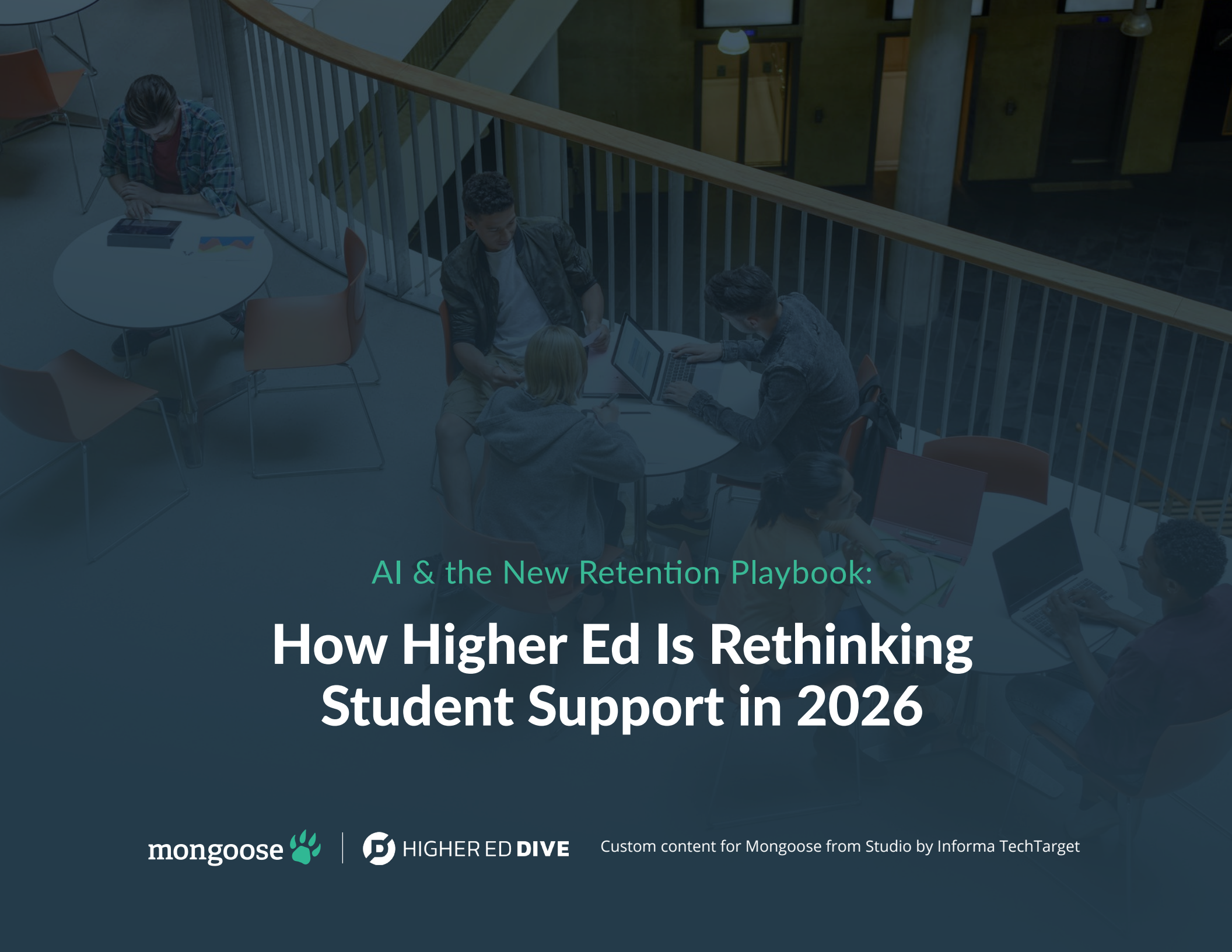




AI & the New Retention Playbook:

How Higher Ed Is Rethinking Student Support in 2026



HIGHER ED **DIVE**

Custom content for Mongoose from Studio by Informa TechTarget

The “enrollment cliff” is already reshaping higher education. Generational shifts in demographics and perceptions of college value are driving a new focus on improving the student experience to address the evolving preferences of Gen Z and the needs of a rising nontraditional student population. In response, forward-looking institutions are rethinking how they engage students before it’s too late — not through more automation, but through authentic, data-informed conversations at scale.

