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 **UPCEA**

Supporting & Retaining the New Professional Learner

How continuing education leaders can meet the needs and expectations of today's learners

Foreword



Drastic changes to the education and workforce landscape have created more demand for upskilling and enabled a wider reach for continuing education programs. We've seen the higher education community come together to navigate new ways to support professional learners.

Furthering your education can be a daunting task. The new professional learner wants courses and programs that match their immediate needs and expectations. They earnestly take into consideration various factors, such as career and personal goals, mode of instruction, part or full-time options, cost and financial aid, reputation, ease of access, and program length – just to name a few. Careful planning and consideration are vital.

This is where you come in. Ensuring that the learning experience aligns to each individual's expectations and needs rests largely on the shoulders of your continuing education departments. We hope the compelling insights from this research report provide next steps for you to support and retain professional learners in new ways.

Wishing you success on your path to helping individuals achieve personal goals and grow their careers.

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About This Report

The higher education landscape is rapidly evolving, and younger generations enrolled in professional, continuing, and online (PCO) programs are consistently increasing. Given these factors, Salesforce.org and the University Professional and Continuing Education Association (UPCEA) wanted to gain greater insight into the expectations and experiences of continuing education (CE) students and staff.

Welcome to Supporting & Retaining the New Professional Learner, a research report highlighting insights and recommendations for PCO programs at higher education institutions. The key findings reveal learner needs and expectations across the full program lifecycle, the differences between ages and experience levels, and opportunities for institutions to better communicate with, support, and retain students. Additionally, this report examines institutions' ability to use technology to automate processes and anticipate learners' needs.

Over 500 qualified professionals looking for continuing education courses and programs were surveyed nationally in the summer and fall of 2021. For the purpose of this research, younger millennials are defined as those age 25-29, middle millennials as 30-34, older millennials and younger Generation X as 35-44, Generation X as 45-54, and boomers as 55 years or older. A detailed breakdown of respondent demographics is compiled in the Appendix.

To build upon the foundation established by the quantitative research—and to better understand institutional capabilities, challenges, and perspectives – advising, recruiting, and student support staff from UPCEA member institutions also participated in focus groups.





This report presents insights into PCO programs when it comes to:

Program Qualities: Key drivers of enrollment, accessing information of interest, program delivery methods, and satisfaction and frustrations with offerings.

Communication and Engagement: Information accessibility, preferred communication channels, frequency, responsiveness, and levels of engagement.

The Learner Experience: Expectations and needs, services related to career support or financial aid, as well as ongoing support.

Institutional Staff Perspectives: Ability to customize and support individual learner goals, communication and engagement, processes or procedures that could be automated, and institutional hurdles or challenges.

Key Findings & Summary



Motivators:

Long-term career and personal goals continue to be the primary criteria for learners when selecting a continuing education and training provider [\(8\)](#). Staff members felt this was particularly true for individuals who feel they've hit a perceived ceiling or have lost interest with their current career trajectory and may want to change their role or field.



Flexibility:

While learners' specific personal and professional goals differ by generation, they value flexibility and seek online or hybrid offerings.



Immediacy:

Having immediate access to resources and support is now a given. Learners express frustrations—from technology issues to real-time support—posing opportunities for institutions to re-examine their processes for engaging with students throughout their educational journey [\(16\)](#).



Accessibility:

When it comes to creating a user-friendly experience and providing basic services related to career support or financial aid, learners express interest in institutions automating processes to improve the student experience [\(18\)](#). Additionally, information that students value must be easily accessible [\(10\)](#).

Key Findings & Summary



Personalization:

There are opportunities for institutions to better personalize communications and adapt to learners across different ages. The younger learner has different preferences than what current systems are designed for [\(12\)](#) [\(14\)](#). Staff members echoed these sentiments and felt institutional systems limited customizable or personalized approaches.



Automation:

Automation was seen by both learners and staff as a beneficial element to improving the student experience [\(20\)](#).



Institutional Hurdles:

When discussing potential hurdles to automating processes, staff members presented three clear challenges: institutional silos, compliance issues, and a lack of trust [\(20\)](#).

Overview: Professional and Continuing Education (PCE) Student Support and Retention

Changing Landscape of PCE: Given the evolution of the economy and the changing needs of employers, PCE programs are being more aggressively designed with learning outcomes and return on investment in mind.

Need for Additional Value for Students: Both credit- and non-credit- bearing programs are increasingly designed in more stackable formats, where a given course or credential can count for credit toward a subsequent course or credential, for non-traditional and professional learners.¹

Tailoring Retention for PCE Students: Pursuing education as a non-traditional student has its own challenges in which institutions must further acknowledge and address in order to improve retention. A study done by the National Center of Education Statistics (NCES) found that 56% of professional learners said they prioritized work over being a student.²

Price Sensitivity Remains High: One of the main barriers for professional learners is the overall cost of the credential, as well as the individual components (or courses). It is important for institutions to factor in pricing, as financial aid and scholarships are usually limited for the professional learner.

Using Data to Identify At-Risk Students: It is critical to identify patterns in student engagement and performance using data analytics and research in order to better implement individualized services and engage at-risk students at the right moment.³ Once this information is synthesized, it is imperative that the appropriate staff intervene with students who are struggling and facilitate virtual engagement and support between key stakeholders.

¹ [Two Views of Adult Student Retention: Small Liberal Arts Institutions](#)

² [What "Persistence and Retention" Means for Adult Learners](#)

³ [Early Detection of At-Risk Students Using Machine Learning Based on LMS Log Data](#)

Survey Breakdown

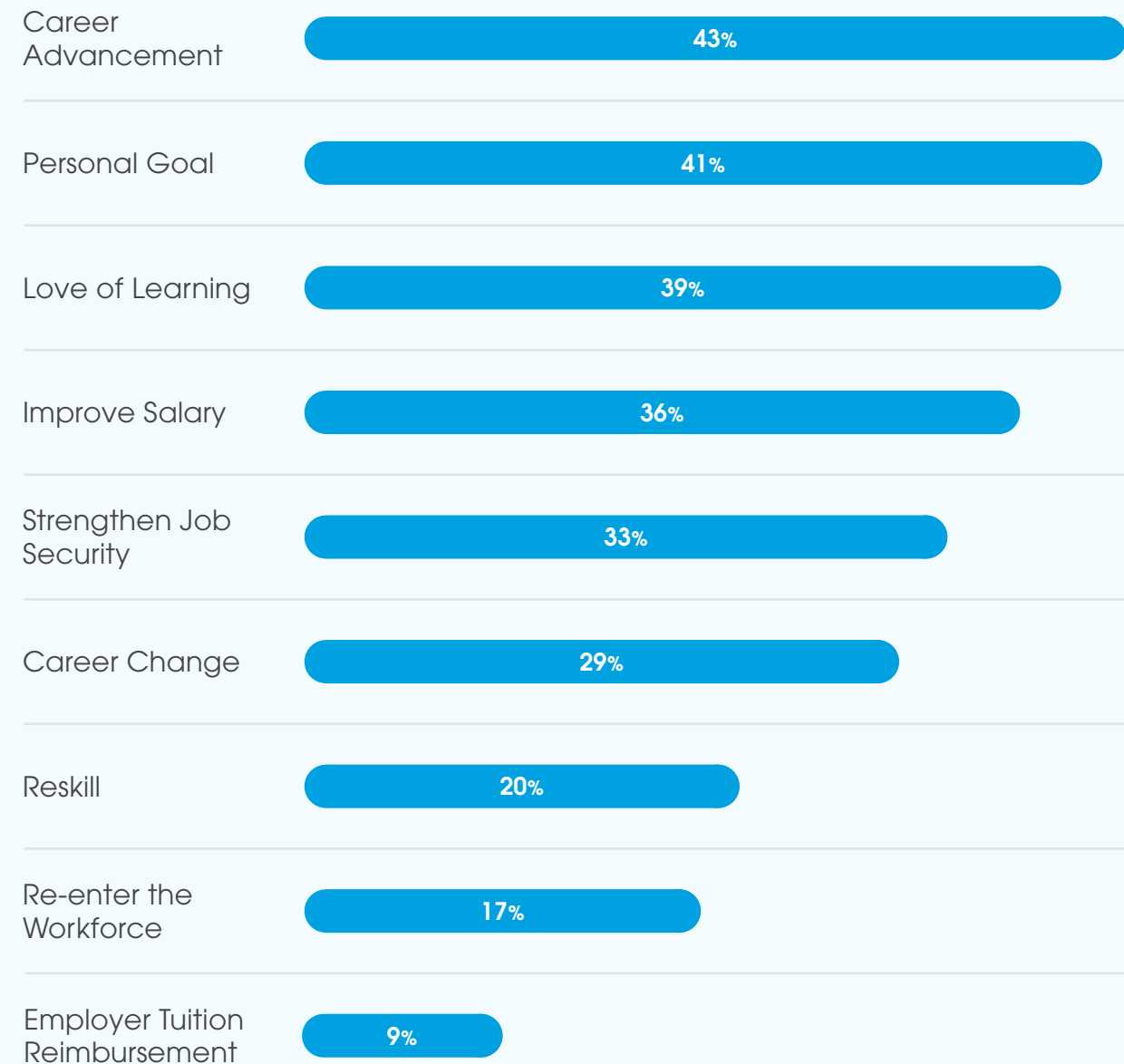
Key Motivators for Enrollment

There are many factors to consider when seeking a provider for continuing education or training. Data suggests that long-term career and personal goals continue to be the primary criteria for learners.

