Tour Guide Autoresponder



David Dysart

May 11 11 am PDT/2 pm EDT



STEVENS
INSTITUTE OF TECHNOLOGY
1870

Stevens Institute of Technology

- Private, Non-Profit
- Hoboken, New Jersey
- ~4,000 Undergrad
- ~4,000 Graduate students



David Dysart

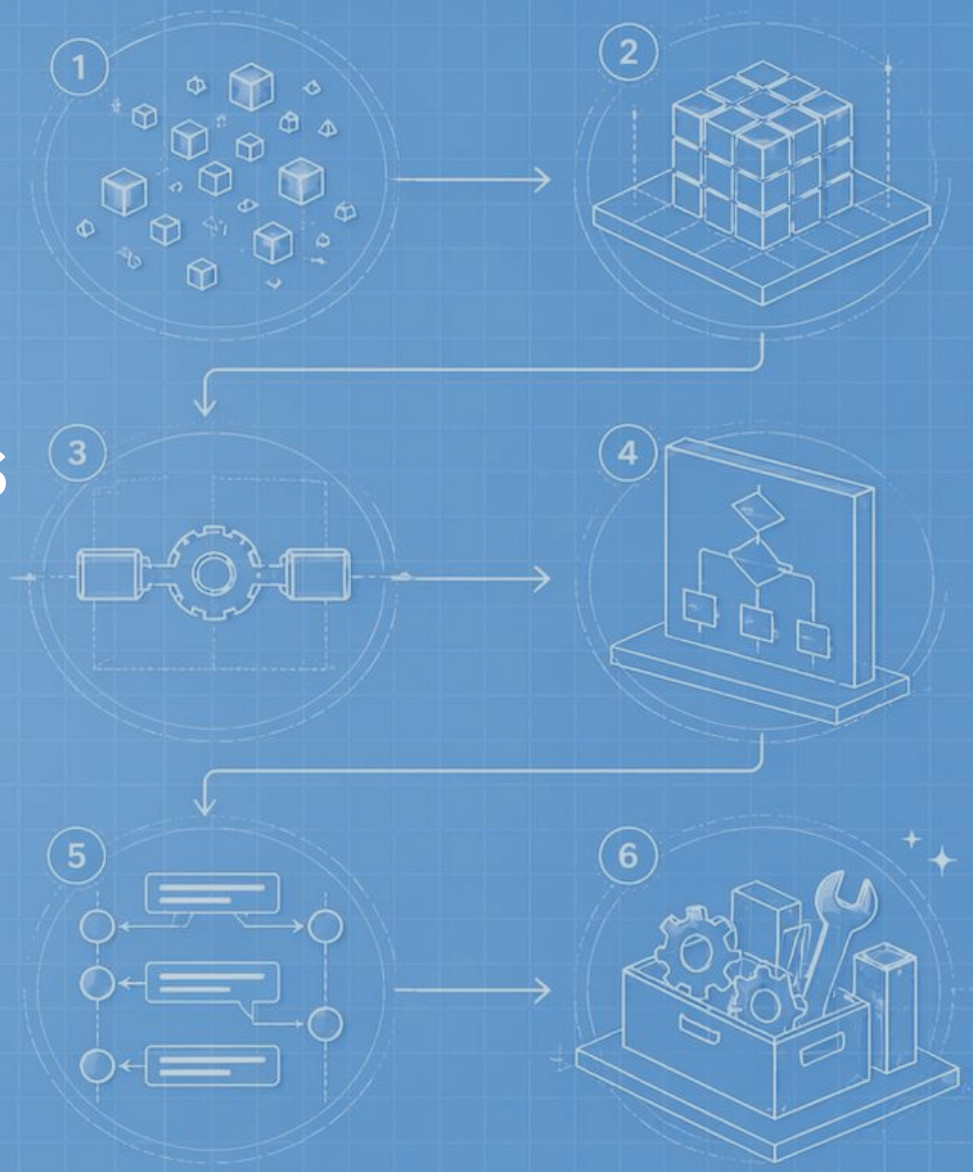
Associate Director of Data Analytics, Enrollment Management

