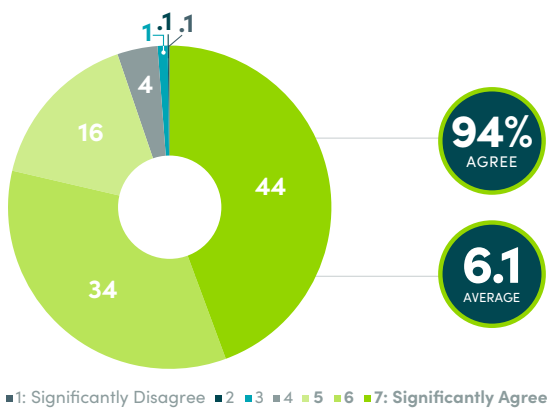
### STATEMENT 11:

Remind students about financial aid deadlines



### STATEMENT 12:

Answer last minute questions students have relating to, for example, upcoming financial aid deadlines and tuition payments, financial aid awards, tuition, refunds

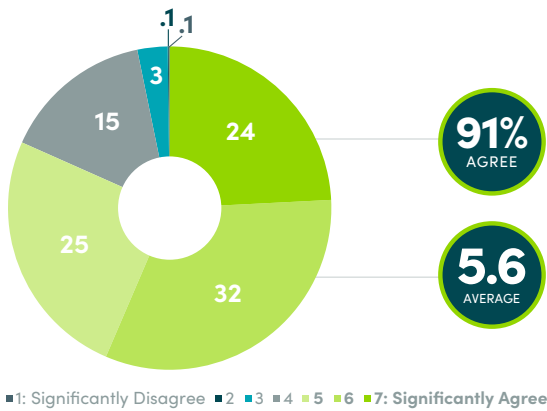


### STATEMENT 13:

Direct students to the relevant forms needed to meet financial aid criteria

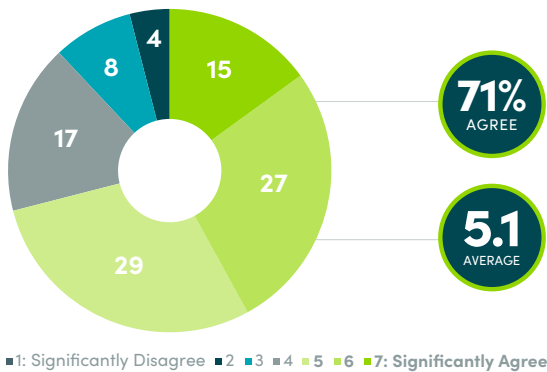
## General Engagement

On a scale from 1-7, to what extent do you agree with the following statements?



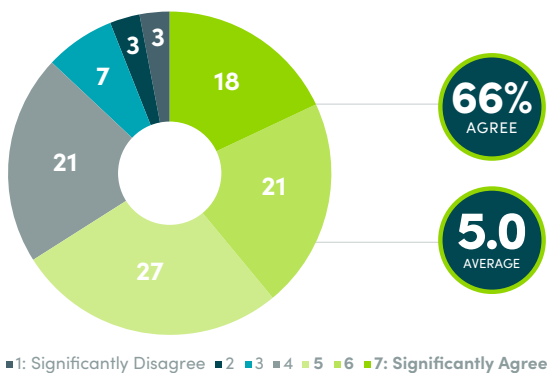
### STATEMENT 14:

Answer questions or prompting engagement with available resources to support student wellness and mental health (e.g., counseling, exercise, etc.)



### STATEMENT 15:

Answer questions on clubs or societies available to broaden the student experience and support a wider education experience



### STATEMENT 16:

Remind students about upcoming athletic and sporting events to support lifestyle and general engagement with the institution

# NEW PARADIGM: HIGH TECH AND HIGH TOUCH ENGAGEMENT MODEL

Data to **Analyze** that improve overall communication strategies as well as prove the ROI these technologies are having in meeting both student needs and institutional goals.

Resources that **Educate** alongside AI-driven and real-time communications. Easy-to-understand video explainers and supplemental content are impactful in getting students what they need.



Two-way student **Outreach** through SMS texting that is integrated into CRM and SIS systems for personalized, dynamic campaigns. Also seamless experience with chatbot and live chat responses.

