

Thriving in  
Change and  
Complexity

Rising to the challenge in  
Continuing Education

CAUCE CONFERENCE 2026  
HALIFAX | MAY 13-15

# CAUCE 2026

Halifax, Nova Scotia · May 13 - 15



# From Engagement to Enrolment

Outbound campaigns  
that work



Continuing  
Education



Rising to the challenge in  
Continuing Education

CAUCE CONFERENCE 2026  
HALIFAX | MAY 13-15

- Monica Bilan – Student Information Services Team Lead
- May 14, 2026



## Land Acknowledgement

Dalhousie University operates in the unceded territories of the Mi'kmaw, Wolastoqey (WOO-LUSS-TOOK-OH-WAY), and Peskotomuhkati (BESS-GO-DUE-MO-GUDD-EE) Peoples. These sovereign nations hold inherent rights as the original peoples of these lands, and we each carry collective obligations under the Peace and Friendship Treaties. Section 35 of the Constitution Act, 1982 recognizes and affirms Aboriginal and Treaty rights in Canada.

# From Engagement to Enrolment

## Agenda

- **Challenge:** High interest, low conversion
- **Insight:** Prospects need more support
- **Shift:** Targeted outreach
- **Model:** Outbound booking campaign
- **Experience:** Human connection
- **Results:** Key success factors
- Reflection questions
- Key takeaways
- Q&A





# The challenge

High interest, low conversion

- High engagement with email activity
- Prospects exploring—but not enrolling
- Digital fatigue

**We asked:**

Where are we losing high-intent learners?

# The insight: Prospects need more support

Engagement does not equal confidence

Clear guidance,  
personalized support,  
and meaningful  
connection empower  
learners to take the  
next step.

## Clarity

Understand program options, requirements, fees, time commitment and processes

## Confidence

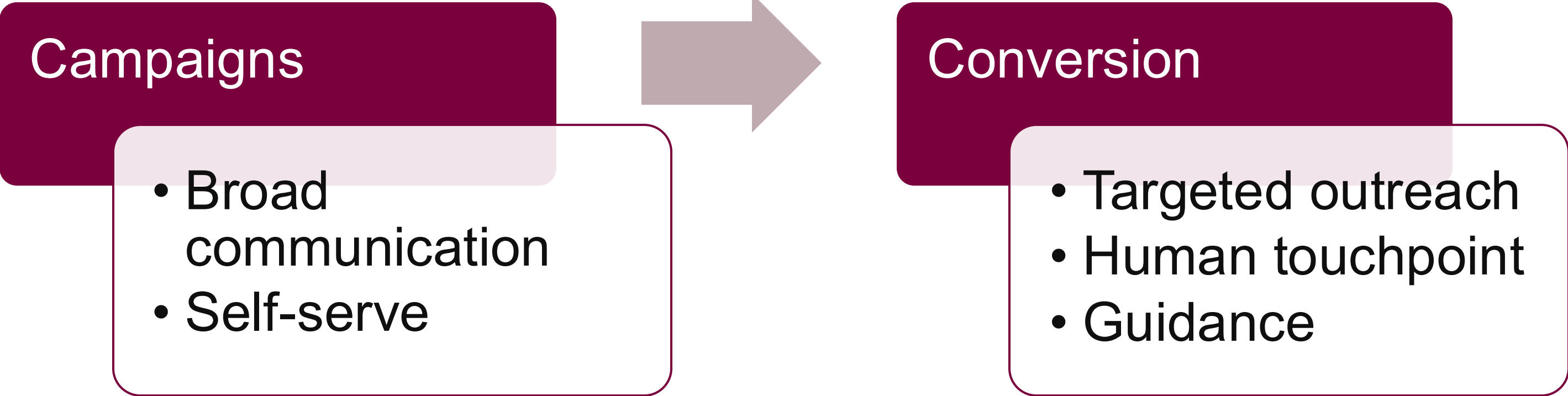
Feel prepared to start and succeed  
(e.g., finances, technology, career path)

## Connection

Cultivate support and engagement –  
personalized guidance, acknowledgement  
and reassurance