Stevens Institute of Technology

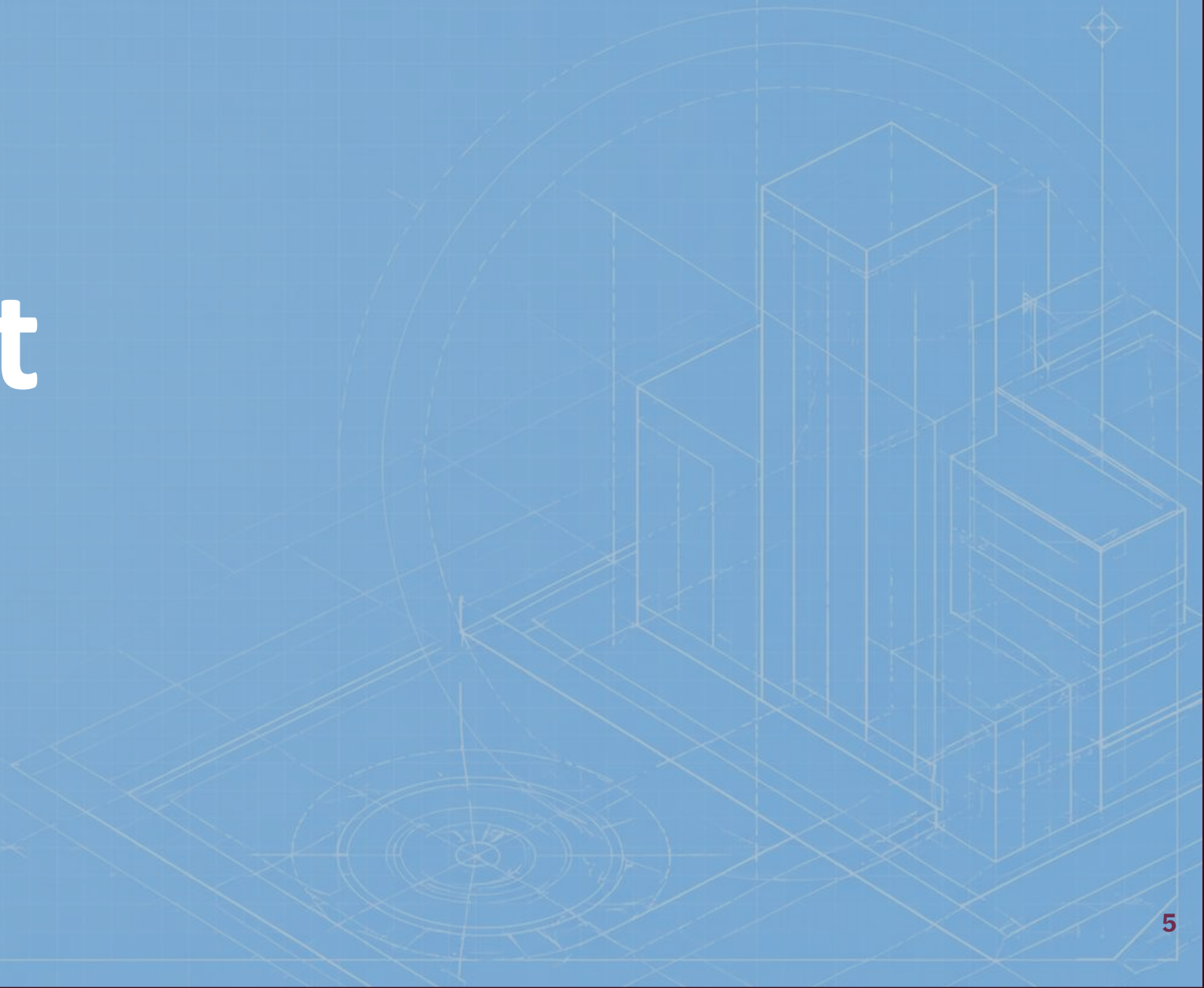
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Agenda

The Current Reality
Tour Guide Dataset
Configurable Joins
Conditional Logic and Merge Fields
Communication Strategy
Other Uses
Takeaways
Resources



The Current Reality



The Current Reality

- Post-event emails are generic (if they get sent at all)
- The Tour Guide, such a critical element on those campus experiences (and the relationship that started forming) fades into the process
- Personalized student voice doesn’t scale

