



## When COVID-19 Hit, the University of Wisconsin–La Crosse Leaned on the TargetX Portal to Deliver a Virtual Transfer Student Orientation Experience

### Challenges: COVID-19 left UWL scrambling to deliver a convenient transfer student orientation

COVID-19 has upended how higher education connects with prospects and incoming students. Events that used to involve hundreds or thousands of individuals on campus are simply not possible right now. For the University of Wisconsin – La Crosse (UWL), that meant getting thoughtful and strategic about how to deliver an effective online orientation to transfer students — an event that would normally be in-person.

“When the pandemic happened, it interfered with our summer plans for orientation for incoming freshman and transfer students. Like so many, we had to devote the time and energies of our small staff to pivoting and figuring out new solutions in a short period of time,” said Sara Walters, CRM and Communications Coordinator.

UWL invested in an online freshman orientation program through an external platform, but putting together that event was a heavy lift — involved and time-consuming. Much of the orientation happened live but remotely. UWL didn’t think that model fit the needs of the transfer student population or that adding another large project to its staff’s workload made sense during such a challenging time.

“Our transfer population is significantly smaller than our incoming freshman and their needs aren’t the same. They tend to be older. Many are parents or work full-time. They might be in the military. They interact differently with our outreach. They want to do things at night or on their own schedule. They don’t want to sit down at exactly 8 AM and log into a Zoom orientation. A live event seemed like too much for them and for us,” explained Walters. “We wanted to meet our transfer students where they are since they are a more self-motivated population.”

### The University of Wisconsin–La Crosse at a Glance

- A public university in La Crosse, Wisconsin
- Part of the University of Wisconsin system
- Founded in 1909
- Offers bachelor’s, master’s, and doctoral degrees
- Home of the Eagles

### TargetX Solutions

- ✓ [Recruitment Suite](#)
- ✓ [Student Portal](#)

### Goals

When transfer student orientation had to be moved online because of COVID-19, UWL needed:

- ✓ an easy-to-create, customizable solution that fit the needs of a distinct population;
- ✓ a visually attractive, user-friendly space to deliver orientation information; and
- ✓ a simple way to know who attended to initiate follow-up communications.

## Solutions: The TargetX Portal provided an expedient, attractive, user-friendly solution to transfer student orientation during a pandemic

The UWL admissions office signed on with TargetX in 2018. They'd never used a CRM before and the TargetX Recruitment Suite delivered everything they needed. However, they'd never used the TargetX Student Portal feature that allows you to create dynamic, personalized portal experiences for students at any stage of the constituent life-cycle — prospects, applicants, and current students — and for other constituencies, like parents and guidance counselors. The portal supports the delivery of individualized content based on a student's unique interests from data collected within the CRM. It's also built 100% mobile-first, so it supports a seamless, modern experience across all devices.

When COVID hit and UWL began thinking of ways to deliver a convenient, but effective and attractive orientation space for its transfer students, the portal suddenly made so much sense. "We decided to use the TargetX Portal in a non-traditional way to meet our transfer students' needs and it worked so well for us," said Walters. "We love that the Portal has the ability to include conditional content so we could change the messaging based on individualized information, is super easy to build with a drag-and-drop interface, and can be accessed on an invite-only basis that lends it exclusivity and formality."



## "The Portal delivered exactly what we needed."



Sara Walters  
CRM and Communications  
Coordinator



With the use of the portal, UWL curated a protected space dedicated specifically to transfer students where they could find a personalized welcome page and all the resources they needed in multiple formats (including video). All students were invited directly via email and provided with a portal login. The best part was that UWL tracked participation using Community User logins in TargetX Reports. That information allowed UWL to follow-up through a text campaign with students who didn't access the portal to encourage them to do so.

## Results: An orientation solution that met transfer students where they are and delivered an enjoyable student experience — without the heavy lift

The fact that the TargetX Portal was easy to build and could be customized, as needed, made a potentially daunting task manageable for a team working overtime during an unprecedented time. "We are a small team. It didn't make sense for us to invest in this giant solution or build this huge architecture for transfer students when what they really want is to explore information at their own pace," explained Walters. "The Portal delivered exactly what we needed."

The transfer student portal has been getting rave reviews from the administration and the participating transfer students. The Associate Vice Chancellor of Student Affairs commented, "Thank you for showing me the platform to support transfers virtually. I was impressed by the user friendliness, that information was presented in a variety of formats, and that it was all laid out in a visually appealing manner."

The majority of student-users agreed. Seventy-six percent said the transfer student portal was valuable to them. One student commented, "I thought this was very informational and I was glad to have this experience even though we couldn't do this in person." ■