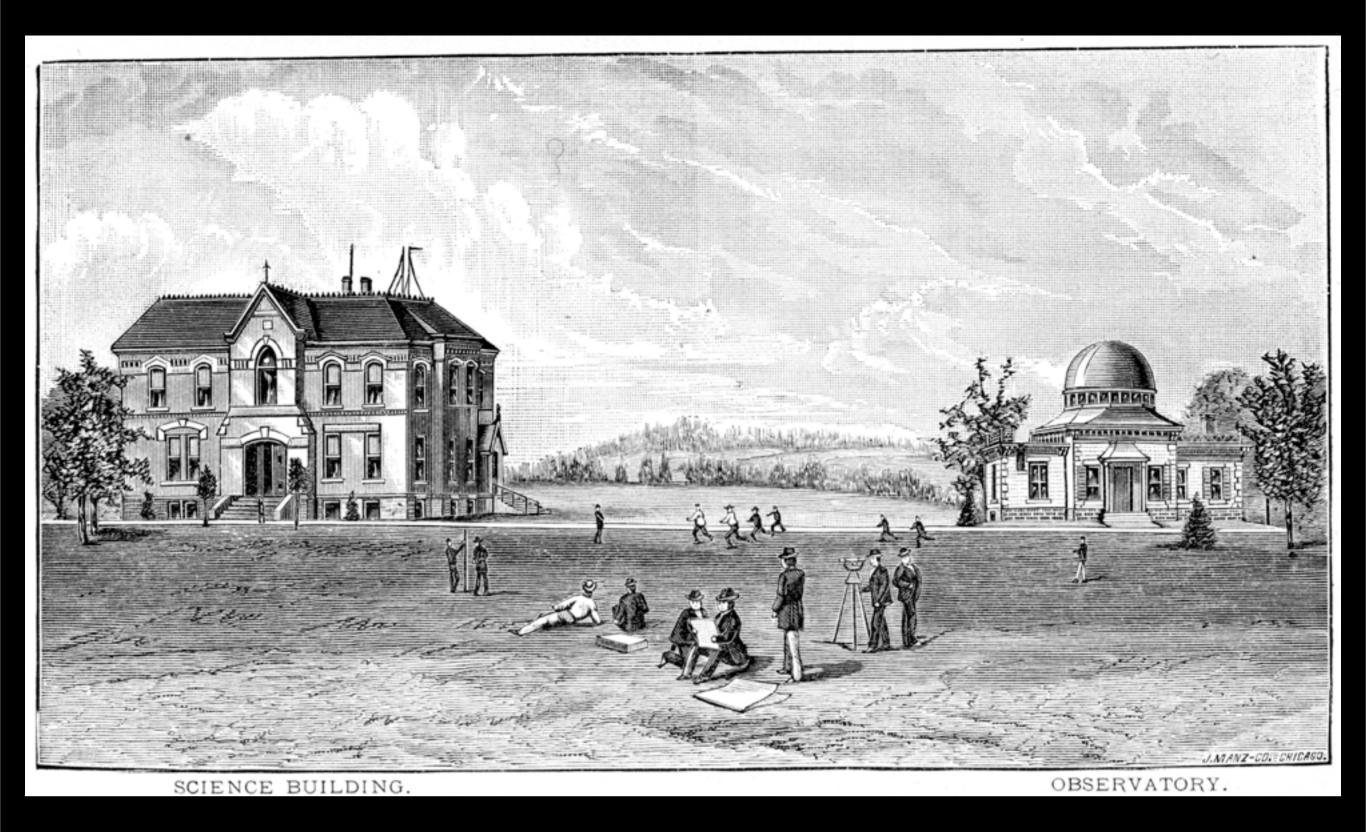


Good morning, my name is Mark Heiman. I'm the Senior Web Application Developer at Carleton College in Northfield, MN.



Carleton College is one of the nation's top liberal arts colleges. We have about 2000 students huddled for warmth out on the lovely Minnesota prairie.

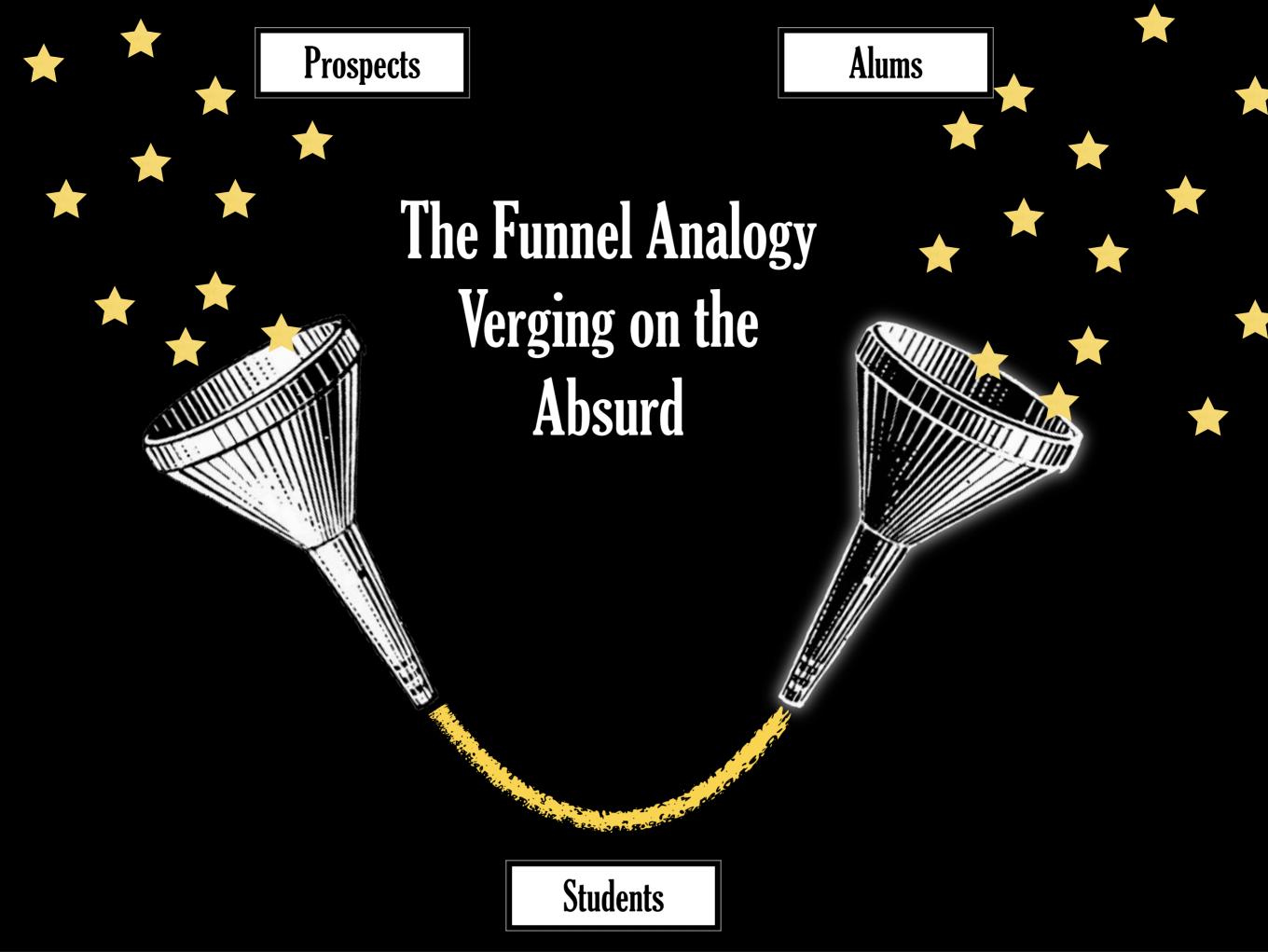
But it's not students that we're here to talk about today. We're here to talk about that fine beast that marches out of our institutions to the tune of Pomp and Circumstance: The alum.

So why am I here talking alumni?

Well, it's partly because Brian and Michelle really like having me in this track to make the other presenters look sane.

But mainly it's because we're doing really badly by our alums. And by we, I mean Carleton College, and I mean higher ed as a whole. Considering who it is who writes a lot the checks that keep us in business, the state of our alumni sites is tragic, particularly when compared with what we offer to prospects and current students.

And why is that? Honestly, because it's hard.



Prospects are tricky, but ultimately they have one goal -- to figure out if you're the one true school for them. You just have to woo them. The closer they get, the narrower their needs become -- how do I apply, am I in, am I out -- and at the end of that funnel they're all lined up and pointed in the same direction.

Students are even easier — they have discreet needs (where are my classes? Where is the beer?) and you know everything about them, in aggregate and as individuals, and they typically spend a lot of time logged into your network, so you can tailor their online experience as precisely as you have the time and technology to manage.

You may have seen the admissions funnel in presentations before, but did you ever think about the fact that your alumni are in the anti-funnel? As soon as they cross that stage gripping a diploma, they're off in as many directions as there are graduates (except those two, who were married the day after commencement).

But unlike prospects, they're not converging on anything.



They're diverging. They're scattering, and if the gravitational mass of their college experience wasn't sufficient to counteract their escape velocity, you may never see them again.

And if they do come back, how do we know what they're looking for? Are they looking for a lost roommate? Hoping to hang out with other alums? Wondering when the homecoming game is? Trying to give us money? Looking for a job? Pining for college beer?

And are the answers to those questions going to be they same if they're a recent grad? Someone in mid-career? A retiree? Single? Married? Local? Abroad?

And how do we know who they are anyway, if they just typed the name of the school into Google and clicked on the alumni link that every single one of us has on the home page?

How in the world do we serve that kind of population from an institutional web site? That's hard! And that's part of the reason alumni web sites are so very bad.

We look at all of the possible questions and all of the possible permutations of alum and the natural reaction is just to throw up your hands, post the phone number of the alumni office and call it a day.



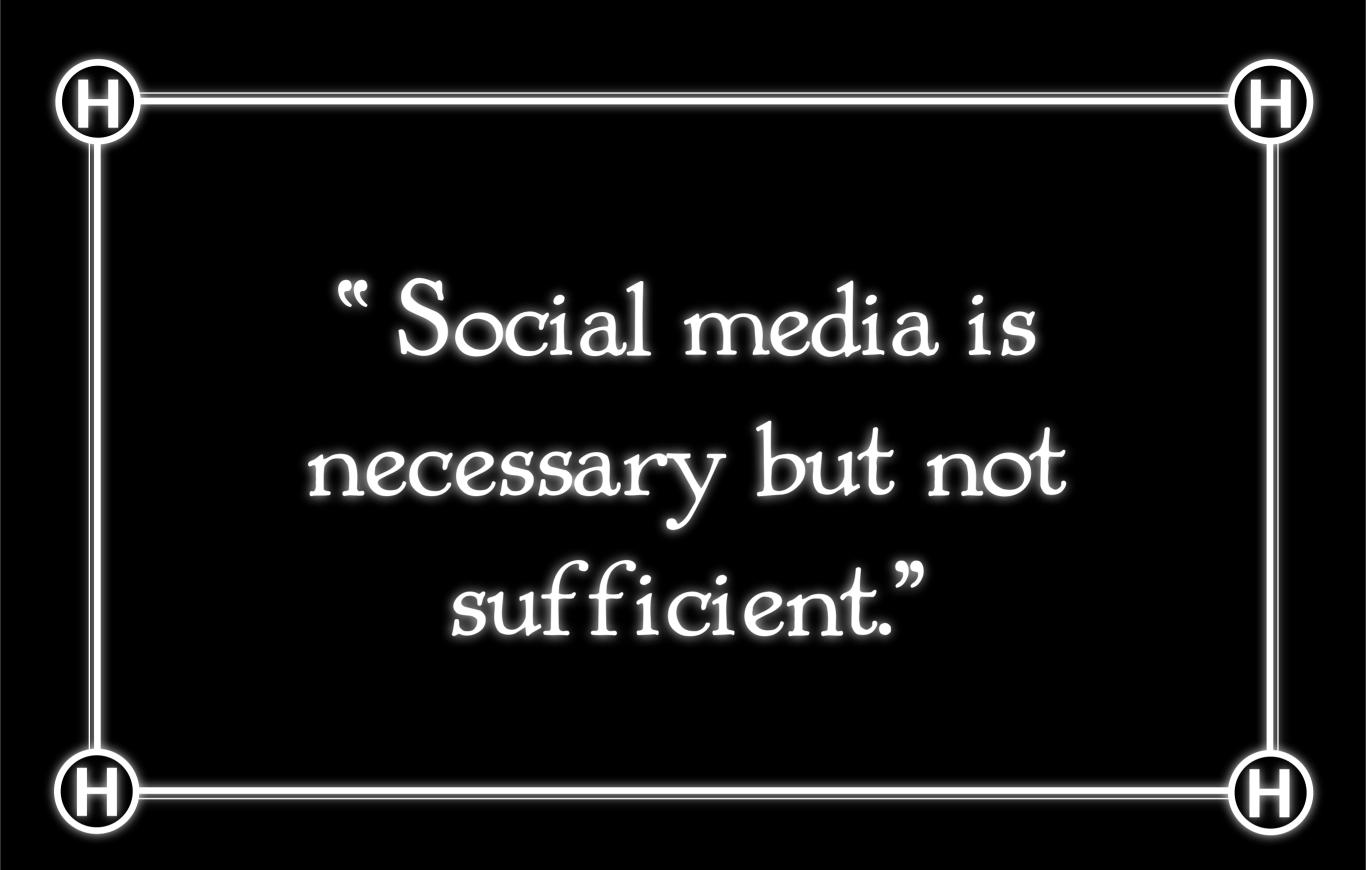
Ok, it's not quite that bad, but it's close sometimes.