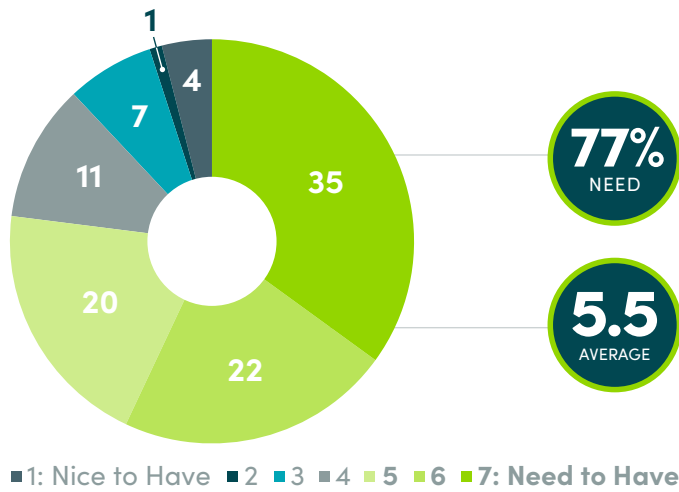
24/7 student **Support** with AI chatbots integrated into the backend platforms for student-specific responses. Live chat option for 1:1 advising when needed.

## A 360° APPROACH TO STUDENT ENGAGEMENT

Institutions need a way to engage students, and students need easy ways to engage with their institution.

# SURVEY RESULTS: PERSPECTIVES OF TECHNOLOGY ROI

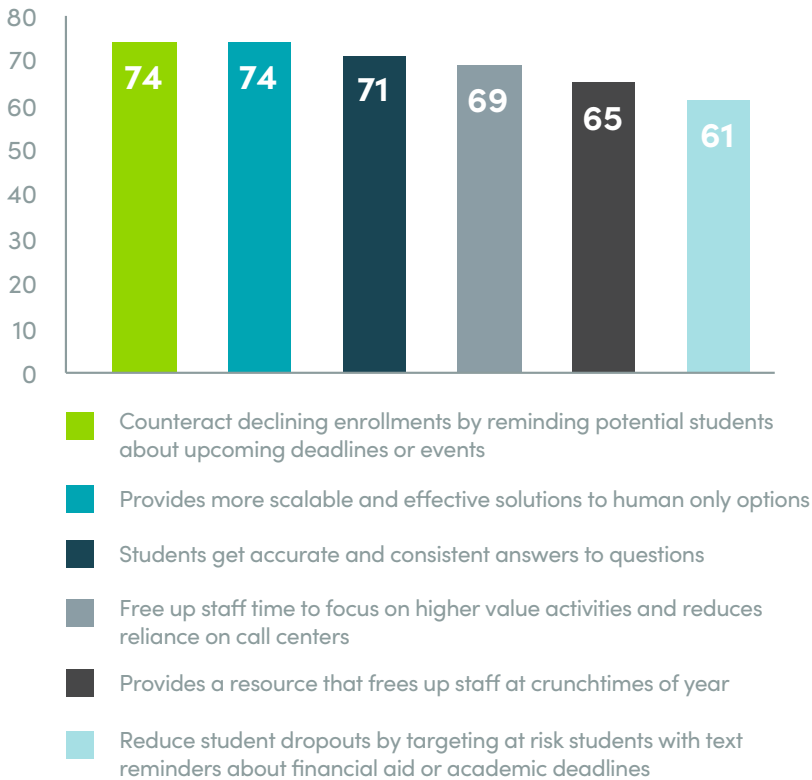
## Student Engagement Tech Stack



### SURVEY QUESTION:

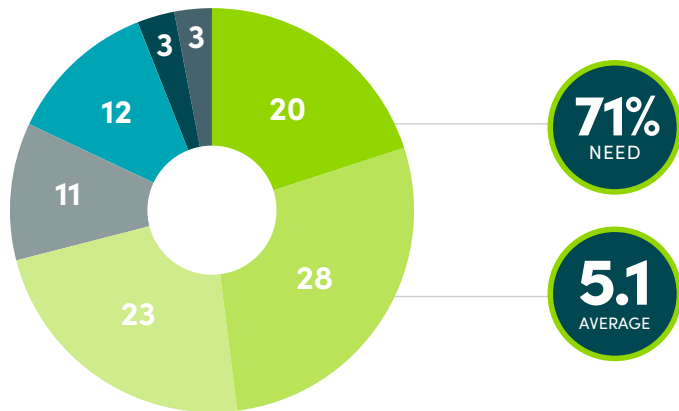
Is a 2-way text messaging platform a nice-to-have or need-to-have for your organization?