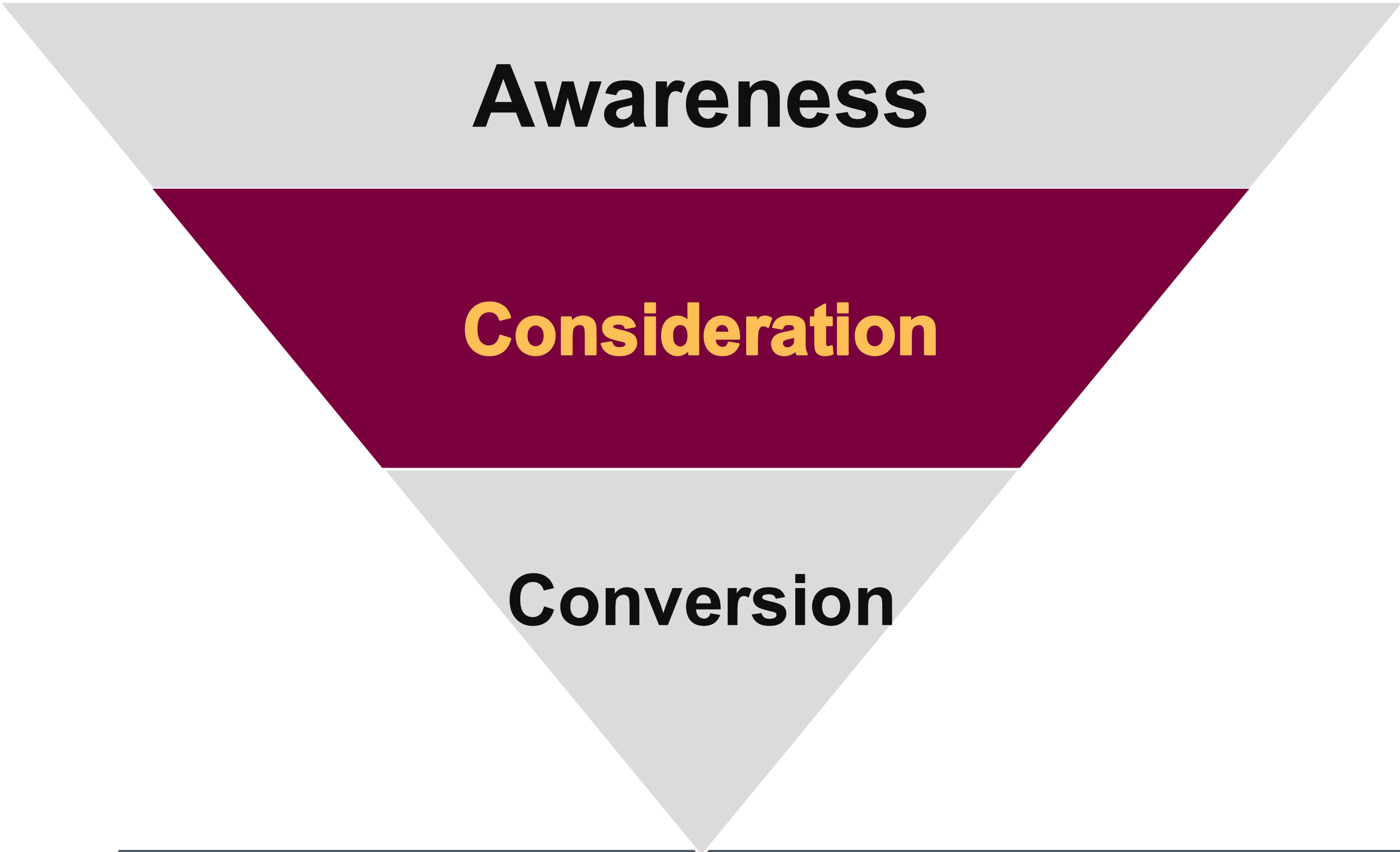
# The shift: Incorporating targeted outreach