So what do we do?

Before I go a step further, let me say this:

You need to engage your alums with social media.

There's no maybe about that. You need to be there. I'm happy to talk about what we're doing in that realm later. But I'm up here right now in the Content track rather than the Social Media track because social media is necessary but not sufficient.



You wouldn't consider outsourcing your admissions or your student web sites to a pure social media solution, and you shouldn't do it for your alums, either (though some people are trying, as we'll see in a bit).

So, social media, and what else?



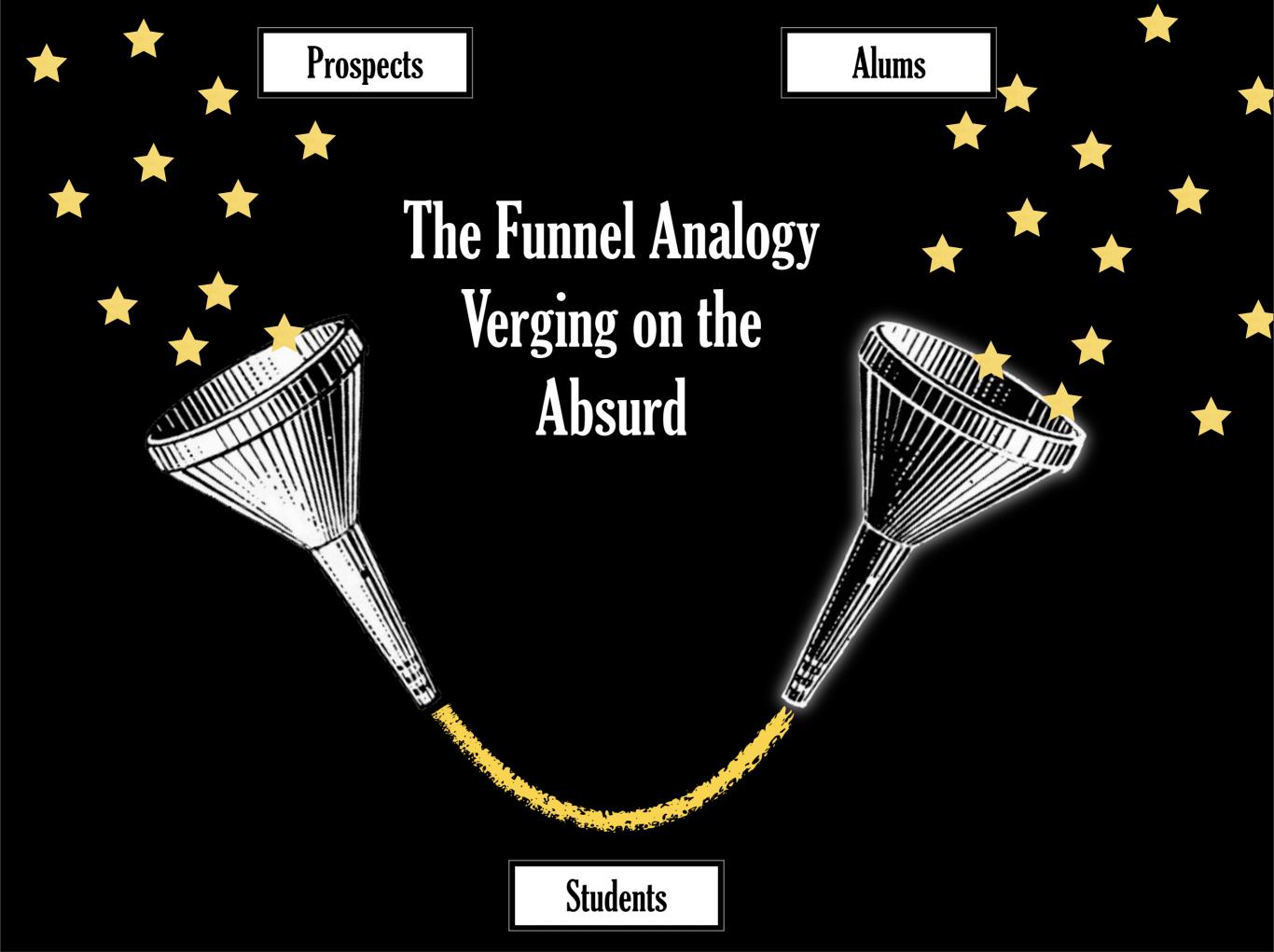
How do you build a web site for folks who've been through the anti-funnel?

Let's start here: What do you need to know about an alum visitor in order to give them what they need?

Two things: Who are you, and what do you want?

That _seems_ simple enough, except that we don't know who they are or what they want, and the answer to the first will probably affect the response we give to the second.

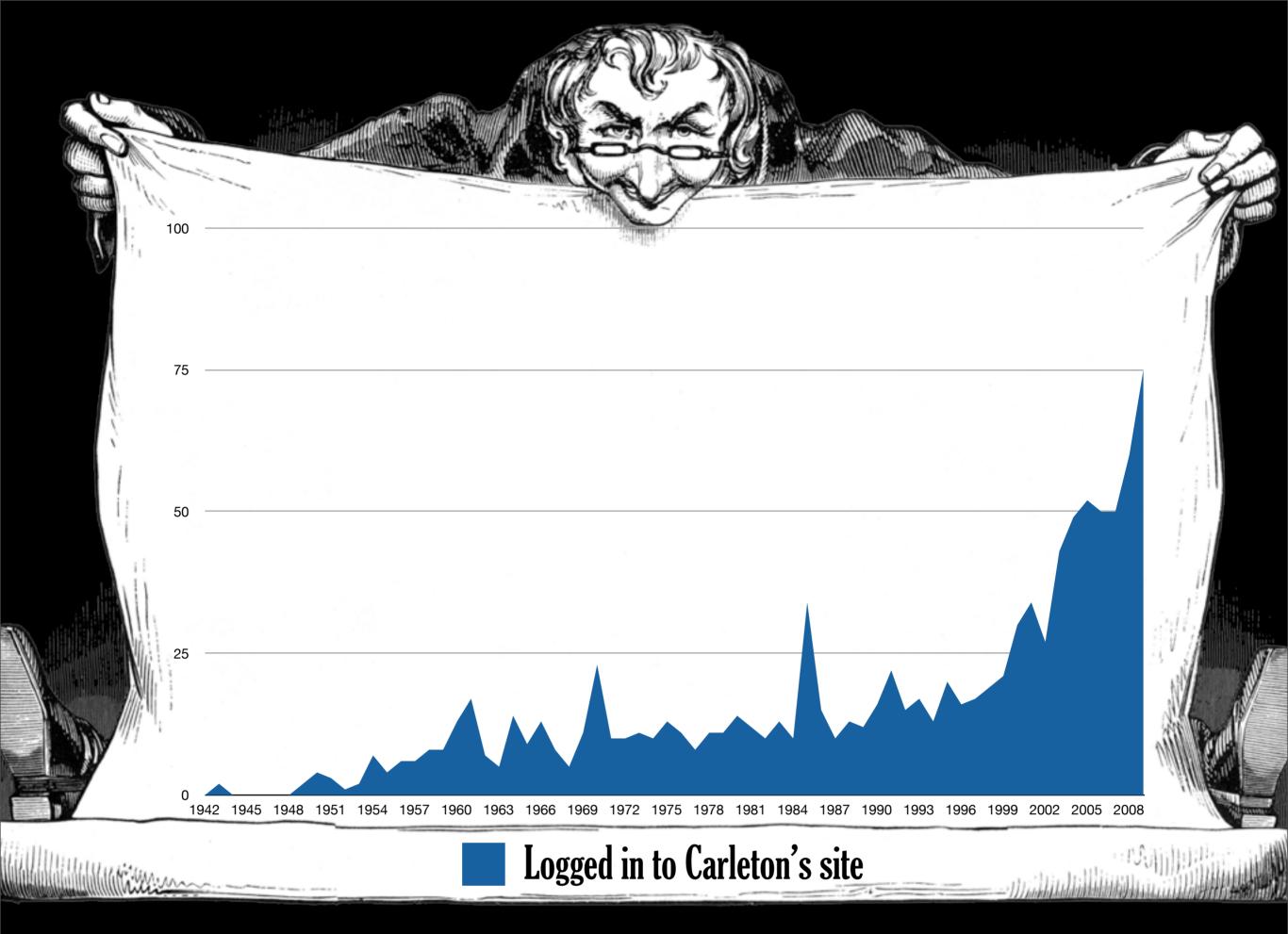
Let's take these in order. First, Who are you?



If we go back to our funnels, it's clear why this is a problem. With prospects, we start out not knowing who they are (except they're probably high school students interested in college, which narrows it quite a lot), but ultimately they have to identify themselves in order to get beyond the flirting stage of the relationship. Maybe we issue them credentials that they can use to interact in the later stages of the application process — once they're logged in, we know who they are.

Students are even easier. We know exactly who they are, in the aggregate, and we can actually require them to log in for some things. If we make it easy to log in and stay logged in, we can serve them very well across our entire web site.

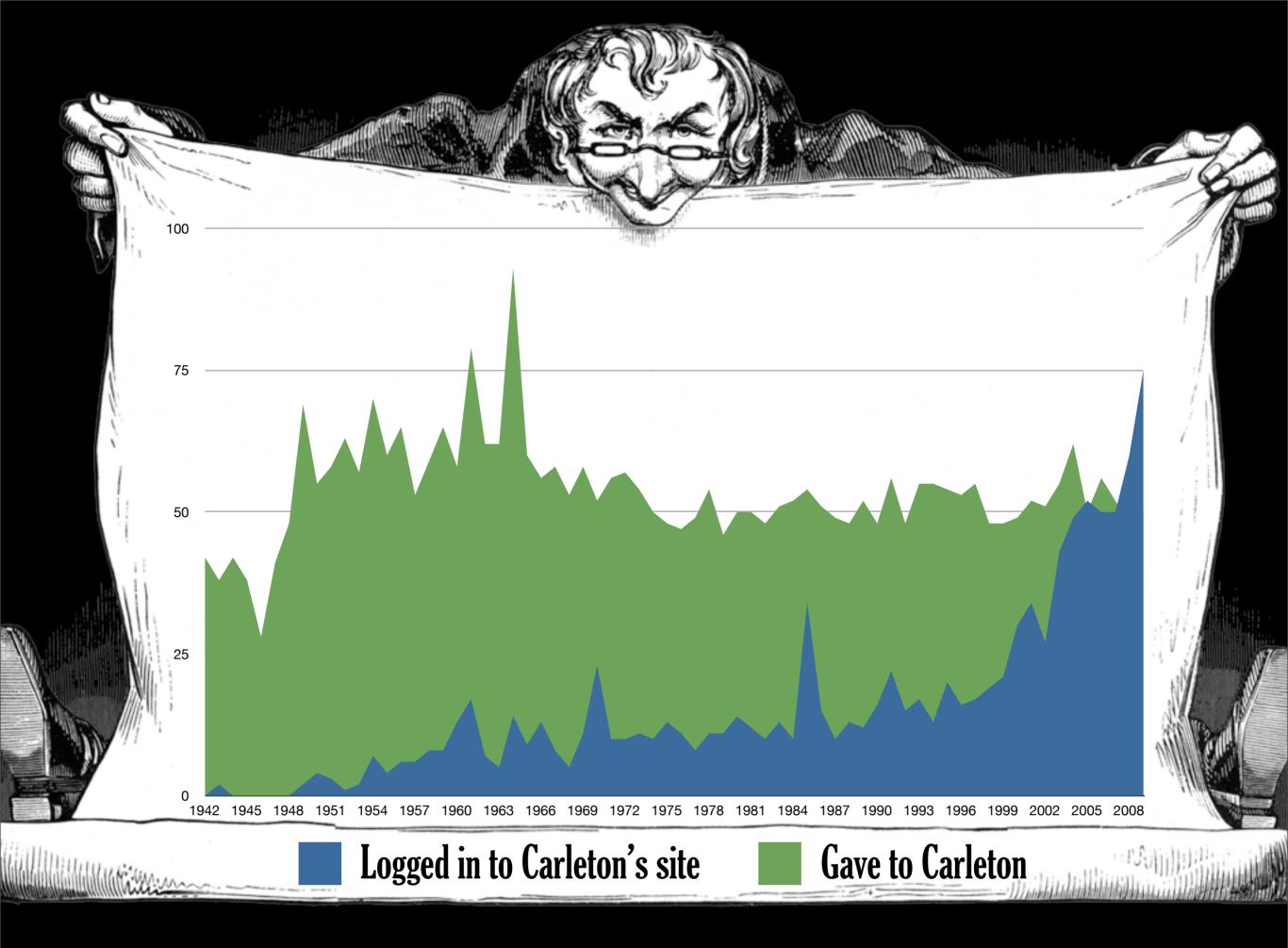
And then we get to the anti-funnel. We can let our recent grads keep their student credentials, and some of them might continue to log in occasionally, but the attrition rate is terrible.



