# Tool #4: Lead-Prioritizing Phone Script

Research has shown that phone conversations used at the right stage in the buying process can be highly compelling to a prospective student. However, many continuing and online education units struggle to provide such high-touch interaction with all of their prospects with a lean staff. Metropolitan State University worked around their staff size by using student ambassadors as ancillary phone staff. By completing the initial phone screen, student ambassadors prioritize phone follow-up delivered by enrollment advisors.

The Lead-Prioritizing Phone Script profiles Metropolitan State's ambassador-driven phone screen process, including the script ambassadors use to score leads before making recommendations to enrollment advisors.

The Lead Scoring Process
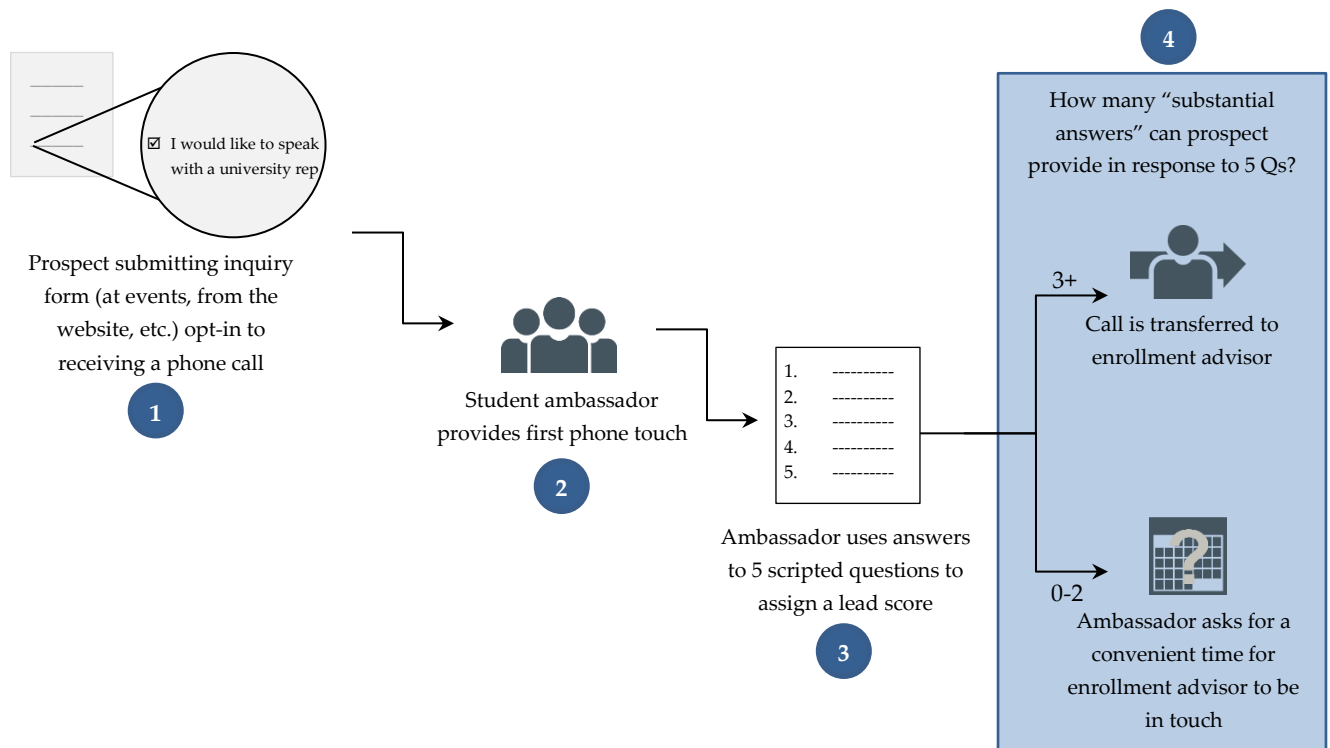
1. The process begins when a **prospective student submits an inquiry form** via the web or at in-person events. Inquiry forms contain an opt-in check box for those prospects that want to speak with a university representative. Actively electing to receive a call screens for those prospective students who submitted an inquiry form just to receive swag at an event.
2. To save enrollment advisors' time, **student ambassadors provide the first phone touch**.
3. Over the course of the conversation, **ambassador asks the prospect 5 questions** (see below). The script ensures the quality of the conversation as well as the uniformity of lead scores.
4. The number of "substantial answers" (defined as a response of more than 5 words) a prospect can provide **earns him a score from 0-5**.
   a. Ambassadors **immediately transfer hot leads, those with 3+ significant responses, to an enrollment advisor** for more in-depth conversation.
   b. Ambassadors **ask warm leads, those with a score of 0-2, for a preferred date and time window** during which an enrollment advisor should be in touch. This gives cooler leads more space, while also providing enrollment advisors with greater scheduling flexibility.

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Lead Scoring 5-Question Script

The script below is used by student ambassadors when reaching out to prospects for the first time in an attempt to discern how serious they are about enrolling.

Lead-Scoring Script

1) What's going on now that is driving your decision to go (back) to college? How will that help you? Why are you looking for a change?
2) What type of program and college will help you achieve your goals?
3) What do you hope to accomplish by earning your degree?
4) Are there specific characteristics you are looking for in a program or university?
5) Who is supporting your decision to go back to school? How do they feel about it?

Building Your Own Script

If your script is only intended to determine how seriously a prospective student has thought through his or her decision to go back to school (as diagnosed by the number of detailed responses they can provide to questions), then developing that script can be as straightforward as asking meaningful questions in a thoughtful tone. Ideas for types of questions to ask are listed below:

1. Motivations for returning to school
2. Sources of worry
3. Programs/areas of interest
4. Need-to-have components of a program/institution/experience
5. Previous educational experience

Ideally, however, the intelligence derived from the call will be put to use not only to score the lead, but to identify meaningful ways to continue the conversation in the future. For example, a prospect who voices worries about funding her education would highly value an email about FAFSA, financial aid, and work opportunities (if it is an on-campus program).