## 2-WAY AI-BACKED SMS TEXTING



### SURVEY QUESTION:

To what extent do you agree that your 2-way text messaging platform has led to a return on investment (ROI) from each of the following?

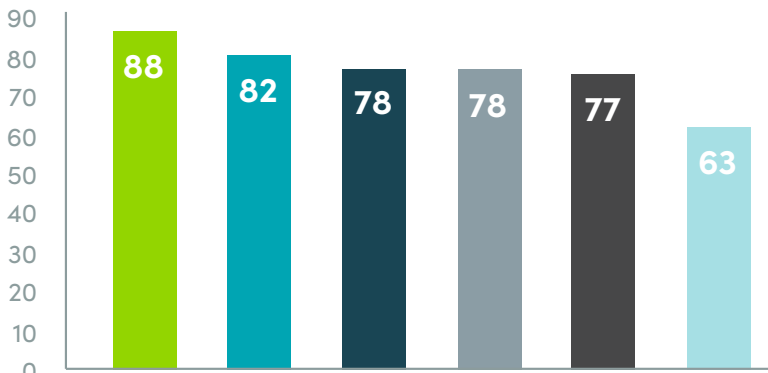


■ 1: Nice to Have ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7: Need to Have

**SURVEY QUESTION:**

Is an AI Chatbot a nice-to-have or need-to-have for your organization?

**AI-POWERED CHATBOT**



- Provide answers to students out of normal school hours
- Provides more scalable and effective solutions to human only options
- Provides a resource that frees up staff at crunch times of year
- Students get accurate and consistent answers to questions
- Free up staff time to focus on higher value activities and reduces reliance on call centers
- Providing bilingual / multilingual support for non-native English speakers

**SURVEY QUESTION:**

To what extent do you agree that your AI chatbot platform has led to a return on investment (ROI) from each of the following?



## Additional Engagement Capabilities



### AI-Assisted Live Chat

AI-backed live chat is helpful for when the bot is stumped or students have a complex issue that needs 1:1 attention. Chatbot conversations should be easily escalated to an available and appropriate staff member who can guide the student to resolution. Or, be even more strategic – lead with live chat when you are appropriately staffed to do so, and believe that is the best way to engage students during those hours. Then, use the AI to provide agents with consistent information to draw upon when answering student questions in real time.



### Short online explainer videos and tutorials

There is significant value in providing clear, easy-to-digest resources in every communication. Do not overwhelm students. Rather, take care to provide supplemental resources – especially short online videos to connect with visual learners – so students can quickly grasp topics that are more challenging for them. Vendors, such as Ocelot, have libraries of online video content covering critical topics such as state and federal aid that can enable staff – without minimal lift – to enhance communications with videos and guide students through complicated tasks.



### Tracking Student Learning Outcomes (SLOs) in Student Services

Success in any measure is rarely a straight line and for institutions that means having clear policies and programs related to Satisfactory Academic Progress (SAP). The policy create clear guidelines of expected results and the program provides an actionable and achievable process for students managing SAP issues.

Wherever there is a process, there is opportunity for technology to make that process scalable and go faster. The results are impactful: freeing up staff from repetitive administrative tasks, measurable student outcomes, and few overall SAP issues across the institution. A SAP program that “speaks student” and is incorporated into other engagement capabilities is a win-win for all involved.



### Open and Flexible Integrations

Integrating these communication channels helps drive elevated, personalized student engagement by leveraging and extending the information from both legacy and modernized CRM, LMS, SIS, and other platforms.