- Career advancement (**43%**) and personal goals (**41%**) ranked as the top two motivators for enrollment.
- A love of learning (**39%**) came in close behind at third.
- Half of students were enrolled in a program that was delivered fully online, while a quarter were in a program that was delivered mostly online.

Staff Perspective: Focus group respondents agreed with these findings as they routinely highlighted students' desire for career advancement, particularly for those who feel they have hit a perceived ceiling or have lost interest with their current career trajectory and may want to change their role or field. Other staff members mentioned that an unintended outcome of the pandemic was increased flexibility and availability among some learners due to COVID-19 restrictions, furloughs, or job loss. This may lead to an increased desire for flexible courses and schedules for future education. Some participants also reported an increased interest in degree completion programs because individuals believed they could find more stable employment during or after the pandemic if they were able to complete a degree.

Q: Which of the following describe why you chose to enroll in your education or training program? Please select all that apply. (n=531)



Supporting Student-Specific Learning Goals

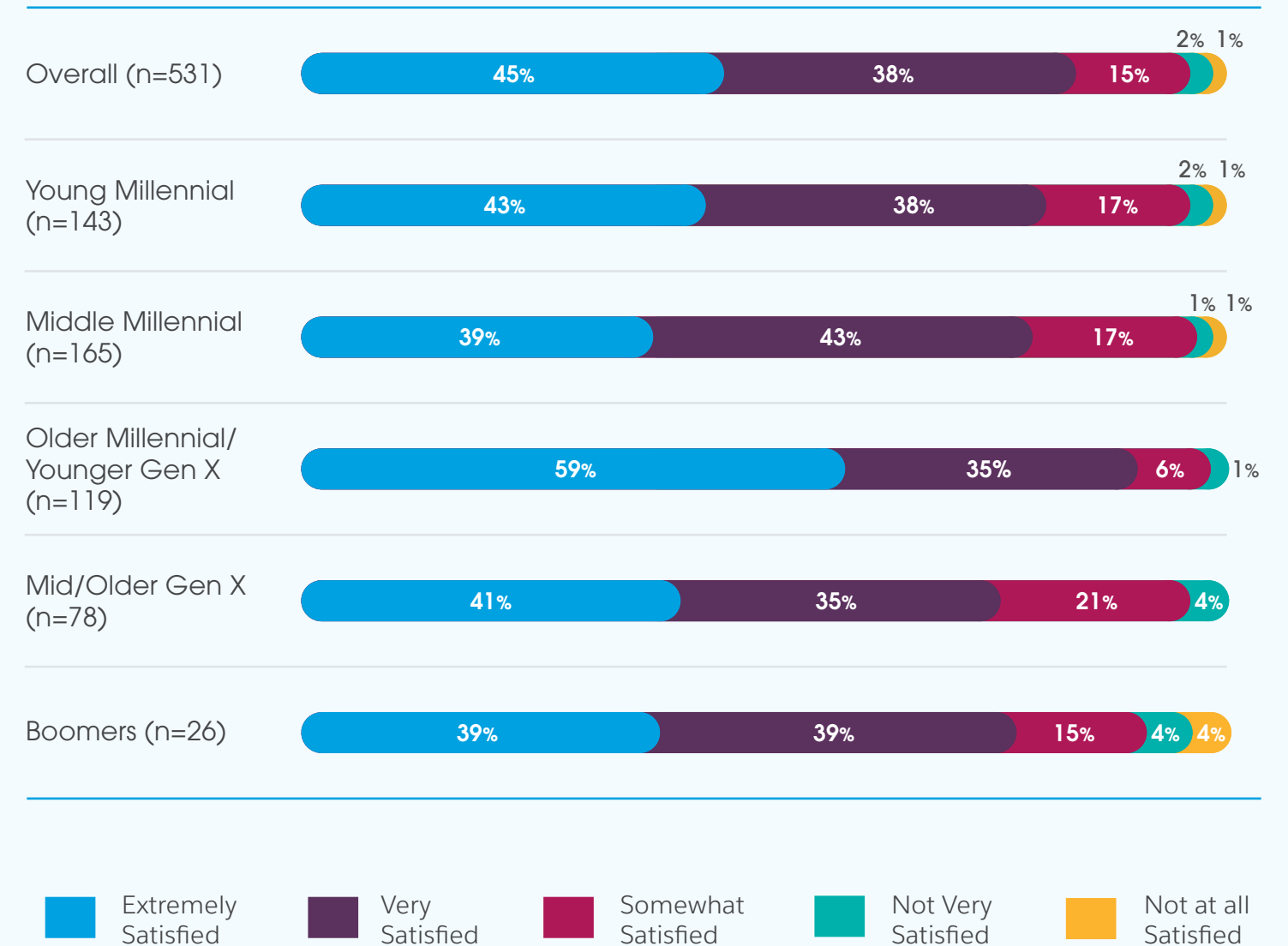
Overall, the majority of students were satisfied with their institution's ability to understand and support their specific learning goals.

- The majority (**83%**) of respondents were extremely (**45%**) or very satisfied (**38%**) with their institution's ability to understand and support their specific learning goals.
- Older millennials and younger Gen X (**59%**) participants were most likely to be extremely satisfied with their institution's ability to understand and support their specific learning goals, while middle millennials were **20%** less likely.

Staff Perspective: Unlike students, the majority of focus group participants did not believe their institution has the ability to customize and support professional learner goals on an individualized basis. Many respondents provided anecdotes about their personal ability to help learners achieve their goals, but stated that institutional systems box them in, preventing them from taking a unique and customizable approach.

Additionally, there has been an increase of younger populations entering the PCO pipeline. Staff noted that, unlike previous generations, younger learners have grown up with an Amazon customer experience and expect information and support quickly. Other staff members noted that some of their students have increased responsibilities and pressures at home, which negatively impacts their pursuit of education.

Q: Overall, how satisfied are you with your institution's ability to understand and support specific learning goals?

