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Introduce yourself in the chat! Which institution are you representing?

Message Best Practices

Discuss how to make the most of your messages with segmentation, purposeful language, campaigns, and more!

Kelsey Seale

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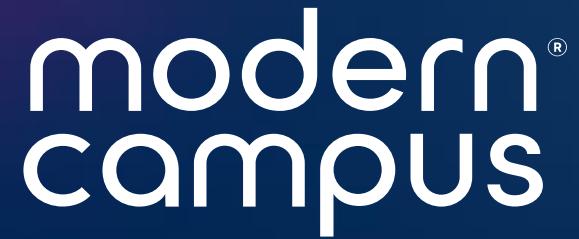
Message Best Practices

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Kelsey Seale

Post-Webinar Survey

- 2 minutes!

- We love knowing what you like or would like improved!

- Really helps me (Kelsey) out when presenting to my bosses ☺

- I'll provide a link at the end or you will get an email tomorrow!!!

* 3. Overall, were you satisfied with your training?

○ Yes

○ No

* 4. On the following scale, how **helpful** and **informative** was the training _**webinar?**_

1 - Not Helpful	2	3 - Neutral	4	5 - Helpful
○	○	○	○	○

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Agenda

1. Best Practices
   1. Use Your Data
   2. Language
   3. Plan Campaigns
   4. Increase Engagement
   5. Mix Up Your Messaging
   6. Keep Up With Compliance
2. Q&A
3. Close

Use Your Data!

Target the correct audience

- Are you sending FAFSA reminders to seniors?

- Are you reminding folks to apply who are enrolled?

- Graduation reminder to a first year student?

Types of Data

1. Demographic data: age, gender, ethnicity

3. Academic data: enrollment status, major, GPA

4. Financial data: financial aid status, scholarships

5. Behavioral data: event attendance, communication history

Contact Segmentation

GPA > 3.0

Appointment date between 9/10/32 – 9/15/23

Application = complete

Attended = true

FAFSA = Not complete

Segment your audience

- Specificity matters

- Use Advanced Search to segment your audience

Advanced Search

Match if [All ⌄] rules are met

Rule #1   (rename rule)   (delete rule)