Here's a fabulous chart showing the percentage of Carleton grads who have logged into our web site at least once in the last year. Going back 5 years, we're at a pretty decent 50 percent, but after that... (those spikes are reunion years)

Some of you may be saying -- that's great! I wish we had participation rates like that.

And it is great -- until you see this.



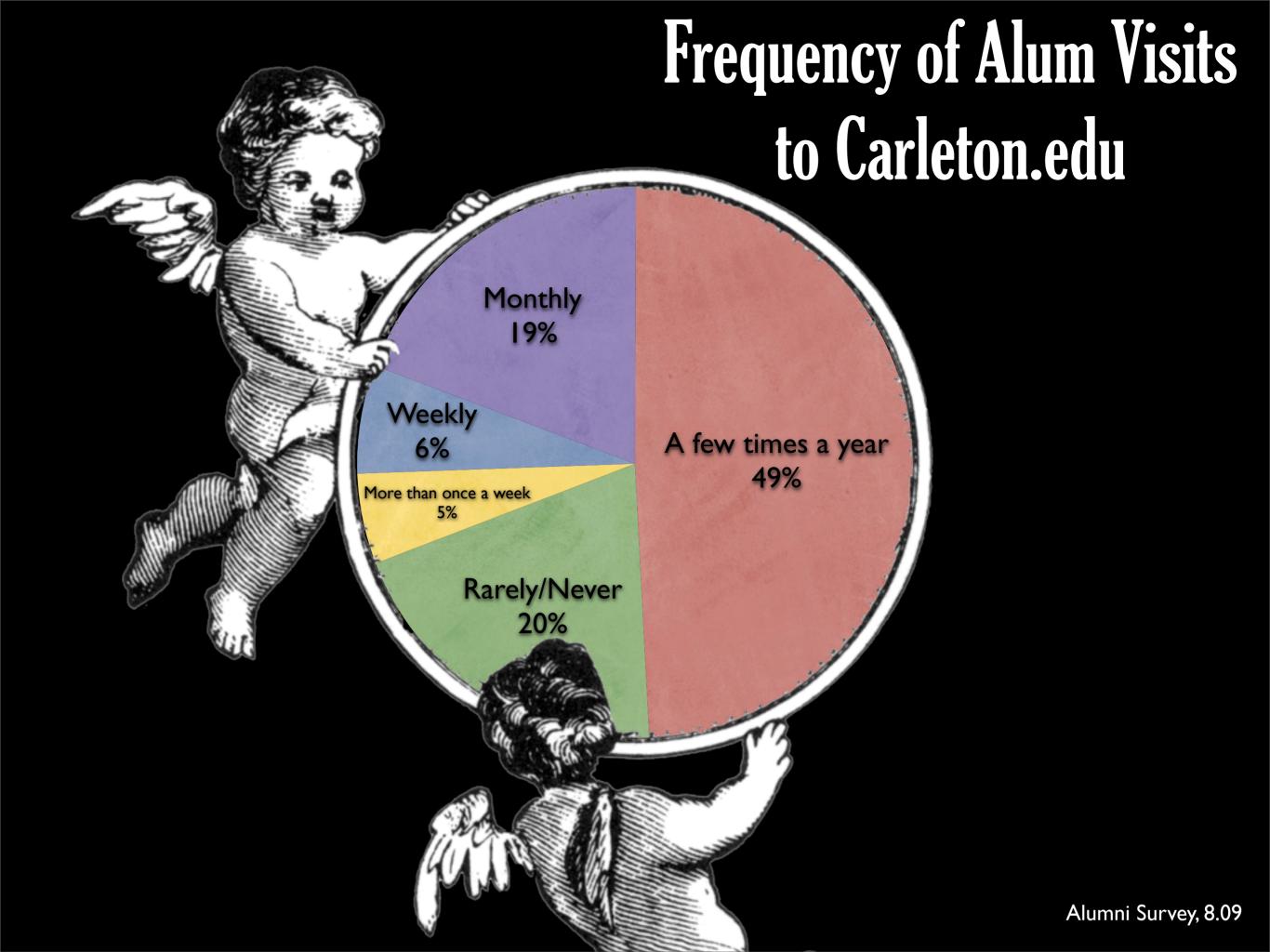
That's the percentage of each class who gave gifts to Carleton in the same period. That's something you can envy -- Carleton's really good at getting out the gifts.

What this chart tells us, though, is this: There is no correlation between level of engagement with the college and logging into the web site.

What these high numbers for the first five years represent are recent alums who are forced to log in for a handful of highly personalized services, like transcript requests, that become less and less relevant as time goes on.

Why am I showing you this? Because it tells me that the most reliable method that we have for determining the identity of a visitor -- requiring a login -- isn't working or isn't relevant for a large percentage of our alumni population -- alums who _are_ engaged enough to give a gift to the college.

Not only that, but the vast majority of the visitors to our alumni web site never log in anyway, so this chart doesn't even apply to them.



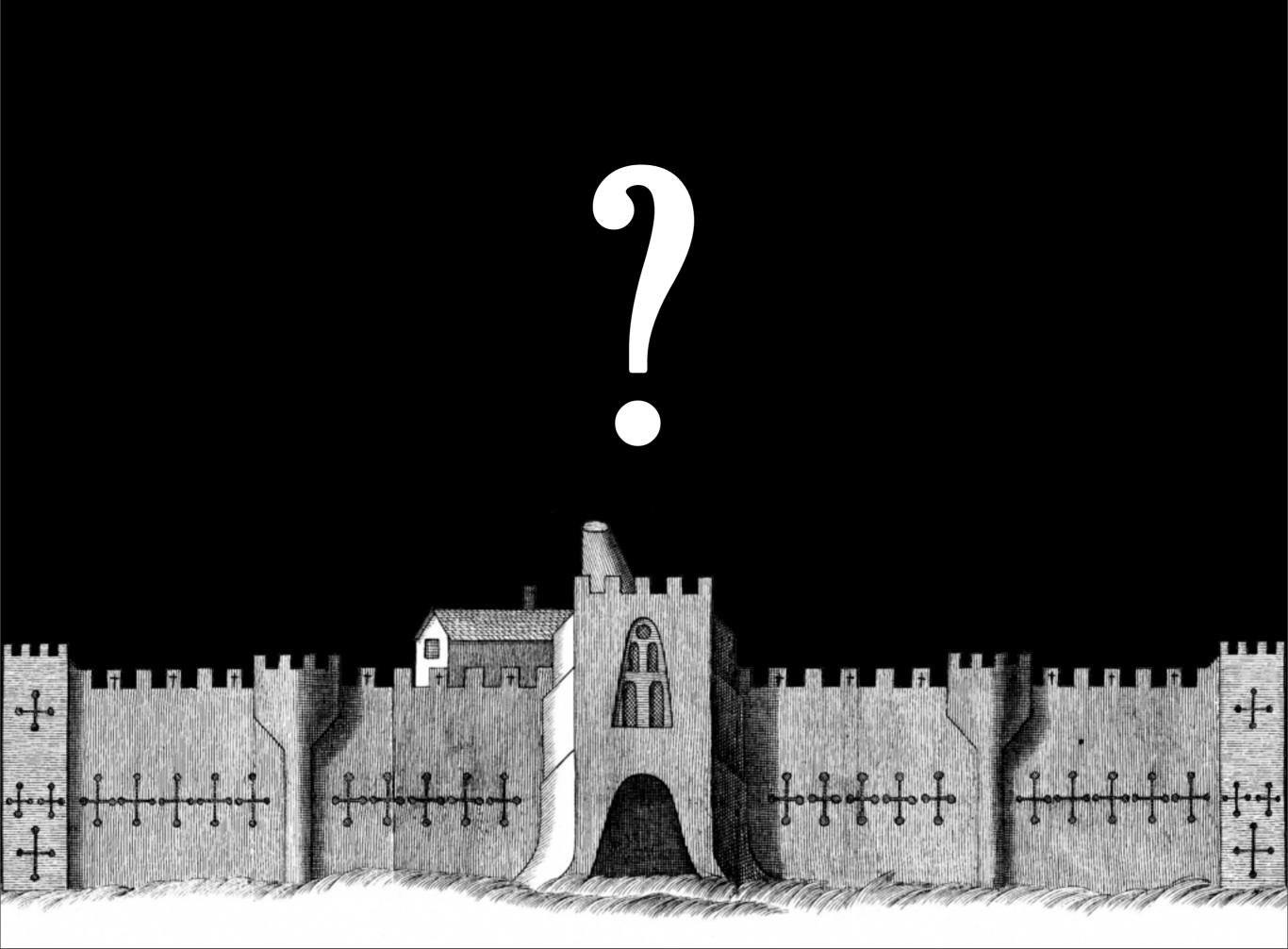
Here's another chart from a survey we did in the last couple of years. The take-away is that 80% of alums surveyed are visiting our web site. That's great. They're just not bothering to log in.

Let me float a theory: The number one thing you can do to reduce the usefulness of your alumni content is to put it behind a login.



In the last few weeks I did an unscientific sample -- I went to the alumni sites for the other schools that, with Carleton, are in the top ten positions on the US News Liberal Arts College rankings. I won't name names -- you can look them up.

Without fail, on every site, within a click or two I was confronted with a page whose primary content was a login box. Poking around a little more, it became clear that every one of those schools was using some kind of prepackaged alumni community software -- mostly from one vendor. The richness of the content outside the wall varied from school to school, but it was pretty clear that all the good stuff was locked away. At least it looked like there might be good stuff there ...



-- but who can tell?

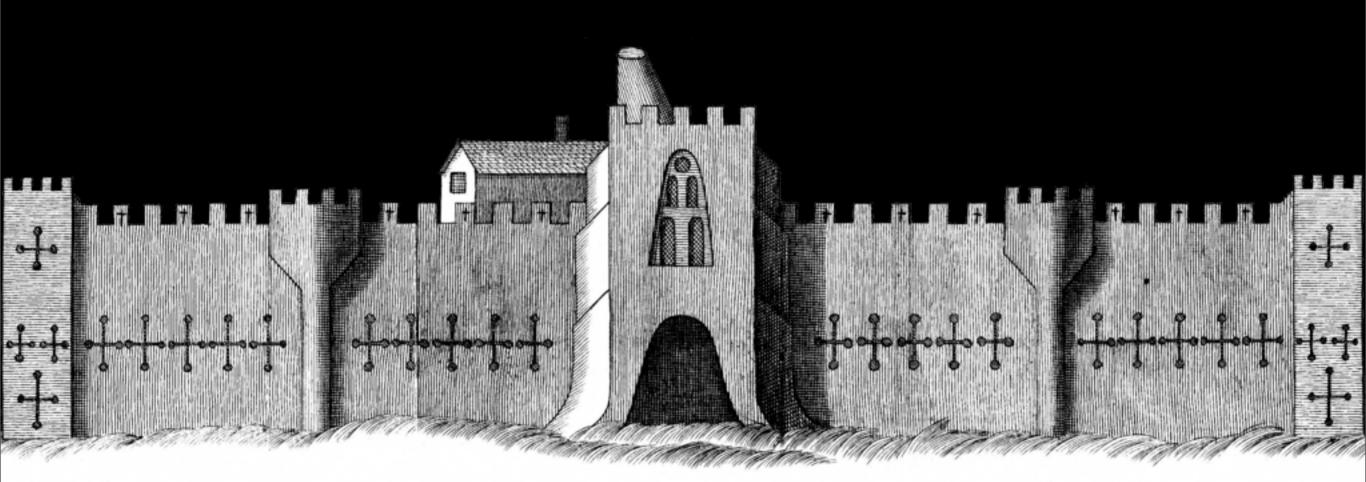
The login prompt effectively brings browsing to a halt, and unless you're part of the small percentage of alums who log in regularly, or you're willing to go through some sort of process to get your login credentials, it's probably going to bring your visit to a halt.

