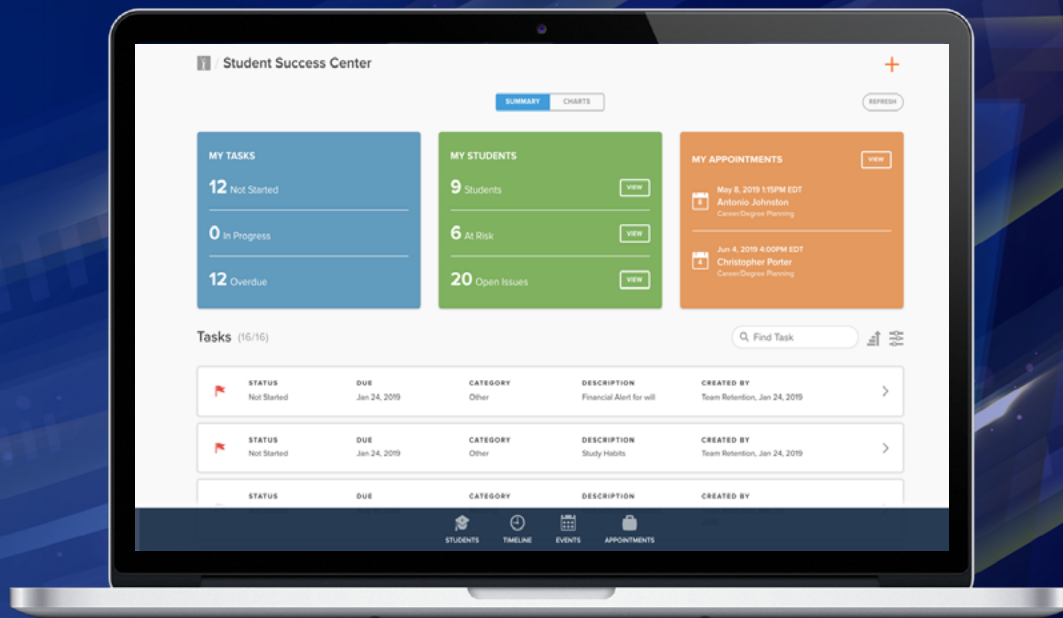# LIAISON | Relationship-Driven

How TargetX by Liaison Helped Shepherd
University Improve Operations and
Increase Yield by 38%

Navigate CRM Buying With Confidence.
Drive Enrollment Excellence.

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CASE STUDY

Shepherd University Improves Operations, Increases Yield by 38% With TargetX

Shepherd
UNIVERSITY

TARGET X
by LIAISON

Founded in 1871, Shepherd University is a small public institution overlooking the Potomac River in quaint and historic Shepherdstown, West Virginia. In recent years, while already struggling with enrollment-related declines, Shepherd's admissions office found itself overwhelmed by its archaic manual application process.

"We went an entire enrollment cycle without having a CRM," Shepherd's Director of Admissions, Will Bell, admitted. "We used an email management system for a year while we transitioned out of a previous CRM that wasn't really working for us."

" **I treat TargetX like it's another staff member. It does its job very well, and we can trust it to do what it's supposed to do."**

WILL BELL
Director of Admissions
Shepherd University

Bell's staff had to work exhaustively to fix and compensate for:

- Not having application or acceptance letter portals
- Unintegrated systems for texting students and event registration
- The lack of email automation to notify students of application status or acceptance

Shepherd was urgently looking for a robust CRM solution to integrate all its processes and quickly saw that TargetX could meet its goals.

Data-driven efficiency

Improvements in operations and administration were quickly realized. Gone are the days of time-consuming manual "clean-up" of applications before processing, and staff handle far fewer phone inquiries because the new system sends timely status updates.

"Now that everything is in one place, everybody in the office is more efficient," Bell said. The admissions team relies heavily on the TargetX data management tool and easy-to-use dashboards to visualize data in seconds — from application counts by state to current student deposits. "Everything we do is seamless now and so much more informed."

Streamlined process for positive results

With the help of TargetX's student-nurture capabilities, Shepherd has dramatically increased its funnel across the board:

- Deposits are up 38%
- Applications are up by almost 20%
- Admits are up by over 15%

Bell credits these increases to TargetX-powered outbound messaging for students and their families.

"Our system now offers timely automated communications and 'smart' acceptance letters — things that provide instant gratification for students and increase our visibility throughout the enrollment funnel."

The university is also leveraging TargetX to improve accessibility for underrepresented populations in the state. With its affordable in-state tuition, Shepherd is preferred among first-generation college-bound students.

Bell shared, "West Virginia has a large first-generation population, so leveraging TargetX Recruitment makes the admissions process as easy as possible for them. This helps bring students that might not otherwise have that access to a higher education institution."

Focusing on future success

Bell and his team are focused on the future with TargetX. "We're seeing many different aspects of enrollment solutions that we didn't even consider when we first signed on. By using TargetX, Liaison has enabled us to execute high-caliber outreach, save budget, be more creative, and grow Shepherd's reputation as a student-first university." ∎

Click here to schedule a demo or for more information on how TargetX can improve your admissions process.

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