



A SQUARE ONE CONSULTING WORKBOOK

The Enrollment Communications Audit Workbook

A guided, fillable framework for reviewing what you sent last cycle before you build what you'll send next.

GAP ANALYSIS • QUALITY REVIEW • AUDIENCE RESONANCE • ROADMAP

BEFORE YOU BEGIN

How to Use This Workbook

Most enrollment teams spend the summer writing next year's communications. This workbook is built to help you spend a little time first making sure you're writing the right ones. It isn't about finding mistakes. It's about finding opportunities.

Students change. Every few years, the entering class represents a different group of people, shaped by different experiences, different technologies and different expectations. A communication flow that felt fresh two cycles ago may be landing very differently today, and the metrics you relied on to judge success may not tell the full story anymore, either.

This workbook walks through the same process I use with institutions I work with directly. Work through it in order, or jump to the section your team needs most. Either way, by the end you'll have more than a list of emails to rewrite. You'll have a clear, evidence-based starting point for next cycle.

A note on scope: this workbook covers what you send — email, text and print, the channels enrollment marketing owns day to day. It doesn't address paid media, your admissions website, the admitted student portal or counselor phone outreach. Those shape the experience just as much, but they deserve their own dedicated review.

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Your companion spreadsheet

If you prefer a digital option, try this! Scan the code for a branded spreadsheet with unlimited rows, dropdowns and sorting.



Build Your Communication Inventory

Before you audit anything, list what you actually send. Most teams have never seen their full communication flow in one place. This page is that place. Work from your CRM, your print calendar and your texting platform, and capture every piece that goes to a prospective or admitted student.

COMMUNICATION	CHANNEL	AUDIENCE	TIMING	GOAL	OWNER
Example: Admit congratulations	Email	Admitted	Decision release	Celebrate, drive to portal	Marketing

Don't skip the small sends. The one-line text reminder and the single postcard count. Once it's all in front of you, the patterns start to show themselves, and the rest of this workbook gets easier.

MORE ROOM ONLINE: Most teams have dozens or hundreds of communications. The **companion spreadsheet** gives you unlimited rows, dropdowns and sorting for this inventory and the other worksheets.

A QUICK GUT CHECK

When you see everything in one place, two questions usually surface on their own: which audience is getting the most attention, and which one is getting the least? Note anything that surprises you before you move on.

Pull the Data, Audit the Analytics

Gather every communication from last cycle, including performance data. Then look for patterns, not just percentages. What counts as success looks different depending on the channel.

Success looks different by channel

CHANNEL	WHAT "SUCCESS" TYPICALLY LOOKS LIKE
Email	Downstream milestone completion, not just opens and clicks. Privacy tools and email security scanners can inflate both, so treat them as a signal worth investigating, not a verdict.
Text	Reply rate, click-through on links and opt-out rate. Delivery and "read" aren't useful metrics since nearly every text gets seen. Watch for spikes in opt-outs, which often signal frequency or tone problems.
Print	Response to a built-in mechanism (QR code, promo code, RSVP card) plus downstream conversion. There's no passive metric here, so the call to action has to be trackable by design.

Sort last cycle's communications

Note the channel next to each one you list. A "well-performing" text and a "well-performing" print piece won't look alike on paper, and that's expected.

COMMUNICATIONS THAT APPEAR TO PERFORM WELL (YOUR ANCHORS) – WHAT ARE THEY DOING RIGHT?

COMMUNICATIONS THAT CONSISTENTLY UNDERPERFORM – TIMING, CLARITY, OR ASKING TOO MUCH?

COMMUNICATIONS WORTH INVESTIGATING (UNCLEAR STORY, OR METRIC THAT DOESN'T MATCH THE CHANNEL)

Ask Better Questions of Your Data

Whatever the channel, the more useful question is rarely "did they open it" or "did they read it." It's whether the communication moved something that mattered.

Instead of "did they open it," ask: did more students complete the next enrollment milestone after this message?

WHERE DID MILESTONE COMPLETION IMPROVE AFTER A SPECIFIC COMMUNICATION?

WHERE DID COUNSELOR QUESTIONS DECREASE BECAUSE A COMMUNICATION ANSWERED THEM FIRST?