From marketing to personalized support



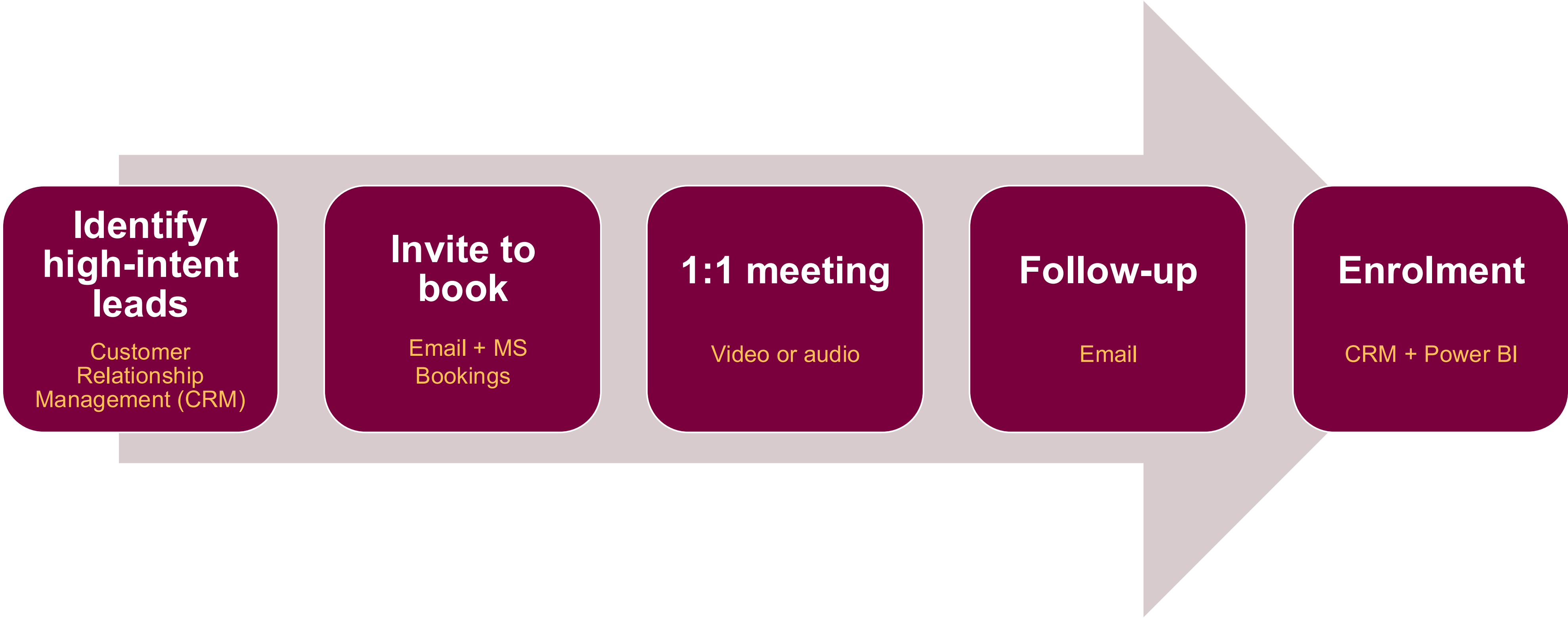
# Cross-functional collaboration

Driving conversion together through the marketing funnel



# The model: Outbound booking campaign

Targeted outreach



# MCE's Outbound Campaign

## Overview

- Piloted over a **2-year period**: 2024/25
- Campaign deployed every term (Fall, Winter, Spring/Summer)
- Three weeks of bookings per term
- Refined the leads targeted through the campaign by **program of interest** to focus on programs with low enrolments
- Each campaign targeted approximately 2000 contacts, with the Pilot launch targeting a **1.5% appointment booking rate**



