

Piloting a Customized Chatbot to Increase College and Financial Aid Awareness

Arya Kukreja and KC Deane

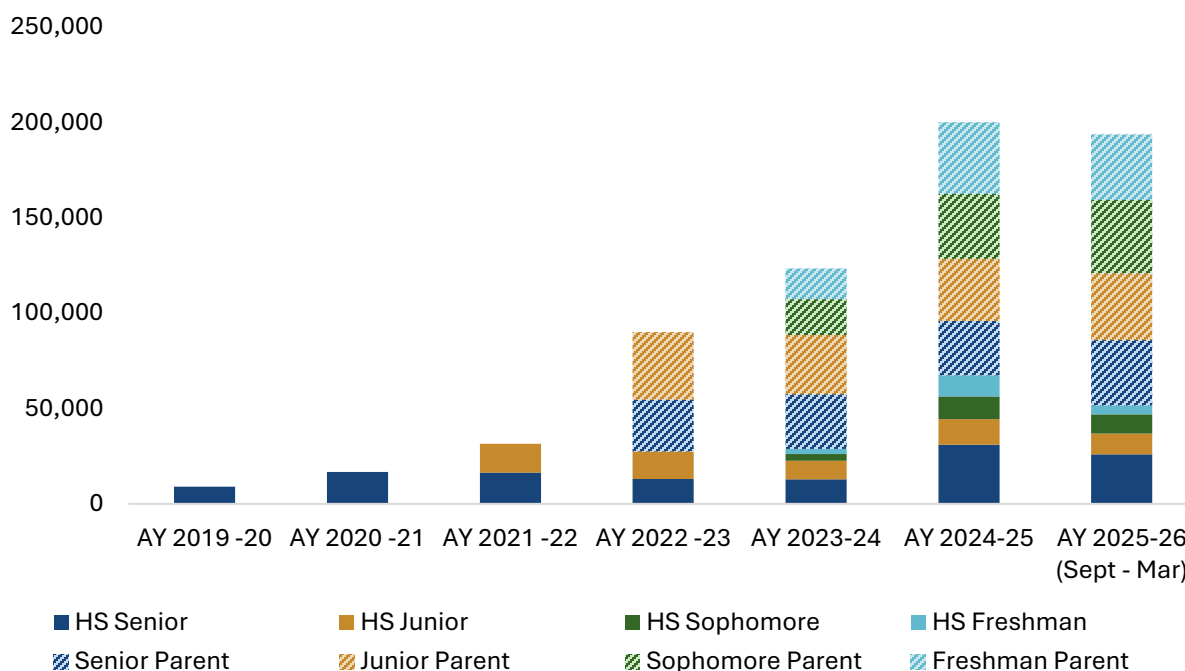
July 2026



OtterBot and the Customized Chatbot Pilot Project

OtterBot, WSAC’s statewide college and financial aid access chatbot, is a low-cost strategy for sharing information with high school students and guardians at scale. Through OtterBot, WSAC sends more than 190,000 students and guardians informational messages that include essay-writing tips, financial aid reminders, and advice on building college lists. Even so, according to students, standard messaging that is disconnected from their circumstances leads them to disengage from the messages they receive.

Figure 1. OtterBot now reaches more than 190,000 students and guardians each year.