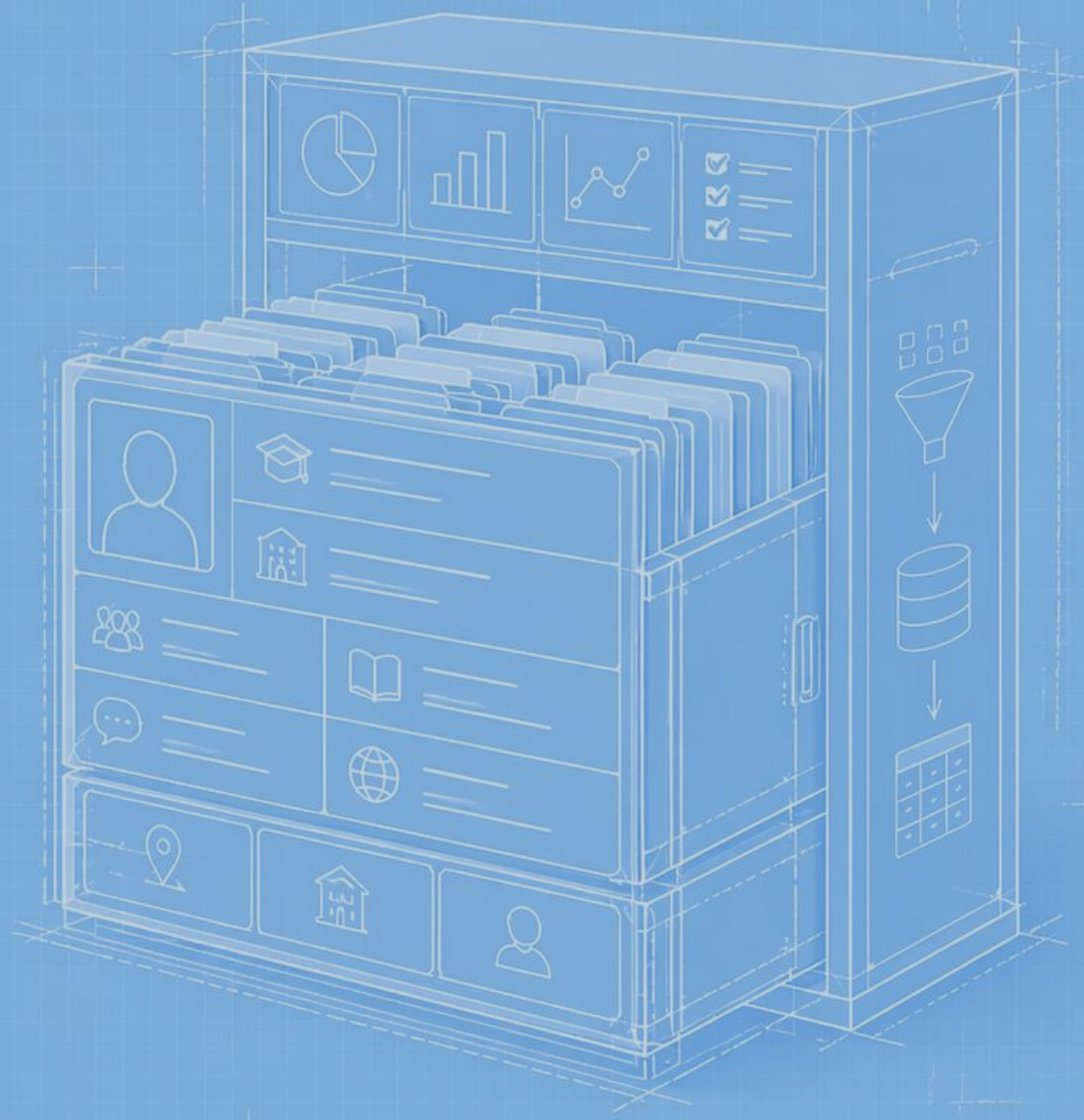
The Current Reality

Or does it?

The Current Reality

- A 3-email series
- From the Tour Guide
- Dynamically rendered based on Tour Guide and Visitor data
- Personalized student voice email without writing dozens of emails a day

Tour Guide Dataset



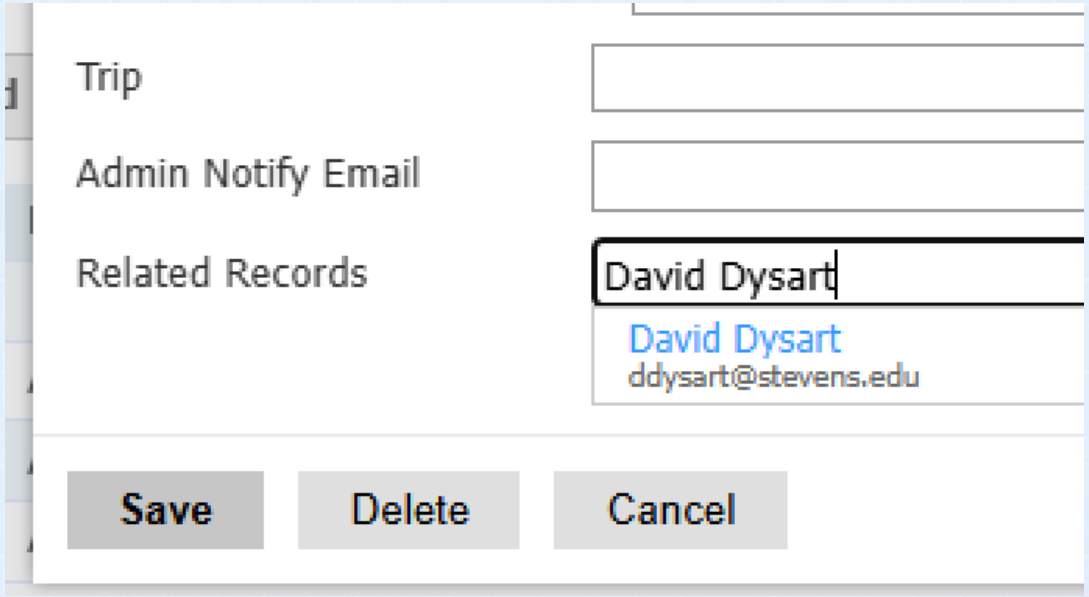
Tour Guide Dataset

- Created a Tour Guide Dataset (Student Workers more broadly)
- Capture data and content from the Tour Guides
- Associate them with Events and Prospective Students