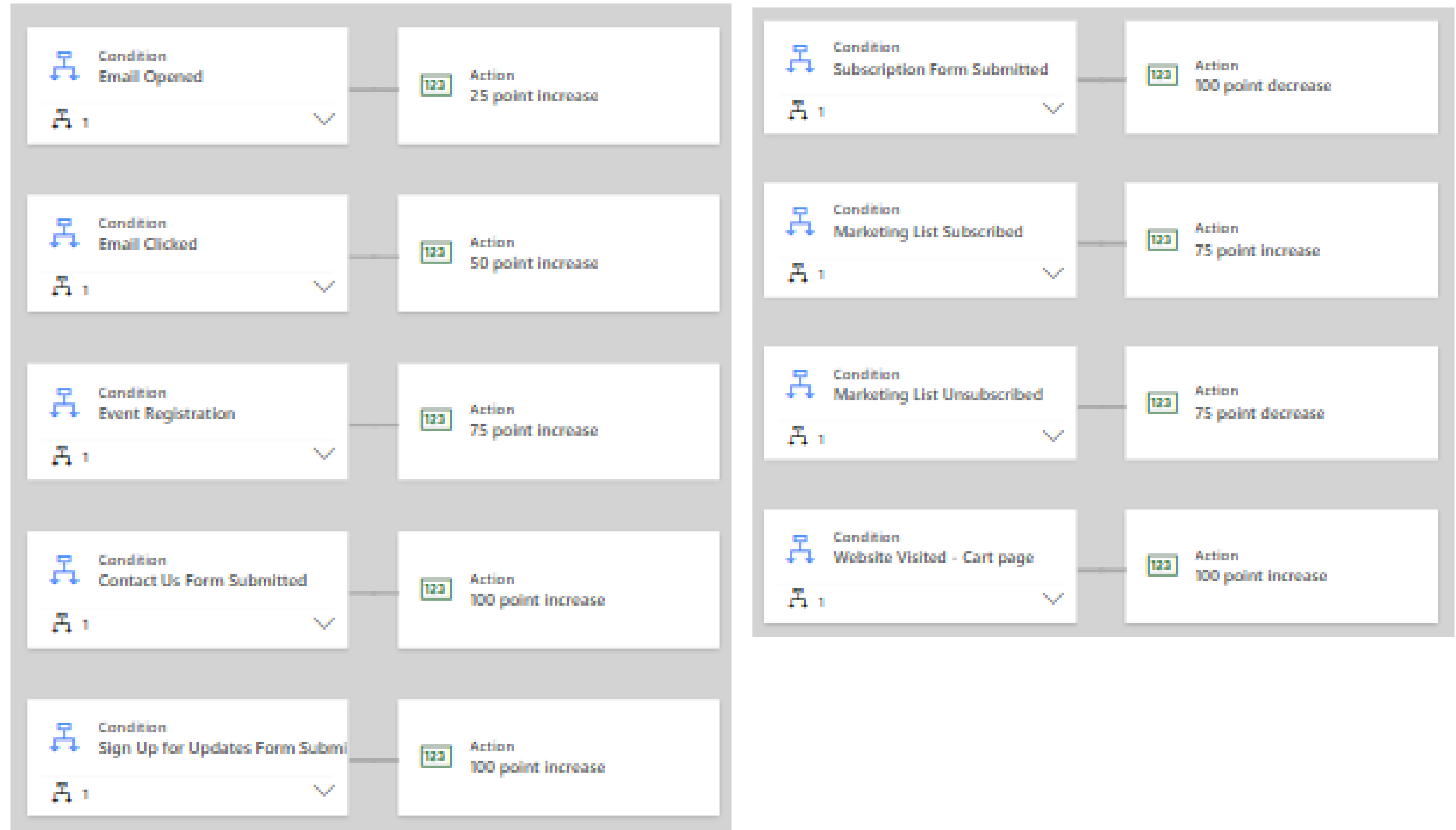
# How “hot leads” were identified

## Intent-based segmentation

### Key Signals

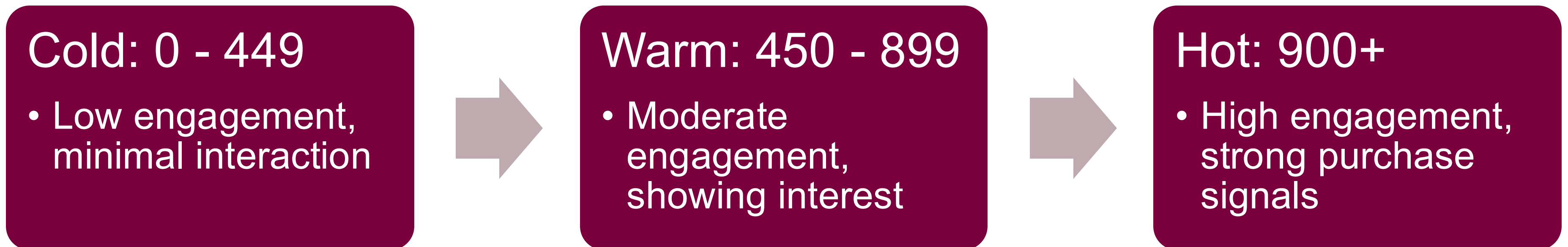
- Email opens/clicks
- Event registrations
- Website activity
- Inquiry forms
- Subscriptions

Supported by the  
Marketing team



# Lead scoring model

## MCE's scoring ranges



# How to determine a lead scoring model

## Not a one-size-fits-all model

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### 1. Define your goal

- Decide what a "qualified lead" means - for MCE, this is a contact who is likely to enrol

### 2. Identify key behaviours

- List engagement signals: email opens, event attendance, website visits, form submissions, etc.

### 3. Assign point values

- Score each action by predictive strength; high intent actions score more than passive actions

### 4. Set score thresholds

- Define cold, warm, and hot tiers; base thresholds on realistic engagement patterns from your data

### 5. Test, measure and refine

- Adjust point values and thresholds based on real results.

# The experience: Human connection

Building trust, guiding decisions



Student Information Specialists (SIS)

## Bookings page

Short, flexible, and easy-to-book appointments removed hidden barriers

## Pre-screening

SIS pre-screen intake questions prior to meeting

Clarifying questions were asked in advance if the purpose of meeting was unclear

## 1-1 Meeting

Video or phone (prospect preference)

20 minutes

## Follow-up

SIS and prospect determine next steps

Follow-up email sent as needed

# Continuous improvement

Debrief, reflect, optimize

Refining the process led to more productive meetings



## New intake questions

- Simple yet direct questions
- Pre-screening for intent
- 59% → **67% appropriate bookings**



## Reminder emails

- Before booking: Email to secure more bookings
- After booking: Email to remind people of their upcoming meeting



## Post-meeting follow-up

- Personalized summary email with next steps
- Developed a **survey** for quality assurance purposes

# Bookings page

## Intake questions



### Provide additional information

What are you looking to gain from this meeting?