If [All ⌄] of the following conditions are met

[fafsa_submitted ⌄]   [equals ⌄]   [False ⌄]   ✕

+ add another condition

+ add another rule

Cancel   Search
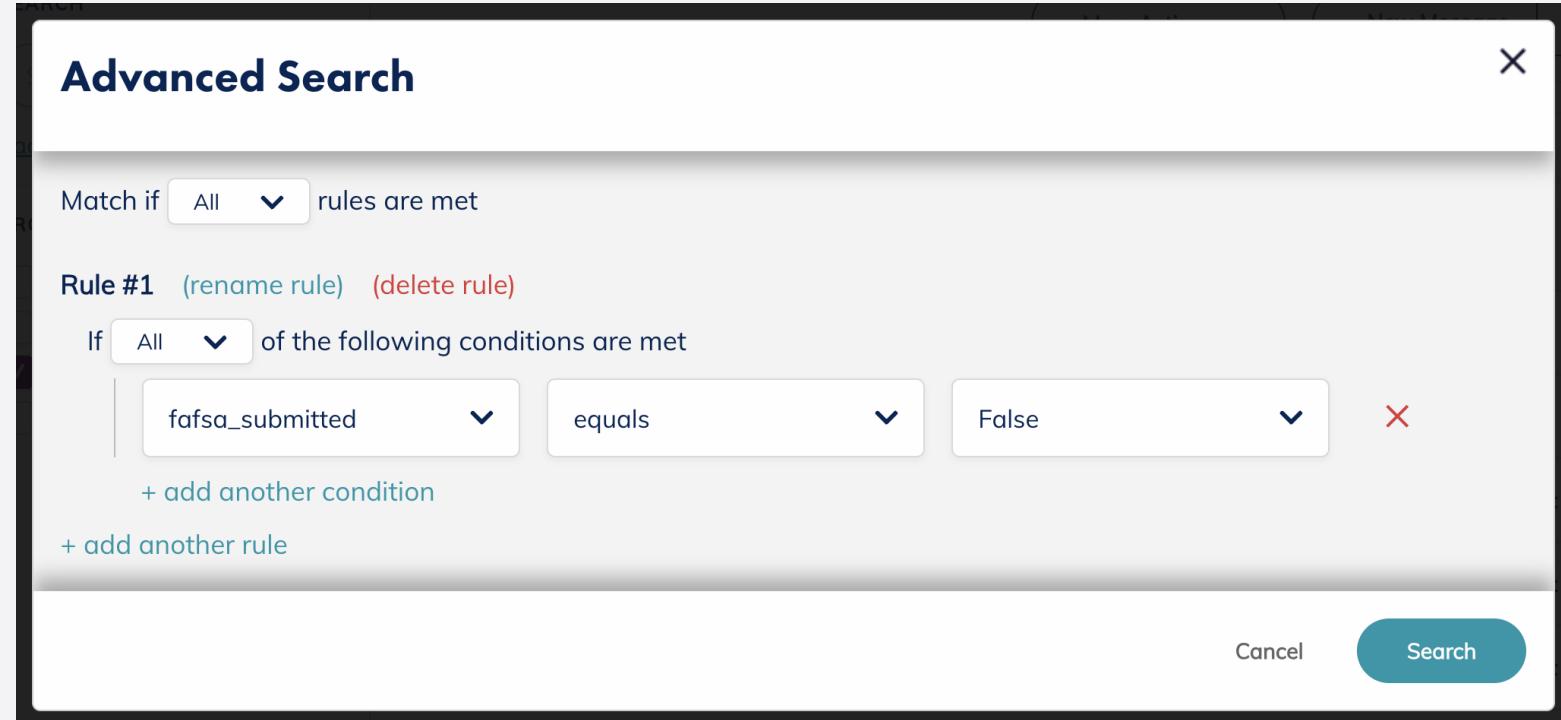
Use Data to Target

❌ **Poor Targeting (Program-wide):**

"Don't forget to complete orientation!"

✅ **Better Targeting (new admits only):**

"Welcome again [first_name]! Orientation opens next week! Want a sneak peek at what to expect?"

Use Data to Target

❌ **Poor Targeting (Program-wide):**

"Time to register for next semester!"

✅ **Better Targeting (only unregistered):**

"Spots are filling fast! Finish registration now to lock in your ideal schedule! Need help?"

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Problem

Contacts who get irrelevant messages will unsubscribe or tune out.

Data Solutions

Use advanced search to narrow down your audience.

Create a schedule to regularly upload your contact file.

Explore options for automatic data uploads!

Language Matters!

Economy of Language

- Don't fall into the email trap.

- Blocks of texts will disengage your contacts.

- Texts are brief – say what you need.

  - You don't always need an intro and signoff
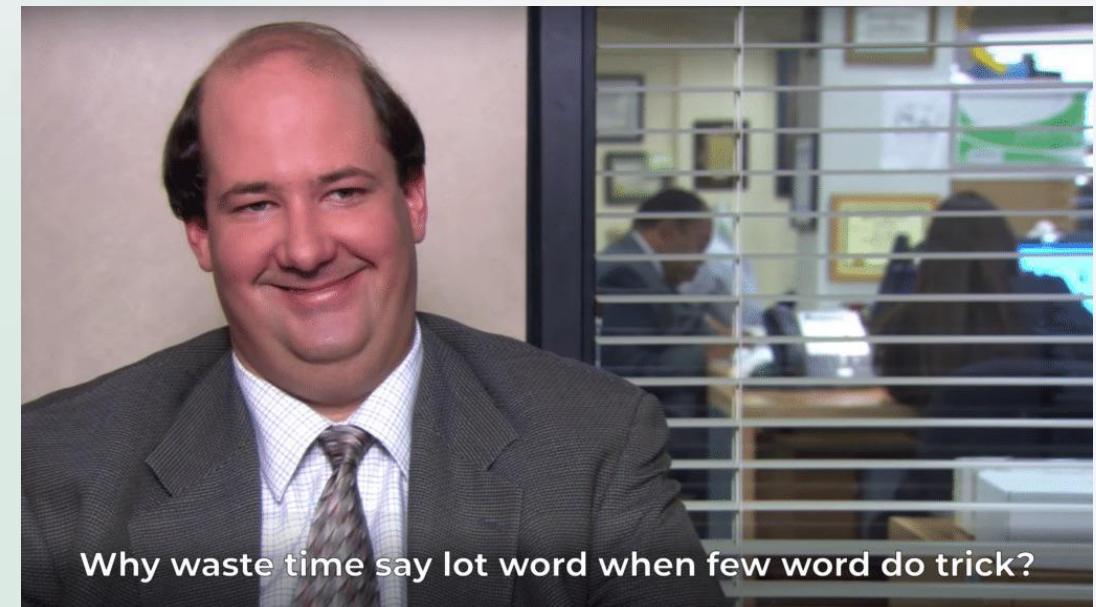
Why waste time say lot word when few word do trick?