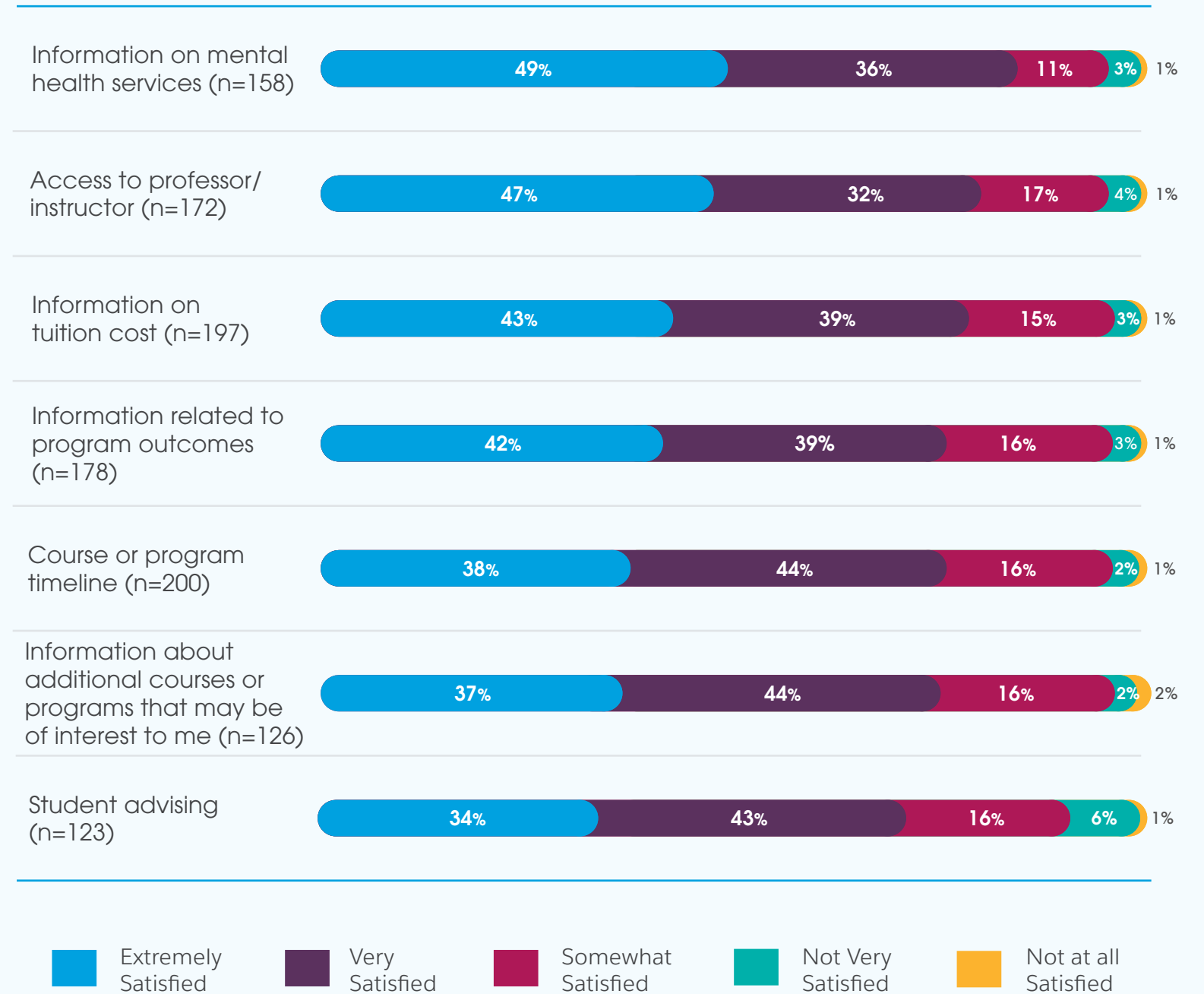


Information Accessibility and Importance

Students were often extremely or very satisfied with their ability to obtain information from their institution. However, some critical information areas could be more readily accessible.

- Students were most satisfied with their ability to obtain information on mental health services (**49%**) and least satisfied with access to student advising information (**34%**).
- Tuition cost was stated as the information most needed by students, yet almost one in five students were somewhat or not very satisfied with their ability to obtain that information.
- Institutions have an opportunity to improve information related to course outcomes, with almost one in five students stating they were somewhat or not very satisfied with their ability to access that information.

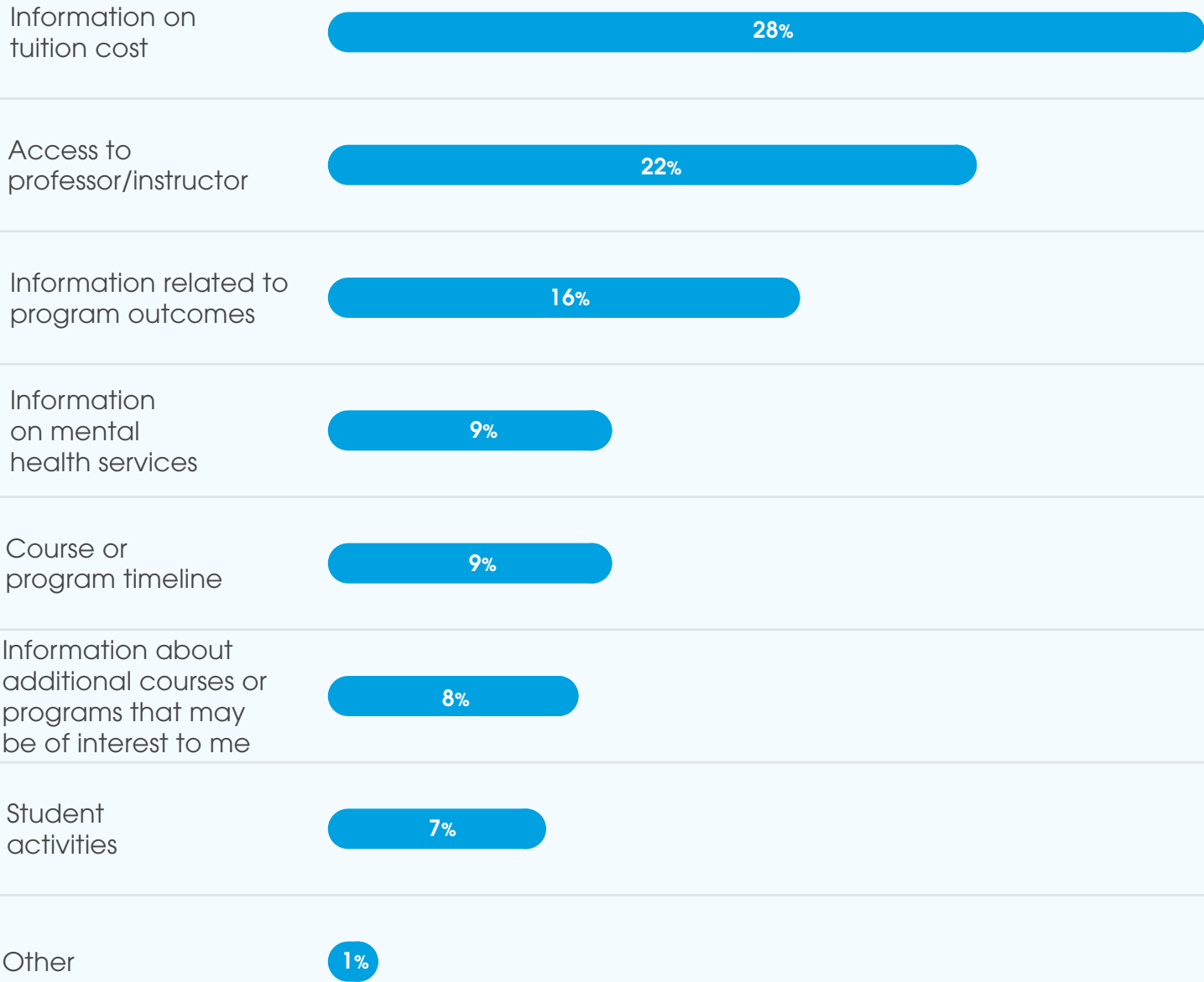
Q: How satisfied were you with your ability to obtain the following information?



Information Accessibility and Importance



Q: Looking back at your experience, what types of information do you or did you need most? (n=528)



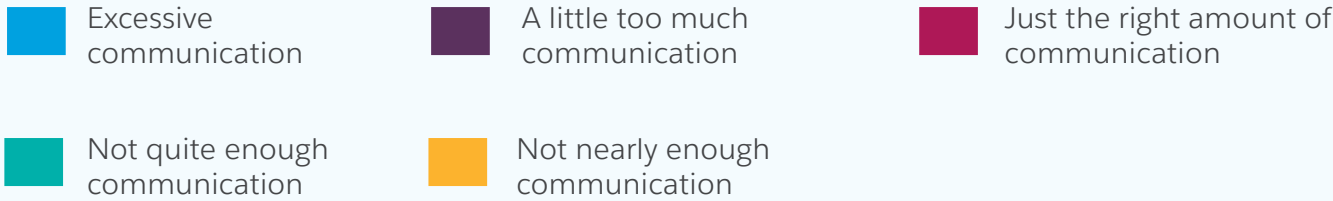
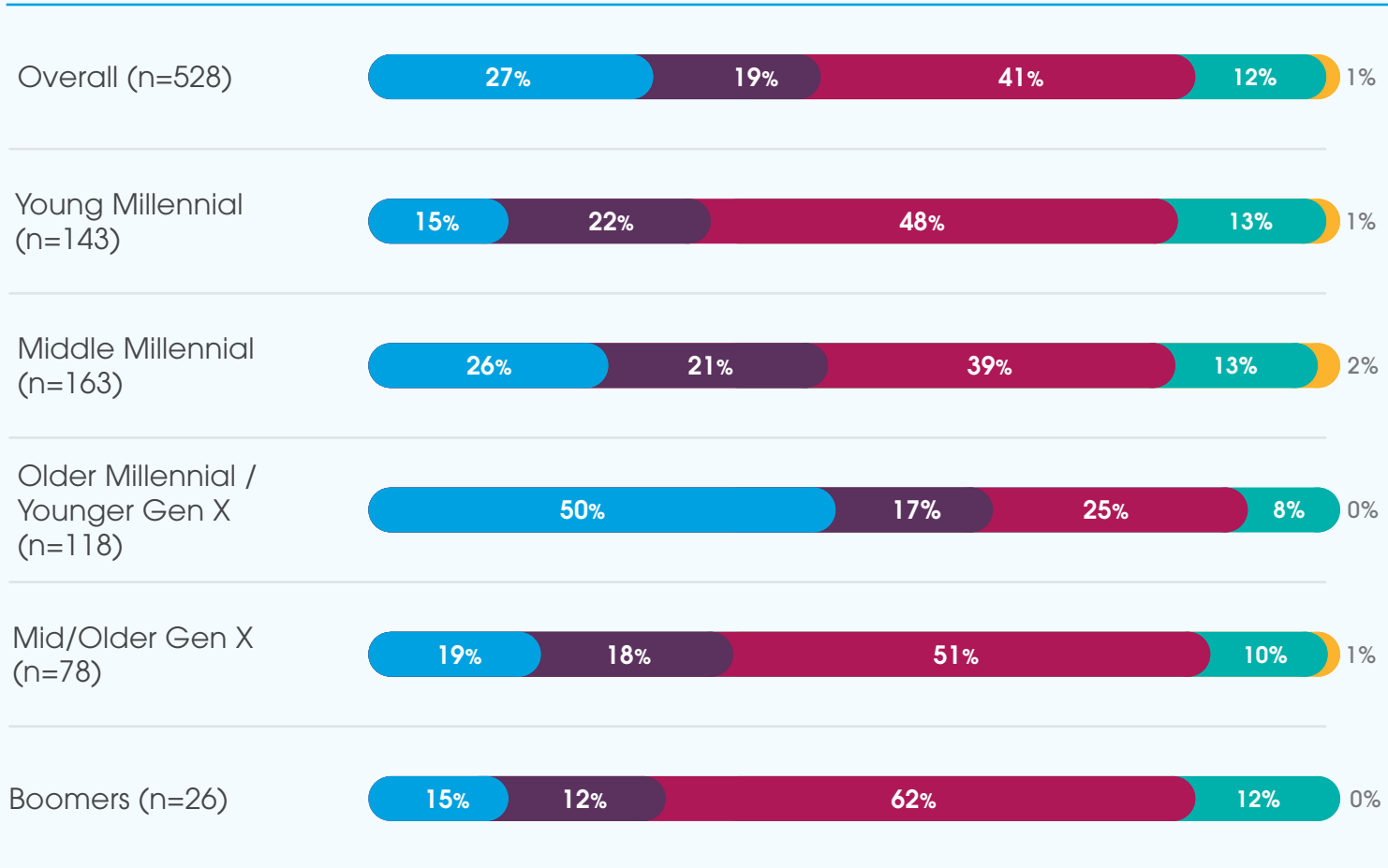
Communication Frequency