We have to be honest with ourselves. We're not Facebook. No one's going to jump through hoops to log in for our content unless they're pretty sure there's something good there and there's no other way to get it.

But wait! you say. Our alumni content is private. It needs to be protected.

Sure it does. Let's think about what that means. What needs protecting?

Contact information Academic records Membership in some interest groups Some conversations



Monday, October 18, 2010

Contact information for alums -- names, addresses, phone numbers, email. Academic records

Membership in some interest groups

Some conversations

Let's ask it another way. What doesn't need to be so closely guarded? I'm not suggesting here that we just post this information in a big list for people to scoop up -- I'm trying to think about what information we can make some use of without having to wall it off from the world. Some of these fall under the phone test -- if someone calls and asks, will you tell them?

Association with the institution Class year Major Some volunteer roles Membership in some interest groups Some conversations Self-selected contact information

Monday, October 18, 2010

Class year
Major
Some volunteer roles
Membership in some interest groups
Some conversations
Self-selected contact information

Association with the institution

Now, it may seem like we've wandered off track, but I promise you, this is all going somewhere. We just need to back up and consolidate.

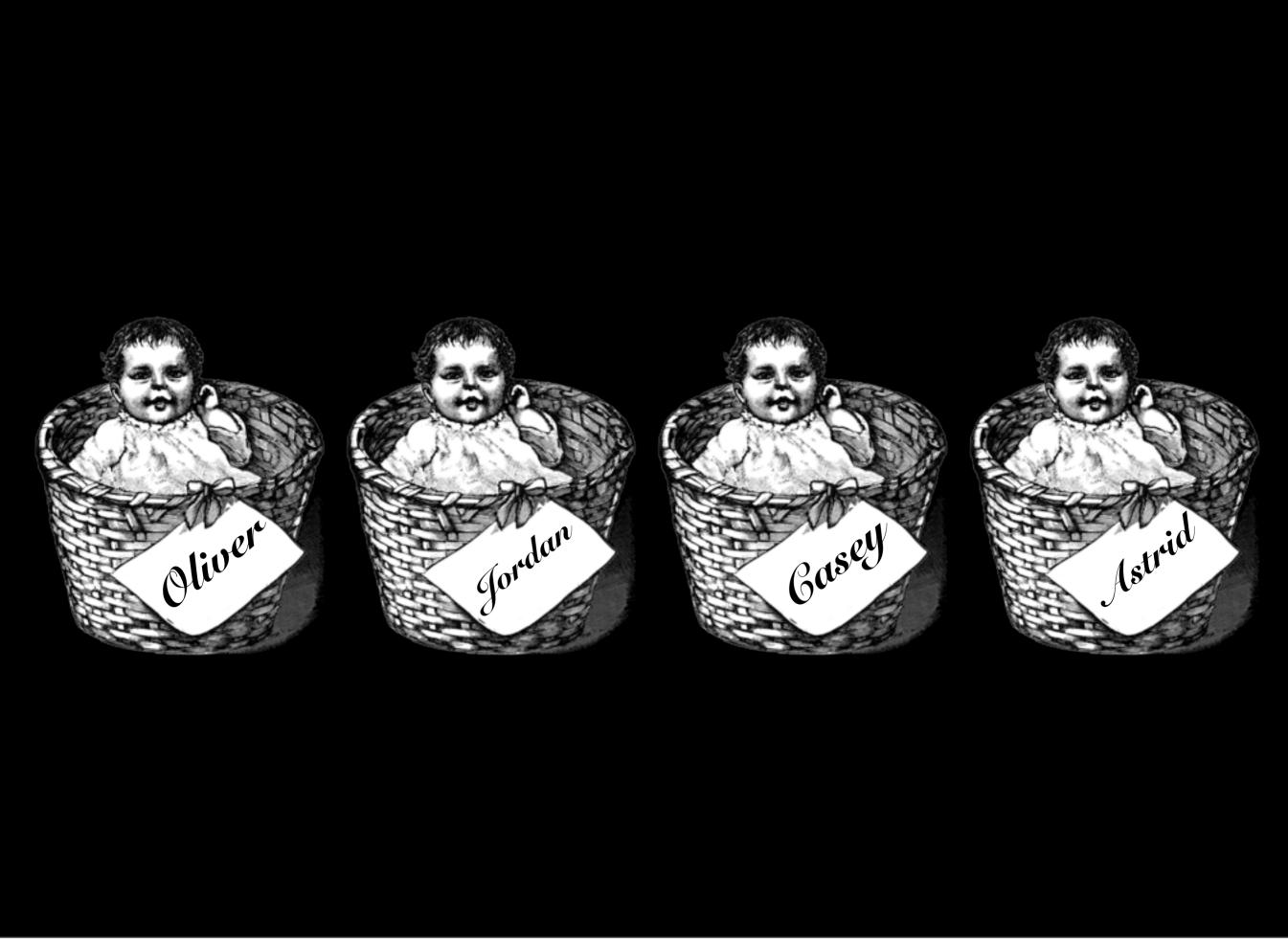




We started back here, with these two questions. I was asserting that ideally, the answers to _both_ these questions should direct the content the we present to an alumni visitor.

But the customary way to answer the first question involves logging in, and as we saw earlier, alums -- especially older alums -- aren't logging in.

Which means that we either need to make logging in work better for more people, or we need to find other ways of answering the who are you question, or -- best of all -- we need to do both.



Now I need to pause for a moment and make a confession. This is the point in the presentation, where, after lots of handwaving, I roll back the curtain to reveal the fully implemented solution to the problems I've been describing.

When I submitted this proposal, Carleton's web team was scheduled to roll out an entirely new alumni section of our website by October first, so that seemed like a fair bet. However, between June and July, our team encountered four major disruptions to that timeline. Their names are Oliver, Jordan, Casey, and Astrid.

And in the absence of the other parents, I can state without fear of contradiction the Oliver is the cute one.

So we haven't launched the site. I have nothing to show you other than very cool wireframes. But I'm going to show you those wireframes, and I'm going to continue to wave my hands in a distracting manner in an attempt to keep you from realizing that none of this actually exists yet.

So, where were we?



Right -- how do we answer the who are you question if our alums aren't logging in?

Let's break this down a little -- What does "Who are you?" mean? what are the key things we care about an alum who's visiting our site? What things matter most for being able to serve their needs most efficiently?

"Where are you?"

If we know where you are, we know a lot. We can show you upcoming events are most likely to be relevant to you. We can present opportunities for connecting with other alums who are near you. We can present volunteer opportunities that are specific to your area.

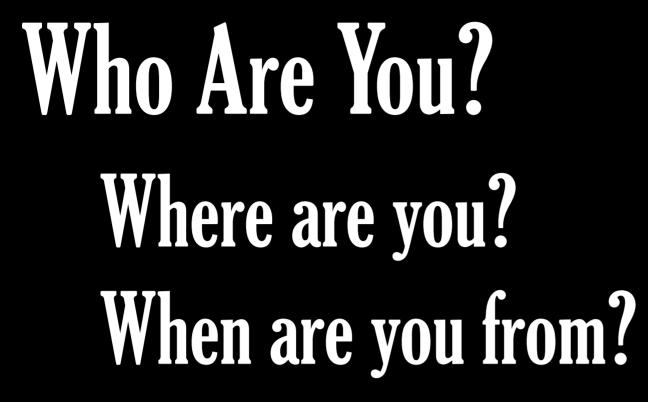
"When are you from?"

If we know your class year, or even your era, we know a lot. First, your class year gives us some clue as to your age, and we may want to present young alums with different information than old alums.

Second, your class year tells us who you might know. We can show you activities from your classmates — both sponsored class events and more informal news and activities. We can push reunion information and other social opportunities. We can point you to web and social media resources specific to your class and era.

Both of those things -- where are you and when are you from -- are powerful on their own, but if we have both, it gets crazy good.

Look at the math.





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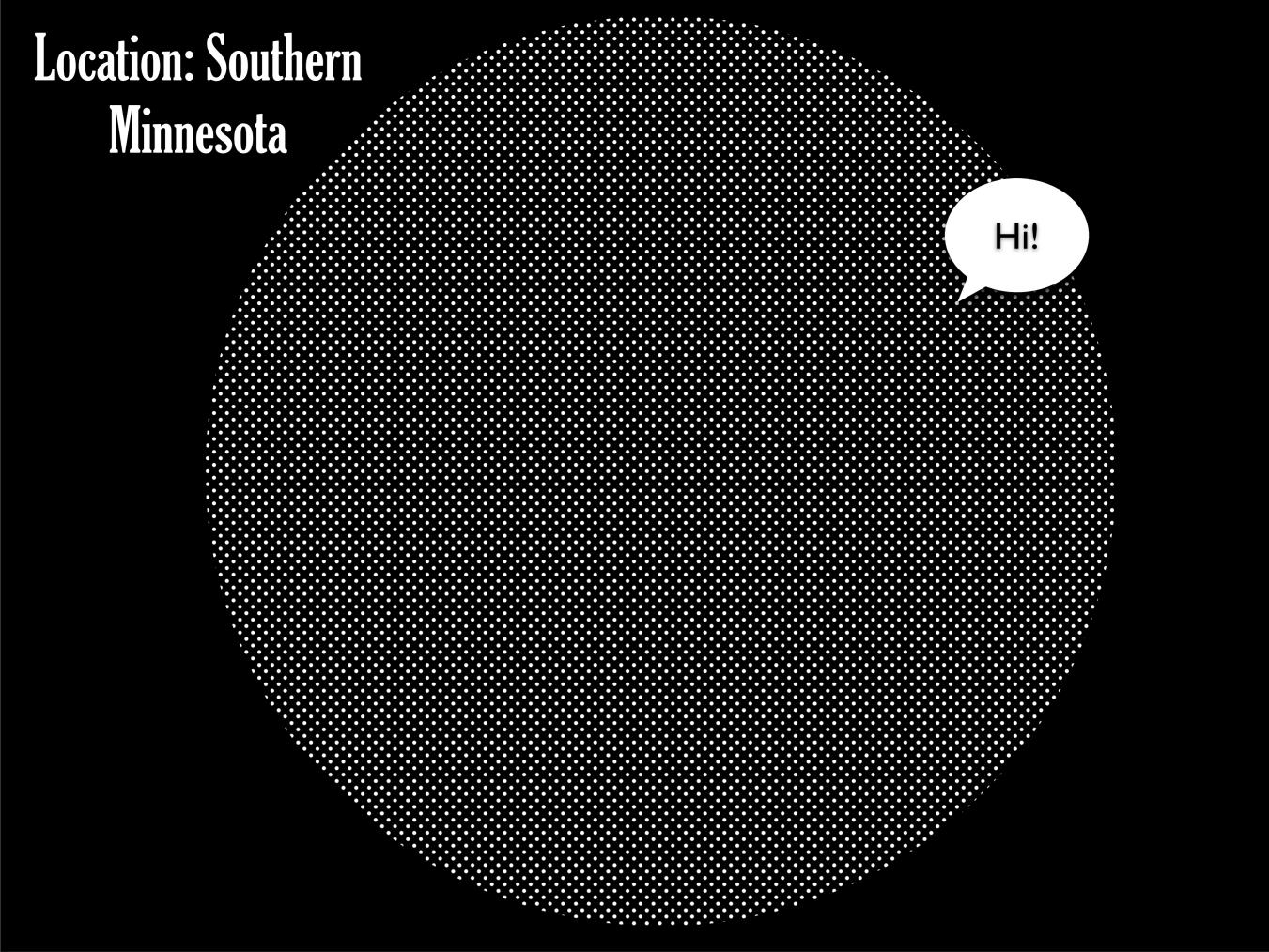
Both of those things -- where are you and when are you from -- are powerful on their own, but if we have both, it gets crazy good.