Today, advising teams are expected to do more with fewer resources as students become accustomed to instant, personalized communication on their terms. But as teams manage more channels, data, and complexity than ever, outcomes can suffer due to a lack of time, visibility, and bandwidth. For teams eager to perform, this can contribute to burnout and disengagement.

AI can act as a force multiplier and free your team to focus on high-touch moments. It can automate routine needs and help identify the most at-risk students by surfacing insights and tone from unstructured conversations. Mongoose’s Conversation Intelligence Platform empowers institutions to build trust and drive better outcomes through AI that understands intent, emotion, and context.



WHAT IS CONVERSATION INTELLIGENCE?

Conversation Intelligence is the capability to convert everyday digital messages (text, chat, WhatsApp, etc.) into actionable insight that improves human connection and institutional outcomes.

In higher education, Conversation Intelligence Platforms (CIPs) integrate with institutional CRMs to unify two-way, cross-channel messaging, enabling institutions to meet students and alumni.

Using AI to interpret intent, sentiment, and context — and pairing analytics with compliance-ready delivery — Conversation Intelligence enables more **timely, relevant, and empathetic engagement** at scale. It moves beyond automation by transforming unstructured conversation data into signals institutions can use to anticipate needs, close communication gaps, and intervene early. (For example, when a missed advising appointment indicates a student may need support.)



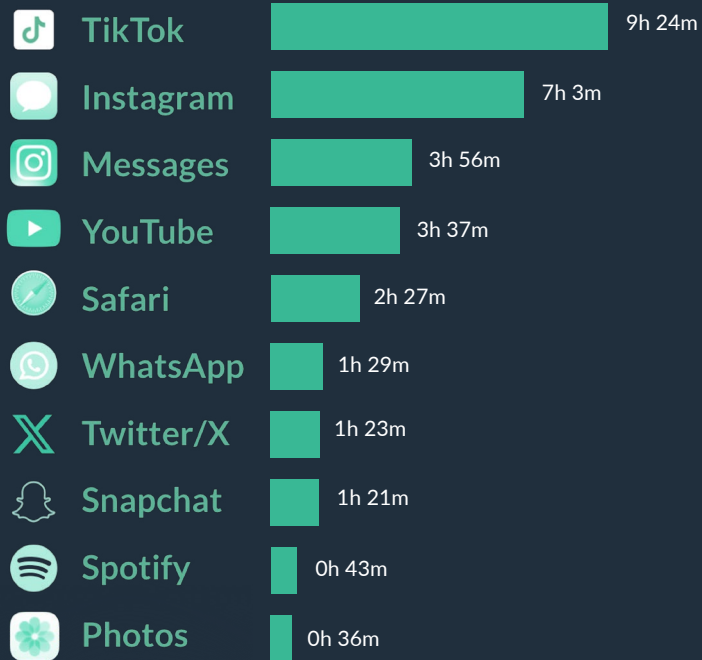
Evidence suggests that two-way conversational engagement is associated with materially better outcomes: students who participate in two-way conversations are significantly more likely to enroll and persist from term to term. In this sense, Conversation Intelligence becomes an operational lever for **measurable results across enrollment, student success, and advancement.**

While CRMs are essential systems of record, they are not designed to manage relationship dynamics in real time. Their automation capabilities typically support rule-based outreach, but they do not natively interpret conversational content or adapt messaging based on evolving intent and emotion.

By contrast, a Conversation Intelligence Platform (e.g., Mongoose) complements a CRM by enabling:

- ✓ Two-way, real-time engagement across channels
- ✓ AI-based analysis of topics and sentiment to surface signals such as confusion, frustration, or enthusiasm
- ✓ Scalable personalization across the student lifecycle without sacrificing consistency, governance, or compliance





Source: "The 2024 4th Annual Gen Z Screen Time Report," dcdx, 2024.

75% of institutional respondents used email, only 37% found it to be very effective.

Today, most institutions rely on a patchwork of disconnected systems across departments, resulting in student communications that arrive in inconsistent formats, channels, and tones — often without coordination or a shared view of prior interactions.