WHERE DID A QUIET RESULT (FEWER REPLIES, FEWER CALLS, FEWER OPT-OUTS) ACTUALLY SIGNAL SUCCESS?

See the Whole Flow, Not Just the Channel

Email, text and print each do a different job well. The audit isn't finished until you've looked at whether they're working together as a system, not competing for the same attention on the same day.

Match the moment to the channel

MOMENT		
Example: Deposit deadline reminder	Text	Yes — urgent, simple, one action. Email alone would likely get missed at this stage.
Example: Financial aid package	Print	Yes — a document families keep, reference and pass around at home.

Look for duplication and gaps

*A text and an email covering the identical message on the same day isn't reinforcement. It's noise.
A moment with no channel covering it at all is where students stall.*

WHERE ARE TWO CHANNELS SAYING THE SAME THING WITHOUT ADDING ANYTHING NEW?

WHERE DOES ONE CHANNEL HAND OFF TO ANOTHER THAT NEVER ARRIVES — A PRINT PIECE WITH NO DIGITAL FOLLOW-UP, A TEXT WITH NO LANDING PAGE BEHIND IT?

TWO THINGS THAT ARE EASY TO MISS

Print needs lead time. If your production calendar is built around email's speed, work backward from your mail date, since design, proofing and printing can take several weeks longer than a digital send.

Suppression should work across channels, not just within one. If a student replies to a text, does that pause the email nudging the same action? Most suppression logic only prevents duplicate sends inside a single channel.

Audit for Tone, Voice and Experience

Read every communication in your flow —email, text or print —as the 17-year-old who just got an acceptance letter, or the parent making sense of financial aid for the first time. Does the communication make the next step feel clearer, or more complicated?

You can't judge tone without knowing your audience

Assessing resonance means knowing who you're writing for, and assumptions age fast. Ground this section in real evidence: your own surveys and focus groups, free national research from organizations like RNL, EAB and Carnegie, and generational studies of who's entering your funnel now. Even one recent data source beats a persona built three cycles ago. For where to find that research and how to use it, read "[One Question That Changed How I Build Communication Flows](#)" at squareoneky.com.

WHAT EVIDENCE ABOUT YOUR CURRENT AUDIENCE IS THIS REVIEW GROUNDED IN? WHAT'S MISSING?

Run each communication through this checklist

- ☐ **Human language** —Does this sound like one person helping another, or an institution broadcasting information?
- ☐ **No unexplained jargon** — Would a first-generation family understand every term without Googling it?
- ☐ **Urgency, not anxiety** — Is the reader acting because they feel informed, or because they feel pressured?
- ☐ **One job per communication** — Can you name the single action this piece needs to accomplish?
- ☐ **Solves their problem, not just ours** — Does it explain the why, not just the what?
- ☐ **One voice across channels** — Read the email, text and print piece for the same moment back to back. Do they sound like the same institution, or like three different offices that never talk?

Apply it

PICK ONE COMMUNICATION FROM YOUR FLOW. WHICH BOX ABOVE DOES IT FAIL FIRST?

"We need you to submit your housing application" is our problem. "Here's why completing it early gives you more options" is the student's problem. Which one are you writing?

REWRITE THE OPENING LINE OF THAT COMMUNICATION SO IT SOLVES THE STUDENT'S PROBLEM FIRST.

Review What You've Already Learned

If you ran A/B tests last cycle, revisit them with a broader lens than "which subject line won." If you didn't run formal tests, you likely learned more than you realize. Think about what surprised you.

WHICH COMMUNICATIONS PERFORMED MUCH BETTER THAN EXPECTED? WHY, IN YOUR BEST GUESS?

WHICH ONES MISSED THE MARK, OR GENERATED REPEATED PHONE CALLS AND QUESTIONS?

WHERE DID STUDENTS SEEM TO STALL AFTER RECEIVING A PARTICULAR COMMUNICATION?

Choose what to test next cycle

Focus testing energy on the moments with the greatest influence on enrollment decisions: the first communication after admission, financial aid messages, and touchpoints before major milestones like housing or deposit deadlines.