Look at the math.



Carleton has about 35,000 living and findable alums (I know, some of you have that many students, but work with me here). A visitor to our current web site could be any one of those 35,000 and there's not a thing we can do for them that's personal. They're lost in the anonymous sea.

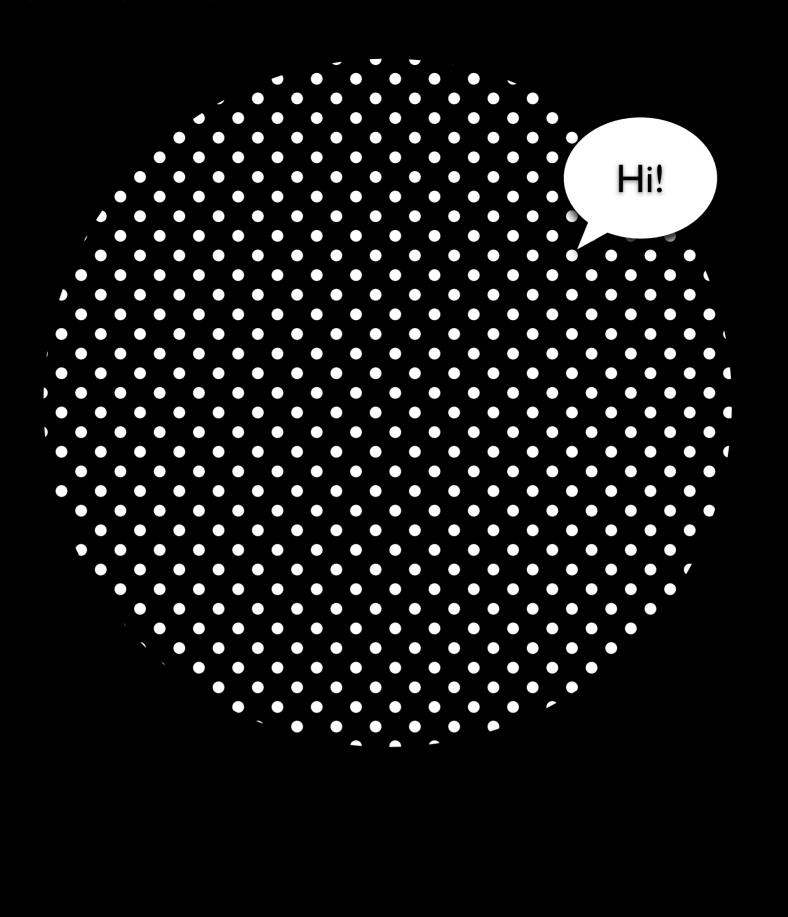
But say we know that a visitor is from southern Minnesota.



There are 4,300 alums in the Minneapolis/St Paul area — some leaves don't fall far from the tree — and now we can provide a customized experience for them. Any given visitor is still pretty anonymous, but the pond is a lot smaller.

But what if we know that our visitor is from the greater Louisville/Cincinnati area?

Location: Cincinnati Area



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Only 150 Carleton alums live here, so suddenly the experience on our site can seem a whole lot more personal. If we show you news about other alums in the area, there's a good chance you might actually know them.

But... what if we know that not only is a visitor from this area, but she's in the class of 1991.

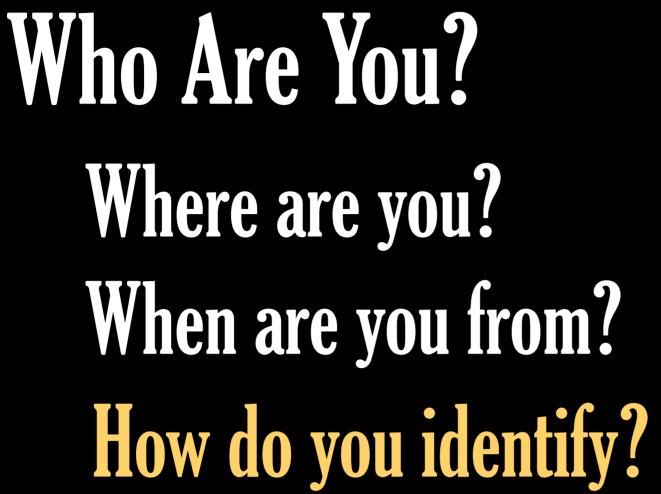
Location: Cincinnati Area

Class: 1991



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There are only two people who meet those two criteria. We have the ability to provide an extremely personalized experience, with no login required, to the point of being creepy. And we don't want to be creepy -- so we won't do that. We'll talk about that some more in a bit.





Where are you and when are you from -- there's a third axis, or maybe set of axes, depending on how you want to count. Let's call it "How do you identify?"

This can be any number of things: major at school, field of work, social and political affiliations, personal interests, existing connections to the institution, etc. The point is that each of these points of identity provides another way to customize the information we provide, and combined with location and/or class year allows for rapidly zeroing in on the slices of information that are relevant to any given visitor.



Q: How do we get this information?

A: We ask for it.*

* We ask the alum and their computer.

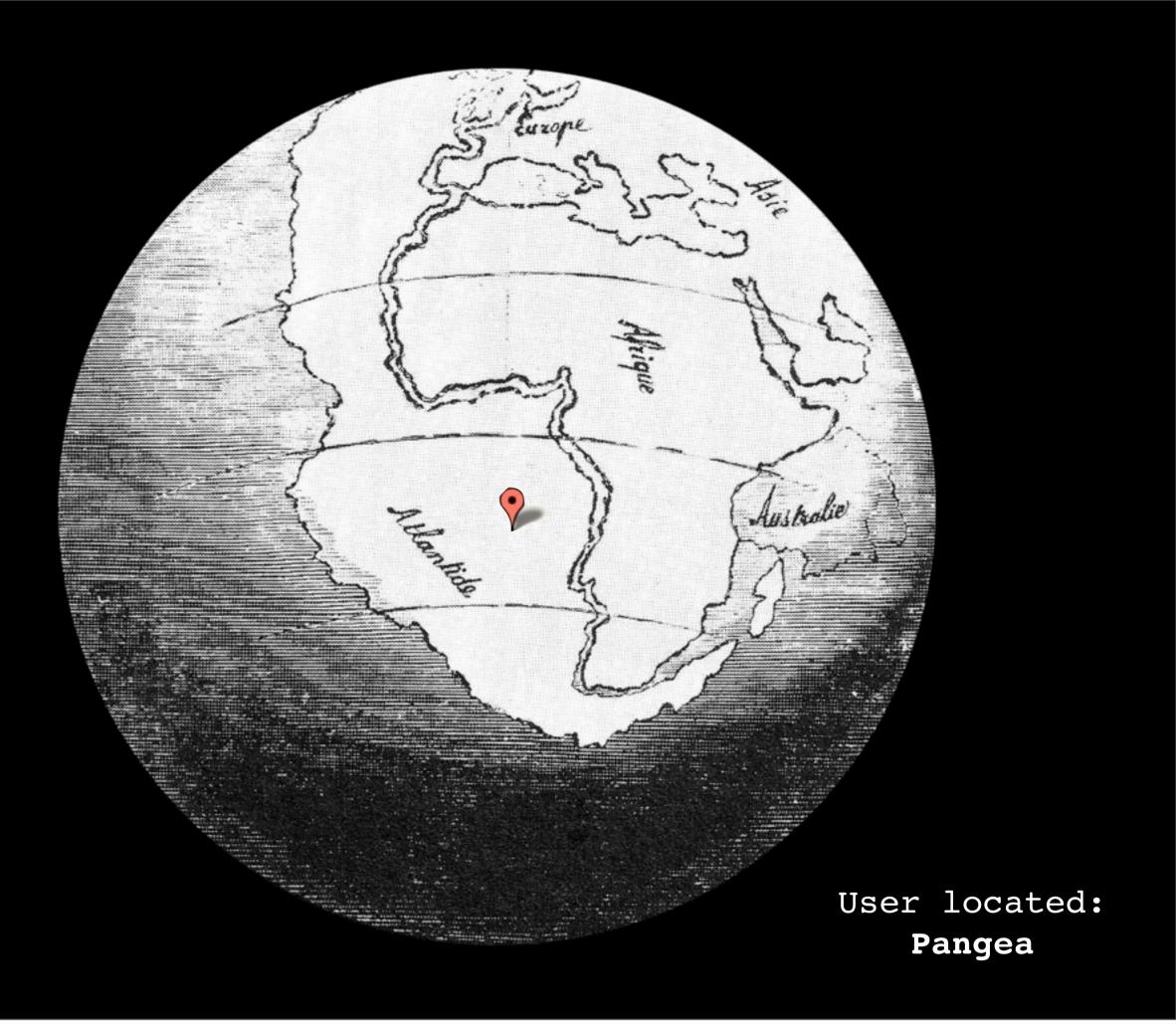
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So, how do we get this information from any random visitor to our web site, if they haven't logged in so that we can look up what we know about them?

Short answer: We ask for it.

Long answer: We ask the alum and their computer.

We saw how just one piece of information -- location -- slices up the population dramatically. And here's the amazing thing: we get that for free.



As soon as they call up our site, we can take the address of their computer and locate them geographically with 100 mile or better accuracy. Which means we know for sure what state or country they're in, and probably what metro area.

Sure, there will always be a few folks visiting from some place other than their home computer — but that's not a problem. If you're in Cincinnati for a conference and checking out the Carleton alumni site, you might very well want to know about alumni and alumni events in Ohio.

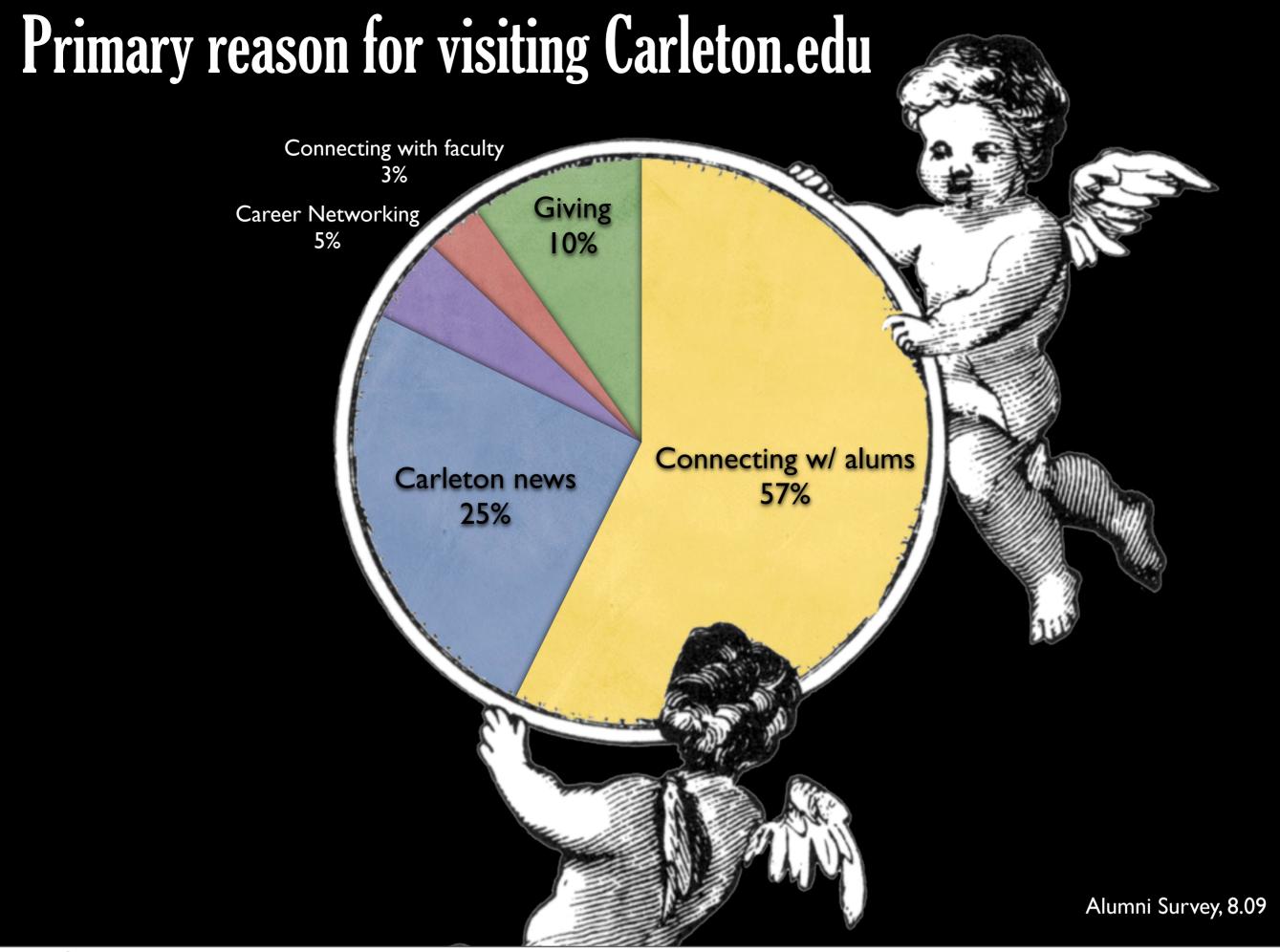
If you're familiar with IP geolocation, this may not seem amazing to you, but let it sink in for a moment in this context. We get, for free, without asking, without a login, one of the key pieces of information about an alumni visitor; a piece of information that, combined with even one other identifying characteristic, can allow us to present a deeply customized experience.