Mongoose CEO and Founder Dave Marshall pointed to disjointed departments and offices with different technologies and vernaculars when emphasizing why institutions must be more intentional in their student communications: "The problem isn't new, but it's compounded by these pressures students face, along with their expectation that everything is customized and delivered in the medium of their choice."

Students increasingly prefer text and other messaging platforms, yet institutions continue to rely on email as their default communication channel. Marshall frames this gap as an ethical issue: "It's borderline unethical to say, 'Well, this is how we communicate, so get on board.'" In fact, a recent survey on behalf of Mongoose by Higher Ed Dive's Studio found that while 75% of institutional respondents used email, only 37% found it to be very effective.

That's why future-forward institutions are rethinking how they engage students, with student success and advising teams uncovering the value of tapping into the power of AI, sentiment analysis, and Conversation Intelligence to intervene earlier, personalize support, and scale empathy, without increasing headcount, while using channels students typically embrace.

In this playbook, discover how your institution can build a smarter, responsive retention strategy with more efficient, results-oriented communication.

From Lagging to Leading Indicators

No department holds more sway in the retention game than student success and advising. They are on the front lines, guiding students as they forge the tricky waters of campus life, from managing schedules and classwork to staying on track to graduate. They also recognize that the problems threatening student progress are often revealed when it's too late — or when it seems that way to a student.

Yet these student challenges rarely appear out of nowhere. Andrew Veatch, VP of Technology for Mongoose, recounts a common scenario: A student felt overwhelmed in the first few weeks of a course. They missed their first assignment. Out of embarrassment, they skipped their next class. Then they fell behind and skipped more classes to avoid the professor, eventually considering dropping the course entirely. “Each step compounds over time until it spirals out of control, making it harder to reverse.”

But institutions can disrupt this negative cycle with proactive outreach to get students back on track. Even a simple message can have a big impact, including asking how the student is feeling as classes start and offering assistance if they're feeling overburdened.

THE FAILURE FUNNEL: How You Engage (or Don't Engage) with Students Directly Impacts Success

01

Missed Connection

- “I got a text that just said ‘You have a hold.’ No one explained what it was or what to do next.”
- “I missed my advisor appointment.”

02

Silence or Confusion

- “I kept putting off dealing with this because I didn't know what to do — and the portal wasn't clear.”
- “Why was my financial aid request declined?!”
- “I didn't know how to access counseling services after hours.”

03

Unresolved Needs

- “I finally texted back, ‘What do I need to do?’ ... and I never heard anything.”
- “I asked a question about donating and never got an answer.”

04

Disengagement

- “I was stressed and trying to fix the problem — but when no one responded, I felt ignored and gave up.”
- “I told you I was overwhelmed ... and the reply I got felt like a robot. So I just stopped responding.”

05

Negative Outcome

- “I missed the deadline, the hold stayed on my account, and I couldn't register for next term.”
- “I didn't meet prerequisites and got dropped from the course.”

“Early intervention is dramatically more effective for getting students adequate resources, rather than relying on lagging indicators.”

Andrew Veatch, VP of Technology for Mongoose

It also levels the playing field for first-generation and other underrepresented student groups who may be intimidated or not know where to turn, he adds.

Dynamic messaging is the key. But many institutions still rely on one-way mass text notifications sent to large groups (often due to their CRM's limited texting capabilities). Generic and static, these mass notifications fail to drive meaningful engagement. By contrast, Conversation Intelligence analyzes conversations to understand who's engaging, what they're talking about, how they're feeling and — potentially most critical — whether the issue was ultimately resolved. It also categorizes conversations by topic, enabling the team to tailor outreach accordingly.

That allows busy teams to ensure they are tackling the most time-sensitive conversations first, aiding at-risk students and ensuring they feel heard and cared for. While suggested replies can boost productivity, AI does far more than make teams more efficient by improving the metric that really moves the needle: effective outcomes.