Text Length

- Try to **keep texts under 160 characters**

- Splitting long messages helps with **readability** and makes the communication feel more conversational, especially for mobile-first students.

- Have a long text? Consider a program message with multiple parts!

This is a very long message. Can you imagine it will ever be displayed in full on the screen? Because I can't. I can tell you, the one other time I wrote a message this long was when we went to the picnic and uncle Bob whipped out his cigars and I had to vent on the family WhatsApp group.

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This is a very long message. Can you imagine it

Slang and Abbreviations

- Avoid outdated abbreviations.

- Don't use slang if you don't know the meaning!

- If it doesn't feel natural it probably won't read as natural, be yourself and follow any institution guidelines for communication tone.

HOW DO YOU DO, FELLOW KIDS?

Plan Campaigns

What are your mini goals for texting?

Ensure contacts are aware of campus resources.

Help students with the application process.

Remind students of outstanding balances.

Make students feel connected and provide advice.

Stay connected with alumni and increase donations.

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The Message Calendar

Consistent Friday texts!

Problem
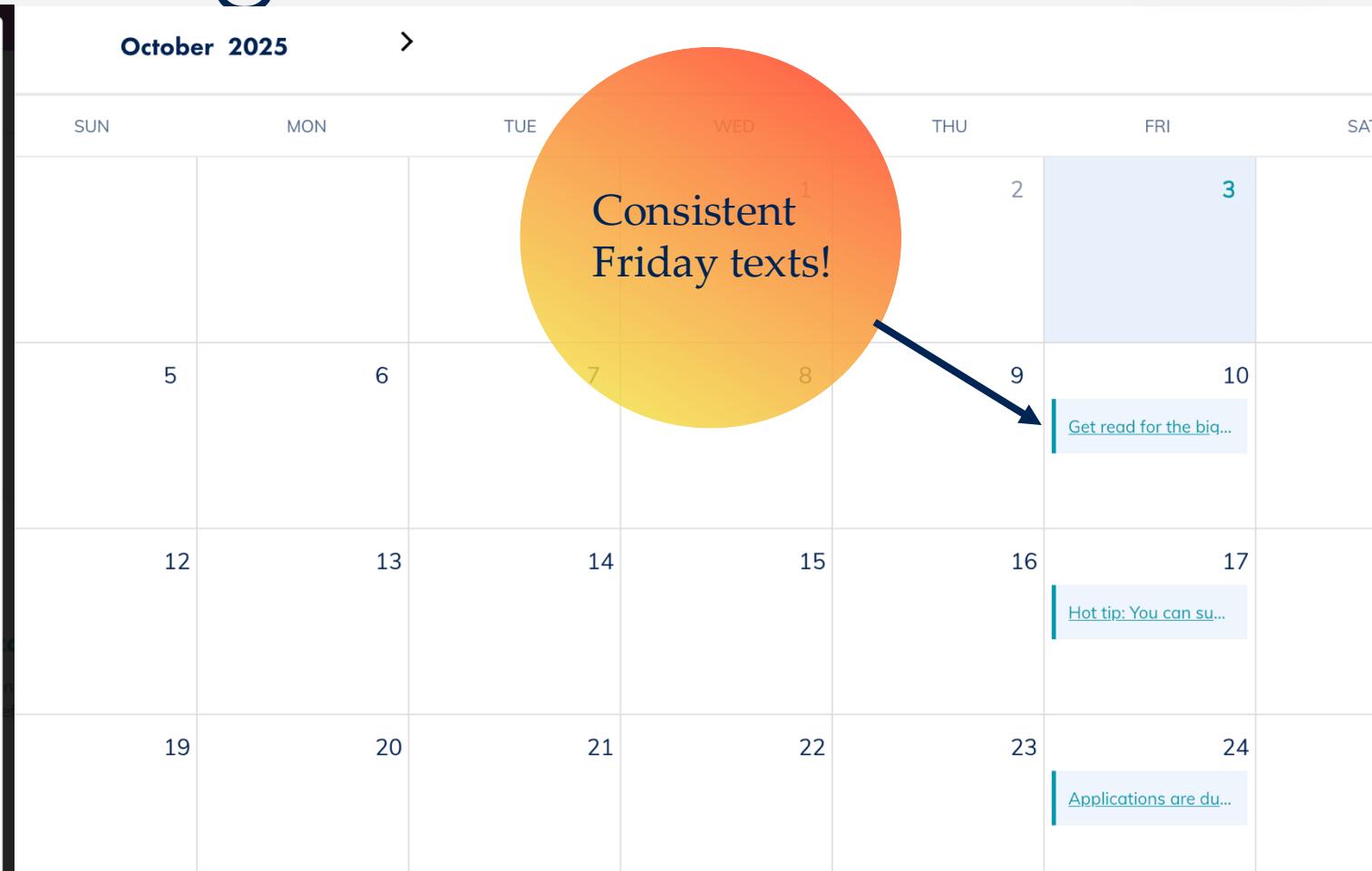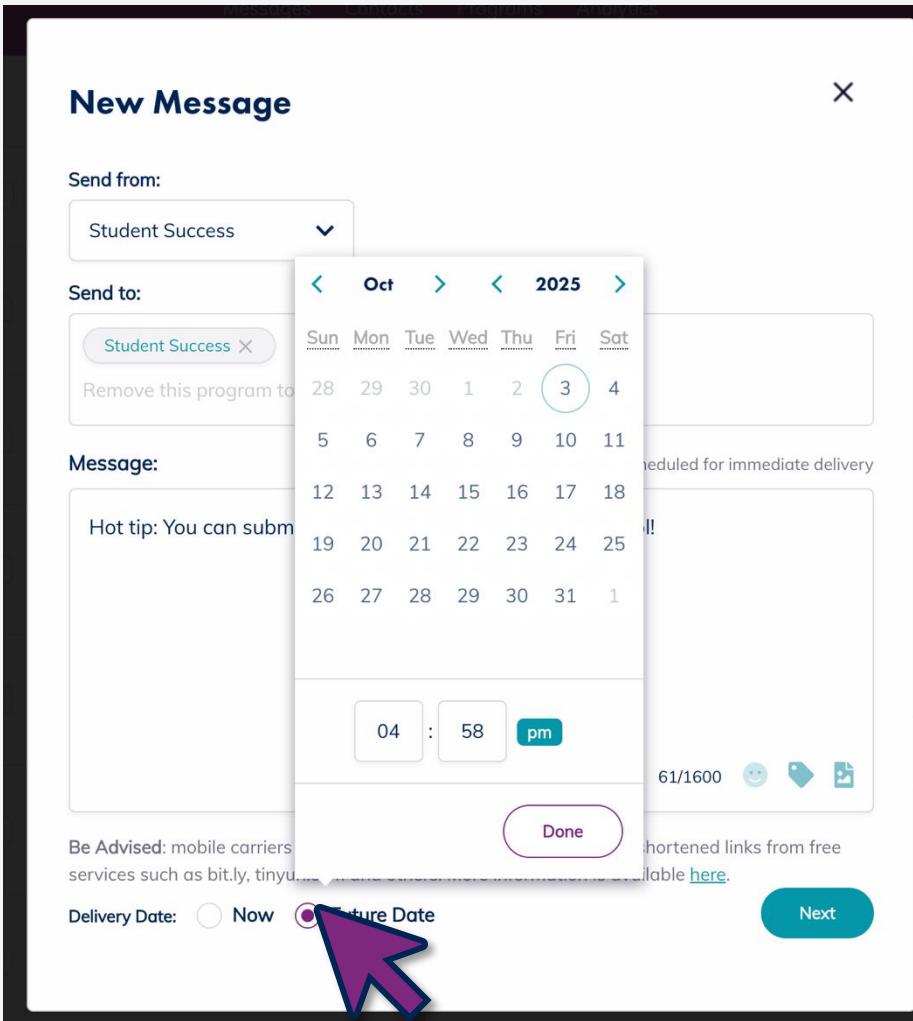
Attention Solutions