And those other identifying characteristics? We can ask for them, and if we do it in a smart way, it won't even be annoying. We'll look at that in a moment.

But, just one more thing before we look at some wireframes.



Back here one more time. We've talked about "Who are you?" Let's spend a minute on "What do you want?"



We asked about that in our survey of alumni. Keep in mind, though, that this was a survey about the status quo -- we weren't asking them what they'd <u>like</u> to be able to do.

It's pretty clear, though: connecting with friends and classmates is way out on top. That shouldn't be a surprise, but it's always nice when data backs up your expectations.

This quarter of news about Carleton is almost too vague to be useful -- that could cover a lot.

But we can take away one thing for sure. If we have to guess at the answer to "What do you want?" we've got a pretty good chance of being right if we say "Connect."

Connect Return Learn Volunteer Ask

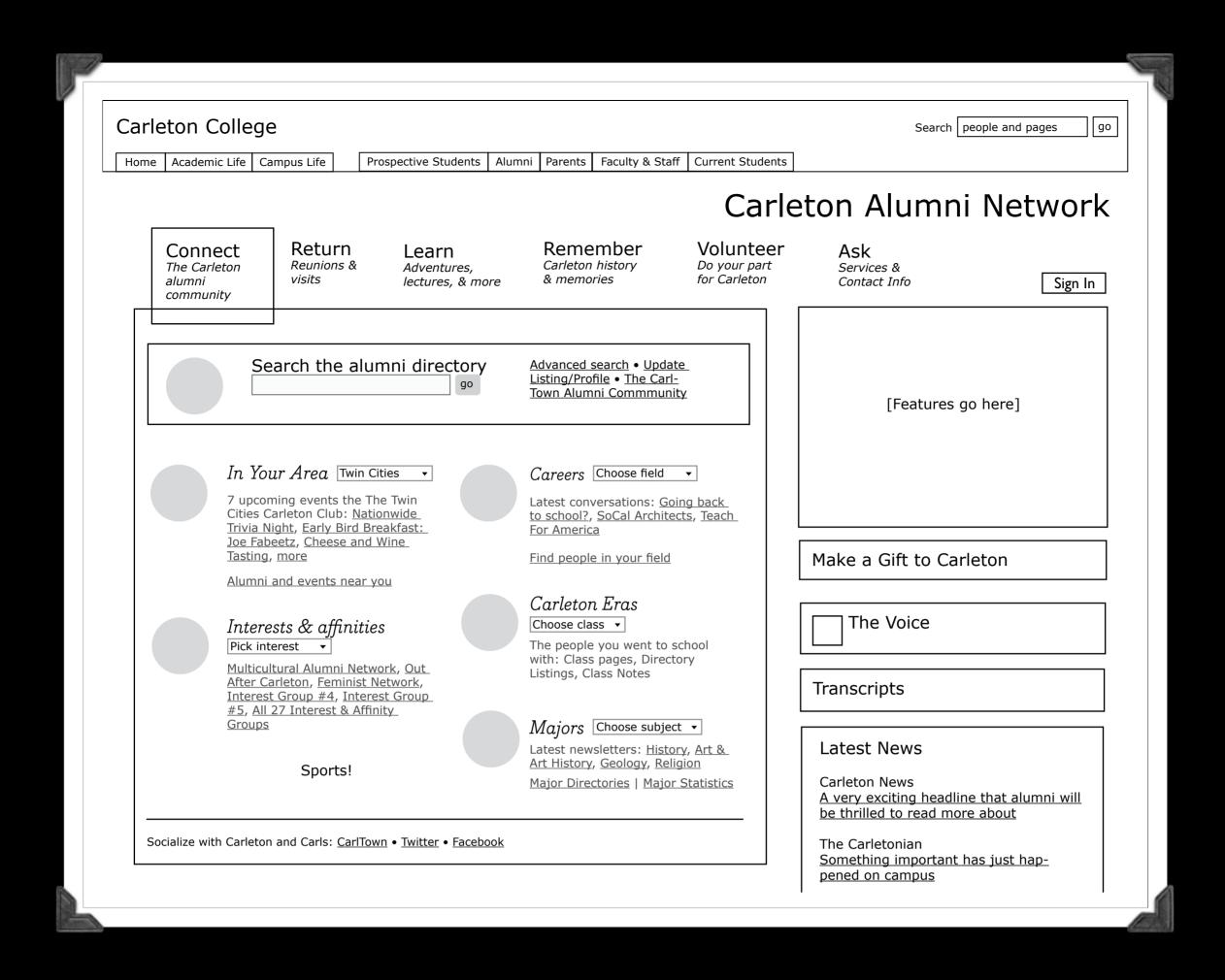


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And that, you might say, is almost too vague to be useful. And it is, so we're going to have to break it down more in just a moment.

But first... after additional research and extensive brainstorming, we decided that we could represent all of the other possible answers to "What do you want?" as four other verbs. Those five words become the core of our navigational framework for alumni.

So let's see how that works.



This is a wireframe that our designer Matt Ryan put together. In case you don't normally deal with this phase of the design process, just keep this in mind: wireframes are supposed to be ugly. They merely define the general position of elements so that you can consider the functional aspects of the page apart from the visual design.

We've moved some of these pages into the design phase, but I thought it would be easier to demonstrate them in this form.

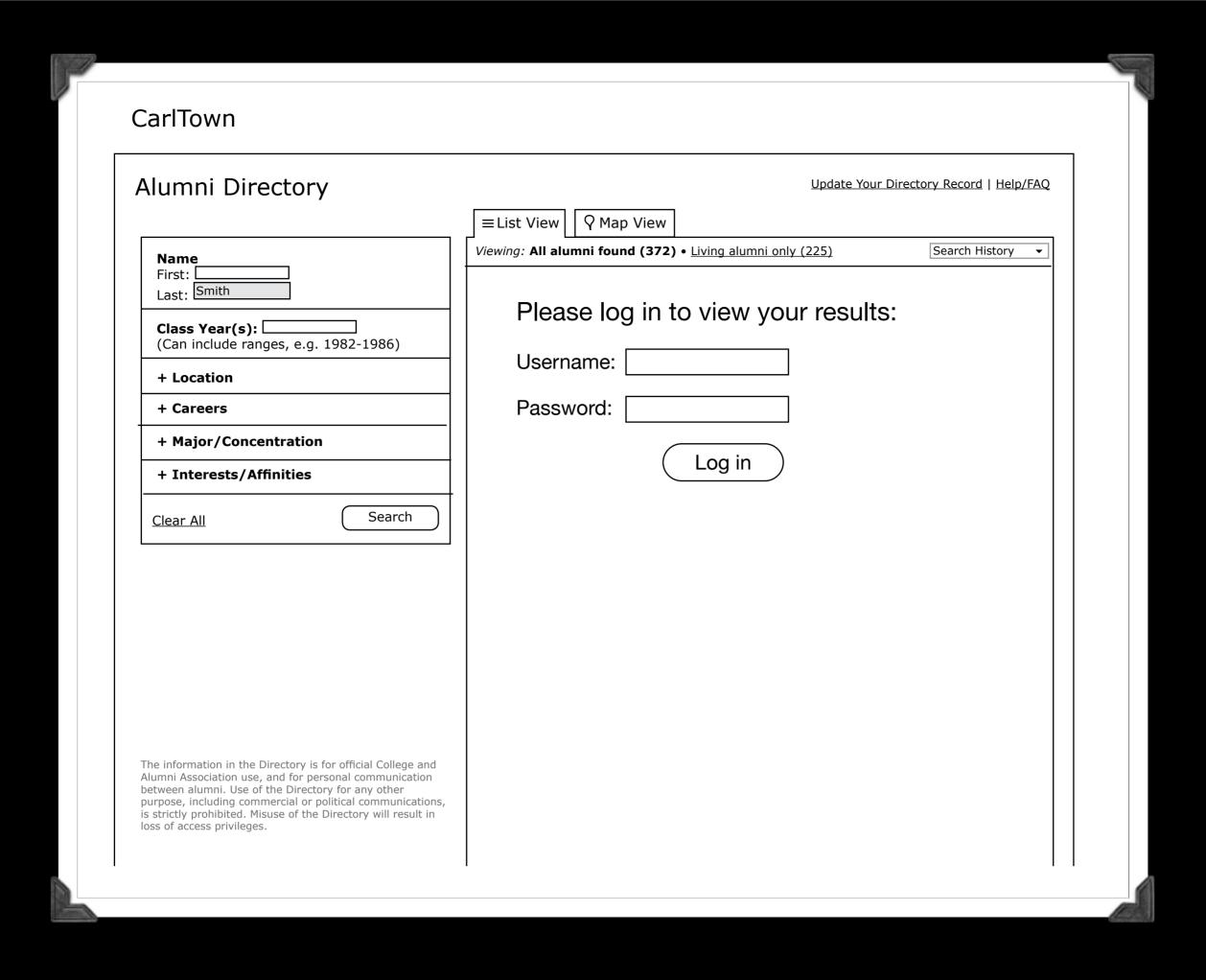
So... here's everything we've talked about in concrete form:

The five navigation areas, which answer the question "What do you want?" Because connections were by far the priority for most of our visitors, this is the home page. The Connect section is the default, so you never have to go looking for it.

In each of the other sections we have....

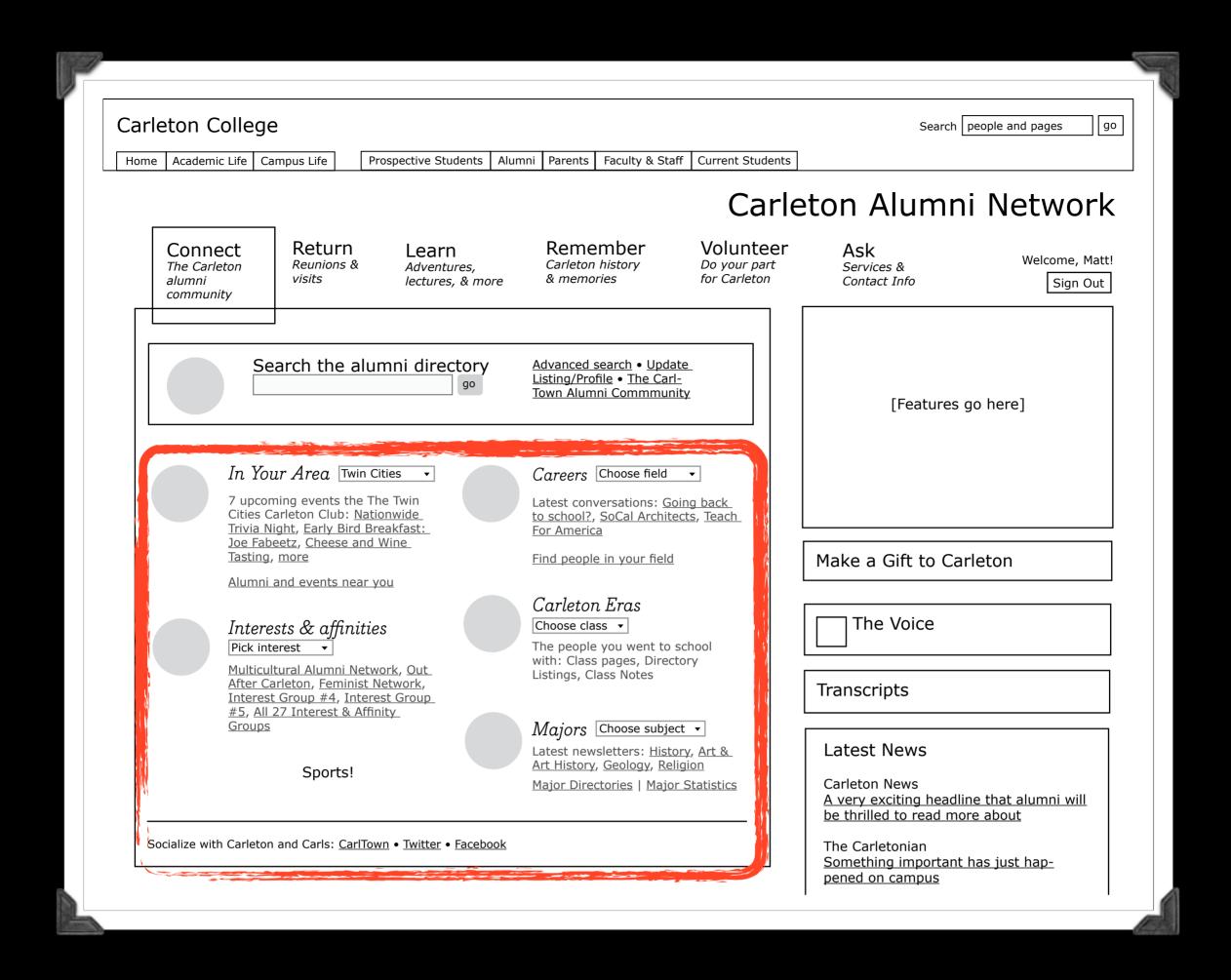
But back to Connect. Front and center, the feature which is by far the most used, our alumnidirectory search. But wait! We're not logged in! How can we search the directory?