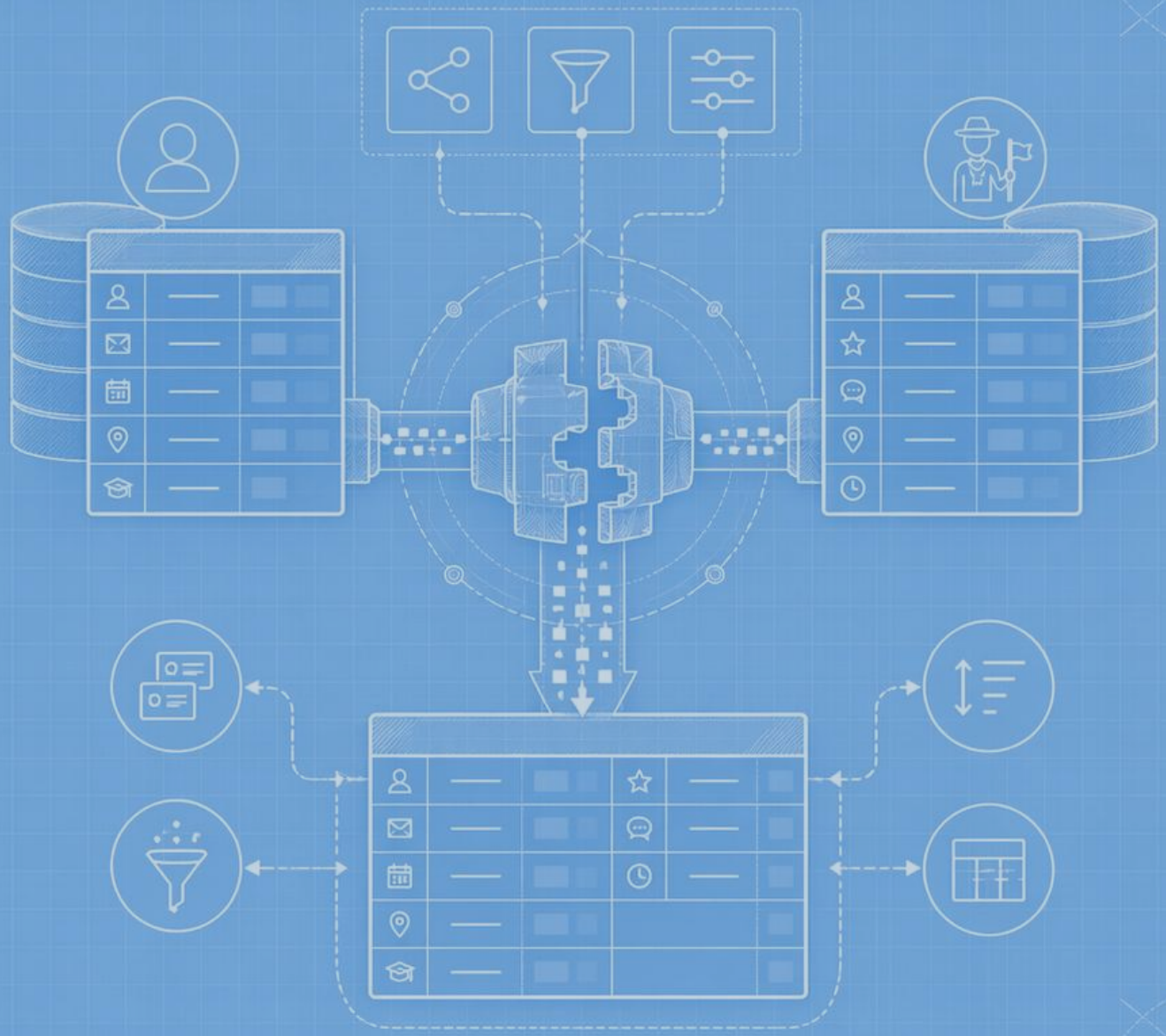
Scope ▲	Category/Tab	Name	Prompt	ID
Student Workers		Club Sports	stu_club_sports	stu_club_sports
Student Workers		Advice to Prospective Students		stu_advice
Student Workers		Scholar Program	special_program	stu_special_program
Student Workers		First Name		stu_first_name

Tour Guide Dataset

- Added as Related Record to Events
- Can add multiple Related Records but not currently able to rank/order them
- Related Records bridge the Visitor to the story we will create for them