Survey respondents felt their institutions were more often too communicative than less so.

- **46%** of learners said there was either excessive communication (**27%**) or a little too much communication (**19%**). Only **13%** said there was either not quite (**12%**) or not nearly enough (**1%**) communication.
- Young and middle millennials were most likely to say there was not quite or not nearly enough communication from the program provider.
- Institutions have an opportunity to decrease the quantity of communications they send to students, and instead focus on more personalized, relevant information.

Staff Perspective: Many focus group participants felt that their institution over communicates with students, inundating their email and phones with continual, and potentially irrelevant, communications.

Q: Which of the following best describes the amount of communication (emails, phone calls, text messages, etc.) you received from your education or training program provider?





EE

“Students aren’t responding because their emails are getting flooded. And we’re also texting them every week about something. Whether it is good information or not, we’re putting everything everywhere and students are overwhelmed.”

- Focus Group Respondent

Preferred Communication Channels

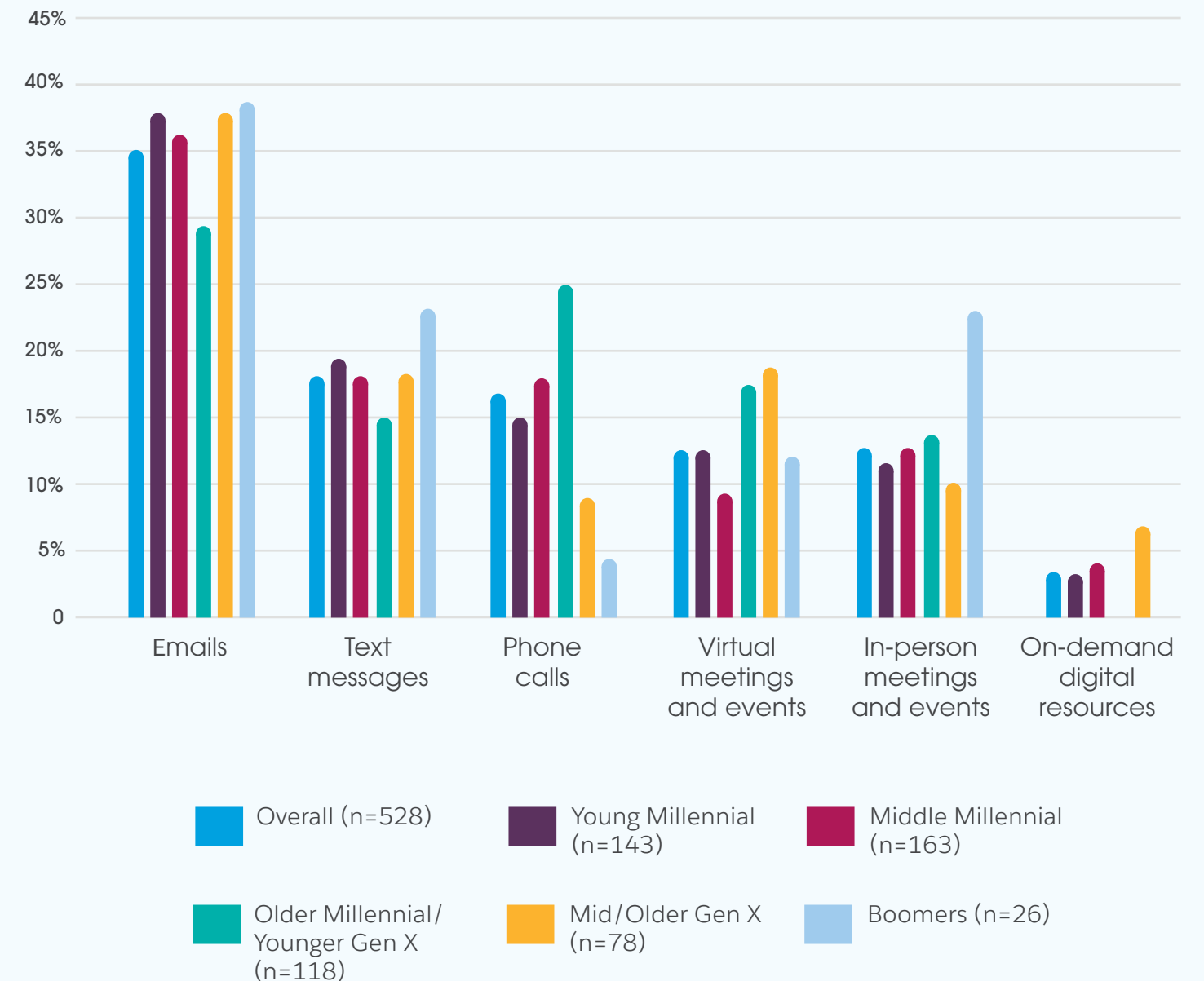
A range of communication channels are expected by learners when seeking or enrolled in a continuing education program. Nearly all learners prefer to communicate by email, followed by text messages and phone calls.

However, the reality of how institutions engage with learners varies by channel and age. This poses an opportunity for institutions to better personalize communications on the channels learners prefer to engage with in order to improve satisfaction.

- Just over a third of respondents (**35%**) prefer to communicate via email.
- A quarter of older millennials and younger Gen X respondents prefer to interact with their institution via phone calls, well above the percentages for middle and younger millennials.

Staff Perspective: While institutions have long employed a scattered approach for engaging and communicating with students, they now have the opportunity to personalize outreach based on individual student preferences. Staff members felt that communication was often driven by the institution’s needs, rather than the student’s needs. Shifting to a more personalized approach allows institutions to better communicate with students based on their preferences and encourages greater engagement, ultimately resulting in a better student experience.

Q: What method or channel of communication would you most prefer to interact with your education or training program provider?





“We aren’t asking what students prefer, but letting them know how we (the institution) prefer to communicate. At the individual staff level, we recognize that students have different needs and preferences. It would be great if we had a platform that not only understands students’ availability, but also conveys to the student that we are interested in connecting with them on their terms.”