Exactly. We need to be logged in to answer certain questions, but we shouldn't have to be logged in to ask them.



If you type your search in there and hit Go, you'll find yourself right in the directory application, and if your query was general enough (say, it matched more than a few dozen records) you'll get a note that says 372 alumni found, log in to view them. If your result count risks revealing information about a specific person, we won't give you a count.

But the directory is fully functional without a login. You can ask the questions, and maybe even get some general statistics (like how many english majors work in the food service industry), but the details are protected by a login. We think, however, that you're a whole lot likely to try to log in if you think you might get something useful. It's a lot like those sites that offer to show you the public records about your ex-girlfriends once you pay them twenty bucks — only not so creepy.



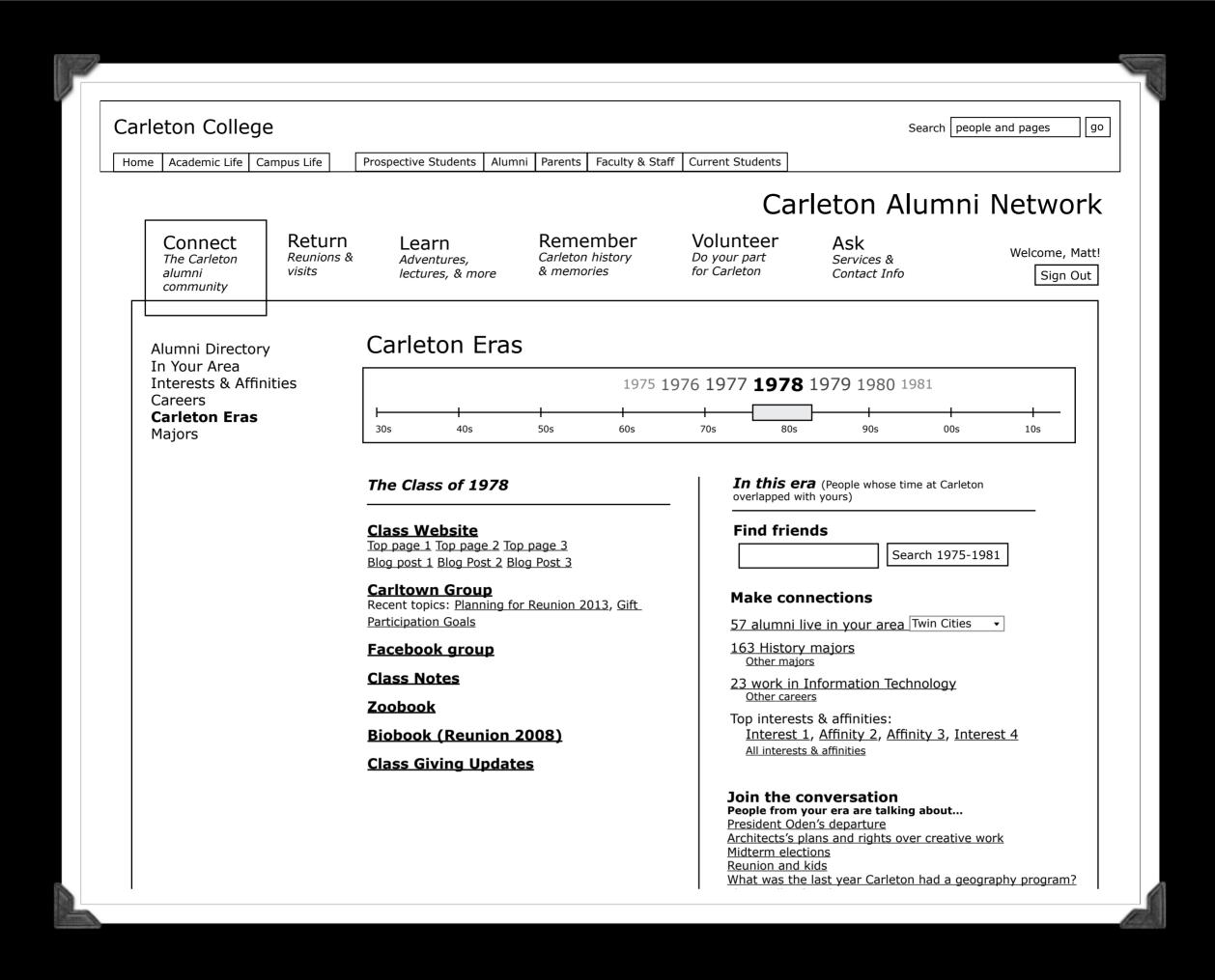
And finally, the other aspects of Connect. You remember our IP geolocation? That's always on. Here we've been located in the Twin Cities area, and already, right here on the home page, we've begun to personalize the content by highlighting some upcoming area events.

And then we have some of the other axes along which you might identify yourself....

... and right there on each of them is an opportunity to identify yourself just a little bit more, and thus personalize the site progressively as you interact with it.

Suppose you choose a class year -- what happens then?

Well, we give you a cookie -- no, not that kind of cookie -- a browser cookie that we can look at later to retrieve your choices, and then we take you to a customized Carleton Eras page for the class you chose.



Now we can gather all of the information that is relevant to your era and either show it to you -- if it's not restricted data -- or tell you that it's available so you can log in and see it.

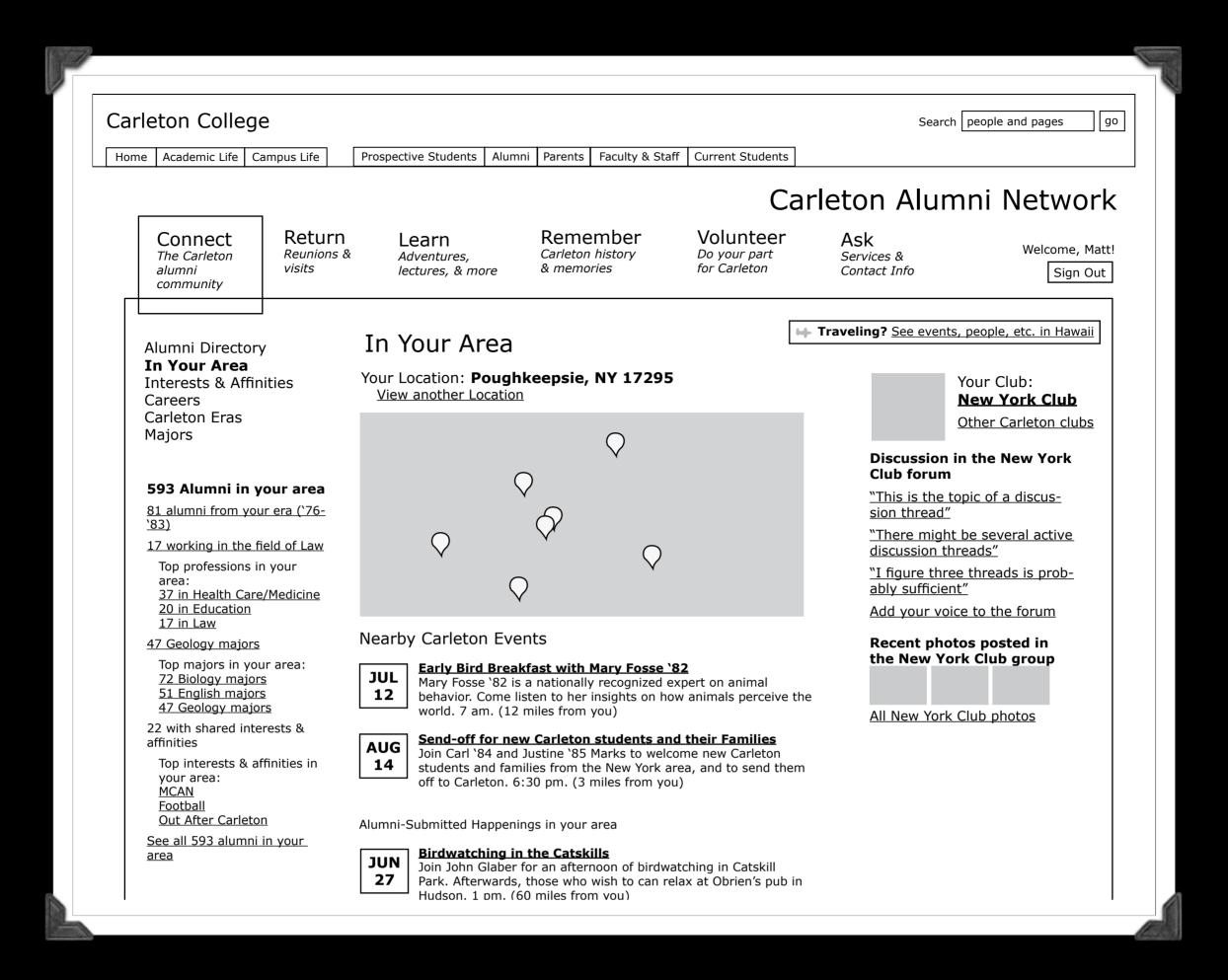
This wireframe was actually designed to show what someone logged in might see, but the public view isn't much different.

Knowing your class year, we can provide you direct links to all of the resources relevant to your class, and provide you a custom search box to automatically restrict your query to people you might have known.

As an anonymous visitor we're still identified with the Twin Cities location, so we can tell you how many other alums are in your area, with a link that will fire off a preformed directory search to show you who they are. In this example, we have some other data, about majors, career, and interests. We could have acquired that via a login, or simply because you picked a major or a career off a menu at some point in the past.

