Tool #2: Guidelines for When to Call a Prospect

Phone outreach is an important part of personalized recruitment of adult learners but also requires significant staff time. This tool outlines action-based guidelines that recruitment counselors can use as they decide when to call prospective students. The guidelines can be adapted based on the staff time and resources at a unit's disposal.



Forwards an email

Responds to an email



Email Activity Prospect is reading emails and following links but may not be comfortable obtaining all information electronically. Call when staff capacity allows.

Follows a link

Prospect is so interested in content of emails that he or she forwards email to a friend. If possible, contact prospect by phone.

Prospect actively reaches out to recruitment staff and may have questions that can best be addressed over email.

Visits Website Five Times within a Few Days

Prospect seeks out passive content but does not "raise hand" (e.g., email question, register for events). Call with encouragement if staff capacity allows.

Watches a Recorded Webinar

Prospect again seeks out passive content but invests substantial time in watching a recorded webinar. Contact prospect to discuss next steps.

Registers for Virtual or F2F Event

Sustain prospect's interest between registration and event with a phone call. Discuss prospect's questions and how event attendance will be helpful.

Event

Website

Activity

Event Activity

Attends a Virtual or F2F Event

Follow-up with a phone call; build on excitement of interacting with faculty, alumni, and students; ensure individual questions are resolved.



about
Complicated
Issue

Submits Question or Uses Self-Evaluation Tool about Transfer Credit

Contacts explain that questions about transferring previous college credit are best addressed over the phone. Even if a COE unit hosts an informal credit evaluation tool on its website, consider calling users to offer an in-depth evaluation based on past institutions attended.

Prioritizing Outreach: As prospects progress through the recruitment funnel, the total volume of prospects decreases. Therefore, to save time, recruitment advisors may decide to prioritize those action-based calls that occur later in the recruitment funnel. Similarly, the most interested prospects take the actions on the right side of the diagram above and, when strapped for time, advisors may focus outreach on the right-most column.

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Prospect Action-Based Guidelines: When to Call Prospects (Cont.)

When basing phone call schedules on prospect action triggers, consider the extent to which prospect email and website activity can be tracked. Discuss the following with your website and technology support team:

- Does the e-mail vendor track when prospects click a link embedded in an e-mail?
- Does the e-mail vendor track when prospects forward e-mails?
- Does the website/portal vendor track visit activity based on prospects' IP addresses (or e-mail addresses if website is designed as portal)?
- Does website/portal vendor track visits to videos or archived webinar pages?
- How is event/webinar registration versus attendance tracked?