Please indicate which program(s) you are interested in discussing.

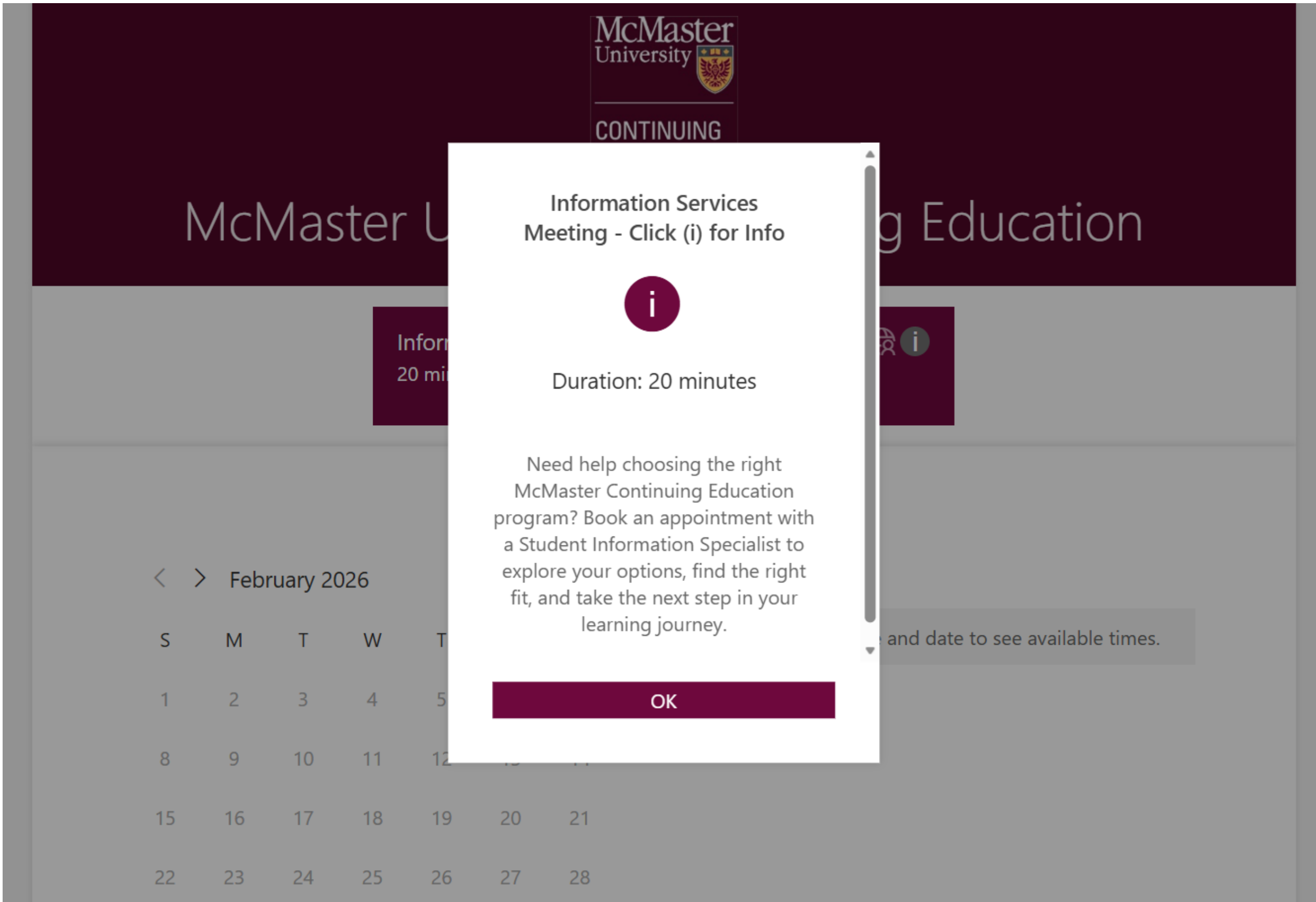
Based on your current schedule, how much time (hours) per week could you set aside for your studies? (optional)

What is your contact preference?

