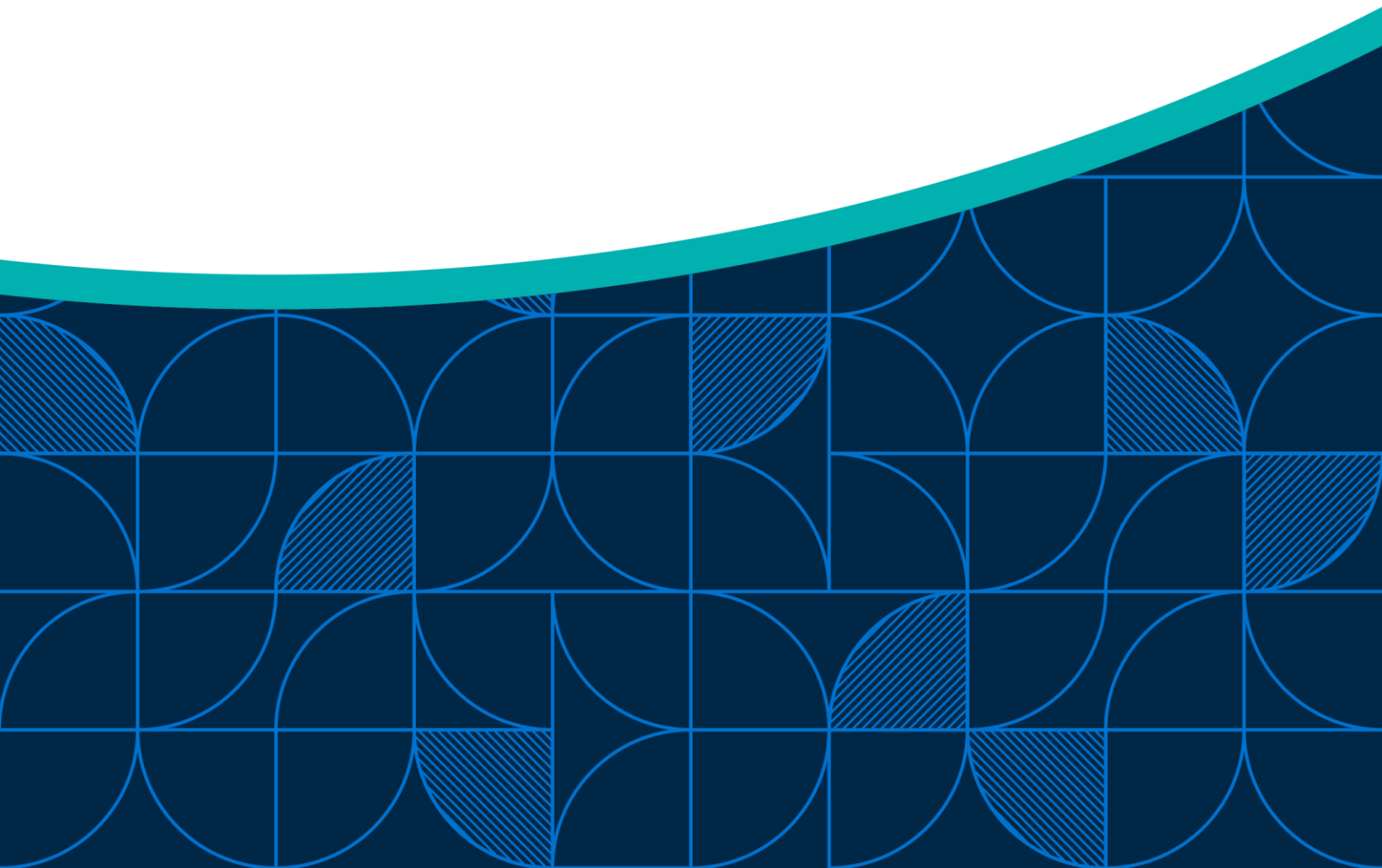




SELF-ASSESSMENT

Assessing Lead Generation Strategies for Long-Term Success

A Top-of-Funnel Maturity Model for Graduate and Adult Program Enrollment Leaders



How Planning Ahead Can Improve Lead Generation

Introducing the Top-of-Funnel Maturity Model

Graduate and adult-serving programs are navigating tighter budgets and increased scrutiny of recruitment investments, in part due to recent federal funding cuts. When reviewing budget allocation, some enrollment leaders view top-of-funnel lead generation as an area to scale back. However, pulling back on early demand-building can leave programs more exposed to market shifts, increasing reliance on near-term prospects and making enrollment gaps harder—and more expensive—to recover from over time.