WHAT WILL SUCCESS LOOK LIKE FOR THIS TEST? (NOT OPENS OR CLICKS — THINK MILESTONE COMPLETION, EVENT ATTENDANCE, OR FEWER CALLS.)

Talk to Your Counselors

This is the step most enrollment marketers skip, and it's one of the most valuable. Bring your admissions counseling team together and ask for specifics, not general impressions.

WHAT QUESTIONS DID STUDENTS AND FAMILIES ASK OVER AND OVER, IN THEIR OWN WORDS?

WHAT CONVERSATIONS CAUGHT STUDENTS OR FAMILIES OFF GUARD?

WHERE DID STUDENTS CONSISTENTLY GET STUCK (FINANCIAL AID, HOUSING, ORIENTATION, ANOTHER MILESTONE)?

WHAT WOULD HAVE MADE A COUNSELOR'S JOB EASIER THIS CYCLE?

The curveball question: What questions disappeared this year? Sometimes success is the absence of something.

ANY QUESTIONS THAT QUIETLY STOPPED COMING IN? WHAT CHANGED?

Meet with Enrollment Leadership

If you're in marketing rather than admissions, this conversation matters most and gets skipped most often. Request a debrief that's a conversation, not a data review.

WHERE DID STUDENTS SEEM TO LOSE MOMENTUM THIS CYCLE?

WERE THERE POINTS WHERE APPLICATIONS, DEPOSITS OR REGISTRATIONS SLOWED UNEXPECTEDLY?

WHAT QUESTIONS OR CONCERNS SURFACED REPEATEDLY WITH LEADERSHIP'S TEAM?

WHICH ENROLLMENT GOAL FELT HARDEST TO MOVE THIS CYCLE, AND WHERE DOES LEADERSHIP THINK COMMUNICATION COULD HAVE HELPED?

IF LEADERSHIP COULD IMPROVE ONE PART OF THE ENROLLMENT EXPERIENCE NEXT YEAR, WHAT WOULD IT BE?

ASK YOURSELVES TOGETHER

Is this really a process problem, or is it a communication problem? Sometimes the answer is both. If marketing isn't in the room, that question may never get asked.

Email and text are easy to secret shop by signing up as a prospective student with a spare address and phone number. Print is trickier since it follows a physical address. Request a viewbook directly, or ask a colleague or friend whose student is in the search process to save what shows up at their house.

WHERE DID YOU FEEL EXCITED, CONFUSED, OR OVERWHELMED AS A PROSPECTIVE STUDENT?

Remember: don't limit this to your closest competitors. Include institutions known for exceptional enrollment experiences, even outside your direct competitive set. The goal is to become a better version of your own institution, not a better version of the school across town.

MORE ROOM ONLINE: Log each institution and channel you shop in the [companion spreadsheet](#) and compare with one another.

Find the Friction

A gap is a moment your communications don't address. Friction is a moment they do address, but something still slows the student down. Friction is quieter and easier to miss, so it helps to look for it on purpose before you map your gaps.

Walk the student journey in order, from first inquiry through the summer before enrollment. At each stage, ask where students hesitate, double back or drop off. Your CRM, your counselors and your own inbox all hold clues.

WHERE FRICTION SHOWS UP	DID YOU SEE IT THIS CYCLE?	WHAT IT MIGHT BE TELLING YOU
Students pause or stall at a step		
The same question keeps coming back		
Deadlines get missed		
Support tickets or calls spike		
Students go quiet after a message		
A repeated question is rarely a student problem. It's usually a signal that a communication isn't answering something it should, or isn't reaching the student at the right moment.		
THE SINGLE BIGGEST POINT OF FRICTION YOU NOTICED THIS CYCLE		

Identify Gaps and Friction Points

A gap is any point in the enrollment journey where students or families have an important question, concern or emotional need your communications aren't addressing. Closing a gap means choosing both the message and the right channel to carry it.

GAP	PRESENT IN YOUR FLOW?	WHAT WOULD CLOSE IT	BEST CHANNEL
Post-admit silence			
Financial aid confusion window			
Summer after deposit			
Unstated assumptions (terms, portal, process)			
Your own gap:			

Not every gap needs a new email. Sometimes the fix is a text where an email is being ignored, a print piece for a document families need to hold onto, or one added sentence in something you already send.