- Focus Group Respondent

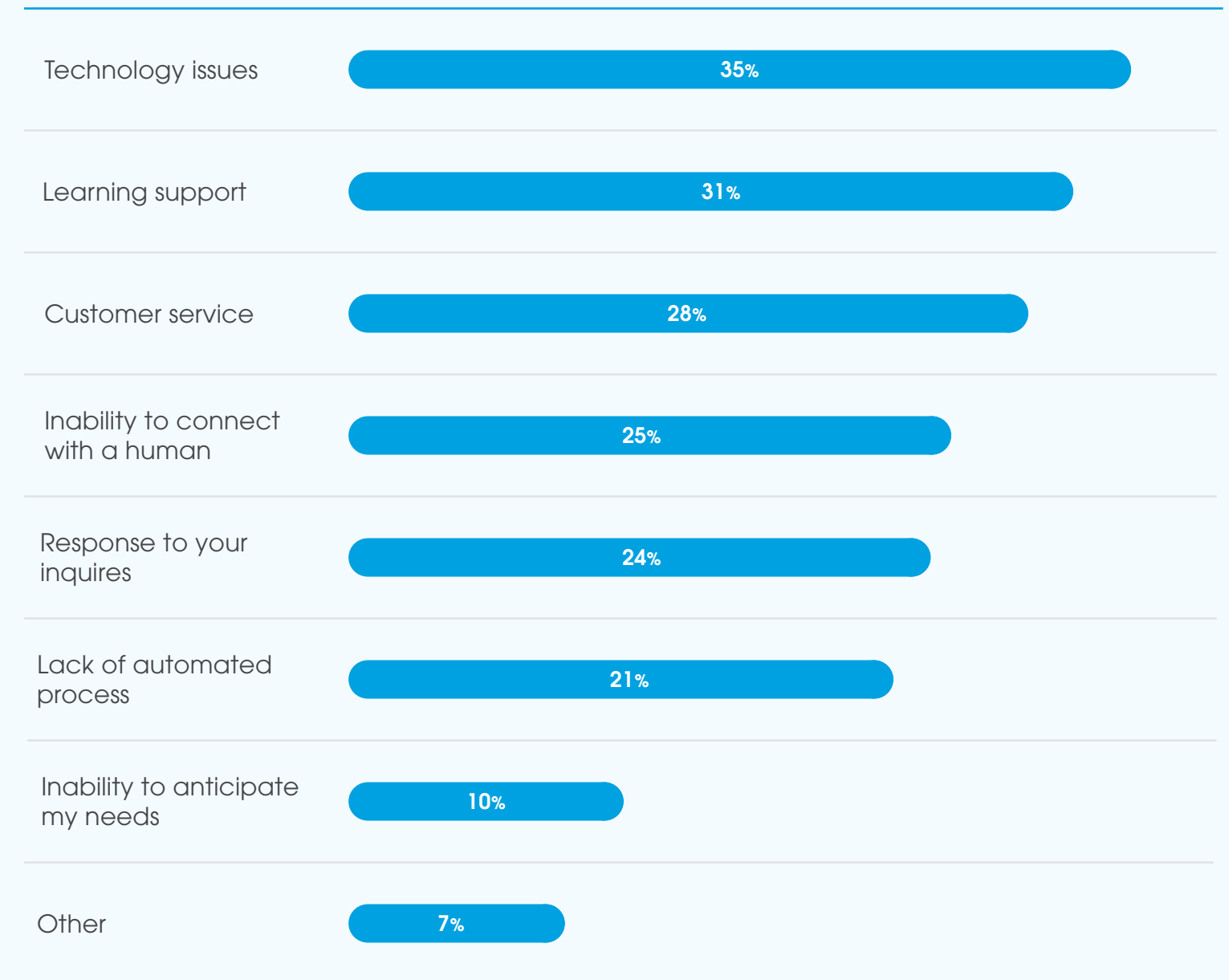


Learner Frustrations

Students experienced a number of frustrations – from learning support to customer service – with their institution. Survey respondents also cited frustration with technology and a lack of automated processes.

- Technology issues (**35%**) were the most common frustration experienced by students.
- While learning support (**31%**) and customer service (**28%**) routinely frustrated students, further findings suggest that these two areas could likely be improved by increasing automation and information accessibility.
- One in five respondents experienced frustrations with a lack of automated processes.

Q: Did you experience frustrations with any of the following during your time in the program? Please select all that apply. (n=528)



Institutional Efficiency

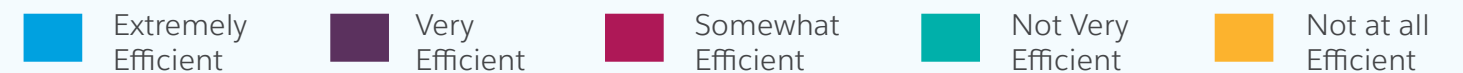
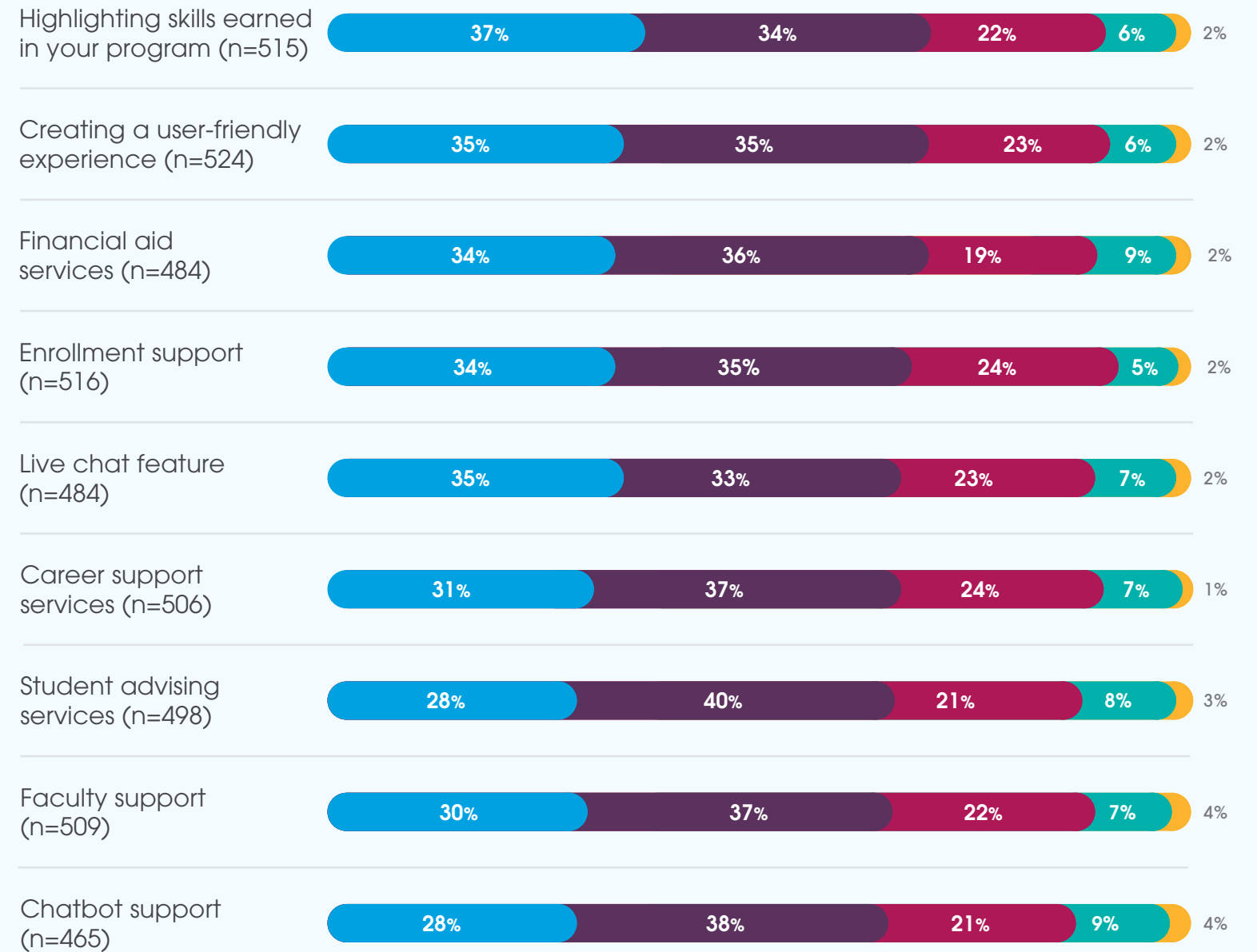
While students were pleased with their institution’s overall efficiency in serving them, certain topics saw considerable inefficiencies.

- Approximately one-quarter of respondents (**25%**) see room for considerable efficiency improvements at their institution.
- Students felt that their educational provider was most efficient at highlighting skills earned in their program (**71% extremely or very efficient**).
- Chatbot support was seen as the least efficient category among students, with the largest percentage of survey respondents citing their education provider was not very or not at all efficient. Improving chatbot support could provide access to critical information for students and reduce staff workload, improving their efficiency in other areas.