In this environment, enrollment leaders should ensure their recruitment strategies are built to perform beyond a single cycle. **Complete this self-assessment to evaluate how long your lead generation strategy will support your enrollment efforts and pinpoint areas of improvement to support more consistent, year-over-year outcomes.**

The Top-of-Funnel Maturity Model

This model outlines four common approaches to planning top-of-funnel lead generation, based on how long recruitment strategies are likely to support enrollment efforts. Level 4 represents the ideal approach, designed to support year-over-year lead generation success.

	Level 1 <i>Present-Focused</i>	Level 2 <i>Short-Term Focused</i>	Level 3 <i>Forward-Looking</i>	Level 4 <i>Multi-Year Mindset</i>
<i>Strategy and Momentum</i>	Lead generation is triggered by immediate pressure, often late in the cycle	Lead generation is focused on the current cycle and upcoming start terms, with limited continuity beyond near-term needs	Lead generation efforts are planned to maintain momentum throughout the enrollment cycle	Year-round lead generation strategy is built to anticipate future need and sustain momentum ahead of demand. Recruitment is designed with the understanding that leads may convert over multiple cycles, not just the current one.
<i>Lead Source Diversification</i>	Relies on a narrow set of familiar channels	Occasionally tests or uses other channels, but diversification is inconsistent or reactive	Maintains a diversified source mix; uses a "set it and forget it" method and re-evaluates between cycles	Actively manages a portfolio of diversified sources and adjusts mid-cycle as necessary
<i>Key Performance Indicators</i>	Evaluates success primarily by lead volume or surface-level cost metrics (e.g., lead volume, cost-per-lead)	Considers volume and cost as well as a limited set of down-funnel indicators, but reviews them inconsistently	Uses engagement metrics to understand and improve performance	Leverages benchmarks, down-funnel outcomes, and year-over-year trends to guide continuous optimization and planning
<i>Communication and Lead Nurture</i>	Early-stage leads receive minimal or inconsistent follow-up	Nurturing occurs, but messaging and cadence are largely uniform and not tailored or responsive to lead activity	Outreach aligns to broad stages of the decision journey, with limited real-time adaptation	Outreach adapts to student behavior and integrates into a coordinated lead nurture strategy
<i>Execution and Support</i>	Execution depends heavily on individual effort, making lead gen vulnerable to bandwidth changes	Teams put processes in place, but execution still slows or stalls when capacity shifts	Lead generation execution has clear priorities and support structure	Execution is resilient, supported by tools, partners, and practices that reduce internal burden.

The following page outlines examples of what each of these levels looks like in action.

Four Common Approaches to Lead Generation

How Each Maturity Level Differs in Building and Sustaining Demand

When resources are tight and enrollment pressure is high, how programs approach lead generation can either build long-term demand or undermine future results. The examples below illustrate how graduate and adult-serving programs typically operate at different levels of top-of-funnel maturity. Read through each description to see which approach feels most familiar—and to understand how top-of-funnel planning shapes decisions, execution, and outcomes. Each level represents a different opportunity to simplify execution, expand reach, and improve results.

Level 1: Present-Focused



Program A

Program A's recruitment activity is **driven by immediate pressure**, with most effort focused on filling current gaps rather than shaping future demand. The team leans on sources they already know how to leverage, such as purchased names or .edu site visitors, and gauges effectiveness by whether application and deposit volumes increase quickly. Prospects who aren't ready to apply receive little nurturing, and lead generation outcomes fluctuate as focus shifts between competing near-term needs.

Lead generation feels urgent, deadline-driven, and difficult to sustain.

Level 2: Short-Term Focused



Program B

Program B plans recruitment with the current year in mind, typically **aligning activity to upcoming start terms** rather than sustaining momentum year-round. The team sometimes experiments with additional channels, but those efforts are often limited in scope and cut short if results aren't seen in the short term. Performance tracking extends beyond volume and cost, but insights are usually reviewed after the cycle ends and used more for reporting than real-time adjustment. Communication with prospects is consistent but largely uniform regardless of how leads engage or progress through the funnel.

Lead generation is more deliberate but still constrained by short-term planning.

Level 3: Forward-Looking



Program C

Program C **looks beyond immediate enrollment cycles**, planning recruitment far enough ahead to support lead generation into the next calendar year. The team has a diversified portfolio of lead sources and allows campaigns to run largely as planned before assessing performance between cycles. Metrics such as click-through and lead-to-application rates inform how sources are evaluated over time. Communication aligns to broad stages of the decision journey rather than responding to individual behavior in real time, and execution is guided by clear priorities and processes, supporting consistency across the cycle.

Lead generation is structured and forward-looking, with periodic optimization.