The SMS text and AI chatbots provide a consistent interface and user experience in the student’s natural language. There is no duplication of sensitive information. The technology taps into the information and data already collected within the SIS and other aggregated knowledge sources (like an institution’s knowledge bases, website, institutional FAQs) giving the student a seamless experience.

## Student Engagement Best Practices

Consider building a long-term relationship with a student outside the classroom. How? Think about the various points in the student journey. Starting at prospect stage. Making a connection via text and email, can supplement any in-person or phone conversations. It can begin with an outreach from a current student to a prospect to generate enthusiasm about attending the college. It can also take on other forms, such as an outreach text message that let's a prospect know that staff are available at certain times of day, and that an AI chatbot is always available as well whether a prospect communicates "after hours" or simply prefers not to speak with a person.

As the student journey proceeds through enrollment and registration, there are many touch points along the way – reminders about deadlines, missing paperwork, offers of assistance, and mental health check-ins. Staff can build tremendous rapport with students through a combination of human interactions and technologies such as a texting and chatbot that can expand the level of engagement, and take both a proactive approach when that is what is needed, and also reactive support after hours and when the institution is closed on the weekend or holidays. And there is no reason the engagement has to end at graduation or completion. It can continue for years into the future for continuing education, support with any loan repayment, and engagement as alumni.



“Students are getting what they need—they are less stressed. Staff are able to focus.”

**Michael Bennett**

Associate Vice President,  
Financial Assistance Services  
at St. Petersburg College



## CASE STUDIES OF CONTINUOUS STUDENT ENGAGEMENT

- Completing Goals (submitting applications, deposits, requests for information, event registration, etc.)
- Enrolling / Overcoming Obstacles
- Raising Student Learning Outcomes (SLOs) / Persistence
- Student Retention
- Critical Situations (Edge use cases of self-harm, mental health issues, failing classes, or adverse financial circumstances)

## AI-Powered 2-Way SMS Campaigns: Completing Enrollment / Overcoming Obstacles

A college conducted an AI-backed 2-way SMS text campaign to inform ~6,000 students that they could use HEERF grants to reduce outstanding balances. **The campaign had a 51.6% response rate with over 3,100 students enrolled for the Fall semester.** The 2-way SMS text campaign was a two-for-one: 1) Making it easy for students to clear up their balances and re-enroll; 2) Making it easier for the staff to focus time and energy on the remaining cohort of students who did not respond to the outreach.

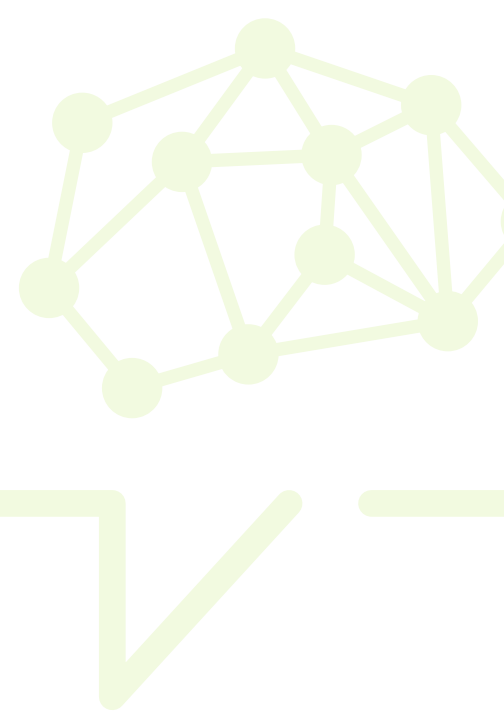
A community college conducted an AI-backed 2-way text campaign to 4,700 contacts who had not yet enrolled. **12.4% of the contacts who received the 2-way text completed enrollment.** So often students at community colleges may get discouraged or pulled into family or work responsibilities, and let an application languish. Timely outreach from the college makes a difference for these students.

Another college had failed with multiple attempts via email over 4 months to engage with 800 students to have them complete a state required form. Their AI-backed 2-way **text campaign to 800 students resulted in 300 students completing the form within 24 hours.** The success of this campaign led to the college to embrace additional 2-way text campaigns as a key communication tool to make it easier for students to navigate through the administrative processes around enrollment and registration.