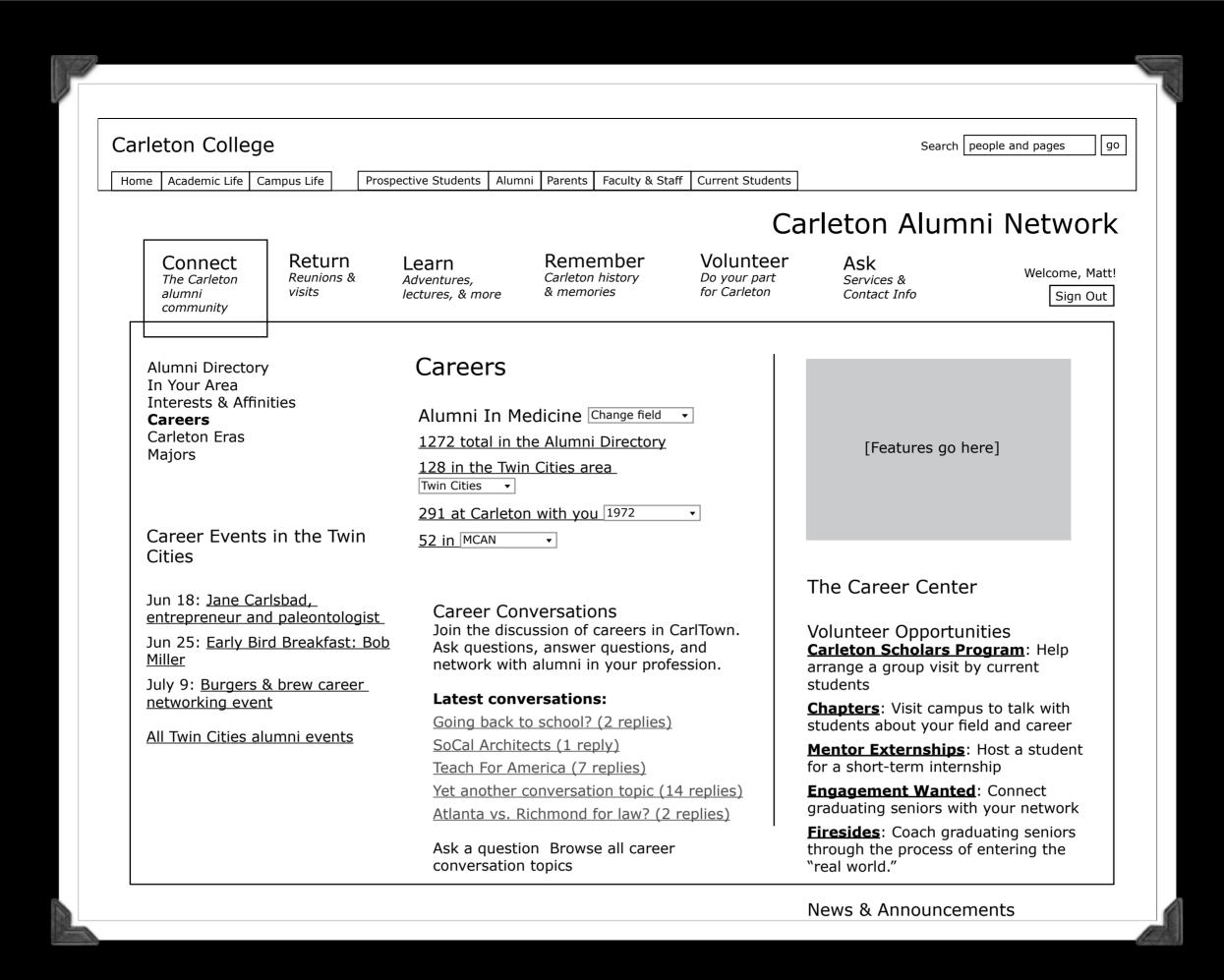
We've also got links here to conversations in our alumni community area that include people from your era. Yes, we have an alumni community, and yes, it has a login, but it's highly permeable, so we can actually lift content and content teasers out to populate these high level pages and demonstrate what's available if you do log in. You can't do that with a turnkey solution.

The other Connect sections work the same way.



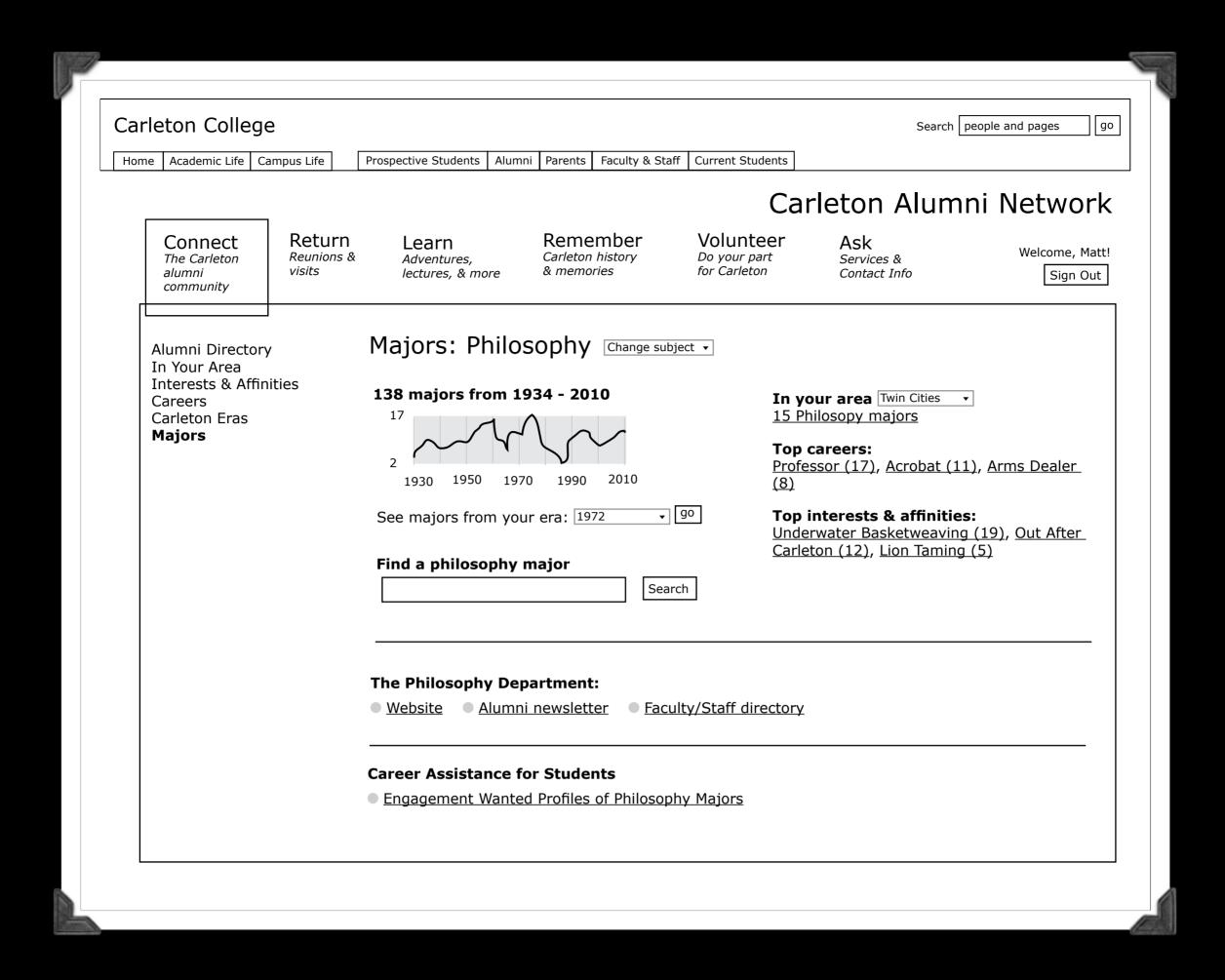
Suppose you're connected from New York -- the In Your Area page is automatically populated with content relevant to you. And the more we know about you, the more content we can provide, but even just having your location provides a rich experience.

And here's a nice touch. Suppose you're logged in, and we know you're from New York, but you're connected from Hawaii: we can detect that discrepancy and offer you views of either location.



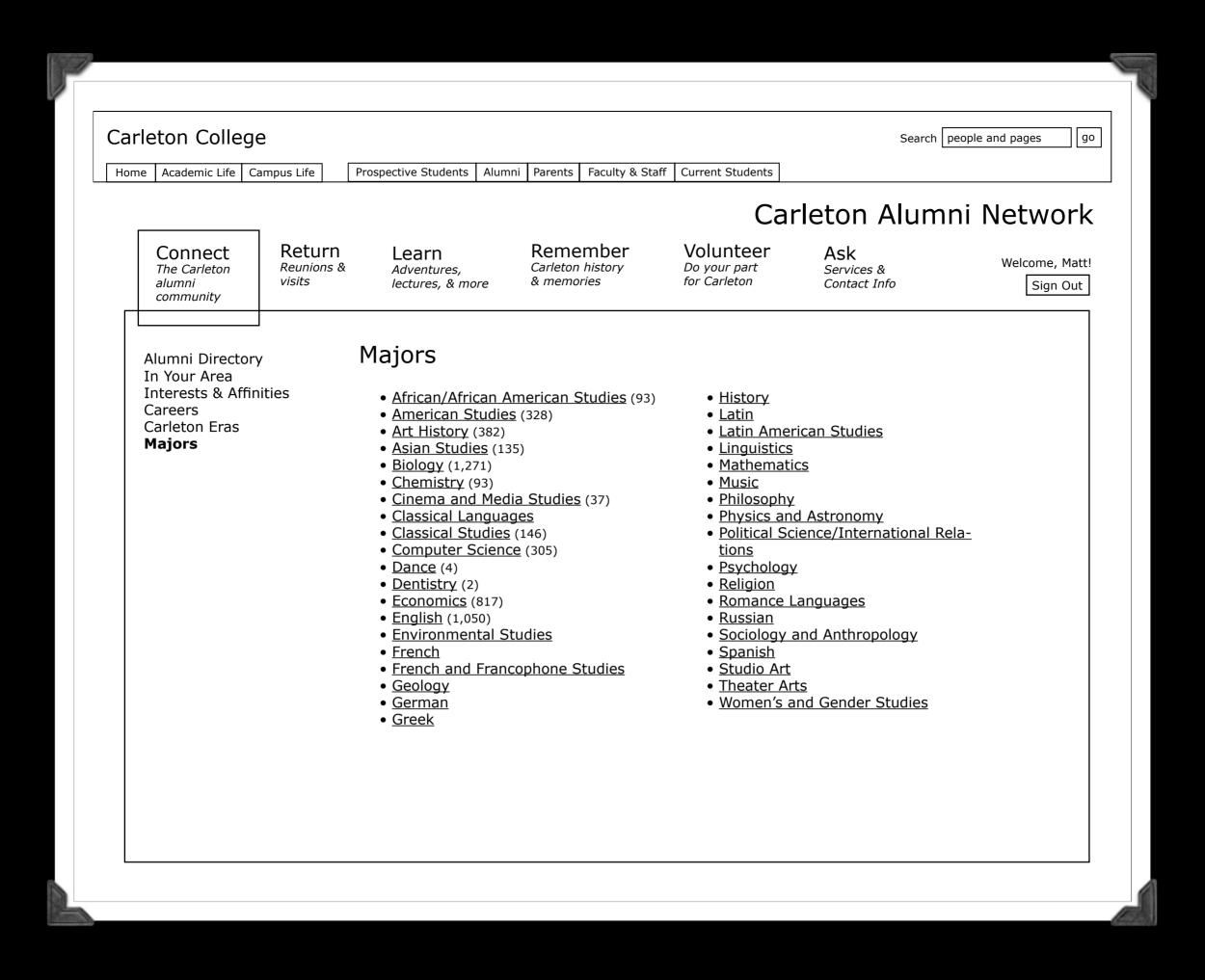
And here's the Careers section. If we know your field, or you choose one, we can pull out all the relevant data, combining it with anything else we know about you.

And look -- you can make new choices at this level as well, to refine the view further.



Here's the Majors section. This is cool: right here, one click from the home page, you can see a historical graph of the popularity of your major. All the personalization we've seen elsewhere is here.

But what if you didn't give us a major and you're not logged in? All of these pages account for that.



Here's the same page, sans personalization. All it does is add a layer to steer you back to the personalized versions.

Now, the Connect area of the site is the most deeply personalized, but the same principles apply throughout. If you visit the Return section, it can customize itself to present reunion information for your class or special interests.

The Learn section can highlight educational opportunities in your area or your areas of interest.

The Remember section can highlight historical material from your time on campus.

The Volunteer section can provide quick links to resources for the volunteer roles you participate in.

I don't believe we've designed any personalization for the Ask section, but if we think of something, we can do it.

Obligatory Bulleted List

- Personalize pervasively and progressively
- * Use data from any available sources
- * Reward disclosure
- * Require login at the last possible point
- Preserve basic privacy in public spaces
- Don't be creepy

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So, here are a basic principles embodied in what we're trying to do:

. . .

Just a couple more things, and we'll go to questions.

First, how are we implementing this?



- ◆ Open source content management
- * PHP/MySQL
- **❖** Designed by higher ed, for higher ed
- Used by schools across the country
- ❖ Nifty keen

This is all being built on the Reason CMS framework, which already supports some of the functionality we need. There is a fair amount of custom coding involved, but we'll be contributing all of the generally-useful new tools back to the community.

That's the end of the Reason pitch, but I'd be happy to talk with anyone in the market for a CMS.



Second, we have two open positions on our web team at Carleton, so if you know any great designers or sysadmins, please send them our way.

We actually do work on thrones. It's uncomfortable, but extremely classy.



Thirdly, some things I want you to take away to think about, even if you're not looking to revamp your alumni web presence in the immediate future.

What is the experience of an anonymous user to your alumni site? Are there small things you can do in the short term to improve that experience?

Are you hiding non-sensitive content behind a login? Is there anything you can do about that? If you can't move the content, can you at least point to it more explicitly so alums will know why they should log in?