Level 4: Multi-Year Mindset



Program D

Program D **treats lead generation as an ongoing investment** rather than a cycle-based activity, planning recruitment year-round with future terms in mind. The team actively manages a diversified portfolio of lead sources, making mid-cycle adjustments as necessary based on how leads engage and progress through the funnel. Lead generation performance is evaluated across cycles using benchmarks and enrollment outcomes, enabling the program to adapt strategy in real time while sustaining momentum over time.

Lead generation supports both current enrollment needs and long-term growth.

Assessment: How Mature Is Your Lead Gen Strategy?

Check the statements that most consistently describe how your program operates today. Most institutions will recognize themselves across more than one level.

Level 1: Reactive

- We ramp up lead generation primarily as deadlines approach or enrollment gaps become visible
- Most of our lead generation efforts are focused on filling immediate needs rather than long-term enrollment growth
- We rely on a small number of familiar lead sources (e.g., test-taker lists, .edu site visitors, institutional alumni)
- Success is judged mainly by application and deposit counts, with limited focus on early-stage engagement

Level 2: Short-Term Focused

- Our lead generation is planned around the current cycle and upcoming start terms, with limited continuity beyond that window
- We test additional channels or tactics occasionally, often in response to peer examples or short-term pressure
- We review performance after the cycle ends, and results are used more for reporting than in-cycle adjustment
- We communicate with leads consistently, but our messaging is largely the same, regardless of how they engage or progress

Level 3: Forward-Looking

- Our lead generation efforts are planned far enough ahead to support the following calendar year's classes
- We maintain a diversified mix of lead sources, allowing campaigns to run largely as planned without adjustments
- Engagement metrics inform how we evaluate sources between cycles
- Outreach aligns to broad stages of the decision journey, with limited real-time adaptation to student behavior

Level 4: Multi-Year Mindset

- Our lead generation efforts run year-round, with the expectation that some leads will convert across multiple cycles or years
- We actively manage a diverse portfolio of lead sources and make mid-cycle adjustments based on performance
- Our decisions are guided by benchmarks, enrollment outcomes, and year-over-year trends
- Engagement and follow-up adapt to prospect behavior as part of a coordinated, long-term strategy

INTERPRETING YOUR SCORE

Level(s) with the most checks:

The level(s) where you checked the most statements likely reflects how your strategy operates most often today.




If your checks span two adjacent levels, your program is likely operating across both—applying more forward-looking practices in some areas while still relying on shorter-term approaches in others.

How to Strengthen Top-of-Funnel Maturity

Where to Focus Next Based on How Your Strategy Operates Today

Advancing top-of-funnel maturity isn't achieved by trying to optimize everything at once. Focus on prioritizing the right next moves based on how far ahead your recruitment strategy is designed to work, so momentum builds over time instead of resetting each cycle. **Read on to learn what your next considerations should be based on your program's top-of-funnel maturity.**

Your Focus Now

-  **Level 1: Move beyond deadline-driven activity.**
 - Focus on lead generation earlier in the cycle to reduce last-minute pressure
 - Introduce at least one additional, high-intent lead source such as Appily Advance alongside existing channels
 - Track more than applications and deposits to gain visibility into early demand
-  **Level 2: Plan far enough ahead to support next year's classes.**
 - Align recruitment activity to the current cycle *and* the next calendar year
 - Invest in sources such as Appily Advance that provide leads for future classes
 - Review engagement and conversion patterns between cycles to guide adjustments
-  **Level 3: Move from periodic assessment to continuous monitoring.**
 - Generate leads year-round with sources such as Appily Advance, with the expectation that they will convert over multiple cycles
 - Actively manage a diversified source mix and adjust while campaigns are live
 - Use performance across cycles—not just single-term results—to guide decisions
-  **Level 4: Strengthen your strategy by leveraging partnerships.**
 - Complement internal teams with trusted partners that bring scale, insight, and continuity
 - Leverage diversified demand sources and external expertise to stay ahead of shifting conditions
 - Invest in solutions designed to sustain momentum over time such as Appily Advance

Build Year-Round Top-of-Funnel Volume with Appily Advance

Strong lead generation requires more than short-term tactics. It depends on a steady flow of high-intent leads over time. No matter where you fall on the maturity curve, Appily Advance helps graduate and adult-serving programs generate demand year-round through our diversified reach, smart lead matching, and guidance from EAB experts, so you can support both near-term enrollment goals and future classes.

▶ To learn more, visit eab.com/appily-advance or email appilyadvance@eab.com.



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ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with more than 2,800 institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across enrollment, student success, institutional strategy, data analytics, and advancement. We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.