WHEN THE FIX ISN'T A MESSAGE AT ALL

Sometimes a moment keeps falling flat in email, text and print because it was never a job for a message. It's a job for a person. A stalled admitted student may need a call from their counselor. A nervous family may need a current parent to talk to. A quiet prospect may need a student ambassador who shares their major. Before you write another email, ask whether an ambassador, a tour guide or a current student could carry that moment better than any channel you own.

What We Found, What We're Prioritizing

Use this page as your one-sheet: the summary you bring into a leadership meeting once the audit is complete.

Tag each item with its channel — (E)mail, (T)ext, (P)rint — so leadership can see whether the work ahead is a message problem, a channel problem or a sequencing problem.

Keep

Revise

Build New

TOP THREE PRIORITIES FOR NEXT CYCLE, IN ORDER

ONE MORE AUDIENCE WORTH A PASS

This workbook centers on students, since that's where most enrollment communication starts. But parents, families and supporters are reading the same print piece over a student's shoulder, forwarding the same email and replying to texts meant for their student. If this audit surfaces a gap that's really a parent and family gap, that's a specific area Square One can help you build. I write about this often, including in ["It's Time to Stop Saying Parents Matter and Start Showing It"](#) on the Square One blog.

Prioritize Before You Plan

Your summary probably lists more than you can do in one cycle, and that's normal. Before you build a timeline, decide what's worth your team's limited hours. Score each priority on the impact it would have and the effort it would take, then let the pattern guide you.

Score each column High, Medium or Low. **Impact:** how much this would move enrollment or improve the student experience. **Effort:** the time, people and budget it would take to do well. **Urgency:** how soon it has to happen, based on your enrollment calendar.

PRIORITY	IMPACT (H/M/L)	EFFORT (H/M/L)	URGENCY (H/M/L)	OWNER

HOW TO READ YOUR SCORES

High impact and low effort is where you start, since those are the changes that earn trust and buy you room for the harder work. High impact and high effort deserve a real place on the roadmap, not a rushed one. Low impact and high effort is usually where good intentions go to die. Be willing to let those go.

[companion spreadsheet](#), then

MORE ROOM ONLINE: Score priorities with sortable dropdowns in the sort by impact to see where to start.

Turn Findings Into a Plan

An audit without a sequence is just a longer to-do list. Move your priorities into three horizons, assign each an owner, and work backward from fixed points — application deadlines, decision release, deposit deadline, orientation. Print needs the longest runway, so schedule those pieces first and let email and text fill in around them.

WHEN	ACTION (FROM KEEP / REVISE / BUILD LIST)	CHANNEL	OWNER
Before launch			
Mid-cycle			
Mid-cycle			
Next summer			
Next summer			

Before launch is your rebuild window: what must exist before the flow goes live. **Mid-cycle** is what can be tested or adjusted in flight. **Next summer** holds everything worth doing that doesn't fit this year — write it down now so it isn't rediscovered in twelve months.

Not everything on your list belongs in "before launch." A shorter list of finished improvements beats a long list of half-built ones. Protect the rebuild window.

Want a second set of eyes on this?

This workbook mirrors the process behind the Square One Communications Audit, the framework I use with enrollment and marketing teams directly: gap analysis, quality review, audience resonance and a roadmap for what comes next. If you'd rather talk it through than fill it out alone, let's talk.

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ABOUT THE CONSULTANCY

Square One Consulting

Higher ed marketing that speaks human.

Square One Consulting is a higher education marketing and communications consultancy built for small colleges, regional universities and enrollment-focused institutions that need sharper strategy and added capacity.

Led by Laura Rudolph, M.S., Square One supports enrollment and marketing leaders through communication audits, student journey mapping, yield campaigns, parent and family messaging, campus visit strategy and Slate CRM support. The work is especially designed for institutions balancing ambitious enrollment goals with limited time, staffing and internal bandwidth.

With experience across admissions, marketing, student services and athletics, Laura brings both strategic perspective and hands-on execution to help institutions find gaps, reduce confusion and create clearer, more useful experiences for students and families.

At its core, Square One helps colleges communicate with more clarity, empathy and purpose, so the people they serve can better understand their options and take the next right step.



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