## AI-Powered Chatbot: Goal Completion

A University tracked students, parents, and prospects who spent time on their website before completing a specific goal. The time period covered was January 1, 2022 - April 21, 2022. The goals included: Applications submitted, Event registration, Deposits, RFI submissions, and Common Application. **For those using the chatbot while on the website, the goal completion rate was 3.2%, compared to only .65% for those that visited the website, but did not use the chatbot.**



## Raising Student Learning Outcomes (SLOs); Facilitating Student Persistence

GetSAP is a series of online counseling sessions that are an extension of the Ocelot platform. Colleges that add GetSAP can require students to complete GetSAP sessions if a student encounters difficulty maintaining the grades and progress necessary to remain eligible for financial aid. The GetSAP sessions are part of the Appeal work-flow process that enable students to **regain eligibility for financial aid**. Cohorts include At-Risk, Warning, and also Orientation. The sessions include a pre-test and a post-test to track learning improvement. **In 2021, across the Ocelot network of clients, the average improvement in learning outcomes between the pre-test and post-test was 19%.**



## AI-Powered Chatbot: Actionable Data to Drive Retention

Retention is a growing need. In 2021, Ocelot's chatbot engaged with students on the following topics that are keywords for retention:

Topics/keywords	Count	% total
Drop out	6,922	0.0429%
Leave of absence	4,517	0.0280%
Exit Counseling	3,095	0.0192%
Unofficial Withdrawal	177	0.0011%
Official Withdrawal	61	0.0004%

These conversations are a starting point for learning. This kind of data is an opportunity for colleges to incorporate the right interventions at the right time with students are at-risk of dropping out, withdrawing early, etc.

## AI-Powered Chatbot: Edge Use Cases of a Critical Nature (<1% of interactions)

Critical Usage are edge use cases where a user has provided an input that can be cause for concern. Examples include text suggesting self-harm, mental health issues, failing classes, or adverse financial circumstances. We are still in the early stages of working through this data, its implications, and how we can best support students. There is a considerable amount of data, and there is opportunity to do more to support and assist students.

Regardless of the user's true intent (i.e, true critical situations, probing, curiosity, humor, etc.) or accuracy of the classification, chatbots have (or should have) the functionality to respond to certain **critical topics & intent** and provide resources or in certain cases, direct users to a live operator.

**Chatbot Critical Usage** provides basic guidance for adverse circumstances, while preserving anonymity.

The following critical **conversation topics** from the top 1000 topics and **user intent**:

### Some Criticality

Academic Hold, Academic Probation, Academic Warning, Acquired Immune Deficiency Syndrome, Attention Deficit Hyperactivity Disorder, Autism, Blindness, Cancer, Cerebral Palsy, Diagnosis, Disability, Disability Income, Foreclose, Hardship, Hardship Review, Health Insurance, Human Immunodeficiency Virus, Identity Theft, Immunization, Incomplete Grade, Insult, Learning Disability, Leave of Absence, Loan Forgiveness, Low-income, Malware, Medical Needs, Mental Health, Obsessive Compulsive Disorder, Phishing, Plagiarism, Probation, Undocumented, Unmet Need, Unofficial Withdrawal, Unvaccinated, Vision Impaired

### High Criticality

Bankruptcy, Crime, Depression, Drop out, Felony, Racism, Sexual Violence, Abuse

### Examples of Critical Usage Responses

**USER INPUT:** "What if paying CSS profile fee is a hardship for my family?"

**Topic/Intent:** Hardship

**Chatbot Response:** The College Board provides fee waivers for students facing hardships. The university may provide fee waivers on a case-by-case basis to students who do not meet College Board's requirements to receive a fee waiver, provided a FAFSA has been submitted to the university. For information about who qualifies for College Board's fee waivers please see here: [\[Link\]](#)

**USER INPUT: "What are some tips for helping my depression symptoms?"**

**Topic/Intent:** Depression

**Chatbot Response:** Learning to cope with depression symptoms often requires some trial and error. Here are some techniques to try that can help you start to build your own coping toolkit: [\[Link\]](#)

Fight the urge to stay in bed all day and not engage in the hobbies/activities you typically do. Even if you only maintain these hobbies for a few minutes each day, they will help you to feel better. [\[Link\]](#)

Remember to eat regular, healthy meals throughout the day and aim to keep a consistent sleep routine. [\[Link\]](#)

Drawing, coloring, painting, and other creative mediums are a great way to let your mind relax. Negative emotions are just as normal as positive ones; let them be acknowledged and not hidden from view. [\[Link\]](#)

Find a friend, family member, teacher or someone you trust to talk about what you're going through. Sometimes others can help us find solutions or offer other ways to see the problem at hand. Avoid the temptation to isolate from those who care about you.