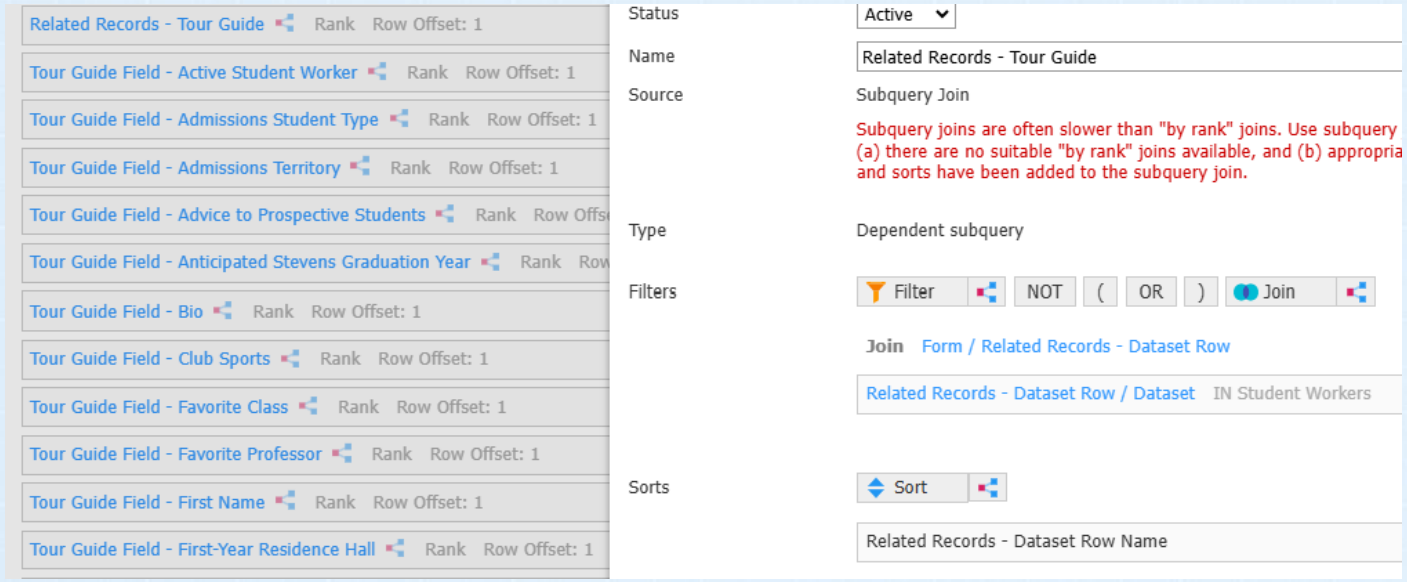


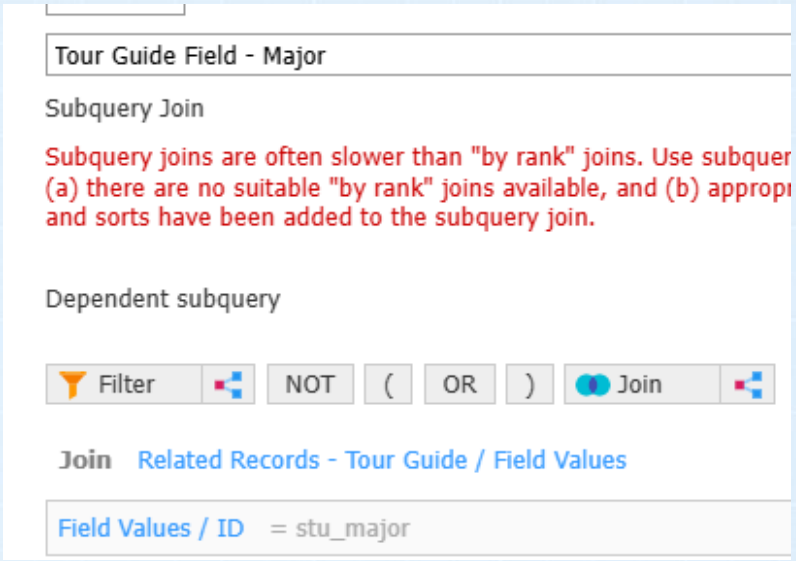
Configurable Joins



Configurable Joins

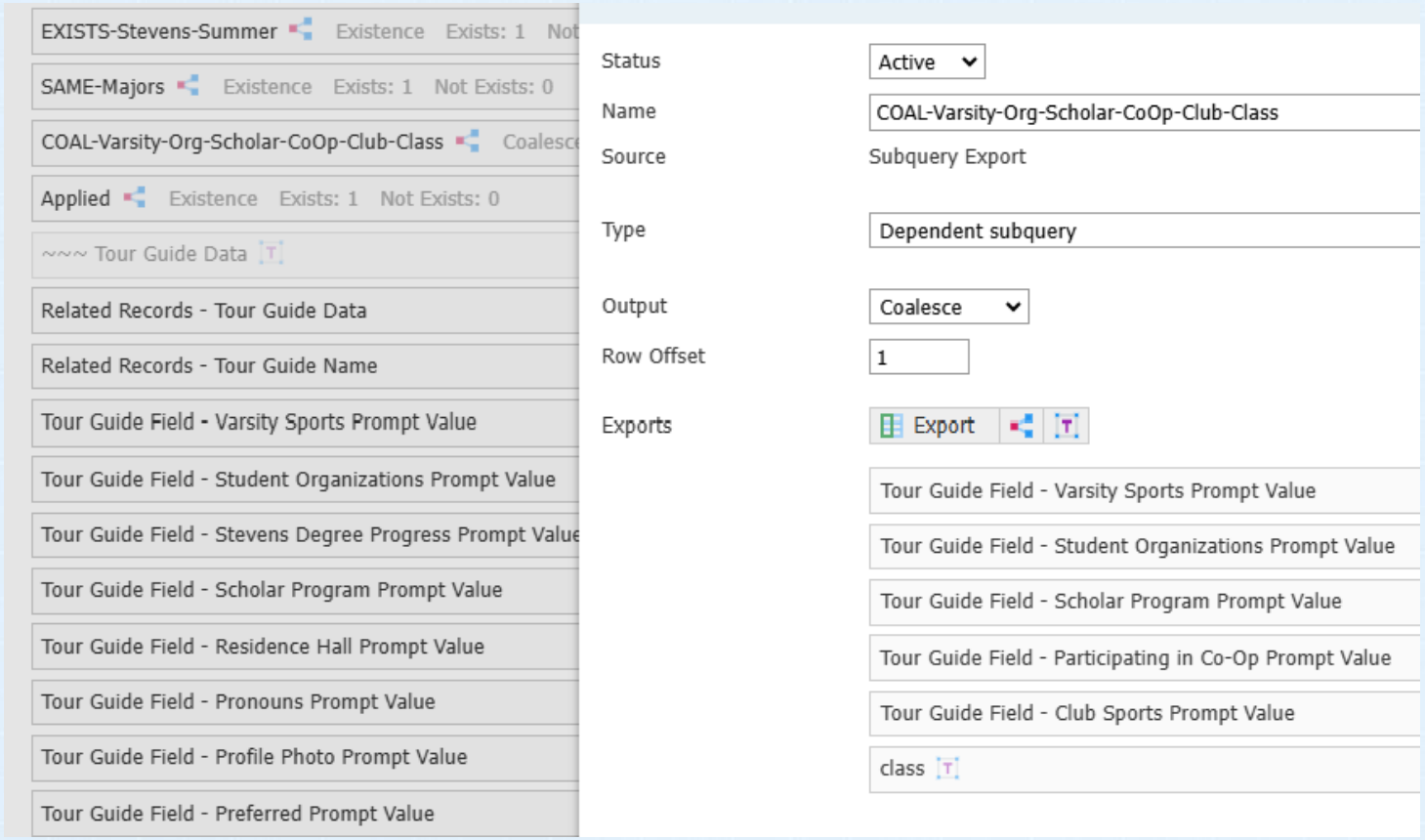
- Can send as Event Template or standalone Deliver
- Join from Form Response to Form to Related Record
- Each field requires an additional Join