AI Capability	How AI Delivers
Sentiment & Emotion Analysis	Detects tone (e.g., appreciation, frustration, confusion) to prioritize at-risk contacts
Trending Topics	Categorizes messages into themes like aid, housing, advising, or giving in real time
Resolution Detection	AI assesses whether a conversation was resolved, responded to, or left open
Suggested Replies	Suggests AI-powered replies to help you get started, saving time and boosting productivity while maintaining quality communication
AI Assistants	Automates conversations with context-aware, generative AI that delivers real-time, adaptive responses, saving time while creating engaging, personalized experiences that scale
Engagement Benchmarking	Compares engagement by topic, team, sentiment, and more based on industry standards and peer-level comparisons

INSTITUTIONS DERIVE MEASURABLE ADVANTAGES FROM AI-OPTIMIZED CONVERSATIONS:

7.5x

Engagement is 7.5 times higher when students interact via two-way messaging compared with static notifications.

86%

Emotionally positive conversations lead to 86% re-engagement, compared with a negative or neutral tone that reduces follow-up rates.

FROM CONVERSATIONS TO OUTCOMES

How AI-Powered Conversation Resolution Supports Student Retention

The challenge in higher ed today

Students expect timely, human responses — but growing volumes of messages make it easy for questions to go unanswered. When conversations stall, trust erodes, small issues escalate, and students disengage

The shift institutions need

Retention isn't just about sending messages — it's about ensuring every conversation reaches a clear outcome.

How Conversation Resolution helps

The Conversation Resolution capability uses AI-powered conversation intelligence to surface unanswered or unresolved student conversations — so teams know exactly where to step in, when it matters most.

What this enables for institutions:

- Fewer missed student questions and follow-ups
- Faster, more empathetic responses at scale
- Early visibility into students at risk of disengagement
- Clear accountability across teams for closing the loop

Why it matters for retention

When students feel heard and supported, they're more likely to persist. Conversation Resolution helps institutions move from reactive outreach to proactive, outcome-driven engagement — strengthening relationships at every stage of the student lifecycle.

“Instead of just sending out information, we’re able to engage students in real conversations. This capability is invaluable for building trust and connection,” explains Peighton Hinote, Coordinator for Student Communication and Initiatives at Lake Land College, a two-year public institution in Illinois that serves a diverse student body.

Conversation Intelligence platforms normalize the importance of speaking up, Marshall says. “Students are wrestling with an enormous cognitive load. Our clients have found that students are willing to be more vulnerable in a messaging medium than they are even in person, allowing teams to address root issues more easily. By building trust through responsiveness, students feel seen.”



Schools have seen immediate, positive results. Take Lake Land College, which struggled to reach and engage its students, especially adult learners. Using Conversation Intelligence, the school improved engagement by 200% with its TRIO Student Support Services, a program designed to provide an environment that promotes academic, social, and personal growth for first-generation, low-income, and/or students with disabilities.

Montcalm Community College, a two-year college in rural Michigan, enhanced student success and engagement by sending weekly “Monday Messages” from its success coaches, which resulted in high reply rates and minimal opt-outs.

“Mongoose makes communication feel personal. That’s what makes it so effective,” said Lisa Gardner, Director of Student Success and Advising.

According to Brian Sondey, Associate Vice President for Enrollment and Student Success at SUNY Dutchess Community College, “Mongoose helps us create a spiderweb of support. We’re reaching students with empathy and relevance, not just information,” as it used Mongoose for intentional follow-ups on early disengagement signs, missed appointments, and support prompts. “We’re not looking to overwhelm students. When they get a text from an advisor, it means something,” Sondey says.

Applying AI Assistants in the Student Retention Workflow



In a study by Mongoose and Higher Ed Dive's Studio, higher-ed leaders identified two-way communication (92%) and personalized support at scale (89%) as the capabilities that would most improve their ability to do their jobs effectively.

The secret is using AI to elevate conversations that deserve the most immediate attention, with the ability to spot frustration, confusion, and burnout in real time. With Mongoose, schools can eliminate gaps and delays in student communication by detecting emotion, intent, and early signs of disengagement. The Mongoose platform eliminates what used to be an extremely time-consuming blind spot: requiring staff to review messages one at a time manually.