Book

# Bookings page

## Pop-up description



# Email invitation

## Sample

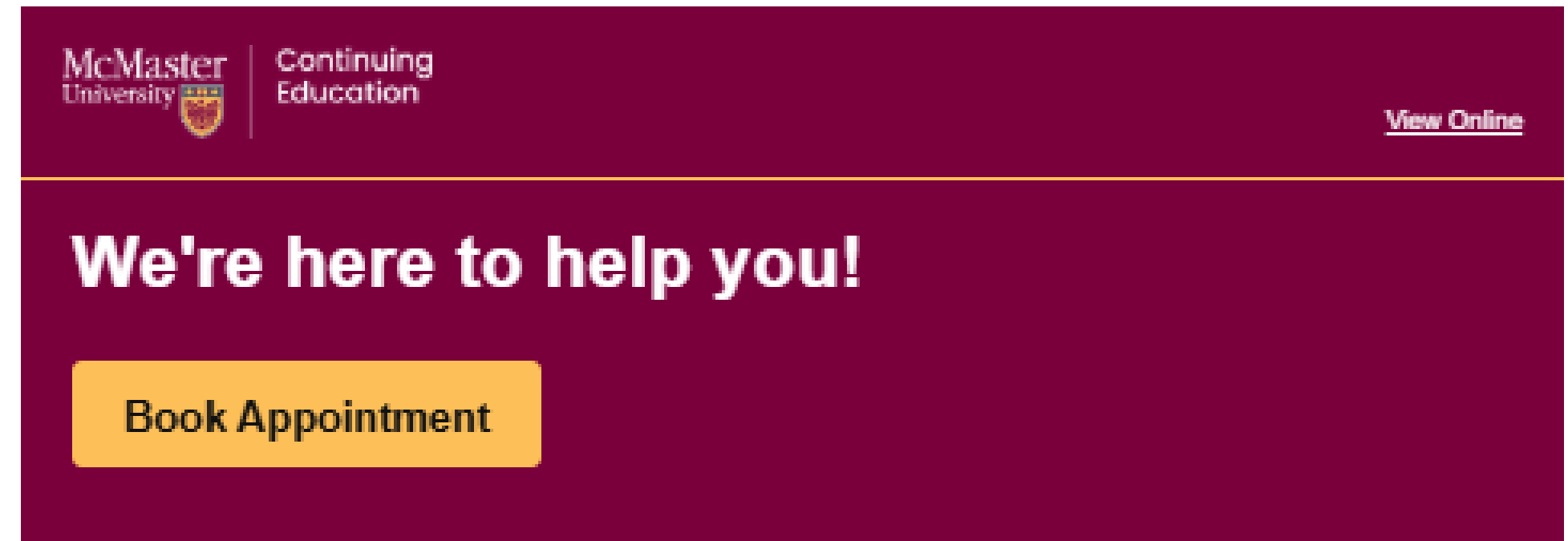


### Subject line

Book an appointment with a Student Information Specialist

### Pre-header text

Get guidance on choosing the right program for your learning goals



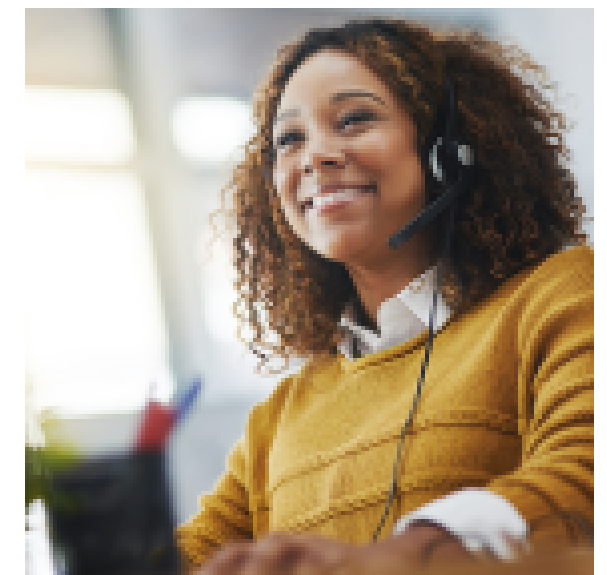
Hi **{{contact.firstname}}**,

Do you need help choosing a continuing education program that suits your goals? Our team is here for you.

Connect with us during our virtual office hours every Wednesday and Thursday from July 23 - August 7, 2025.

**Book your appointment** with one of our specialists to discuss your goals, pick the right program, and start your learning journey to fast-track your career.

**Book Appointment**



# Post-meeting follow-up email

## Email template sample

“It was a pleasure chatting with you today about ---.