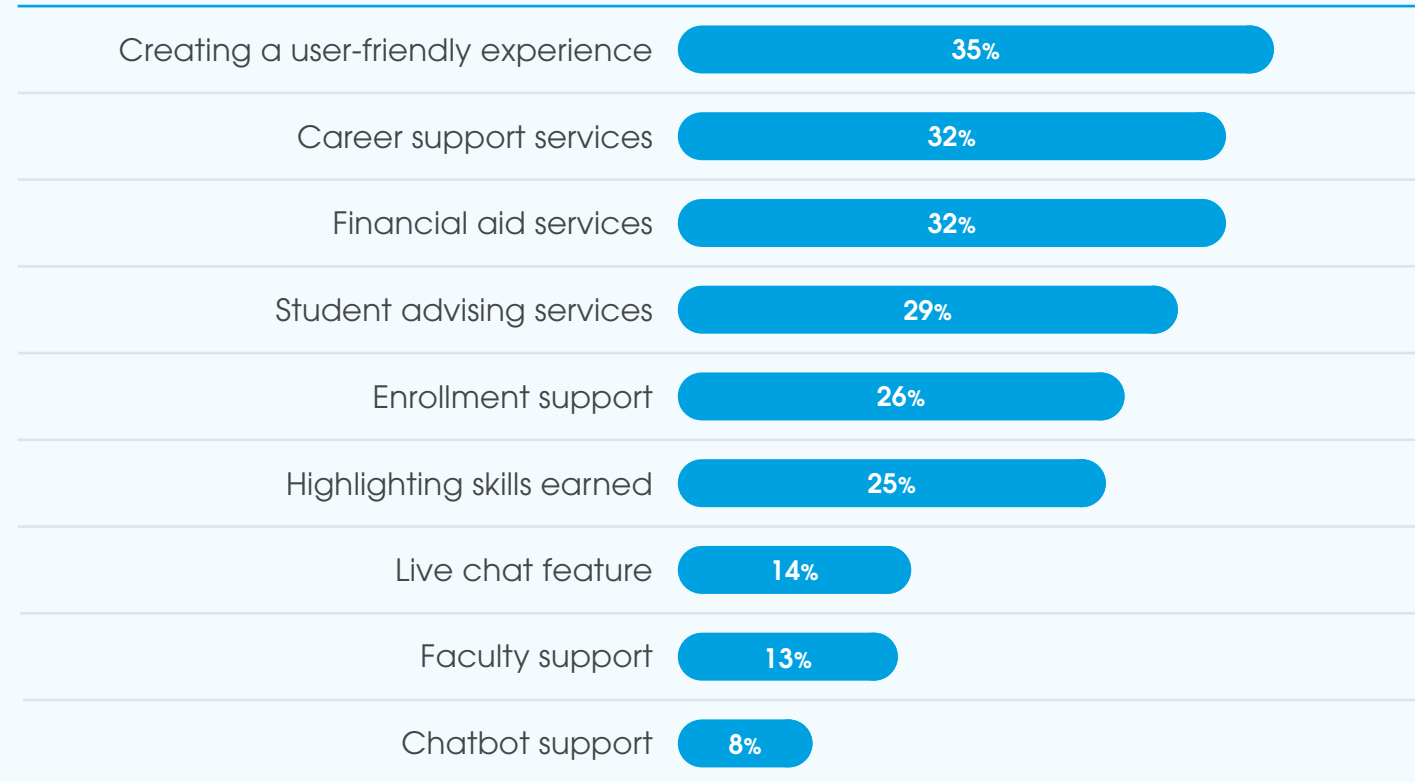
Q: How would you describe your educational provider’s efficiency in serving you? (n=528)



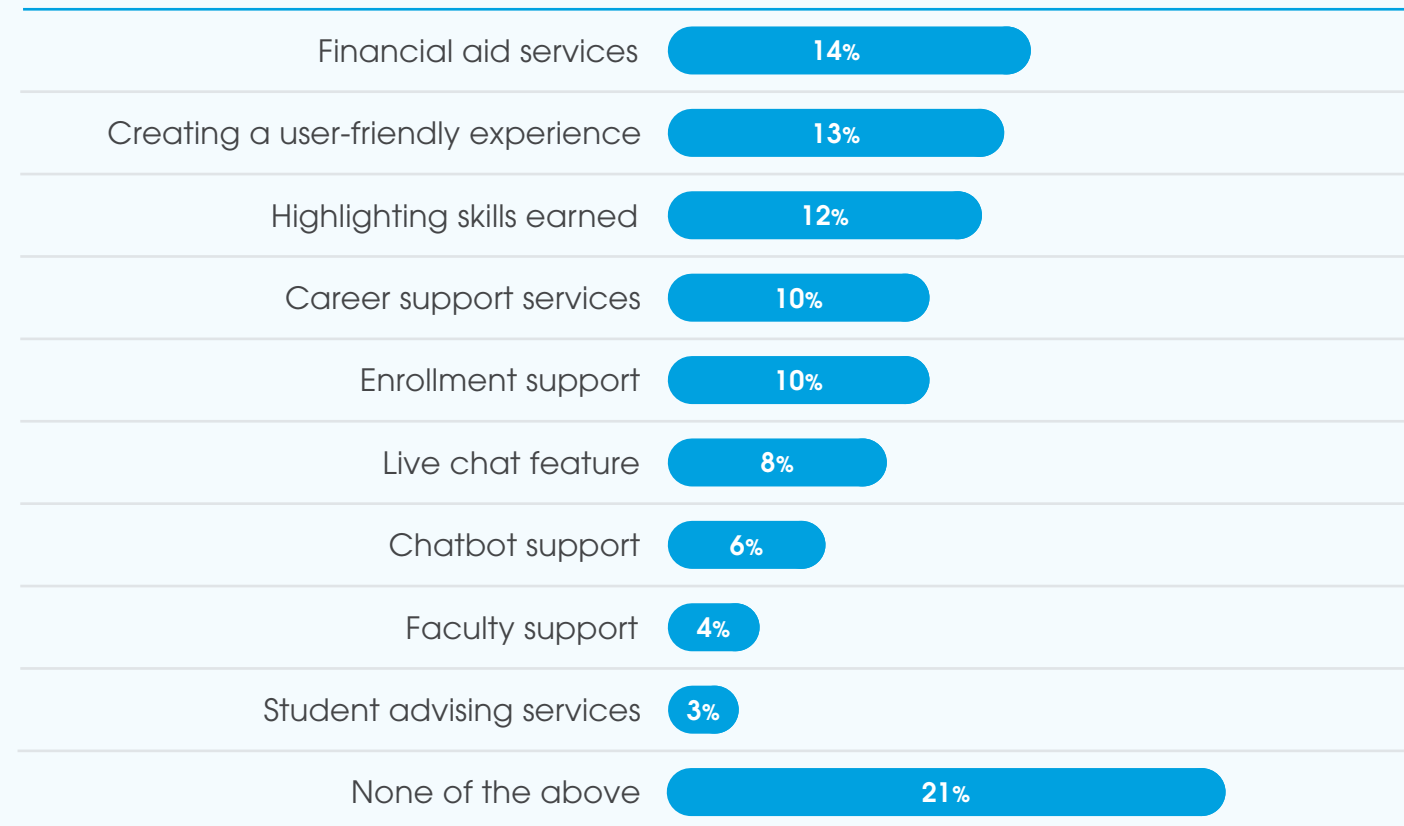
Q: How would you describe your educational provider’s efficiency in serving you?



Q: What could be automated at your institution? Please select all that apply. (n=527)



Q: What topic or service do you think could be most improved through automation, if any? (n=527)



Automation: Addressing Learner Needs

To better understand, and to help improve potential inefficiencies, students were asked about areas that could be automated at their institution. In general, students seemed to embrace automation.

- Approximately one-third of all respondents felt that creating a user-friendly experience (**35%**), career support services (**32%**), and financial aid services (**32%**) could be automated at their institution.
- When asked what topic or service could be most improved through automation, financial aid services ranked highest followed by creating a user-friendly experience and highlighting skills earned.