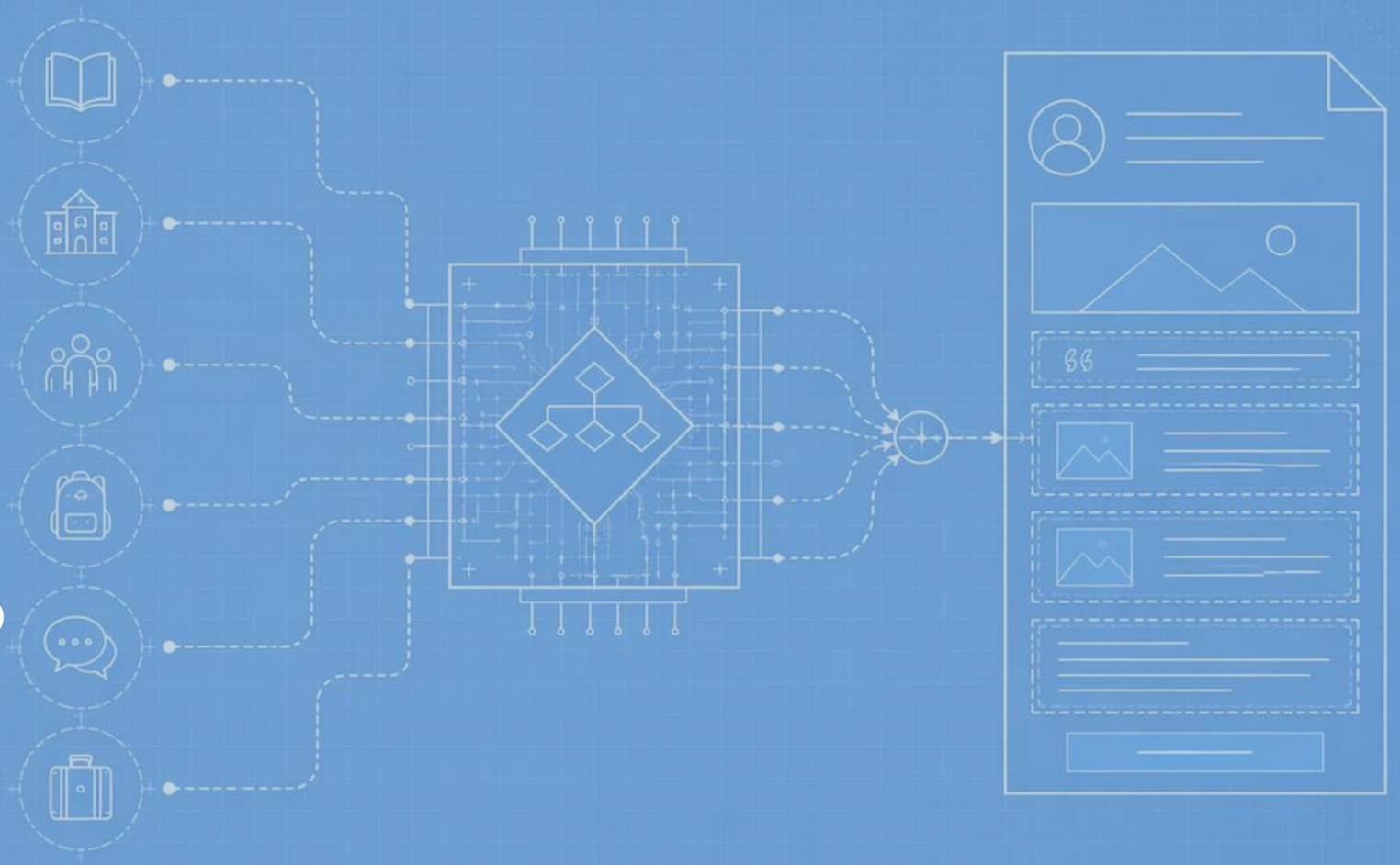


Configurable Joins

- We Export each field
- And Coalesce some fields to reference the most relevant topic



Conditional Logic and Merge Fields



Conditional Logic and Merge Fields

- Each email uses Conditional Logic and Merge Fields to create a conversational and tailored email
- Connect on shared data (major, pre-college, geography) or share personal experience and advice
- Below is the staff view and student-facing versions when Majors do and don't match

It was so great meeting you on the tour today. I really enjoyed talking about {{Tour-Guide-Field---Major-Prompt-Value}}. {% if {{SAME-Major…

I remember being in your shoes, trying to picture what studying {{Person-Academic-Interest-1}} here would actually feel like. Spoiler: it's even better than I imagined. The professors are awesome, and there's always something happening in {{COAL-Varsity-Org-Scholar-CoOp-Club-Class}}. {% else %}

Even though I'm majoring in {{Tour-Guide-Field---Major-Prompt-Value}} I get to collaborate with {{Person-Academic-Interest-1}} students all the time. One of the best things about Stevens is how connected everything is. {% endif %} {% if {{EXISTS-Stev…

It was so great meeting you on the tour today. I really enjoyed talking about Cybersecurity.

I remember being in your shoes, trying to picture what studying Cybersecurity here would actually feel like. Spoiler: it's even better than I imagined. The professors are awesome, and there's always something happening in Stevens Trivia Club.

It was so great meeting you on the tour today. I really enjoyed talking about Cybersecurity.

Even though I'm majoring in Cybersecurity I get to collaborate with Economics students all the time. One of the best things about Stevens is how connected everything is.

Anyway, I just wanted to say thanks again for coming. If you have any questions about classes, dorm life (Castle Point Hall is where I live!), or even the best place to get coffee between lectures, hit reply. I'd be happy to help.