As discussed, -----

Below, I have shared some additional links/resources that you may want to review and bookmark for future reference:



- [Student Journey/Getting Started](#)
- [Course Outlines](#)
- [Support Services](#)

If you found our conversation today helpful, please take a moment to complete this short survey about your booking and student service experience: <https://forms.office.com/r/s99gmyiSyp>”

# Post-meeting survey

Link shared in follow-up email



McMaster University | CONTINUING EDUCATION

## How was your recent chat with a Student Information Specialist?

Your feedback is important to us! Please take a few moments to share your thoughts on your recent interaction with a McMaster Continuing Education Student Information Specialist. This will help us as we strive to improve the student services experience for prospective students.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

\* Required

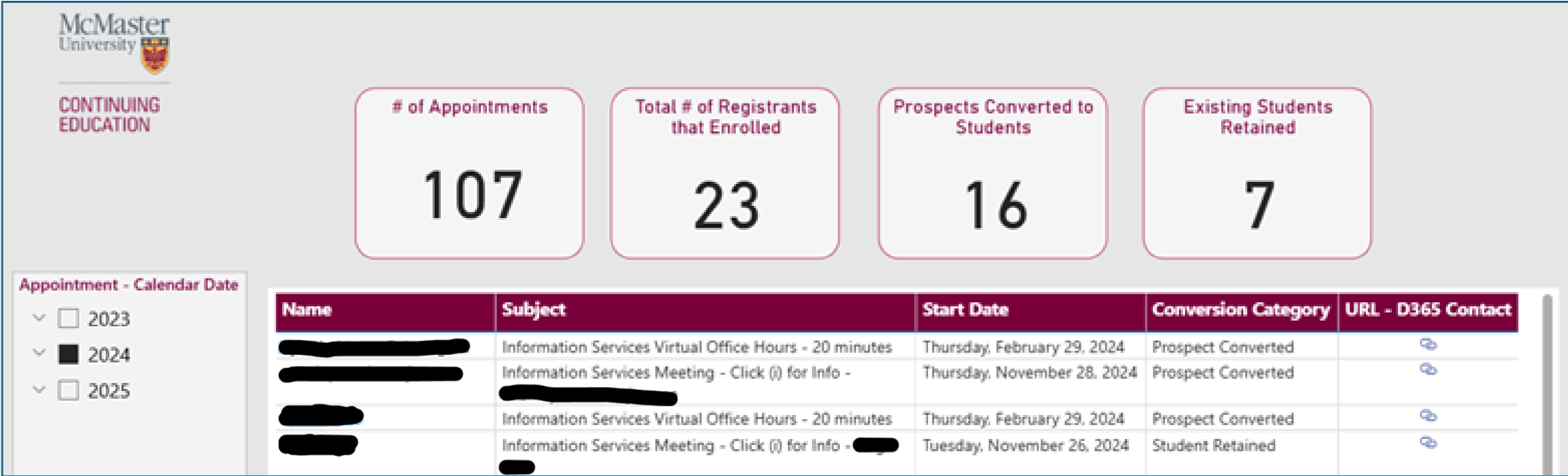
1. Was your meeting with the Student Information Specialist helpful? \*