Contacts have a lot going on, they might not get it the first time!

Nudge, don't nag!

Create & schedule messages around a theme.

Stay relevant. Send out helpful or meaningful messages.

Strategize to Increase Engagement

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Timing

- High schoolers respond best after school – around 2pm

- College students respond best between 10am-2pm

- Keep it to weekdays!

Make time to monitor your inbox

- Time messages that ask for response or will have questions, make sure you are staffed in the next few hours

- Keep that in mind when you're sending "after school"

- 2pm vs. 4pm

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Response Tips

- Text the way you would talk on the phone or in person

- Seem human

- Don't be AI

- When you're chatting back and forth, wrap up the conversation

Give a Call to Action

- Want a response? Ask for one!

- You contacts might not know they can text you back / think you're a bot.

- A simple "Reply yes or no."
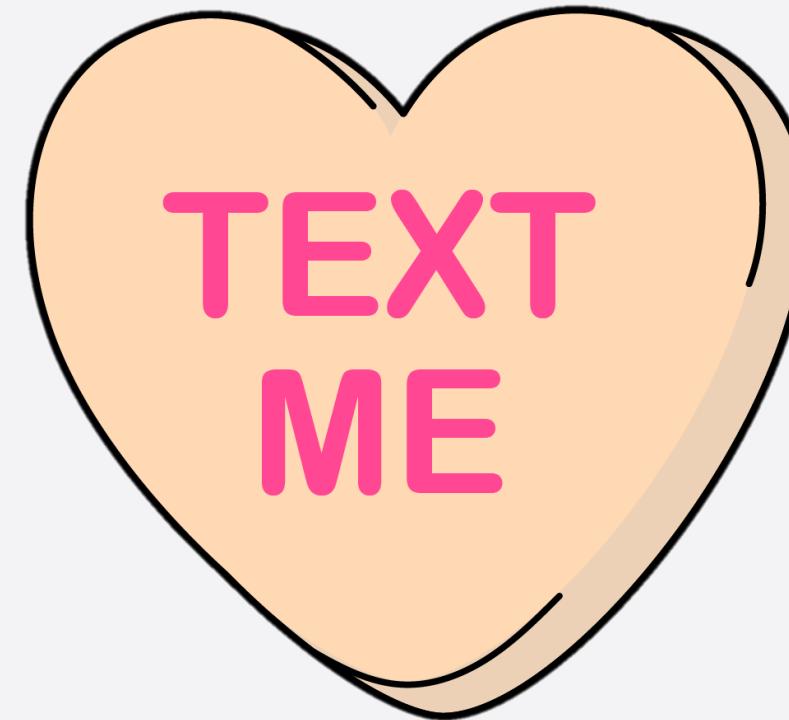
Challenge: We have low engagement.