Please [\[Contact\]](#) the Mental Health Services or make an [\[Appointment\]](#) to speak with a counselor if you find these coping tips are not helpful, and we can work with you to create a plan for your symptoms.

**USER INPUT: "Does the college have a tuition forgiveness program?"**

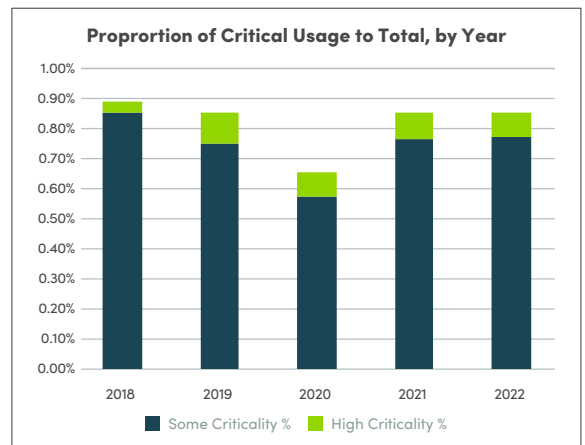
**Topic/Intent:** Tuition, Forgiveness

**Chatbot Response:** I have a link that may answer your question. [\[School\] Tuition Forgiveness Program](#)

**Ocelot Classification Statistics**

- Approx. 80% of user input (conversation turns) are classified by intent to some degree of confidence (13M / 16M total turns). Intent confidence is typically high (90%)
- Approx. 30% - 40% of user input are classified by a specific topic

**Critical Usage Statistics**



- 40,000+ interactions related to **immunization** in between 2020 and 2022
- 18,000+ interactions related to **disabilities** (learning or otherwise) and **disability accommodations & support**
- 6,900+ interactions related to drop-out and 7,500+ interactions related to other **highly critical topics** (violence, abuse, depression, etc.)

“

“The AI tool has made the process of getting my questions answered fast. It’s there when I am in class, at home, or at work and has helped get simple questions answered without the hassle of driving to the office. Not knowing what a 1098-T form was or how to get more information regarding a Pell Grant, it has benefited me greatly. I wish I would have had this resource in the beginning. It’s a way of the school coming to me when I need it the most.”

**J. Aceves, Student**

College of the Desert

”



## About Ocelot

Ocelot is higher education's most-deployed and fastest-growing multi-tenant AI-powered Student Communication Platform providing over 7 million students at 500 institutions with 24/7 virtual engagement. The Ocelot SaaS Platform includes 2-way AI-backed SMS text campaigns for student outreach, AI chatbot and live chat for student support, an unrivaled and fully compliant knowledgebase of content – including thousands of video explainers and text Q&A – for ease of technical implementation and administration, as well as an open integration framework to access data from other systems for personalized student interactions. The Ocelot platform enables colleges and universities to reach every student, answer every question, and ensure students and families can be guided through all aspects of the student lifecycle to drive enrollment, retention, wellness and access.

Colleges choose Ocelot's AI-powered communication platform in order to:

- › Provide "Virtual Student Engagement" and Self-Service
- › Engage with prospects and students in a digital first communication channel
- › Provide personalized information and guidance through predictive paths
- › Drive Enrollment and Retention
- › Improve Customer Service
- › Reduce Phone Calls and Wait Times
- › Ensure Consistency of Answers
- › Save Staff Time - empowering them to have more meaningful interactions with students
- › Promote Financial Literacy / Debt Education / FAFSA Completion
- › Support Access, Wellness, and Equity Initiatives

To schedule a demo, visit [ocelotbot.com](https://ocelotbot.com) to learn more.