"These conversations contain a treasure trove of data and insight as to what students are experiencing and struggling with. One of the superpowers of AI is to pull that unstructured data apart by reading a text message conversation and analyzing it for topic and sentiment, with the most important metric being whether the student was satisfied."

Andrew Veatch, VP of Technology for Mongoose

Unlike general-purpose AI tools, Mongoose's Conversation Intelligence Platform is trained on higher ed language, topics, and emotional cues — ensuring that responses reflect the context of student life, not generic service scripts.

Using AI enables schools to track outcomes as a meaningful measure, rather than relying on outputs.

Veatch calls AI Assistants “a new front door for the institution,” since they’re on 24/7. AI Assistants can provide consistent, judgment-free responses, helping ensure equitable access and tone for every student. Veatch points out, “AI Assistants are never stressed, impatient, judgmental, or having a bad day. And because they are multilingual, it ensures equity to all students.”

AI tools both optimize the efforts of a stretched team and empower students with self-service capabilities. They can handle routine inquiries and escalate to human involvement as necessary, while students can find solutions on their own — even outside of regular hours.

Mongoose’s four-year benchmark report found that nearly half of all chat conversations occur outside of regular office hours, with an 82% self-service success rate in students finding the requisite information. It also found that over 30% of all follow-up requests originate from off-hours conversations, confirming that students who need additional input are queued for human follow-up.

“The result is less effort spent sifting through messages, preserving the team’s time to connect with the humans behind those messages. There’s nothing worse than a student who’s in distress and isn’t acknowledged or responded to.”

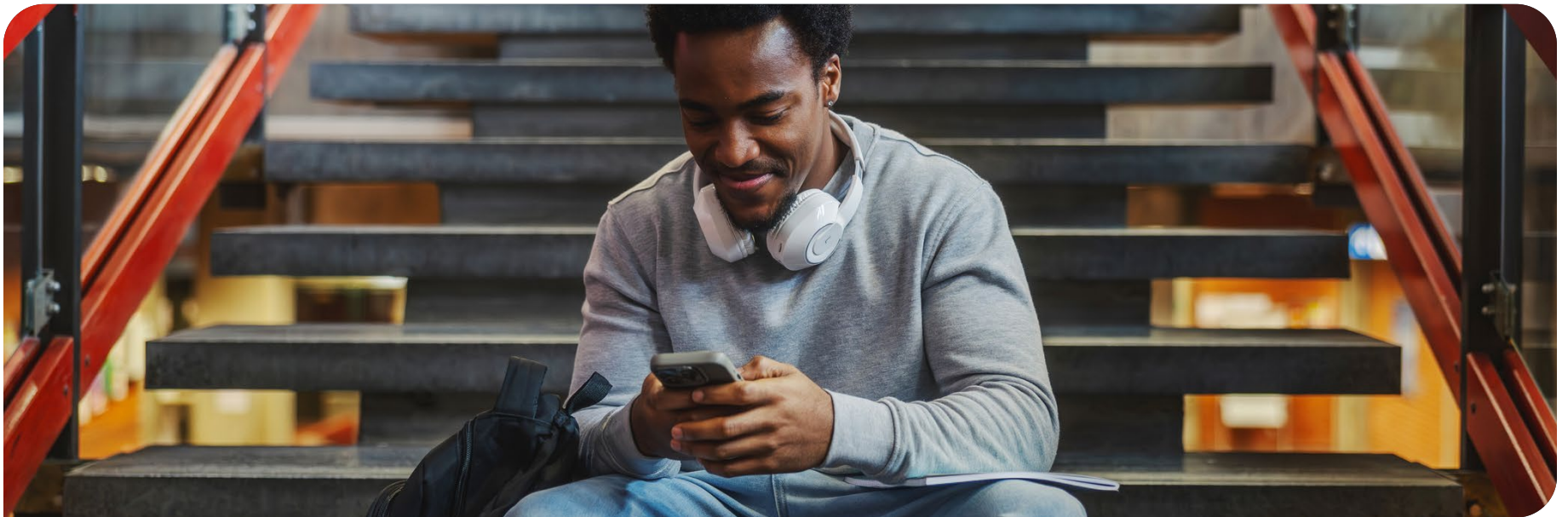
Dave Marshall, Mongoose CEO and Founder



Taking it to the Next Level with AI Agents

As powerful as assistants are for answering questions and routing requests, **the next step is AI agents**: systems that not only respond but also act within defined guardrails. An AI assistant is primarily reactive — it answers prompts, drafts content, summarizes information, and can recommend next steps. But it typically requires a human to initiate or approve actions. An AI agent, by contrast, is goal-directed and workflow-embedded: It can monitor for triggers, make decisions within policy constraints, and execute approved tasks end-to-end across connected systems. (For example, creating or updating a case, initiating outreach, scheduling an appointment, or escalating to a staff member with the right context.)