Yes

No

# Power BI conversion data

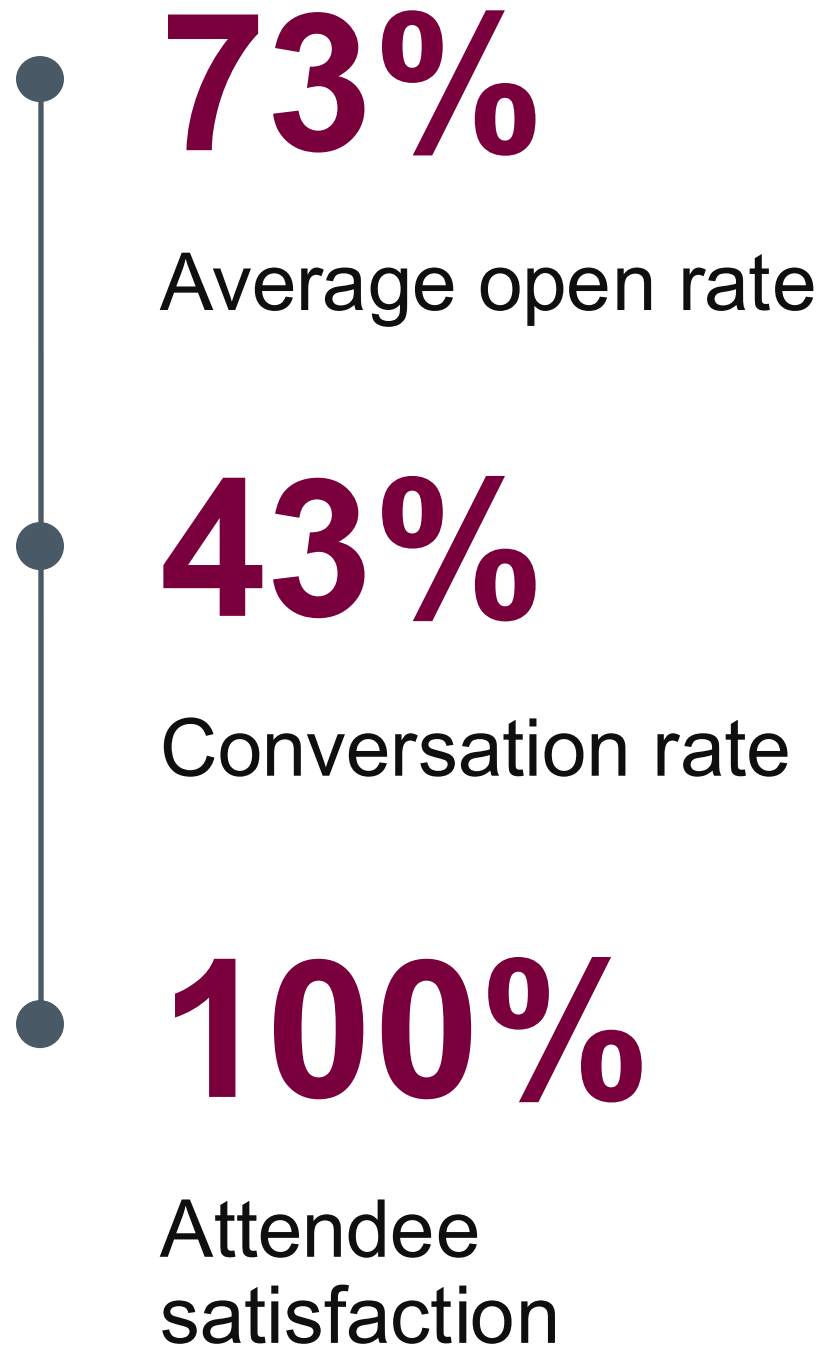
## Sample 2024 data



# Results that matter

## From engagement to enrolment

Through continuous improvements, booking volume increased and conversations became more applicable and productive.



# Beyond the numbers

## Key success factors



**Human-centered engagement** → elevated learner experience



**Equity & access** → reducing barriers to enrolment



**Cross-functional collaboration** → shared goals, new strategies



**Targeted outreach** → intent-focused engagement



**Data-informed approach** → continuous improvement



**Scalable design** → high impact, low cost

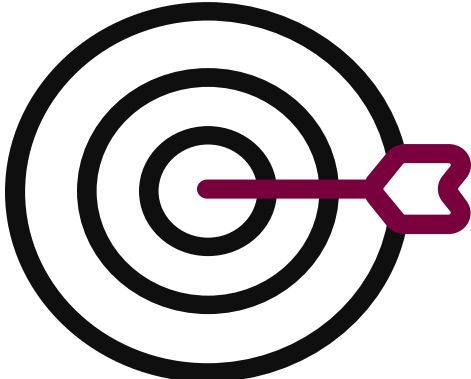
# Reflection

Questions to ask your team:

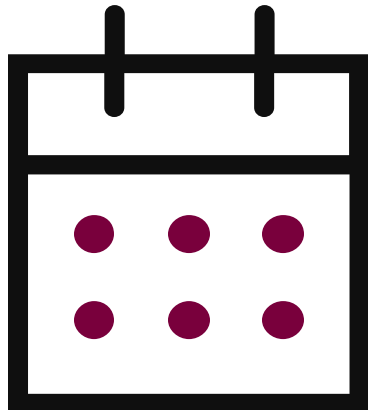
1. Where are your high-intent prospects dropping off?
2. What barriers prevent enrolment?
3. Where could a human connection make the difference?

# Key takeaway 1: Practical framework

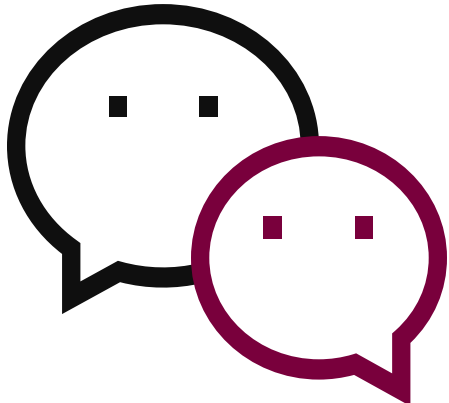
Benefits for engagement and retention



**Identify**



**Invite**



**Connect**



**Support**



**Convert**

# Key takeaway 2: Targeted outreach

Bridging digital engagement with human decision-making

In a complex, digital-first environment, the institutions that will stand out are not the ones who communicate more - they are the ones who connect better.



# Thank you!

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- May 14, 2026



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