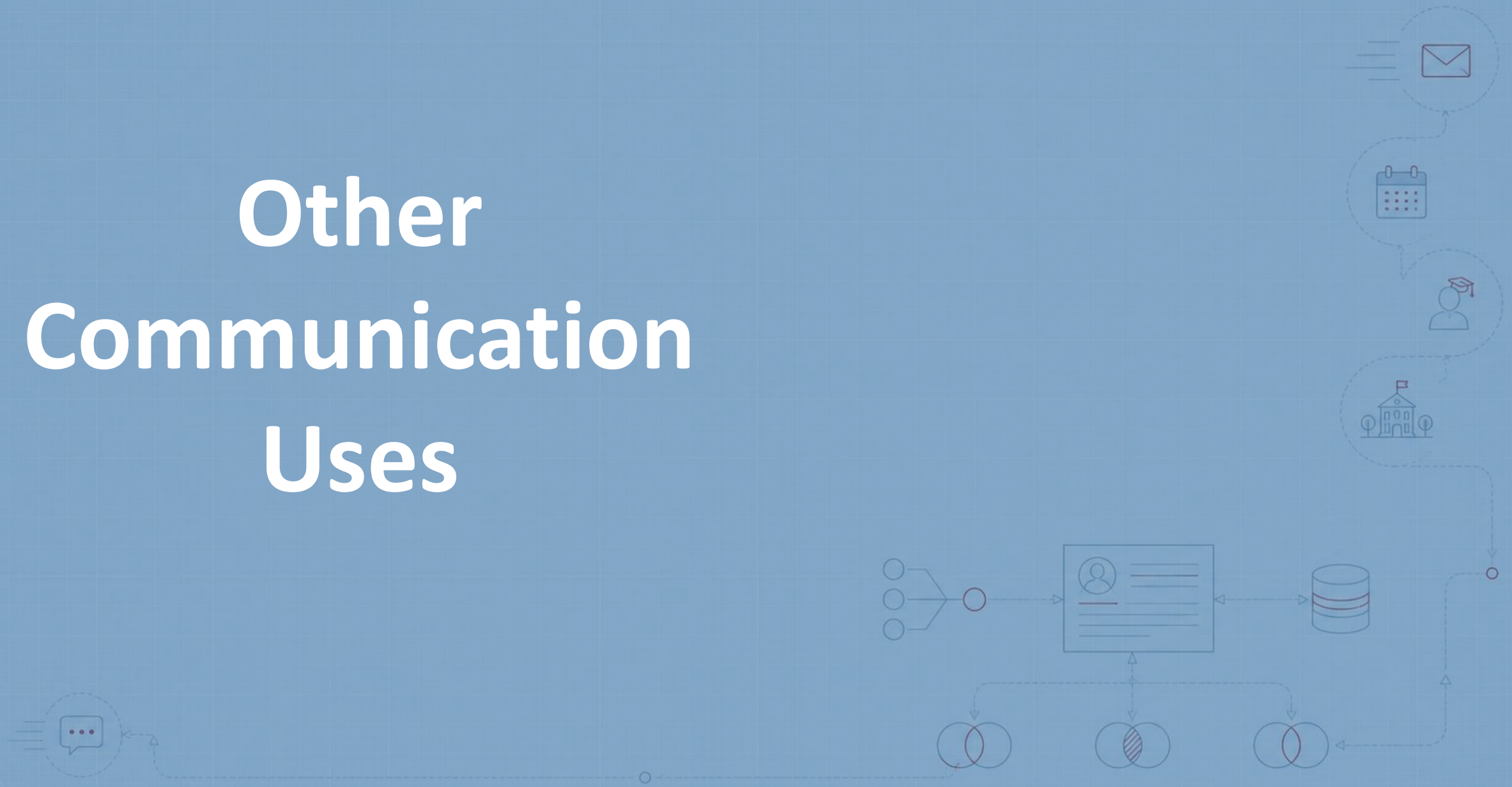
Communication Strategy



Communication Strategy

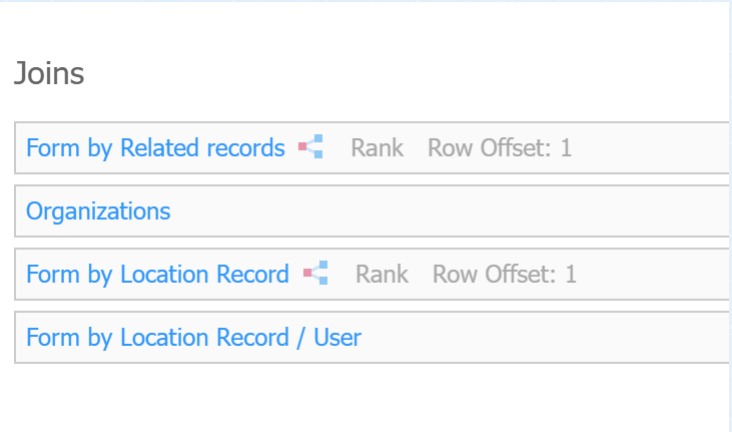
- Email 1 - Thanks and shared context
  - Uses shared major logic, pre-college, residence hall, etc.
- Email 2 - Academic proof and next step
  - What I wish someone told me before I applied…””
  - Favorite class, favorite professor, etc. and CTA
- Email 3 – Check-in and invite a reply
  - "How is your college search going?"
  - Uses involvement coalesce plus a simple invitation
  - Dynamic CTAs (P.S. start your app, submit deposit, etc.)