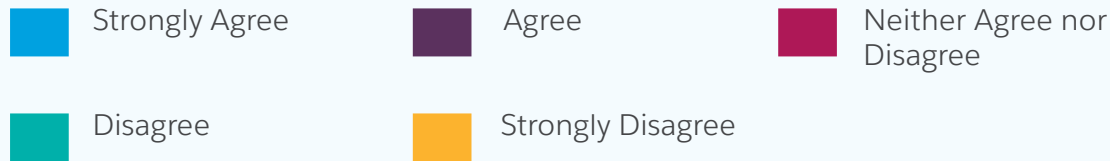
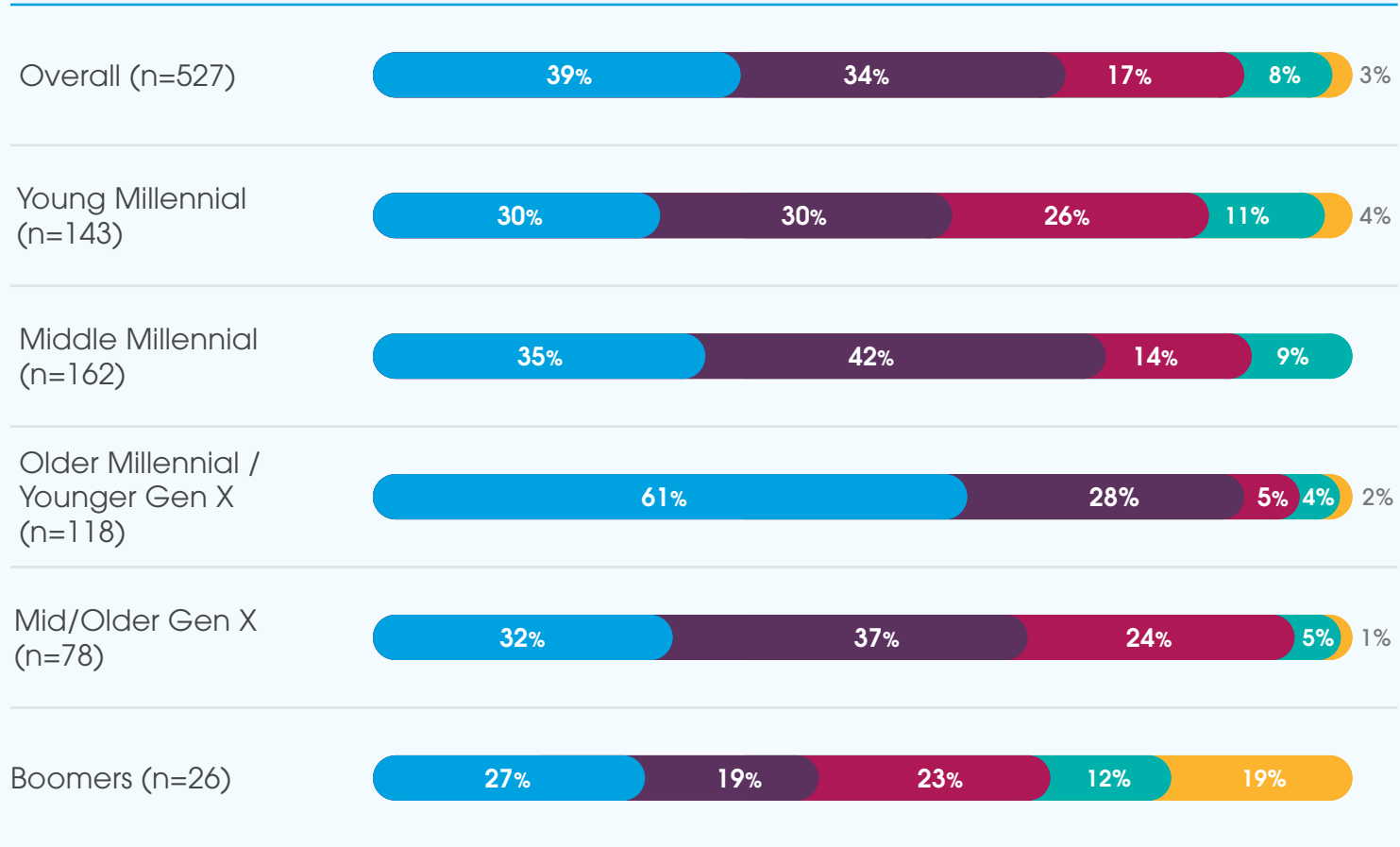
Staff Perspective: Staff felt that a number of processes and procedures related to the admissions process, student transfers, and Free Application for Federal Student Aid (FAFSA) could be automated to better improve institutional efficiencies and ultimately better meet the needs of learners.

Automation: Addressing Learner Expectations

Overall, students felt that their questions should be able to be answered through automation. Institutions have an opportunity to implement the appropriate structures and communication processes to satisfy this expectation.

- Nearly three-quarters of respondents (**73%**) strongly agree or agree that all of their questions should be able to be answered through automation.
- 19%** of boomers strongly disagree that all of their questions should be able to be answered through automation, which is **9%** more than all other cohorts combined.

Q: Please rate how strongly you agree or disagree with the following statement:
All of my questions should be able to be answered through automation?



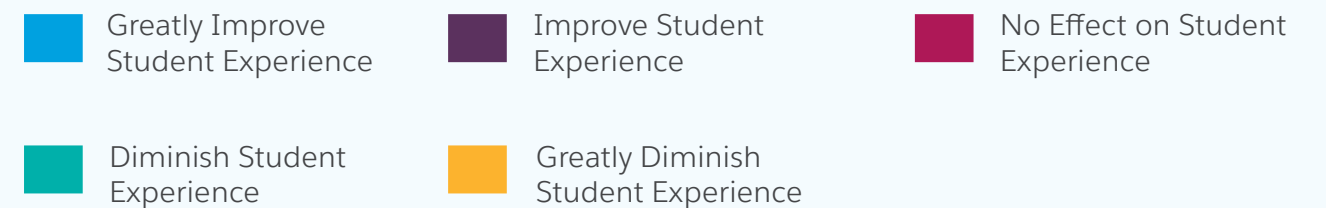
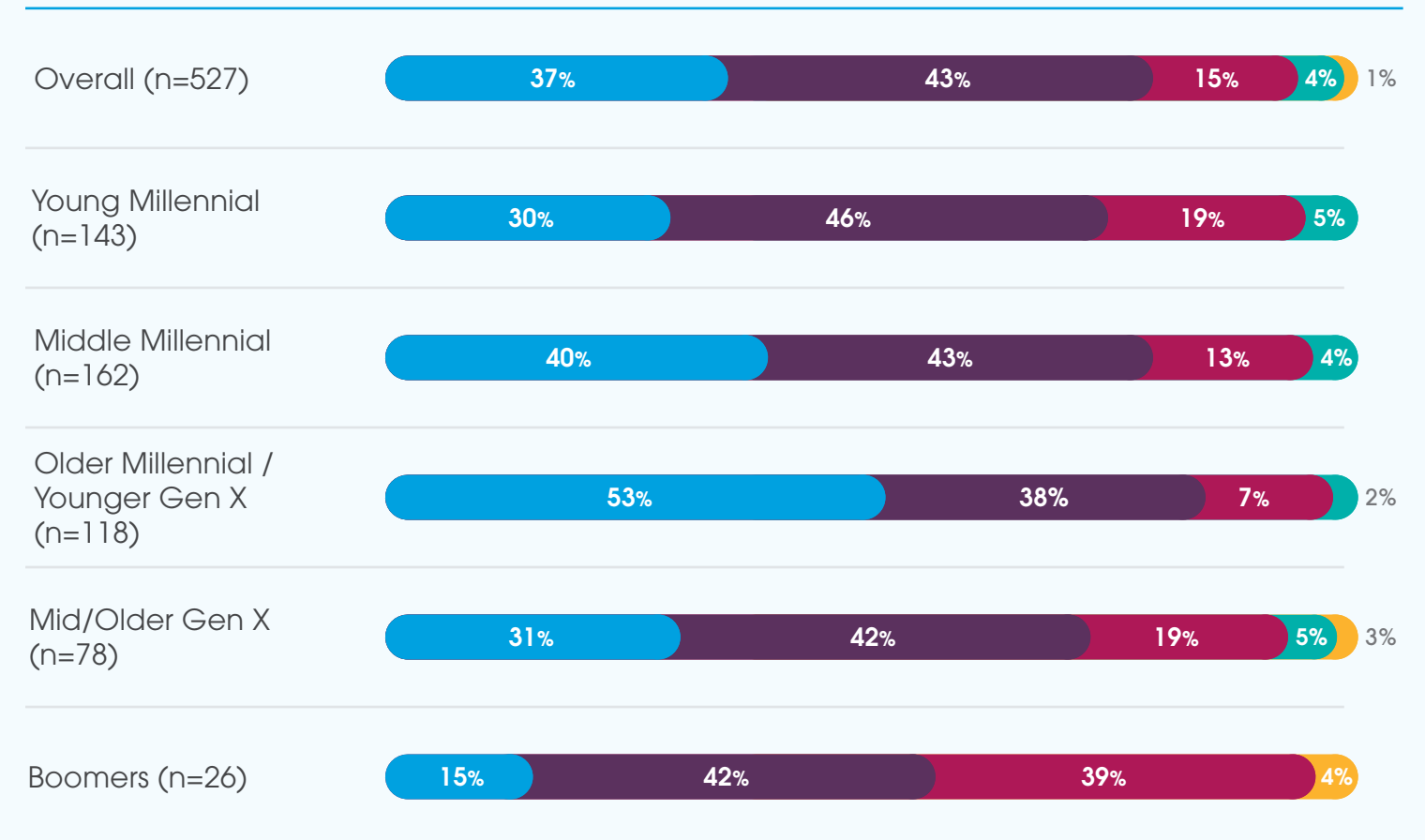
Automation: Anticipating Learner Needs

Students clearly indicated that automating processes and anticipating their needs would positively impact their learning experience. Institutions of all types have an opportunity to examine their structures and capabilities to incorporate automation and improve the student experience.

- In total, **80%** of students said additional initiatives to automate processes and anticipate their needs would greatly improve or improve their student experience.
- Younger cohorts were more likely to say additional initiatives to automate processes and anticipate their needs would improve their student experience, compared to the two oldest cohorts.

Staff Perspective: When discussing potential hurdles or challenges to automating processes, staff members presented three clear issues: institutional silos, compliance challenges, and a lack of trust.

Q: If your institution pursued additional initiatives to automate processes and anticipate your needs, what effect would that have on your experience as a student?



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“The moment automation fails and a student is lost in some capacity, it is hard to ever trust it again. We have so many different systems in higher education that don’t talk to each other.”

