Effective Prospect Communication

Three Tools for Recruiting Prospects via Email and Phone Communication
*Great Plains IDEA*

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- Start with best practices research
  - Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
  - At the core of all we do
  - Peer-tested best practices research
  - Answers to the most pressing issues

- Then hardwire those insights into your organization using our technology & services

**Enrollment Management**
Our Royall & Company division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

**Student Success**
Members, including four- and two-year institutions, use the Student Success Collaborative™ combination of analytics, interaction and workflow technology, and consulting to support, retain, and graduate more students.

**Growth and Academic Operations**
Our Academic Performance Solutions group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

- **1,100+** College and university members
- **10,000+** Research interviews per year
- **250M+** Course records in our student success analytic models
- **1.2B+** Student interactions
COE Forum in Brief

A Diversified Portfolio

Serving Leaders Across Professional, Adult, and Online Education

- Professional Master’s
- Certificates
- Non-Credit Education
- Online Education
- Growth & Operations
- Marketing and Recruiting
- Program Development
- Degree Completion
- Executive Education

Membership at a Glance

- 350+ COE Forum Member Institutions
- 94% Percentage of Members who Renew
- 300+ Practices, Case Studies, and Implementation Tools
- 3000+ Market Demand Briefs Completed to Date
Tool 5: Personalized Email Builder and Templates

Activity: Spot the Areas for Email Improvement

Tool 2: Guidelines for When to Call a Prospect

Tool 12: Follow-Up Conversation Scripting Tool

Activity: Write a Follow-Up Conversation Script
Email Builder Worksheet

From Field: Alan@exampleU.edu

- Send e-mails from an individual’s email address, one who will respond to student follow up (e.g., program coordinator, lead faculty member).

Subject Line
Consider the following subject line strengtheners:
- Prospect’s Name Example: Benjamin, thanks for your interest. I have a few answers to your questions.
- Question Example: What motivates you to return to school?
- Casual Greeting Example: Hello from ExU! We have stress management tips to share!
- A Call-to-Action Example: Experience online learning: register for the next test-drive course before Friday.

What elements from the list above would you incorporate into a subject line?
What have been your best performing subject lines?
What subject lines would you like to A/B test?
Email Builder Worksheet Cont.

Salutation:

- The COE Forum recommends either addressing an email to the prospect’s first name or eliminating the salutation and beginning the email with a casual greeting.

- Consider the following salutations. Check the salutation that you think will best resonate with your prospective student audience based on the age and career level of your typical prospective student:
  - Dear Brian,
  - Hi, Brian:
  - Hello and thanks for your interest in Example University!
  - Hi there! We’re glad you are interested in the MSW program at Example University.

Sign Off and Signature:

- Sign e-mails with a name and including contact information in a signature:

  Have a nice day!
  Alan
  Alan@ExampleU.edu
Dear Katherine Zellner,

Thank you for requesting information regarding online education at the Example University. The Extended Education Unit is committed to providing you with an exceptional educational experience. Please see information below to help you get started in finding a quality online degree or certificate program.

If you have any questions, you may follow up with the Extended Education staff:

- xxx-xxx-xxxx
- info@example.edu

**Information at your finger tips:**
- **Contact us** for more help by calling xxx-xxx-xxxx or emailing info@example.edu
- **Extended Education Overview** - Provides a brief overview about Extend Education and its delivery media, programs of study, student services, credit options, faculty, admission, tuition and fees, and financial aid.
- **Degrees and Certificates Overview** - Provides printable descriptions and contact information for the online degree and certificate programs offered by Example University.

You will need Acrobat Reader to view these documents. Download here: [http://www.adobe.com/products/acrobat/readstep2.html](http://www.adobe.com/products/acrobat/readstep2.html)
# Tool 2: Guidelines for When to Call a Prospect

<table>
<thead>
<tr>
<th>Email Activity</th>
<th>Website Activity</th>
<th>Follows a link</th>
<th>Forwards an email</th>
<th>Responds to an email</th>
<th>Registers for Virtual or F2F Event</th>
<th>Watches a Recorded Webinar</th>
<th>Attends a Virtual or F2F Event</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Email Icon" /></td>
<td><img src="image" alt="Website Icon" /></td>
<td>Prospect is reading emails and following links but may not be comfortable obtaining all information electronically. Call if staff capacity allows.</td>
<td>Prospect is so interested in content of emails that he or she forwards email to a friend. If possible, contact prospect by phone.</td>
<td>Prospect actively reaches out to program representatives and may have questions that can best be addressed over email.</td>
<td>Sustain prospect’s interest between registration and event with a phone call. Discuss prospect’s questions how event attendance will be helpful.</td>
<td>Prospect again seeks out passive content but invests substantial time in watching a recorded webinar. Contact prospect to discuss next steps.</td>
<td></td>
</tr>
</tbody>
</table>
Tool 2: Guidelines for When to Call a Prospect Cont.

What Information Can You Use to Track and Prioritize Conversations?

- Do you have any ability through your campus infrastructure to track prospective students’:
  - Interaction with emails?
  - Interaction with your website?
- Are your webpages set up to encourage students to submit information so you can follow up with them?
  - How do you access and track this information?
- How is event/webinar registration versus attendance tracked?
Tool 12: Follow-Up Conversation Scripting Tool

Phone Conversation Script
Fill Out Prospective Student Profiles

1. “I noticed you are undecided about selecting a program.”
2. “Did you know that some employers offer tuition reimbursement? Who is your current employer?”

Illuminate a Prospective Student’s Motivations

3. “What are some of the considerations you’re weighing as you choose a program?”
4. “What factors will affect your program start date? What is your estimated start date?”
5. “What are your educational goals? Why are you interested in enrolling in a degree or certificate program?”

Possible Prospective Student Answers:
   a) To advance in my current career
   b) To change careers
   c) For personal enrichment
6. “Do you have any questions or concerns about returning to school?”

Corresponding Segmentation Tactic

Questions build upon optional inquiry fields that were left blank.

Segment by Motivation
Consider motivation when differentiating communication
Tool 12: Follow-Up Conversation Scripting Tool

Phone Conversation Script Cont.

Understand a Prospective Student’s Demographic

7. “What institutions have you attended in the past?”
   a. “What did you study? What did you like about those courses? What study tips would you apply to future courses?”
   b. “What challenges did you face at your last institution?”

8. “Tell me about your career history.”

9. “What responsibilities occupy most of your time? Let’s talk about flexibility within those obligations and Example U’s curriculum.”

Corresponding Segmentation Tactic

Segment by Demographic
Consider demographics when differentiating communication.
Activity: Write a Follow-Up Conversation Script

Activity

• Write out the information you typically have on a prospective student.
• Outline the questions you’d ask during a follow-up conversation. What will help you understand their motivations? Their demographics?

Share Out

• How would you open your conversation?
• What questions would you ask?
• What information would you share?
• How long would it take you to hold this conversation?
Takeaways and Next Steps

• What practices seem most do-able vs. least do-able?
• Which practice (email or phone follow up) do you think is most important to try first?
• What practice would deliver the biggest return in the short-run vs. the long term?
• What are some anticipated roadblocks to implementing these practices?
• What are ways you plan to overcome these roadblocks?

For more prospect communication strategies and implementation ideas, see the COE Forum’s Lead and Inquiry Management Toolkit.