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Too much information to share – over texting

No clear call to action

Poor Timing

Students don't see value

Staff Inconsistency
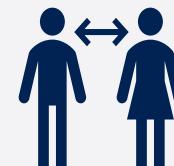
# Problem

Low Engagement Solutions

Engagement is low.

Use good timing.

Create a culture of texting.
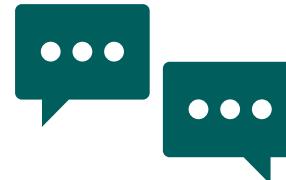
Use automated keyword response messages.
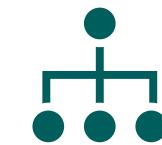
Mix Up Your Messaging

Vary Your Message Content

Personalized vs. Generic - Use data tags!

Hey <mark>Cody</mark>, congrats on declaring your major! Such an exciting step, and we think <mark>English Lit</mark> is a GREAT choice!
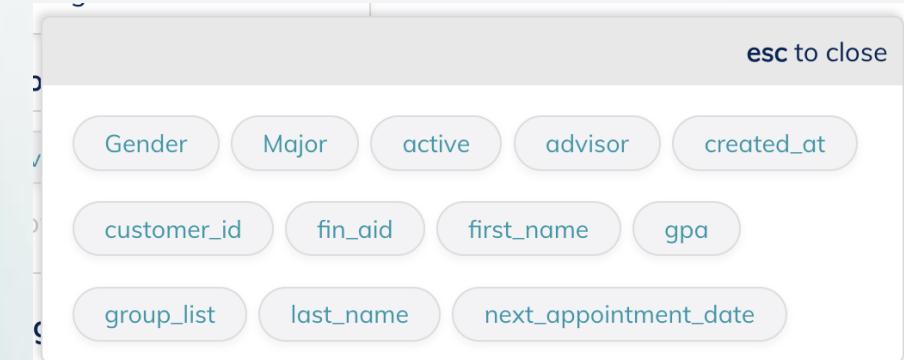
Use Images/Links/GIFs

A GIF can draw attention, a FAFSA help link can remove friction.

esc to close

Gender   Major   active   advisor   created_at

customer_id   fin_aid   first_name   gpa

group_list   last_name   next_appointment_date

WELCOME BACK!