- Focus Group Respondent



Relationships and Future Programming

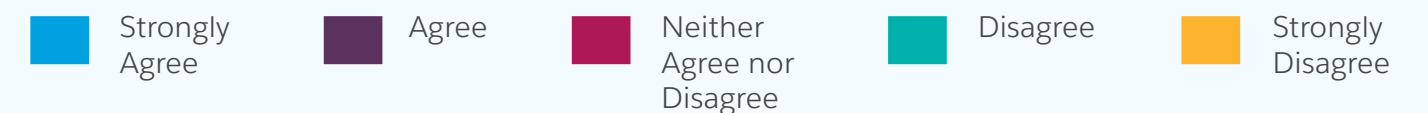
Individuals who completed their program had a less optimistic view of their relationship with their institution compared to individuals who were still currently enrolled. It is imperative that institutions discuss future programming opportunities with students while they are actively enrolled in a program.

- Among respondents who completed their program, **65%** strongly agreed or agreed that their institution made future programming recommendations and has shown an interest in maintaining a relationship with them, compared to **85%** of those still enrolled in their program.

Q: Please rate how strongly you agree or disagree with the following statement: After I completed my program, the institution has made future programming recommendations to me and has shown interest in maintaining a relationship with me. (n=126)



Q: Please rate how strongly you agree or disagree with the following statement: While I have not yet completed my program, the institution has made future programming recommendations to me and has shown interest in maintaining a relationship with me. (n=401)



Conclusions & Recommendations

Reduce institutional hurdles through targeted communication and collaboration: Institutions have an opportunity to break down internal walls and silos, as well as improve communication and collaboration among units to streamline processes and procedures for both students and staff. Institutions should evaluate legacy processes that are not learner-centered.

Utilize automation to improve processes and the student experience: Automation was seen as a major tool that could combat inefficiencies and be employed by institutions to improve the overall student experience [\(18\)](#). Students feel strongly that their questions could be answered through automation [\(19\)](#).

Anticipate learner needs: In order to improve continuing education student retention, institutions have to better understand and anticipate students' needs [\(20\)](#). While there will always be high-touch areas within student retention, professional learners want the ease and experience of automated and anticipated support processes.

Clearly communicate program outcomes related to career advancement: Career advancement is still the main motivation for professional learners to enroll [\(8\)](#). However, students still struggle to find information about program outcomes [\(10\)](#). Ensuring students understand how a program will benefit their career, given a challenging and changing economy, is of the utmost importance.

Update and modernize internal systems: Not only must we integrate more efficient and automated processes at points where human interaction is not critical or even counterproductive, but redesigning the intake process and customer relationship around the student of the future should also be considered. Internal systems should be designed and implemented in a way to help staff efficiently communicate, share information, and develop a long-term relationship with the professional learner.

Understand and act upon age differences: There are nuanced differences among various populations of professional learners that need to be understood and acted upon, particularly as it relates to communication methods [\(14\)](#) and frequency [\(12\)](#). A more automated process could help institutions leverage these opportunities to their advantage.

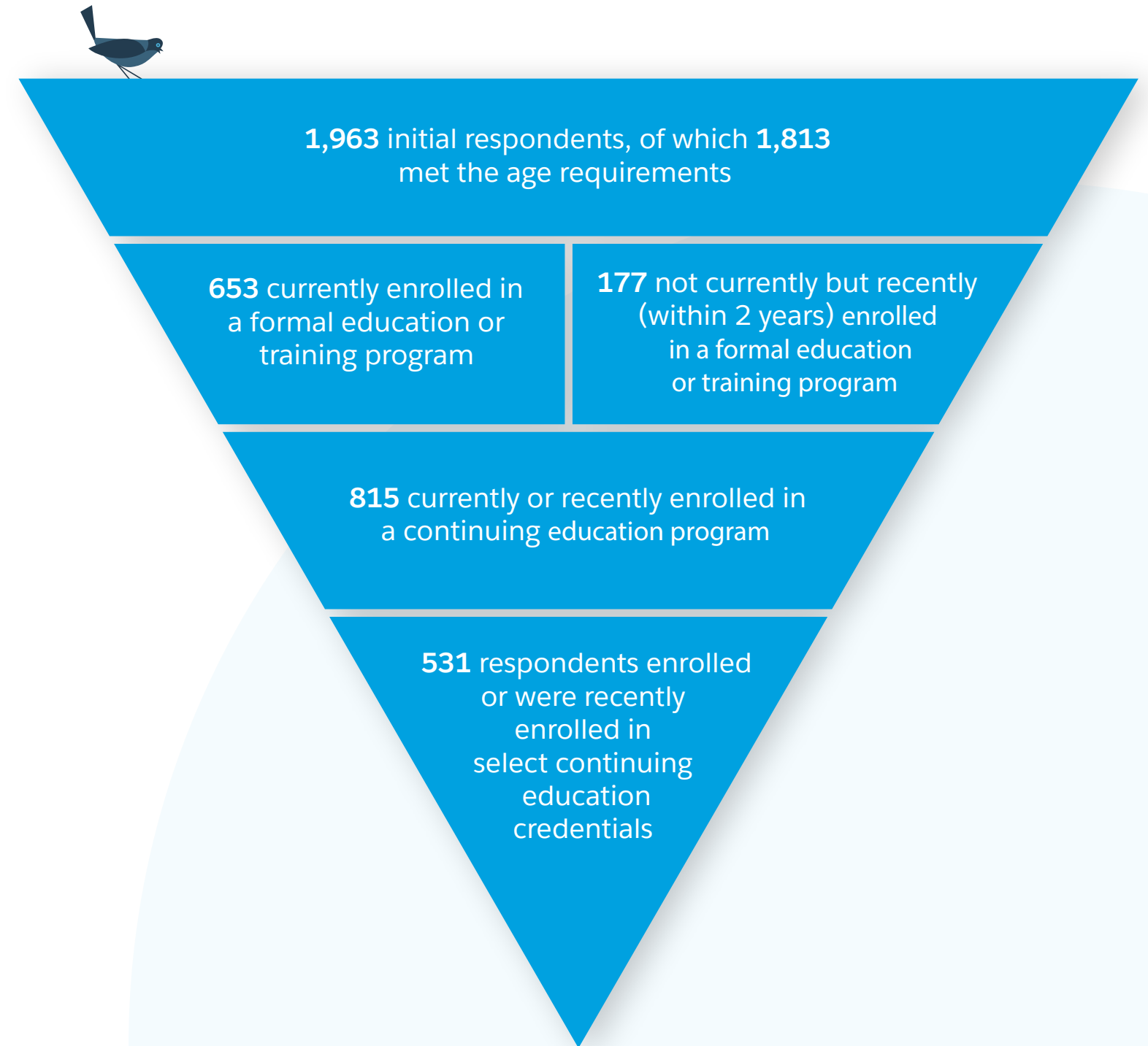
Appendix

Survey Methodology

In order to better understand the perspective of continuing education students, UPCEA and Salesforce.org developed a survey that was distributed to a national audience. Individuals qualified if they were between the ages of 25 and 64, are currently or were enrolled in a continuing education program within the last two years, and were not enrolled in an undergraduate certificate, graduate certificate, or degree program. In total, 531 individuals of the initial 1,963 respondents met all of the parameters of the research.

Focus Group Methodology

UPCEA, through its CORE Network, invited advising and recruiting staff from member institutions to participate in a series of focus groups regarding retention and support of the new professional learner. Individuals from 10 institutions participated and were divided into two six-person groups. Their titles include manager of online enrollment services, academic advisor, senior manager of recruiting and admissions, student success specialist, online retention specialist, and assistant dean of students, among others. Focus group discussions took place in fall 2021.



About Salesforce.org and UPCEA

Salesforce.org and UPCEA partnered to create a research report that provides the higher education community with the data necessary to impact change. As the education landscape becomes increasingly competitive, it is imperative that institutions have access to key insights to reach, engage, support, and retain their students.

Now more than ever, institutions need a robust and thorough understanding of professional learners, including their unique needs and preferences. Institutions have an opportunity to tailor their support services to these individuals and improve retention strategies. Not only can more efficient and automated processes be integrated at points where human interaction is nonessential or even counterproductive, but institutions should consider redesigning the intake process and relationship from the ground up around the new professional learner.



Salesforce.org Education Cloud drives learner and institution success from anywhere with one, integrated platform for lifelong learning. With products and solutions for recruitment and admissions, student experience, advancement, and institution operations, institutions of all sizes can leverage Education Cloud across the professional learner journey – transforming learner engagements into lifelong relationships.

Salesforce.org is committed to supporting the education community through the technology, workforce development, and lifelong learning initiatives needed to drive equitable access to education for all.



While there are many challenges associated with implementing processes and procedures that anticipate student needs, one of the main hurdles is the uncertainty of where to begin. Most education providers have little, if any, experience in this space. Institutions that lack internal expertise should consider relying on organizations that have a rich and storied brand to aid their institutional development. UPCEA is uniquely positioned to not only provide institutions with internal expertise, but also has the ability to connect professionals with their peers that have faced many of the same challenges. This combination of resources helps institutions implement strategic and proven processes that aid strategic decision making, mitigate risk, and ultimately improve the experience and retention of continuing education students.