In retention workflows, agents can continuously monitor signals across conversation streams and institutional systems, then take policy-approved actions: opening and updating cases, triggering outreach sequences, scheduling advising appointments, generating documentation, and escalating to the right staff member with full context. This shifts student support from reactive service to proactive coordination. It's no longer "What do you need?" after a problem surfaces, but "We noticed this pattern — here's the next best step," delivered through the channel the student actually uses.





This is the direction Mongoose is taking, with a new generation of agents designed specifically for higher education. Built on Conversation Intelligence and integrated with institutional CRMs, these agents will operationalize what teams already know matters most — two-way communication and personalization at scale — by turning real-time student signals into timely interventions. Critically, they will be designed to work alongside staff, not replace them: Agents handle the repetitive orchestration and follow-through, while humans focus on judgment, coaching, and care.

In a landscape defined by constrained resources and rising expectations, agents represent a pragmatic evolution. They help institutions deliver faster, more consistent support, while preserving the empathy and accountability that effective retention requires.



Using AI to Create All-Star High-Performing Retention Teams

Because it can automate a large share of routine inquiries, AI already acts as a team multiplier — helping a small staff handle peak volumes and sustain high-quality support without adding headcount or burning out existing teams. With intuitive tooling and workflows, staff can ramp quickly and begin realizing value immediately. Ultimately, AI frees teams to do what they do best. “Rather than serving as a walking FAQ on the institution or handling other mundane tasks, student success teams can reframe their roles to higher-leverage work, which is why they got into higher ed in the first place,” Veatch says.

Veatch views AI as a transformational opportunity that will become increasingly adept at managing nuance, tone, and sentiment. “It’s so meaningful because these teams have always wanted to do a better job, improve communication and treat students more equally. We have tools no one saw coming. This is an amazing time to be in the business of engaging students.”

TO PREPARE FOR THIS SHIFT, INSTITUTIONS SHOULD:

- 01.** Update privacy and ethics policies and communicate them broadly
- 02.** Reduce data silos to create an integrated source of clean, trustworthy data
- 03.** Continue experimenting as capabilities expand
- 04.** Establish guardrails that define what AI can do, when humans must be involved, and how decisions are audited.

Privacy and ethics, Marshall argues, must be more than checkboxes—and they are foundational to Mongoose’s platform design. “With built-in safeguards that prioritize data security, transparency, and responsible AI use, our goal is to model the kind of ethical stewardship we encourage institutions to adopt.”

As schools strive to improve retention, AI will remain a force multiplier — first as an assistant, and increasingly as agents that operationalize timely follow-through — while staff remain the true MVPs.

“AI will never be a better success coach, but it empowers staff to be more valuable than they ever have been, with forward-thinking organizations tapping its capabilities as a thought partner and efficiency expert.”

Dave Marshall, Mongoose CEO and Founder

Are you ready to supercharge your retention and improve student achievement? Discover how Mongoose can revolutionize your student success and advising teams today.





Mongoose is the leading Conversation Intelligence Platform, trusted by more colleges and universities than any other platform to send messages to their constituents. We help institutions build trust and empathy through AI-driven insights, turning unstructured conversation data into actionable intelligence. By enabling personalized, compliant, and standards-aligned communication, Mongoose empowers teams to engage at scale, strengthen relationships, and enhance outcomes across the student lifecycle. Thousands of teams at hundreds of institutions rely on Mongoose to make 100 million connections annually, fostering relationships that drive student success, deepen alum bonds, and strengthen community ties — all through transformative, conversation-driven engagement.

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