Source: WSAC analysis of OtterBot users

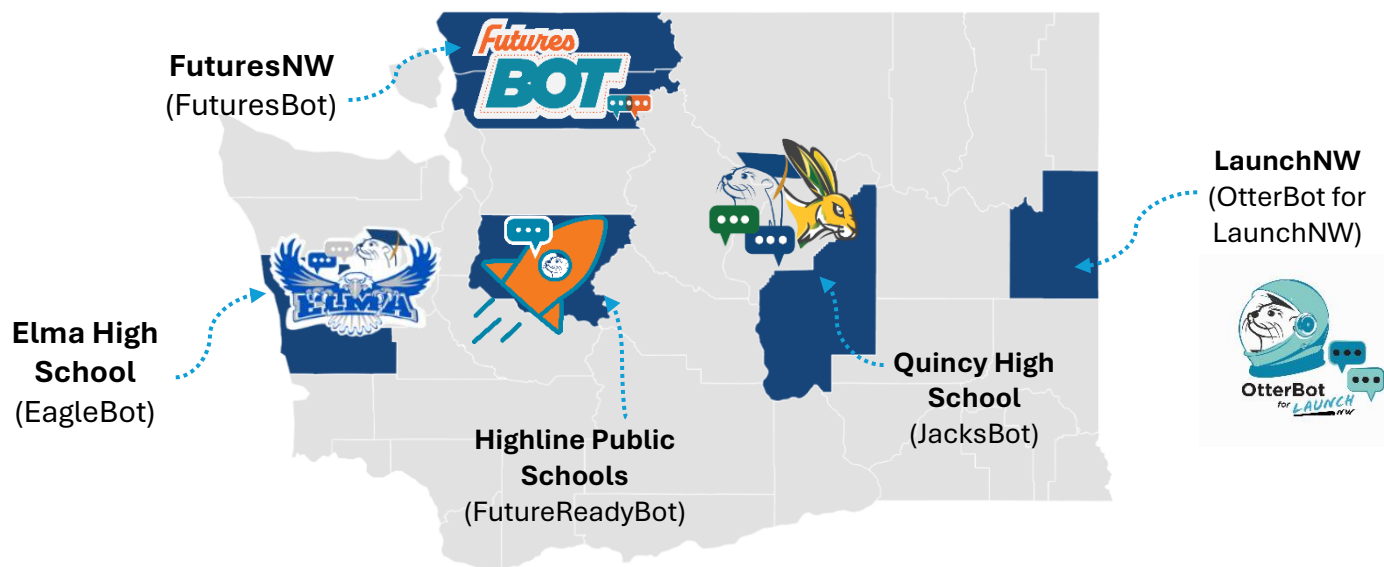
Individualized communication from OtterBot is likely to improve students’ and guardians’ engagement with its financial aid outreach. With funding support provided by Axim Collaborative, WSAC worked with five partners across the state to identify what makes for effective, scalable customization. WSAC hypothesizes that small, replicable changes can increase OtterBot’s credibility with users and, in turn, help more students plan for and pursue a post-high school pathway. This brief highlights how a customized OtterBot informed by regional partners directly adapts to students’ desires for personalized information from a recognizable source as they navigate post-high school planning.

Customizing the Chatbot

Regional branding

OtterBot users living in a pilot region receive text messages from a regionally branded version of the chatbot. Each chatbot's name and logo is selected by the local partner organization based on what is recognizable to their community. Figure 2 shows the counties in which regional partners operate, overlaid with each partner's logo.

Figure 2: Pilot partners are located across the state.



Source: WSAC map of regionalization counties, custom chatbot logos, and names.

Adapted messaging

Alongside regional branding, the customized chatbot:

- Sends messages from human counselors who work alongside WSAC.
- Shares local information and events with students and guardians.
- Escalates questions and concerns to a trusted messenger in the community.

The Challenge of a Statewide Chatbot

High school seniors who were interviewed as part of a research project on the potential impacts of integrating behavioral science principles into OtterBot made clear that **generic messages do not adapt to their needs.**¹



¹ For additional information on the behavioral science principles integrated into the OtterBot messages, see: Fife, Jason. (August 2020). *How Behavioral Science Encourages Students to Take Action*. Mainstay. <https://mainstay.com/blog/how-behavioral-science-encourages-students-to-take-action/> ; See

Students:

- Trust chatbots they recognize.
- Want personalized information based on local resources and supports.
- Want to use the chatbot to connect with trusted messengers in their community.

Regional customizations are designed to directly address each of these desires through strategic changes in the messaging approach.

Regional Changes in College and Financial Aid Outreach

WSAC will monitor key outcomes in three areas related to college and financial aid outreach:

- *Regionalized Chatbot Engagement.* Based on previous research that found engagement increased when messages integrated behavioral science principles, we anticipate that customization will increase engagement through decreased opt-out rates and increased responses to messages from the regionalized chatbot.
- *College and Financial Aid Access.* When students and their families engage with the customized chatbot, they will better understand how completing a financial aid application can help them reach their post-high school goals. As a result, more student chatbot users will file an aid application and enroll in postsecondary education or job training.
- *Trusted Messenger Capacity.* As students and guardians come to rely on the customized chatbot for support, trusted messengers in pilot regions may receive fewer standard questions, allowing them to focus more time on students who need individualized support.

In fall 2026, WSAC will publish preliminary findings on user engagement and FAFSA completion rates in pilot regions.

Conclusion

Individualized communication with students and their guardians is likely to improve engagement with OtterBot's financial aid outreach, which can have a downstream impact on financial aid application rates. WSAC hypothesizes that these small, replicable changes can increase OtterBot's relevance and credibility with users and, in turn, help more students plan for and pursue a post-high school pathway.

Acknowledgements

The regionalization pilot was made possible through the generous support of Axim Collaborative. The findings and conclusions included in this brief are those of the authors and do not necessarily reflect the views of Axim Collaborative.

WSAC is grateful to its collaborative partner, Mainstay, a division of Lemnis, whose student-centered guidance made possible the development and implementation of the statewide and regionalized chatbots.

also: n.a., (n.d.). *Learn: What do we mean when we say behavioral science?*. ideas43.
<https://www.ideas42.org/learn/>.