# Tool #18: Segmentation Briefing Sheet: Actions Taken

Though segmentation is still in its nascent stage within many continuing, online, and professional education units, progressive marketing teams have embraced the practice of segmenting according to actions taken. It can be a powerful tool for identifying those leads that are most likely convert and allocating attention accordingly. The challenge of segmenting according to actions taken is developing a set of identifiable trigger behaviors.

This tool will provide a baseline set of those behaviors as well guidance for adding to the list.

## Action-Based Segmentation Triggers

The chart below presents the behavioral profiles of hot, warm, and cold leads. You can add to the list of triggers to any additional behaviors corresponding to communication stimuli. However, the list of triggers should be manageable—no more than 20 or so triggers. The Forum also advises that you select only those triggers that are easy to notice—ideally they are automatically detected and recorded by a CRM or other system. Remove from the list any triggers that would be difficult or impossible to identify given your current technological capabilities.

| Behavioral Trigger | Hot | Warm | Cold |
|---|:---:|:---:|:---:|
| Completes an Inquiry | • | • | • |
| Opens emails | • | • | • |
| Responds to first or second email | • | • | |
| Responds to first or second email within 12 hours of receiving it | • | | |
| Responds to 3rd+ email | • | • | • |
| Calls an advisor | • | | |
| Registers for an event | • | • | |
| Attends an event | • | | |
| Attends a one-on-one meeting | • | | |
| Completes application but did not complete it | • | | |
| Clicks on a link to register for a course or program by never completed the registration | • | • | |
| Used the net price calculator | • | • | • |
| Explored credit transfer | • | • | • |
| Proactively asked questions before submitting an inquiry form | • | • | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |

**Learning from the Negative**
Particularly observant units note the significance of actions that have been initiated by not completed.

**Walking in Their Shoes**
Even in the era of Web 2.0, it is still possible for prospects to be uncomfortable asking questions over email and otherwise engaging over the web. For example, prospects that open a chain of emails but do not click on links likely need help or comforting before they will commit to a purchase. This segment is a good candidate for phone follow-up.

**Watching the Clock**
Other institutions look for actions taken in conjunction with how early in the process (based on intended start date provided on inquiry form) prospects start exploring the details of enrolling. The earlier the actions are taken, the more interested the prospect is.

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## Features of the Hot, Warm, and Cold Segments

The schematic below explains the various features of constituents of hot, warm, and cold microsegments. Use this information to develop a communication strategy that caters to the characteristics and preferences of each group.

| **Hot**<br>Motivated and/or self-sufficient | **Warm**<br>Interested but needs support or a nudge | **Cold**<br>Shopping; little intention of applying |
|---|---|---|
| • Typically seeking education for professional reasons; these prospects have done their homework and know what they need to do to complete the application<br>• Use phone conversations and personal emails to ensure informational needs are met as soon as possible | • These prospects are interested but not sold on the program; they will take some initiative, but still need encouragement down the path to application<br>• Court over the course of several emails and conversations; do not smother with attention | • These prospects likely feel no immediate pressure to attain more education; they are perusing the market and for many of them, no amount of hand-holding will lead them to apply<br>• Provide regular emails and offers for more high-touch interaction |

0 days     3 days                                    60days

**Prospect's Response to Last Contact**
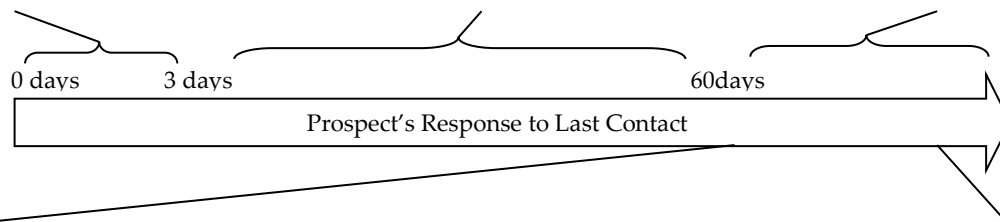
**Accepting the long tail…**
Many institutions realize that the adult student decision-making cycle can be on the order of years for some prospects and therefore provide long-term communications to their cold prospects. One institution reports that 5-10% of their applications each cycle come from prospects who had been inactive for more than six months and two percent of them had been inactive for more than a year. As a result of this behavior, it is difficult to know when to stop communicating with long-cold prospects.

**…And letting "prospects" go**
On the other hand, the majority of those prospects that go silent after six months of alerting the institution to their presence will not reactivate in the traditional sense—they will never fill out an application. Smart institutions have realized, however, that this does not make them useless. Sophisticated institutions are able to find value in this group by identifying "influencers" and targeting newsy material to them that they can forward on to others in their network.

## A Mini-Profile of Action-Based Segmentation

Embry Riddle Aeronautical University Worldwide uses a hot-warm-cold segmentation scheme based on time in the funnel and actions taken to determine type and frequency of communication to prospects. Time in the funnel earns the prospect a basic hot, warm, or cold classification. Actions taken add a further level of lead scoring and communication customization. For example, "Hot App" is a designation for leads that recently submitted an inquiry

form and started an application soon after. "Warm Re-engaged" is a designation for leads that were silent for a long period and re-initiated activity (ERAU WW works with many deployed military personnel). ERAU WW developed a communication plan for each of several designations.

This methodology was developed in response to a 90% stealth representation in the application pool—primarily because Worldwide staff were letting so many prospects slip through the cracks or fall of the radar.

The new practice, along with the automated workflow creation that went into developing it, have yielded impressive results. Not only have conversion rates gone up, the number of complaints received from irate prospects who weren't receiving enough (or any) attention has drastically fallen.