Vary Your Message Content

Avoid Copy-Paste Fatigue

Slightly vary your wording even within a campaign.
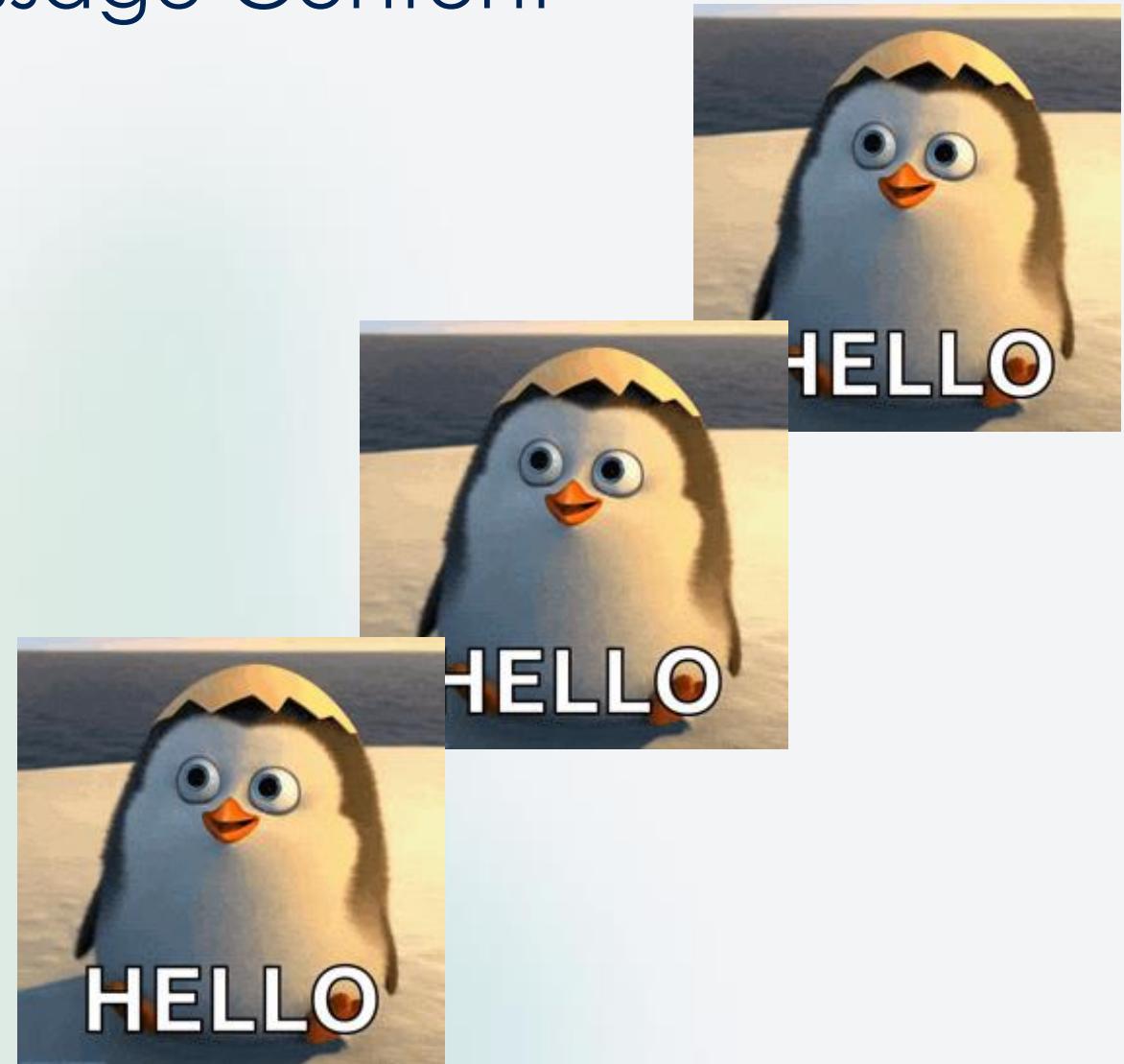
Vary Your Message Types

Resources: "You can find your FAFSA ID here: https://studentaid.gov/fsa-id/sign-in/retrieve-username"

Reminders: "FAFSA deadline is coming up! Need help?"

Informational: "FAFSA can help you get grants, not just loans."

Check-ins: "Hey, how's the FAFSA going? Need help or stuck? Reply or Help or Stuck."

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FAFSA Submission Campaign

Goal: Increase FAFSA completion.
Recepients: All students with "fafsa_complete = FALSE"

Week 1:
Did you know that FAFSA stands for Free Application for Federal Student Aid. 🎓 It's how you get grants, loans, and work-study money for school.

Week 2:
FAFSA may ask for your Social Security #, tax info, and your parents' income. 📄 Do you need any help gathering that information?

Week 3:
Hey [first_name], 25 days until the FAFSA deadline! Have you applied? Y/N

Week 4:
Need help with FAFSA? 🤔 Your counselor and FAFSA.gov have free support.

Week 5:
Almost out of time! 🚨 Submit your FAFSA now at fafsa.gov. It only takes about 30 minutes!

fafsa_complete = TRUE
Congrats, you submitted your FAFSA! Check on your app anytime at StudentAid.gov

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Stay Compliant!

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NO LINK SHORTENORS!

- Always use the full url

- Using bitly or tinyurl can result in carrier rejection!

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Don't Text Without Permission

- You must have consent to text.

- Be aware of how you got contact information.

Text between 8am – 9pm local time.

Problem

Compliance Solutions

Texting is regulated, make sure to stay in the carrier's good graces!

Get permission to text.

Only text between 8am and 9pm local time. Don't spam.

Watch your links. No shorteners!

What will you put into practice after this webinar?

Answer in the poll!

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Q&A

Please put your questions into
the Zoom Q&A feature!

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Thank You

See you next month!