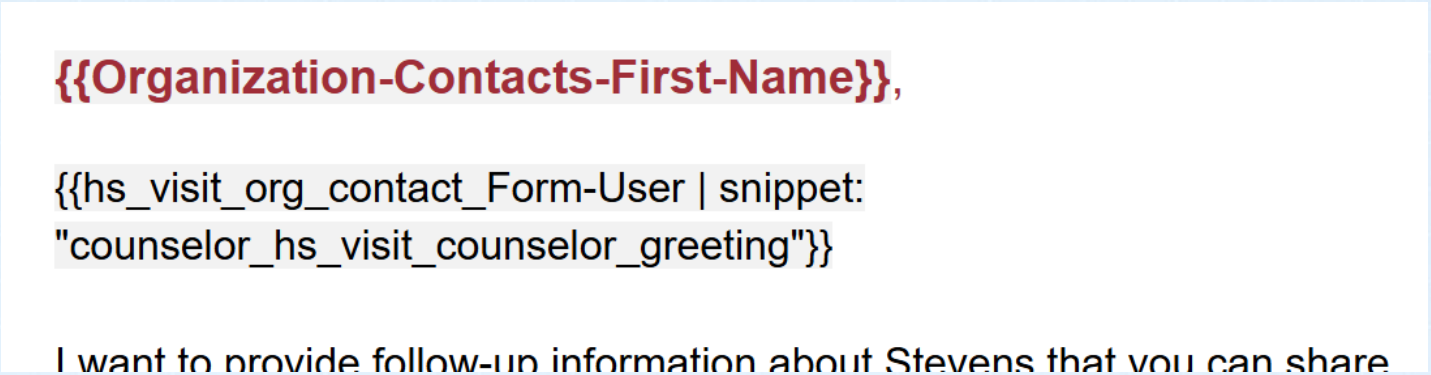
Other Communication Uses



Other Uses – High School Visit (to Counselor)

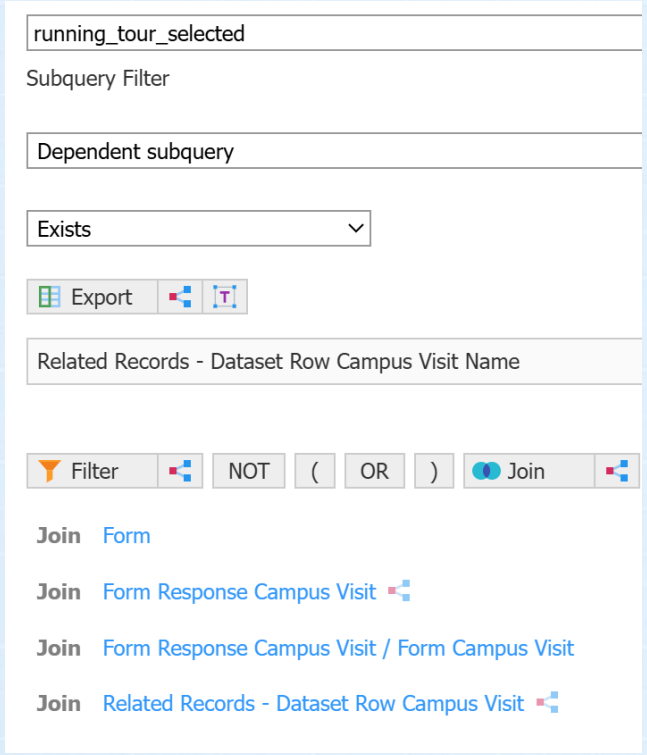
- Emailing the High School Counselor after a visit
- To the actual person talked to, not the coordinator
- Tailored Content Blocks from staff (User 1)



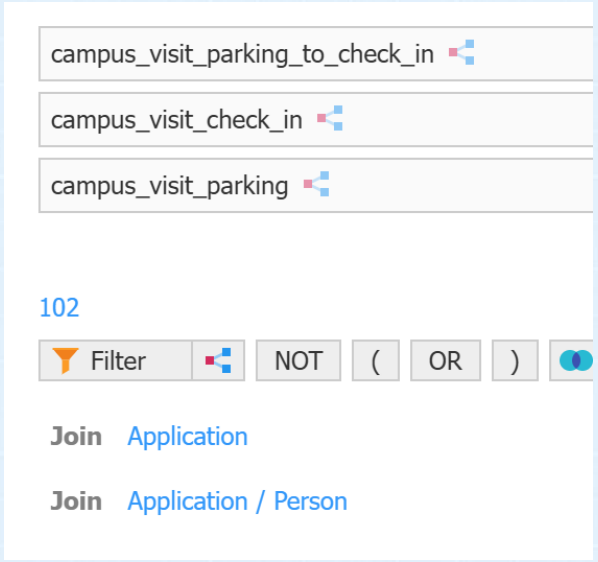


Other Uses – Template Communications

- Umbrella Events with Related Events
- Send only when Related Events have certain Related Records
- Tailored text (parking, check-in, weather, etc.)



Check-In Location: {{campus_visit_check_in | snippet: "event_details"}}
Parking: {{campus_visit_parking | snippet: "event_details"}}
{{campus_visit_parking_to_check_in | snippet: "event_details"}}



Takeaways

With David



Takeaways

- Create a Tour Guide Dataset
  - Add interesting fields
  - Collect responses from students with a Form
- Add to Events with related Records or match for standalone emails with data (major, geo, etc.)
- Build the Email and Rec Lists (with LOTS of Joins)
- Write modular chunks of text that flow well
- This process is a logic layer, not data storage

Suitcases and Resources

Deliver Suitcase

Powerpoint

Video Walkthrough of building Related Record projects (Tour Guide Autoresponder, HS Visit Email, and Dynamic Template Communications)

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